

Luna Installation Wizard

Guided setup for deploying the Luna agent in your Power Platform environment



Overview: The Luna Installation Wizard provides a guided setup experience to deploy the Luna agent into your organization's Power Platform environment. The wizard walks you through authentication, environment selection, agent import, publishing, and billing policy setup so Luna can be enabled for your company.

BEFORE YOU BEGIN

- Microsoft 365 Copilot license assigned to the installing user
- Azure subscription access with Owner or Contributor permissions
- Power Platform Administrator role assigned to the installing user
- Dynamics 365 Business Central Administrator role assigned to the installing user
- Loan Vision version must be 1.865.139.1 at a minimum — if not, please update

HOW TO LAUNCH

- Open Business Central and go to Assisted Setup, or
- Use Search and enter "Luna Installation Wizard"
- Launch the wizard and follow the guided prompts



INSTALLATION STEPS

#	STEP	WHAT HAPPENS
1	Authenticate	Copy the sign-in code provided by the wizard, open the Microsoft authentication prompt, and sign in with your Microsoft credentials.
2	Select environment	Choose the Power Platform environment where Luna should be installed.
3	Import Luna	The wizard imports the Luna agent into the selected environment. Once complete, Luna will be visible in Copilot Studio.
4	Configure billing	Create or select a billing policy, choose the Azure subscription and resource group, and use pay-as-you-go pricing.
5	Complete setup	The wizard continues processing in the background while the agent is imported, published, and configured.



VERIFICATION

- Luna is visible in Copilot Studio
- Billing policy and Azure settings are configured
- Luna is enabled and company settings are complete

RESULT

After the wizard finishes, Luna is deployed, published, and ready to support users in the selected Power Platform environment. For installation or configuration assistance, contact the Loan Vision support team.



REVIEWING LUNA'S SECURITY BEFORE YOU INSTALL?

Your IT and security teams can review Luna's full security posture — SOC 2 reports, data handling and residency, architecture, and compliance documentation — in the Loan Vision Trust Center before deployment.

[Visit the Loan Vision Trust Center →](#)