USER GUIDE

Smart Sell AI Companion

RAND GROUP

Last updated
July 7, 2026

CONTENTS

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/

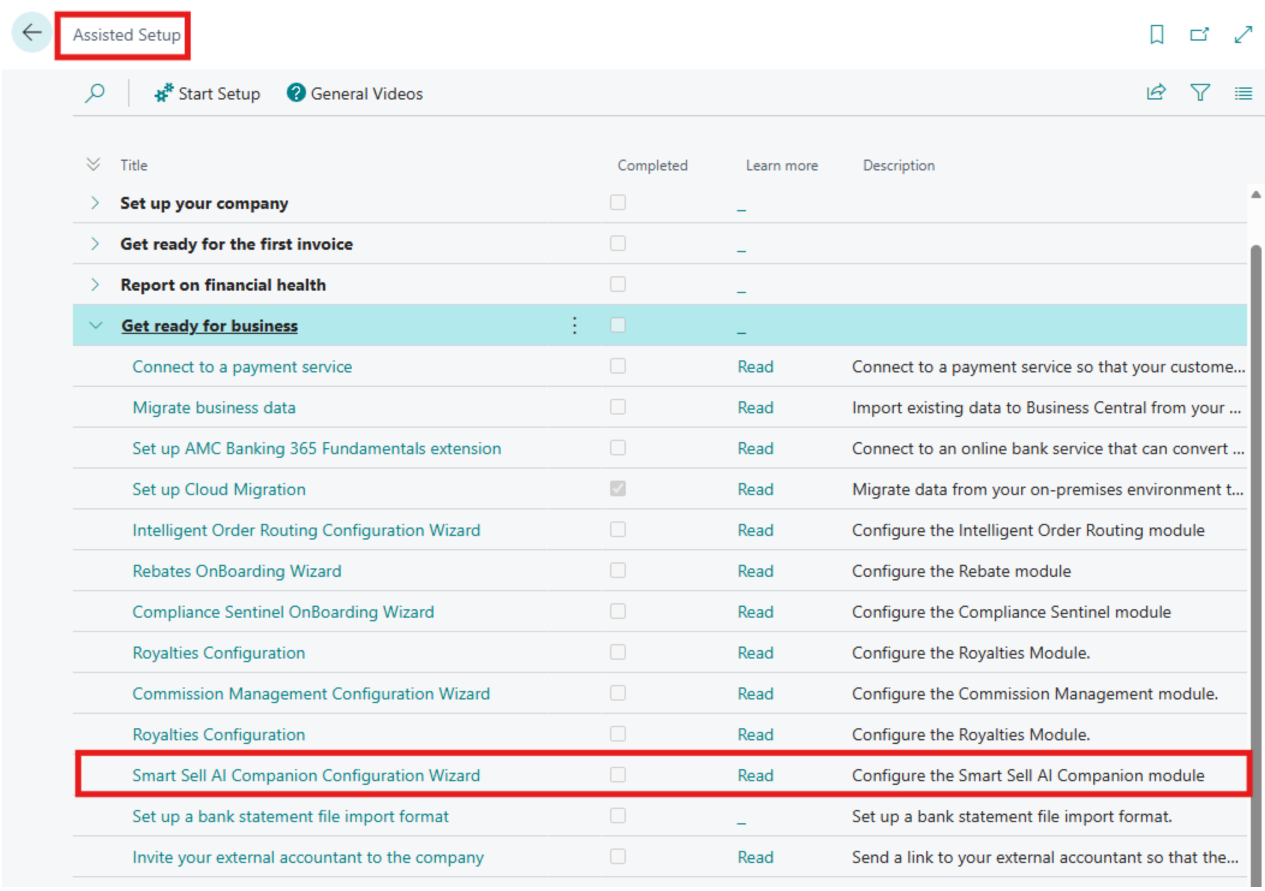
2 BASIC SETUP

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.



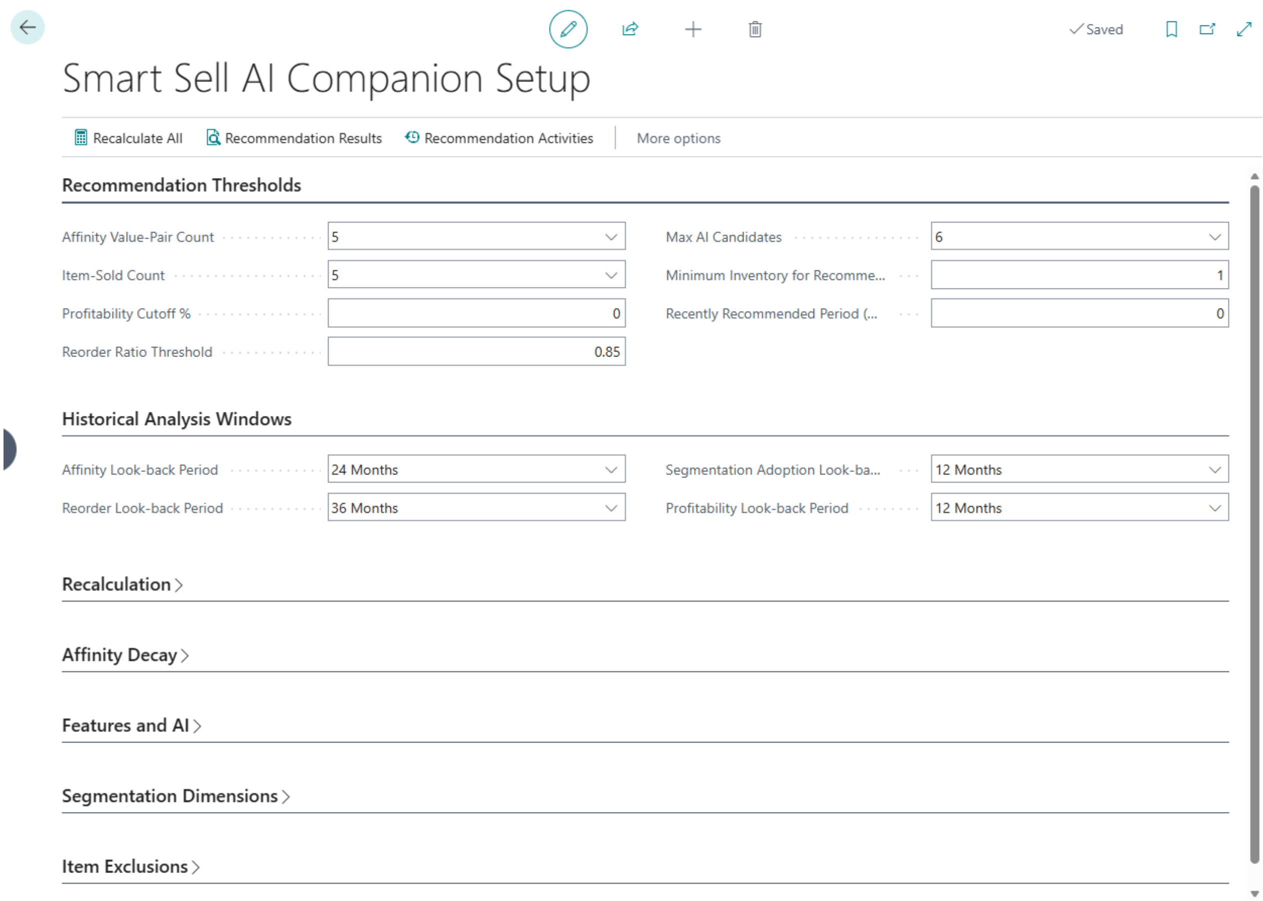
The Smart Sell AI Companion Configuration wizard will guide you through the installation steps of the application, including:

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

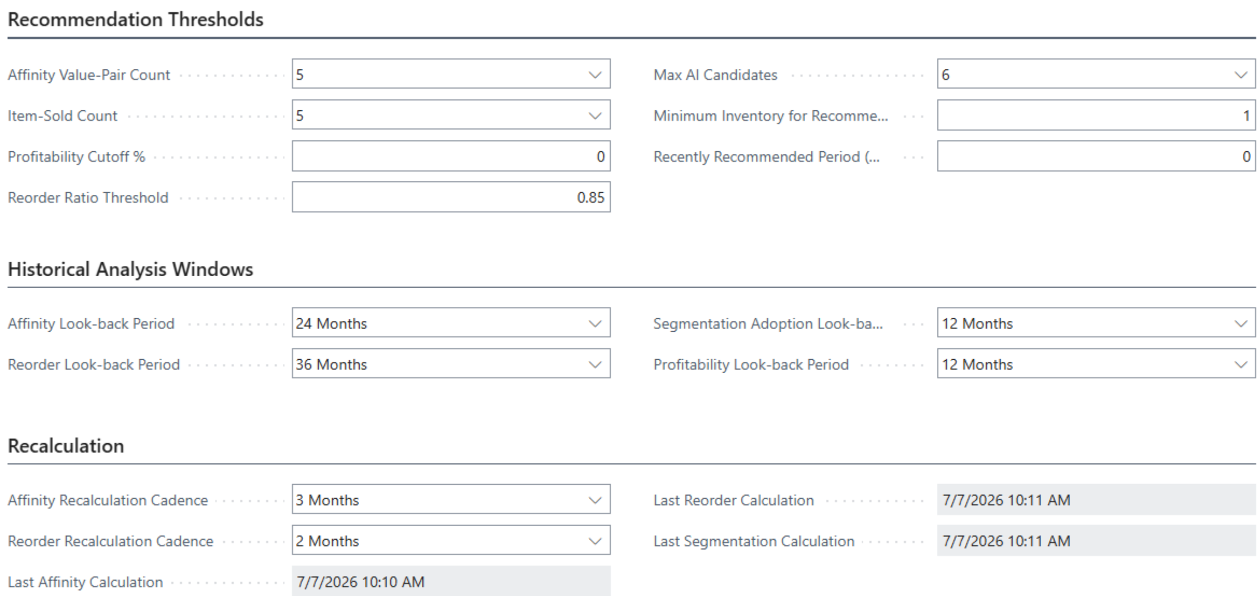
The default configuration is suitable for most organizations, and no changes to these settings are required after installation. Administrators can OPTIONALLY fine-tune recommendation behavior by configuring settings. Below outlines these settings.



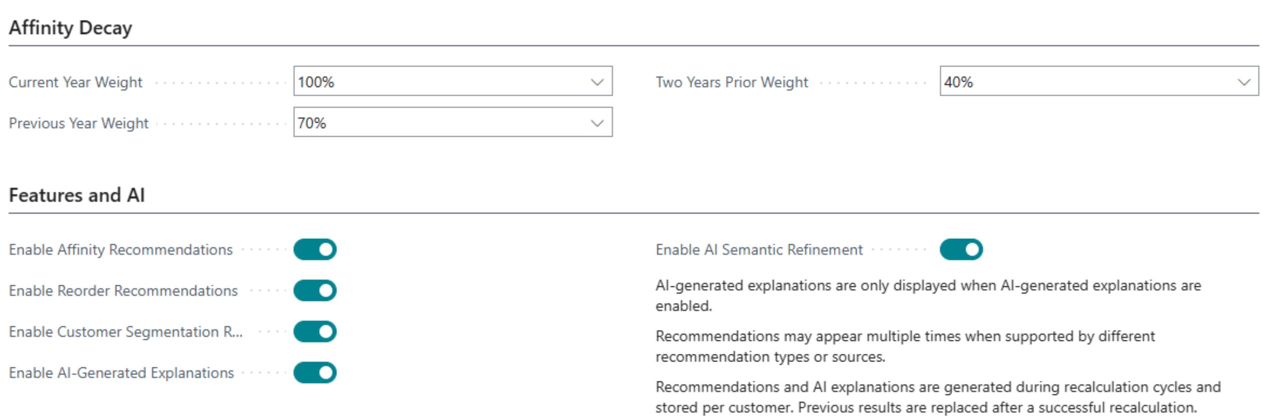
Complete the following steps to configure the application:

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.

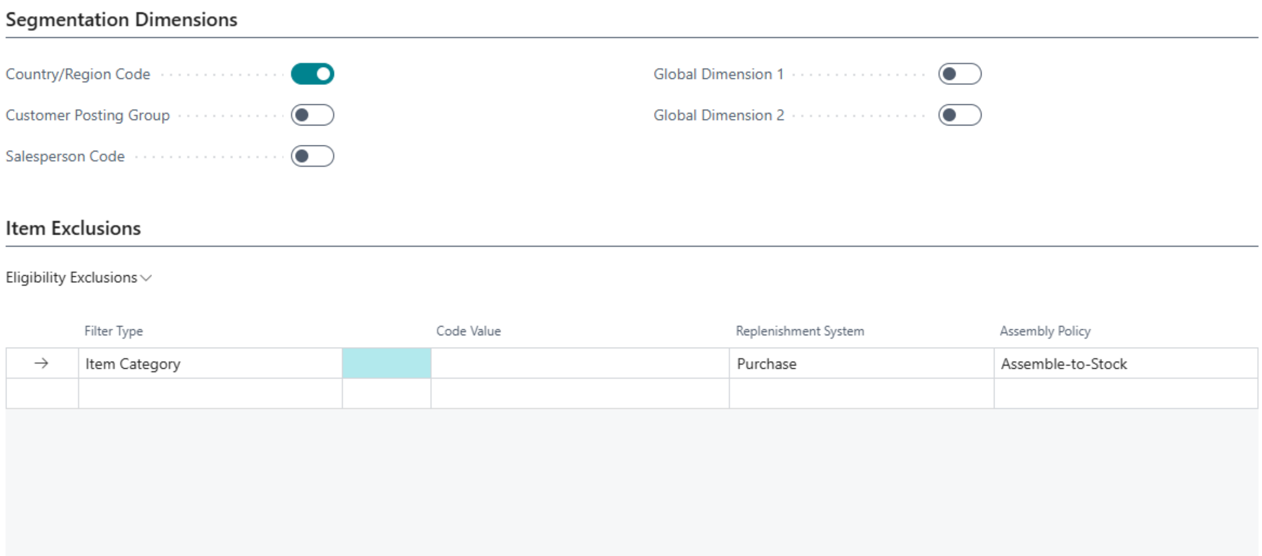


4. Configure recalculation and affinity decay settings. Recalculation settings determine how frequently recommendation data is regenerated, while affinity decay gives greater importance to recent purchasing activity than to older transactions. Together, these settings help balance recommendation accuracy, 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.



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.

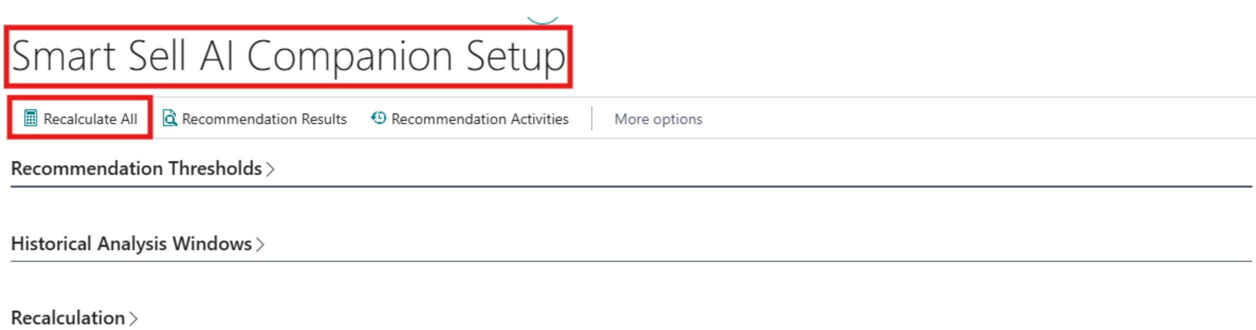
7. Configure item eligibility and exclusions. Define which items participate in recommendation generation by configuring eligibility rules and exclusion criteria. This helps ensure that recommendations focus on products relevant to organizational sales processes.



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.



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.

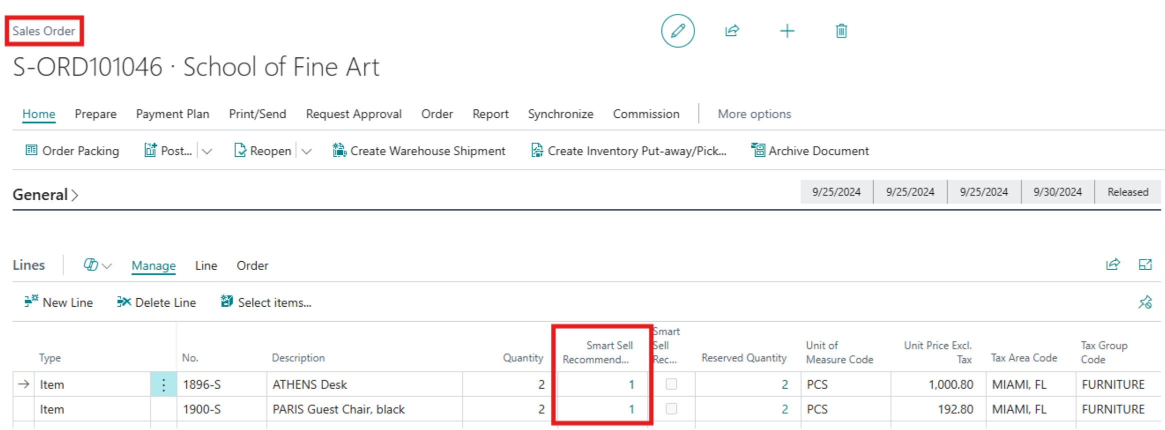
3.1 Using AI Recommendations

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.

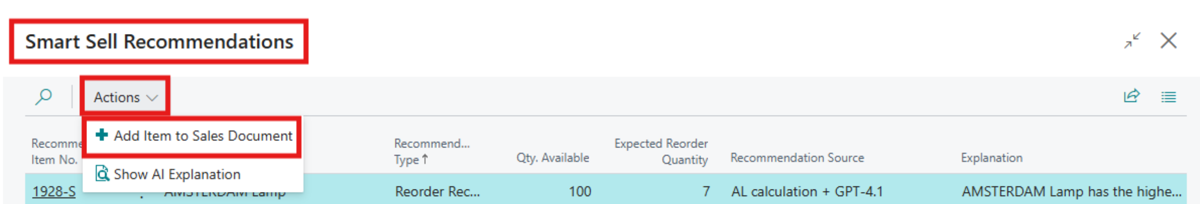
When an inventory item is added to a supported Sales Quote, Sales Order, or Blanket Sales Order, the application automatically checks whether customer-specific recommendations are available for the selected item. If recommendations exist, the AI Recommendations field displays the number of available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



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



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

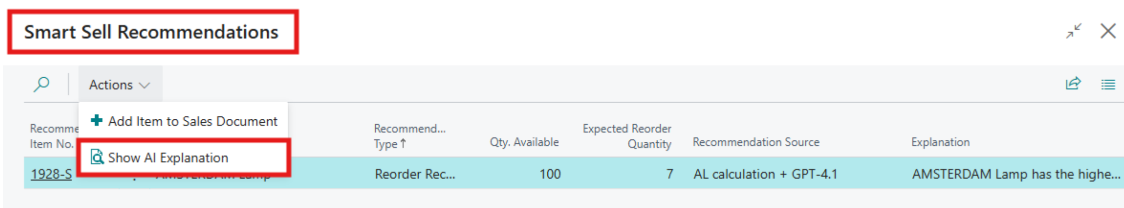
3.2 Viewing Recommendations Details

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.

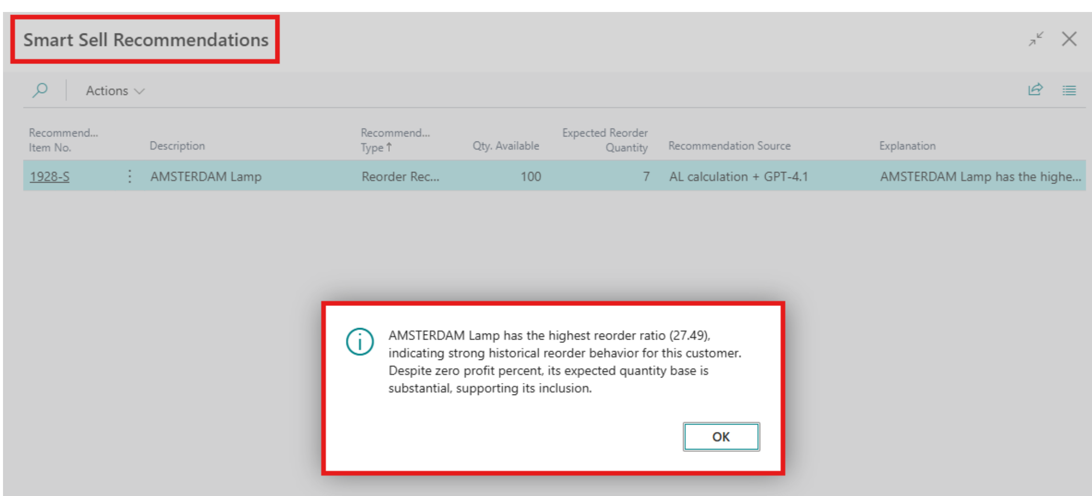
Each recommendation includes information to help users evaluate whether the suggested item should be added to the sales document. Depending on the recommendation type, available information may include the recommended item, recommendation type, ranking, inventory availability, profitability metrics,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

To view a recommendation:

1. Review the list of available recommendations.

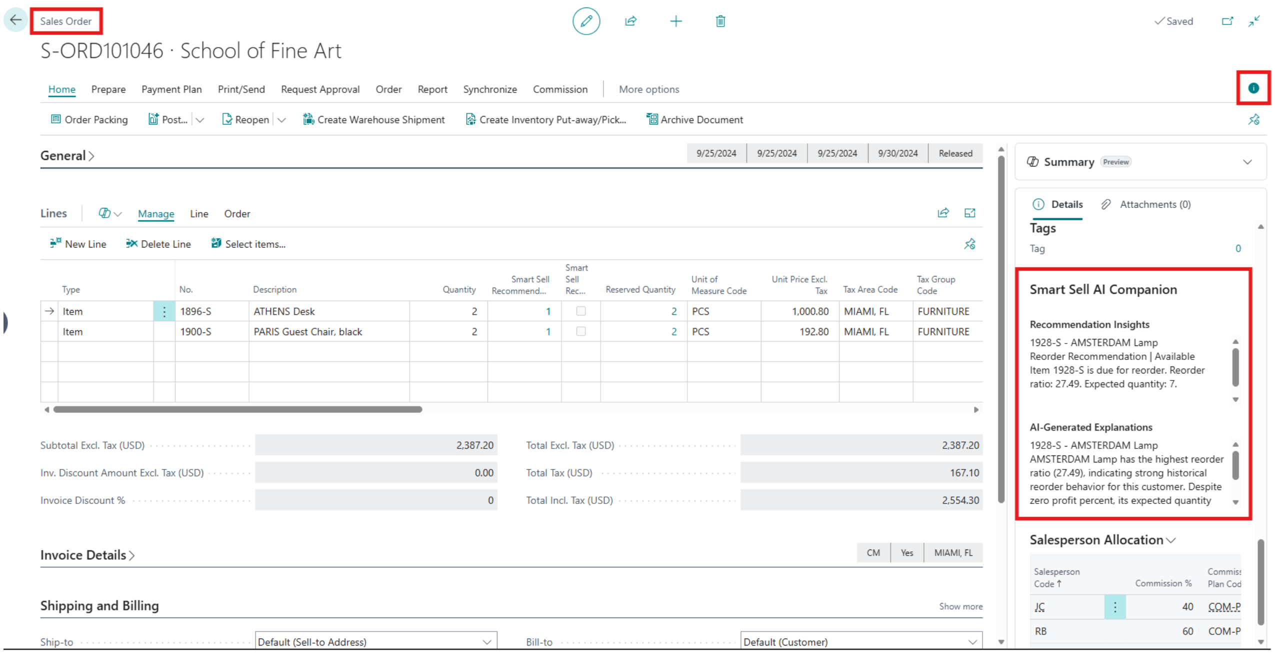


2. Select the recommendation to review its details and associated AI-generated summary, if enabled.



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.



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:

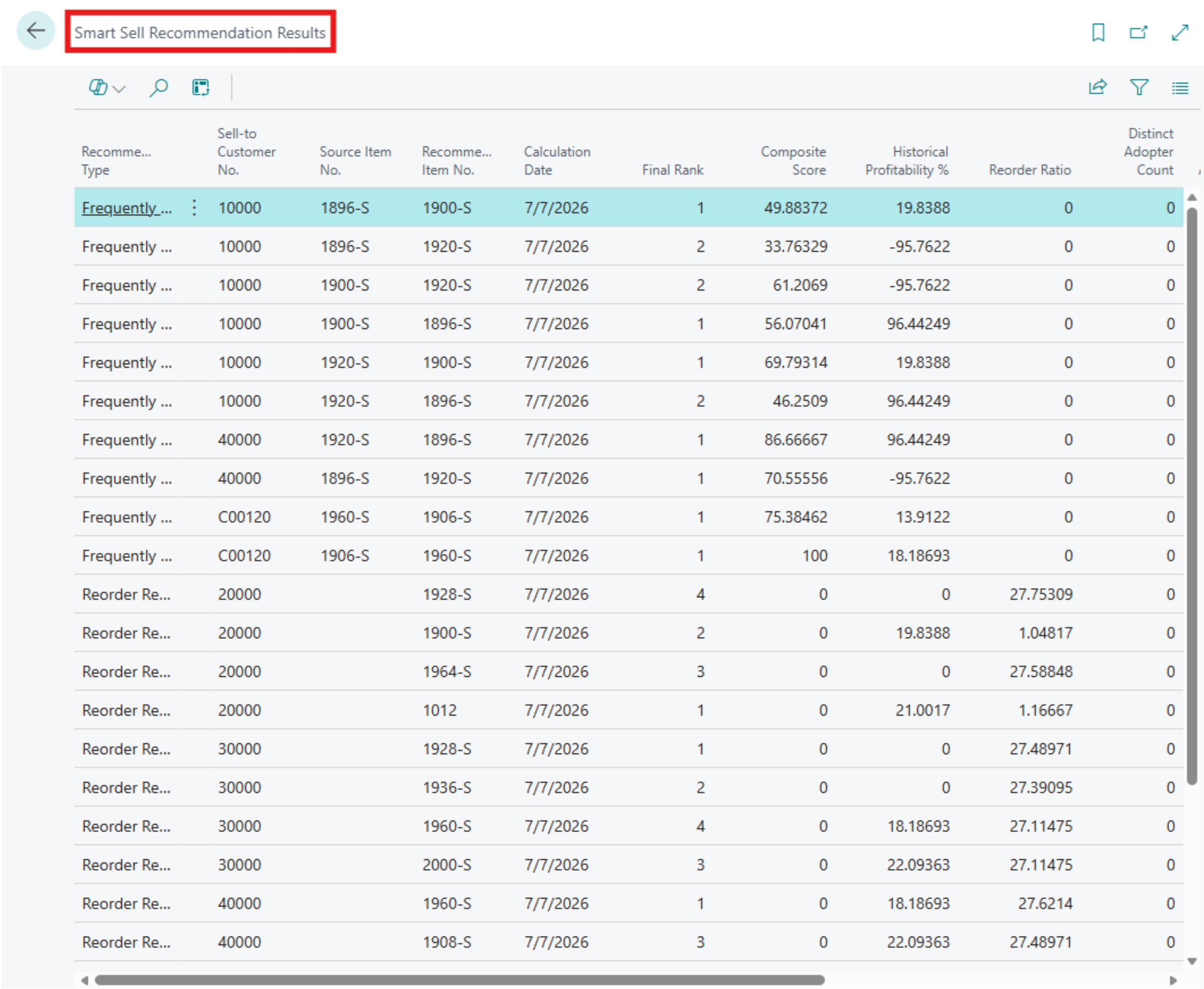
- **Frequently Purchased Together**: Items commonly purchased together by the customer.
- **Reorder Recommendation**: Items the customer is likely ready to purchase again based on historical purchasing patterns.
- **Similar Customers**: Items adopted by customers with similar characteristics.

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

Recomme... Type	Sell-to Customer No.	Source Item No.	Recomme... 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.

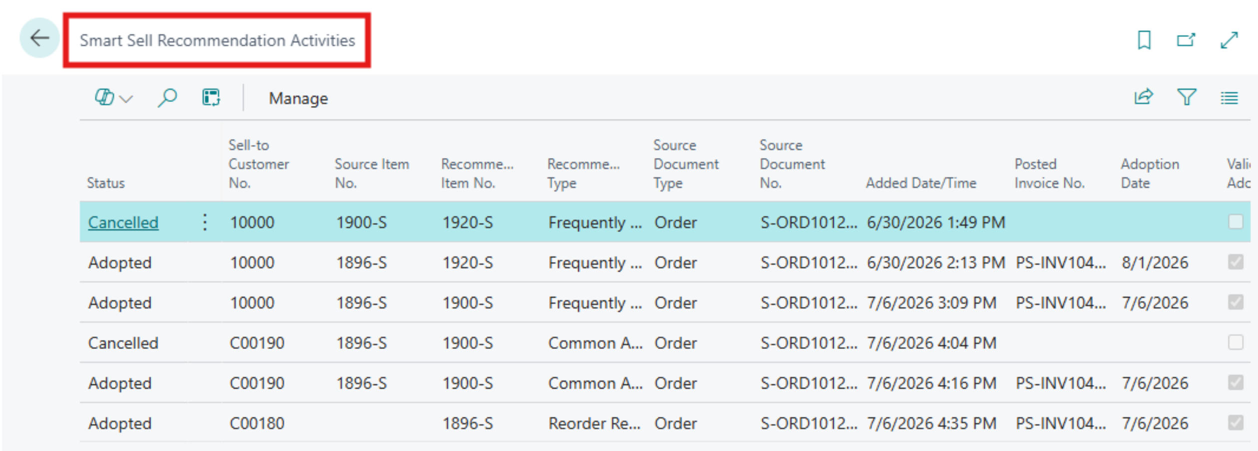
Recommendation results are updated each time the recommendation generation process is executed.

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.	Recomme... Item No.	Recomme... Type	Source Document Type	Source Document No.	Added Date/Time	Posted Invoice No.	Adoption Date	Vali 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.

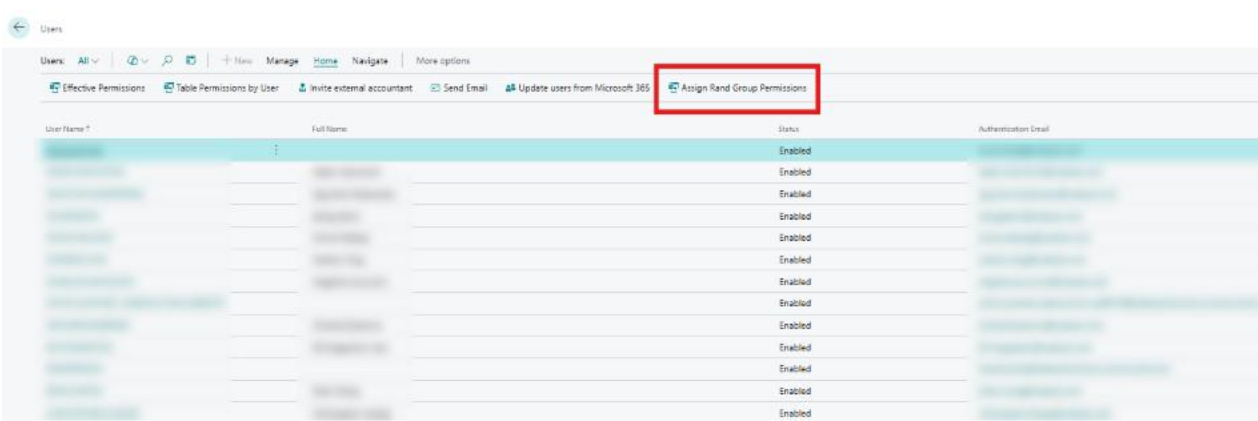
5 SECURITY

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.

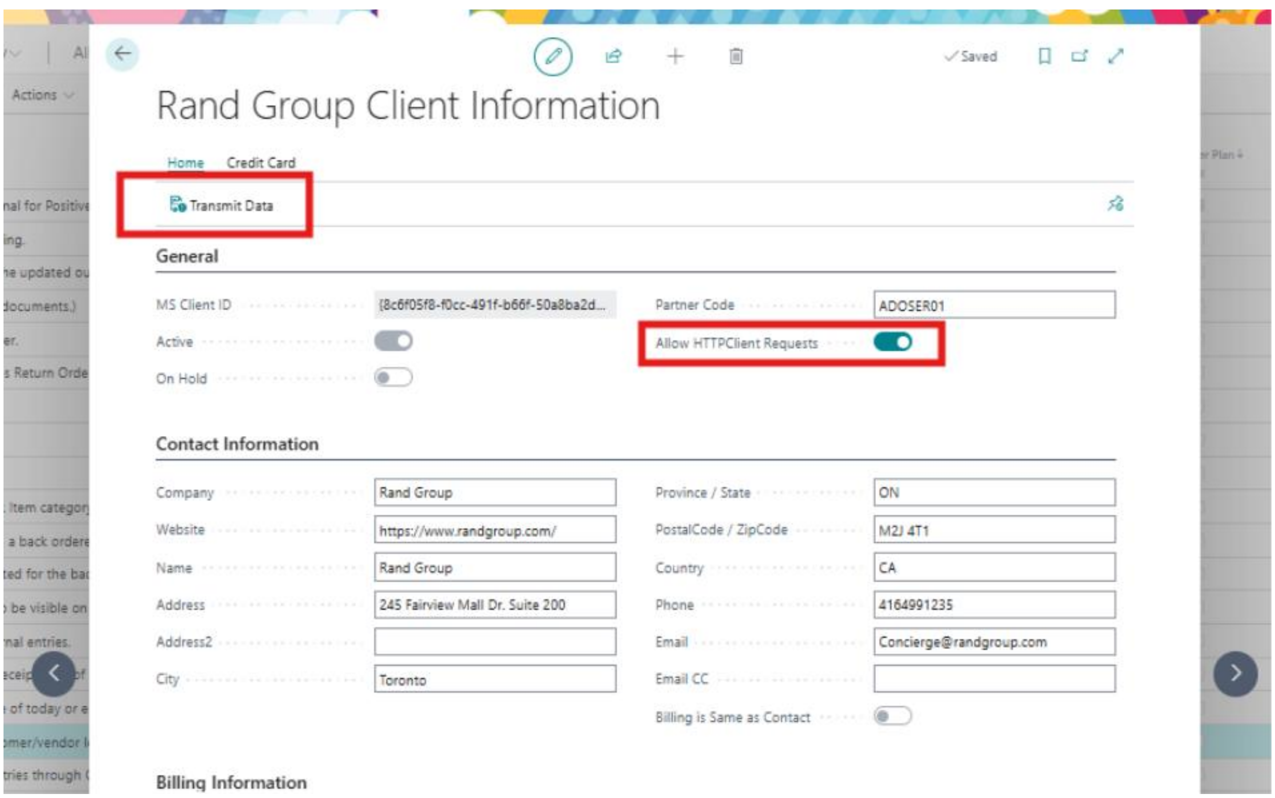
6 REGISTRATION

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.

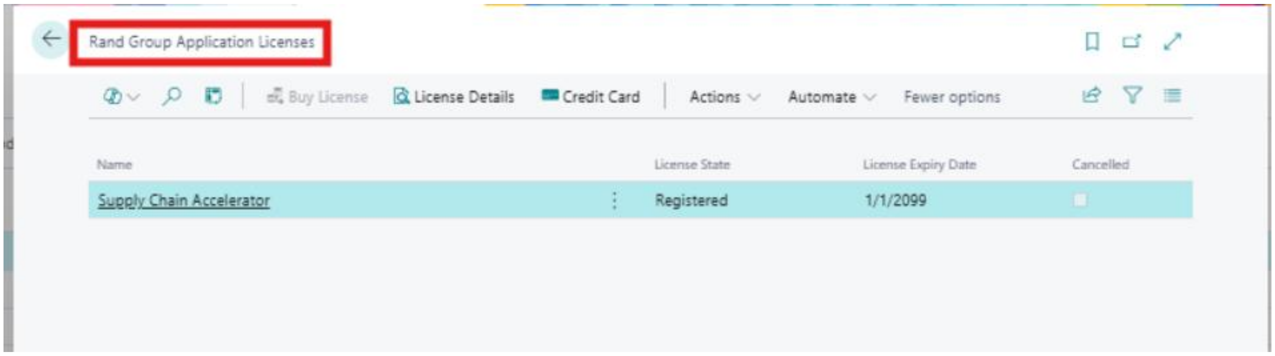
1. Submitting Rand Group client Information

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.



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/