

USER GUIDE

Smart Sell AI Companion



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1 ABOUT THE APP



The Smart Sell AI Companion enhances the sales process in Microsoft Dynamics 365 Business Central by providing AI-assisted product recommendations during sales document entry.

The application analyzes historical customer purchasing patterns, item relationships, and product profitability to identify cross-sell, upsell, and reorder opportunities. Recommendations are presented directly within supported sales documents, allowing users to review and add suggested items without leaving their current workflow.

AI Note: The application uses historical sales data, recommendation settings, and AI-assisted analysis to generate and store customer-specific recommendations and their associated AI-generated summaries. These are retrieved and displayed during sales document entry, providing a seamless experience without requiring additional software or external services.

For more information, please go to:

<https://www.randgroup.com/apps/microsoft/business-central/smart-sell-ai-companion/>

2 BASIC SETUP



This section covers the basic system setup needed to use the Smart Sell AI Companion application. These steps should be completed prior to using the app.

2.1 Onboarding Wizard

To configure the application using a guided step-by-step wizard:

1. Use the magnifying glass tool to go to the Assisted Setup window.
2. In the Assisted Setup window, go to the section “Get ready for business”, and select the Smart Sell AI Companion Configuration Wizard.

The screenshot shows the 'Assisted Setup' window with a search bar and navigation icons. A table lists various setup tasks with columns for Title, Completed, Learn more, and Description. The 'Get ready for business' section is expanded, showing several tasks. The 'Smart Sell AI Companion Configuration Wizard' is highlighted with a red box.

Title	Completed	Learn more	Description
Set up your company	☐	—	
Get ready for the first invoice	☐	—	
Report on financial health	☐	—	
Get ready for business	☐	—	
Connect to a payment service	☐	Read	Connect to a payment service so that your custome...
Migrate business data	☐	Read	Import existing data to Business Central from your ...
Set up AMC Banking 365 Fundamentals extension	☐	Read	Connect to an online bank service that can convert ...
Set up Cloud Migration	☒	Read	Migrate data from your on-premises environment t...
Intelligent Order Routing Configuration Wizard	☐	Read	Configure the Intelligent Order Routing module
Rebates OnBoarding Wizard	☐	Read	Configure the Rebate module
Compliance Sentinel OnBoarding Wizard	☐	Read	Configure the Compliance Sentinel module
Royalties Configuration	☐	Read	Configure the Royalties Module.
Commission Management Configuration Wizard	☐	Read	Configure the Commission Management module.
Royalties Configuration	☐	Read	Configure the Royalties Module.
Smart Sell AI Companion Configuration Wizard	☐	Read	Configure the Smart Sell AI Companion module
Set up a bank statement file import format	☐	—	Set up a bank statement file import format.
Invite your external accountant to the company	☐	Read	Send a link to your external accountant so that the...

The Smart Sell AI Companion Configuration wizard will guide you through the installation steps of the application, including:

1. Submitting your client information to Rand Group (go to the Registration section of this document for more details)

2. Verifying that you have a valid license to start using the application (go to the Registration section of this document for more details)
3. Assigning user permissions (go to the Permissions section of this document for more details)

2.2 Smart Sell AI Companion Setup

The default configuration is suitable for most organizations, and no changes to these settings are required after installation. Administrators can OPTIONALLY fine-tune recommendation behavior by configuring settings. Below outlines these settings.

Smart Sell AI Companion Setup

Recalculate All Recommendation Results Recommendation Activities More options

Recommendation Thresholds

Affinity Value-Pair Count	5	Max AI Candidates	6
Item-Sold Count	5	Minimum Inventory for Recommendation	1
Profitability Cutoff %	0	Recently Recommended Period (Months)	0
Reorder Ratio Threshold	0.85		

Historical Analysis Windows

Affinity Look-back Period	24 Months	Segmentation Adoption Look-back Period	12 Months
Reorder Look-back Period	36 Months	Profitability Look-back Period	12 Months

Recalculation >

Affinity Decay >

Features and AI >

Segmentation Dimensions >

Item Exclusions >

Complete the following steps to configure the application:

1. Open the Smart Sell AI Companion Setup page.
2. Configure recommendation thresholds. Recommendation thresholds define the minimum criteria that recommendations must satisfy before they are presented to users. These settings help reduce low-confidence recommendations while ensuring that suggested items are supported by meaningful historical purchasing patterns.
3. Configure historical analysis windows. Historical analysis windows determine how much historical purchasing data is included when generating recommendations. Different

recommendation types may benefit from different analysis periods depending on how purchasing behavior changes over time.

Recommendation Thresholds

Affinity Value-Pair Count

5

Item-Sold Count

5

Profitability Cutoff %

0

Reorder Ratio Threshold

0.85

Max AI Candidates

6

Minimum Inventory for Recomme...

1

Recently Recommended Period (...)

0

Historical Analysis Windows

Affinity Look-back Period

24 Months

Reorder Look-back Period

36 Months

Segmentation Adoption Look-ba...

12 Months

Profitability Look-back Period

12 Months

Recalculation

Affinity Recalculation Cadence

3 Months

Reorder Recalculation Cadence

2 Months

Last Affinity Calculation

7/7/2026 10:10 AM

Last Reorder Calculation

7/7/2026 10:11 AM

Last Segmentation Calculation

7/7/2026 10:11 AM

4. Configure recalculation and affinity decay settings. Recalculation settings determine how frequently recommendation data is regenerated, while affinity decay gives greater importance to recent purchasing activity than to older transactions. Together, these settings help balance recommendation accuracy, relevance, and system performance.
5. Enable recommendation and AI features. Enable the recommendation types and AI capabilities that will be available to users. Individual recommendation engines, AI-generated summaries, and semantic refinement can be enabled or disabled independently to meet organizational requirements.

Affinity Decay

Current Year Weight

100%

Previous Year Weight

70%

Two Years Prior Weight

40%

Features and AI

Enable Affinity Recommendations

Enable Reorder Recommendations

Enable Customer Segmentation R...

Enable AI-Generated Explanations

Enable AI Semantic Refinement

AI-generated explanations are only displayed when AI-generated explanations are enabled.

Recommendations may appear multiple times when supported by different recommendation types or sources.

Recommendations and AI explanations are generated during recalculation cycles and stored per customer. Previous results are replaced after a successful recalculation.

6. Configure customer segmentation. Customer segmentation allows recommendations adopted by similar customers to be propagated across customer groups based on selected Business Central attributes, such as dimensions, salespersons, or customer classifications.

- 7. Configure item eligibility and exclusions. Define which items participate in recommendation generation by configuring eligibility rules and exclusion criteria. This helps ensure that recommendations focus on products relevant to organizational sales processes.

Segmentation Dimensions

Country/Region Code ☒

Global Dimension 1 ☐

Customer Posting Group ☐

Global Dimension 2 ☐

Salesperson Code ☐

Item Exclusions

Eligibility Exclusions

Filter Type	Code Value	Replenishment System	Assembly Policy
→ Item Category		Purchase	Assemble-to-Stock

Depending on the volume of historical sales data, the initial recommendation calculation may take some time to complete.

2.3 Generating Recommendations

After the application has been configured, recommendation data must be generated before recommendations become available in supported sales documents.

Smart Sell AI Companion Setup

Recalculate All

Recommendation Results

Recommendation Activities

More options

Recommendation Thresholds >

Historical Analysis Windows >

Recalculation >

Select Recalculate Recommendations from the Smart Sell AI Companion Setup page to analyze historical purchasing data and generate customer-specific recommendations and AI-generated recommendation summaries. The application stores the generated results so they can be retrieved instantly during sales document entry.

Depending on the volume of historical sales data, the initial calculation may take some time to complete. After the process finishes, recommendations become available in supported Sales Quotes, Sales Orders, and Blanket Sales Orders.

Recommendation calculations should be performed after changing recommendation settings or when historical sales data has significantly changed.

3 FUNCTIONALITY



The Smart Sell AI Companion integrates directly into supported sales documents, allowing sales users to review and add AI-assisted product recommendations without interrupting the standard sales process.

3.1 Using AI Recommendations

The Smart Sell AI Companion integrates directly into supported sales documents, allowing users to access AI-assisted product recommendations without interrupting the standard sales process.

When an inventory item is added to a supported Sales Quote, Sales Order, or Blanket Sales Order, the application automatically checks whether customer-specific recommendations are available for the selected item. If recommendations exist, the AI Recommendations field displays the number of available recommendations for the corresponding sales line.

To view the available recommendations:

1. Create or open a supported sales document.
2. Add an inventory item to a sales line.
3. Review the value displayed in the AI Recommendations field.

Sales Order S-ORD101046 · School of Fine Art

Home Prepare Payment Plan Print/Send Request Approval Order Report Synchronize Commission More options

Order Packing Post... Reopen Create Warehouse Shipment Create Inventory Put-away/Pick... Archive Document

General > 9/25/2024 9/25/2024 9/25/2024 9/30/2024 Released

Lines Manage Line Order

New Line Delete Line Select items...

Type	No.	Description	Quantity	Smart Sell Recommend...	Smart Sell Rec...	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Area Code	Tax Group Code
Item	1896-S	ATHENS Desk	2	1	☐	2	PCS	1,000.80	MIAMI, FL	FURNITURE
Item	1900-S	PARIS Guest Chair, black	2	1	☐	2	PCS	192.80	MIAMI, FL	FURNITURE

4. Select the value to open the list of available recommendations.

Smart Sell Recommendations

Actions

+ Add Item to Sales Document

Show AI Explanation

Recommend... Item No.	Recommend... Type ↑	Qty. Available	Expected Reorder Quantity	Recommendation Source	Explanation
1928-S	Reorder Rec...	100	7	AL calculation + GPT-4.1	AMSTERDAM Lamp has the high...

If no recommendations are available for the selected customer and item combination, the AI Recommendations field remains blank.

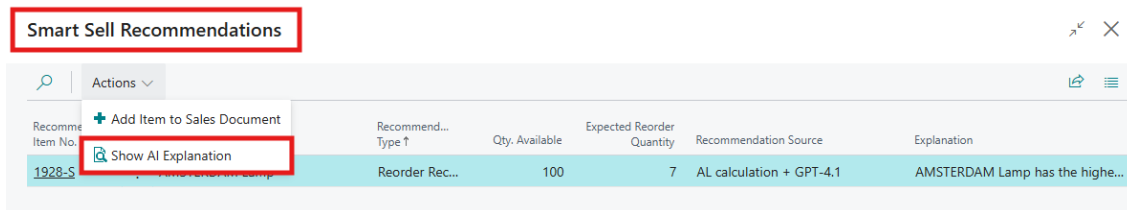
3.2 Viewing Recommendations Details

The recommendation list displays all recommendation candidates available for the selected sales line. Each recommendation includes information such as the recommendation type, recommended item, ranking, and supporting metrics to help users evaluate the suggested products.

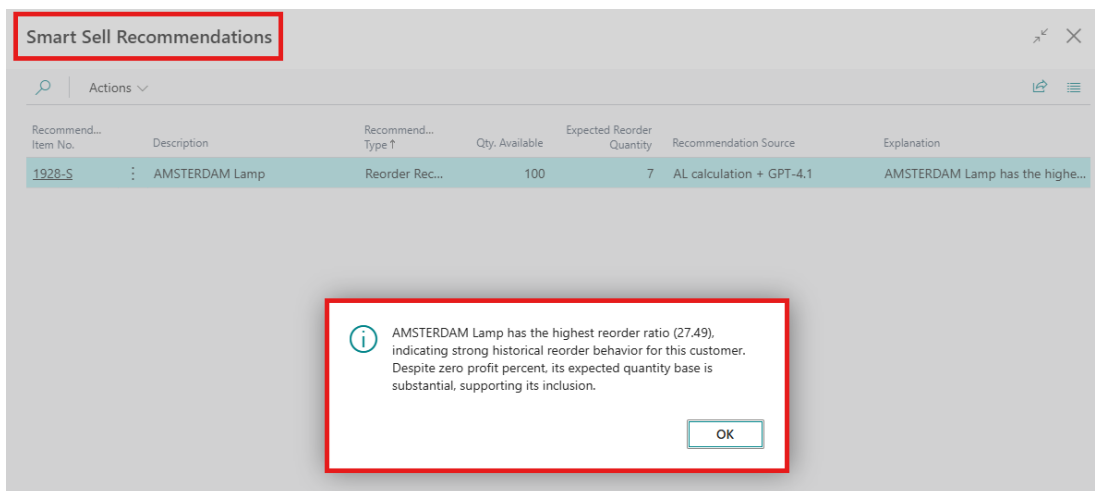
Each recommendation includes information to help users evaluate whether the suggested item should be added to the sales document. Depending on the recommendation type, available information may include the recommended item, recommendation type, ranking, inventory availability, profitability metrics, reorder indicators, and other supporting information.

To view a recommendation:

1. Review the list of available recommendations.



2. Select the recommendation to review its details and associated AI-generated summary, if enabled.



The same item may appear more than once if it is supported by multiple recommendation types or recommendation sources.

Available AI Recommendations generated for the line items in the Sales Document may also be accessed through the FactBox pane > Smart Sell AI Companion section.

The screenshot displays the Smart Sell AI Companion interface within a sales order document. The top navigation bar includes a 'Sales Order' tab, a search bar, and various action icons. The main content area is divided into a 'General' section and a 'Summary' section. The 'General' section shows the order details, including the order number 'S-ORD101046', the customer 'School of Fine Art', and a table of line items. The 'Summary' section on the right provides a detailed view of the AI-generated insights, including 'Recommendation Insights' and 'AI-Generated Explanations'.

General Section:

Type	No.	Description	Quantity	Smart Sell Recommendation	Smart Sell Ratio	Reserved Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Area Code	Tax Group Code
Item	1896-S	ATHENS Desk	2	1		2	PCS	1,000.80	MIAMI, FL	FURNITURE
Item	1900-S	PARIS Guest Chair, black	2	1		2	PCS	192.80	MIAMI, FL	FURNITURE

Summary Section:

Smart Sell AI Companion

Recommendation Insights

1928-S - AMSTERDAM Lamp
Reorder Recommendation | Available Item 1928-S is due for reorder. Reorder ratio: 27.49. Expected quantity: 7.

AI-Generated Explanations

1928-S - AMSTERDAM Lamp
AMSTERDAM Lamp has the highest reorder ratio (27.49), indicating strong historical reorder behavior for this customer. Despite zero profit percent, its expected quantity

Salesperson Allocation

Salesperson Code	Commission %	Commission Plan Code
JC	40	COM-P
RB	60	COM-P

3.3 Understanding AI Recommendation

When AI-generated summaries are enabled, the FactBox displays a natural-language explanation describing why a recommendation was generated. Depending on the recommendation type, the summary may reference purchasing patterns, reorder behavior, or similar customer activity.

Recommendation types:

- **Frequently Purchased Together:** Items commonly purchased together by the customer.
- **Reorder Recommendation:** Items the customer is likely ready to purchase again based on historical purchasing patterns.
- **Similar Customers:** Items adopted by customers with similar characteristics.

4 REPORTING



The Smart Sell AI Companion provides inquiry pages that allow administrators to review generated recommendations and monitor recommendation activity within the application.

4.1 Reviewing Recommendation Results

The Recommendation Results page displays the recommendations generated by the application for each customer. The page can be used to review recommendation rankings, recommendation types, supporting metrics, and other information generated during the recommendation calculation process.

←
Smart Sell Recommendation Results
🔍 📄 📌

Recommen... Type	Sell-to Customer No.	Source Item No.	Recommen... Item No.	Calculation Date	Final Rank	Composite Score	Historical Profitability %	Reorder Ratio	Distinct Adopter Count
Frequently ...	10000	1896-S	1900-S	7/7/2026	1	49.88372	19.8388	0	0
Frequently ...	10000	1896-S	1920-S	7/7/2026	2	33.76329	-95.7622	0	0
Frequently ...	10000	1900-S	1920-S	7/7/2026	2	61.2069	-95.7622	0	0
Frequently ...	10000	1900-S	1896-S	7/7/2026	1	56.07041	96.44249	0	0
Frequently ...	10000	1920-S	1900-S	7/7/2026	1	69.79314	19.8388	0	0
Frequently ...	10000	1920-S	1896-S	7/7/2026	2	46.2509	96.44249	0	0
Frequently ...	40000	1920-S	1896-S	7/7/2026	1	86.66667	96.44249	0	0
Frequently ...	40000	1896-S	1920-S	7/7/2026	1	70.55556	-95.7622	0	0
Frequently ...	C00120	1960-S	1906-S	7/7/2026	1	75.38462	13.9122	0	0
Frequently ...	C00120	1906-S	1960-S	7/7/2026	1	100	18.18693	0	0
Reorder Re...	20000		1928-S	7/7/2026	4	0	0	27.75309	0
Reorder Re...	20000		1900-S	7/7/2026	2	0	19.8388	1.04817	0
Reorder Re...	20000		1964-S	7/7/2026	3	0	0	27.58848	0
Reorder Re...	20000		1012	7/7/2026	1	0	21.0017	1.16667	0
Reorder Re...	30000		1928-S	7/7/2026	1	0	0	27.48971	0
Reorder Re...	30000		1936-S	7/7/2026	2	0	0	27.39095	0
Reorder Re...	30000		1960-S	7/7/2026	4	0	18.18693	27.11475	0
Reorder Re...	30000		2000-S	7/7/2026	3	0	22.09363	27.11475	0
Reorder Re...	40000		1960-S	7/7/2026	1	0	18.18693	27.6214	0
Reorder Re...	40000		1908-S	7/7/2026	3	0	22.09363	27.48971	0

To review recommendation results:

1. Open the Smart Sell AI Companion Setup page.
2. Select Recommendation Results.
3. Review the generated recommendations and their associated information.

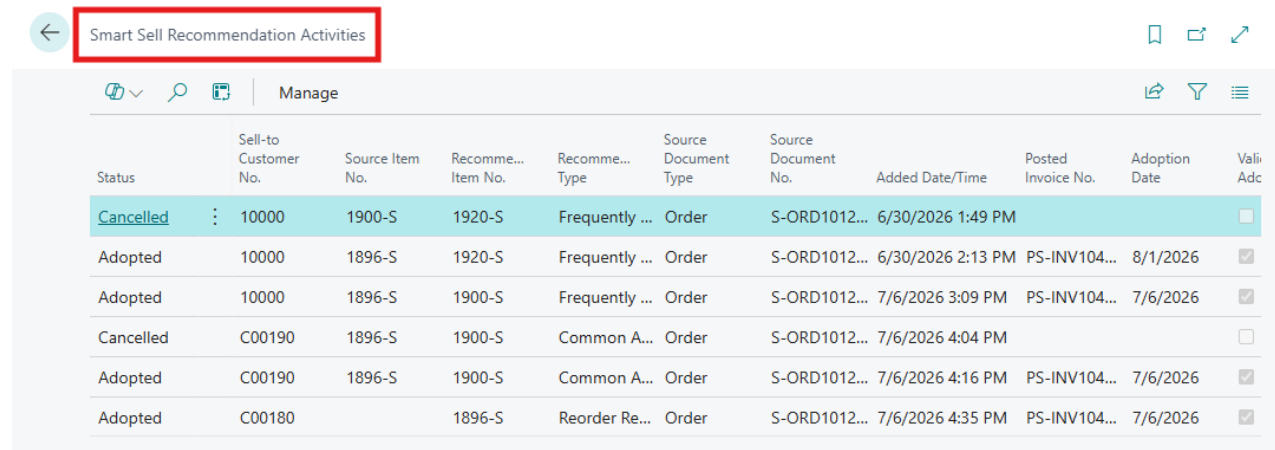
Recommendation results are updated each time the recommendation generation process is executed.

4.2 Reviewing Recommendation Activities

The Recommendation Activities page provides a history of recommendation activity, allowing administrators to review recommendations that were presented to users and track whether they were adopted or dismissed during the sales process.

To review recommendation activities:

1. Open the Smart Sell AI Companion Setup page.
2. Select Recommendation Activities.
3. Review the recommendation activity records and their current status.



Status	Sell-to Customer No.	Source Item No.	Recomm... Item No.	Recomm... Type	Source Document Type	Source Document No.	Added Date/Time	Posted Invoice No.	Adoption Date	Valid Adc
Cancelled	10000	1900-S	1920-S	Frequently ...	Order	S-ORD1012...	6/30/2026 1:49 PM			☐
Adopted	10000	1896-S	1920-S	Frequently ...	Order	S-ORD1012...	6/30/2026 2:13 PM	PS-INV104...	8/1/2026	☒
Adopted	10000	1896-S	1900-S	Frequently ...	Order	S-ORD1012...	7/6/2026 3:09 PM	PS-INV104...	7/6/2026	☒
Cancelled	C00190	1896-S	1900-S	Common A...	Order	S-ORD1012...	7/6/2026 4:04 PM			☐
Adopted	C00190	1896-S	1900-S	Common A...	Order	S-ORD1012...	7/6/2026 4:16 PM	PS-INV104...	7/6/2026	☒
Adopted	C00180		1896-S	Reorder Re...	Order	S-ORD1012...	7/6/2026 4:35 PM	PS-INV104...	7/6/2026	☒

Recommendation activity records provide visibility into recommendation adoption and can assist when reviewing recommendation effectiveness or troubleshooting application behavior.

5 SECURITY



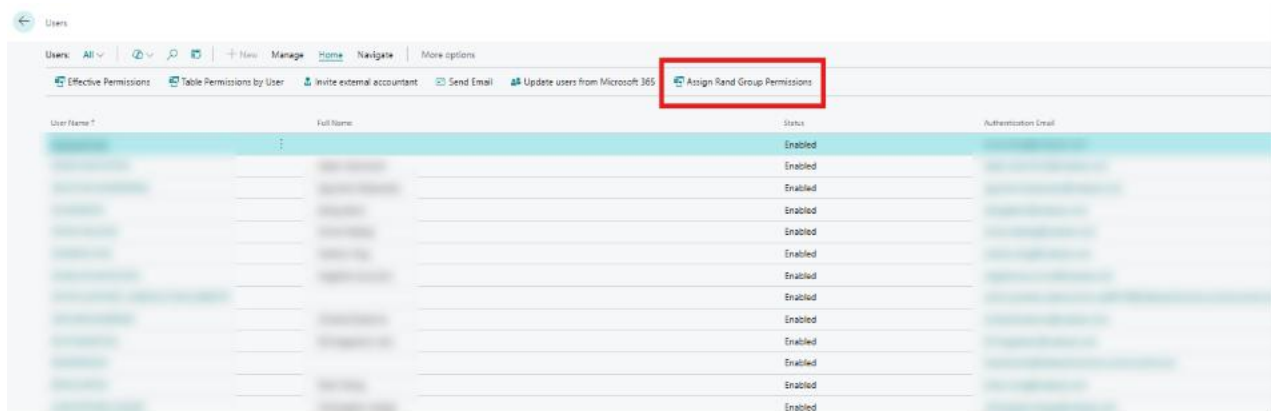
Once a Rand Group application is installed, it is essential to assign user permissions to grant access to pages, data, actions, and additional components integrated with and generated by the Rand Group applications.

The "Assign Rand Group Permissions" feature, accessible under the Home Menu within the Users page of Dynamics 365 Business Central, assigns the necessary permissions for all users to access the complete range of pages, data, actions, etc., provided by all Rand Group applications installed on the tenant.

To assign user permissions to the Rand Group apps, search and go to the User list.



In the Users window, select Assign Rand Group Permissions to assign all users the Rand Group Permission Set.



Note that only a user with the proper permissions (Super is recommended) will be able to Assign Rand Group Permissions.

6 REGISTRATION



To use any application developed by Rand Group users must first provide their contact information as part of a registration process. This applies to all applications published by Rand Group.

Note: There is no cost to register an application. Users are only charged if they choose to purchase a license for a Production environment. Production licenses are not required in sandbox environments, allowing users to test Rand Group applications for an unlimited time without cost.

1. Submitting Rand Group client Information

To submit client information to Rand Group, in Dynamics 365 Business Central, navigate to the Rand Group Client Information page. Fill all required fields under the Contact Information and Billing Information FastTabs. Before selecting "Transmit Data," ensure that the "Allow HTTPClient Requests" setting is enabled. This is necessary for the data to be successfully transmitted to Rand Group.

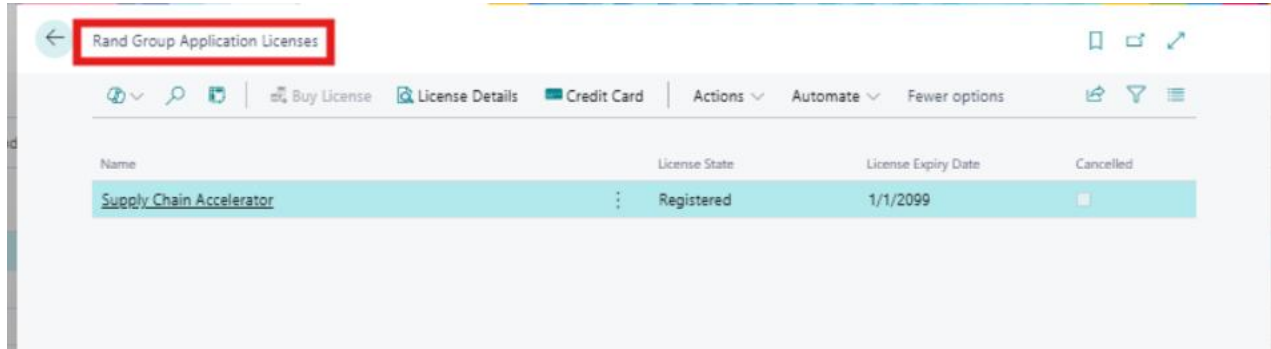
The screenshot displays the 'Rand Group Client Information' page in Dynamics 365 Business Central. The page is divided into several sections:

- General:**
 - MS Client ID: {8c6f05f8-f0cc-491f-b66f-50a8ba2d...}
 - Partner Code: ADOSE01
 - Active: ☐
 - On Hold: ☐
 - Allow HTTPClient Requests: ☒ (highlighted with a red box)
- Contact Information:**
 - Company: Rand Group
 - Website: https://www.randgroup.com/
 - Name: Rand Group
 - Address: 245 Fairview Mall Dr. Suite 200
 - Address2:
 - City: Toronto
 - Province / State: ON
 - PostalCode / ZipCode: M2J 4T1
 - Country: CA
 - Phone: 4164991235
 - Email: Concierge@randgroup.com
 - Email CC:
 - Billing is Same as Contact: ☐
- Billing Information:** (Section header visible at the bottom)

The 'Transmit Data' button is highlighted with a red box, and the 'Allow HTTPClient Requests' toggle switch is also highlighted with a red box.

2. Verifying License Status

Users can view, purchase, and refresh licenses for applications on the Rand Group Application Licenses page in Dynamics 365 Business Central. This window shows installed Rand Group applications and their license status.



It is important to note that Rand Group applications installed on Dynamics 365 Business Central sandbox environments do not require a production license. Instead, they only need a sandbox license that automatically renews prior to expiration; however, users must register the applications by submitting Client Information to Rand Group before utilizing any Rand Group app.

For more information about licensing and pricing, please

visit: <https://www.randgroup.com/apps/microsoft/business-central/smart-sell-ai-companion/>