

BI Agent Chatbot (Sales)

Ask a question...

Ask

USER

Show redemptions by fund type last quarter

ASSISTANT

Fund Type	Redemptions
Equity	78,000
Balanced	20,000
Fixed Income	15,000

USER

Purchases by wholesaler last quarter

ASSISTANT

Wholesaler	Purchases
Wholesaler A	230,000
Wholesaler C	130,000
Wholesaler B	90,000

USER

Assets by advisor

ASSISTANT

Advisor	Assets
Advisor Y	7,800,000
Advisor X	7,500,000
Advisor Z	5,200,000

USER

RVP Alice purchases last quarter

ASSISTANT

Purchases for RVP Alice (Last Quarter): Purchases = 230,000.00

USER

what are fund types?

ASSISTANT

Purchases: Purchases = 980,000.00

USER

fund type

ASSISTANT

Purchases: Purchases = 980,000.00

USER

All assets

ASSISTANT
Assets: Assets = 20,710,000.00

Tip: Try "Purchases by wholesaler last quarter", "Assets by advisor", or "RVP Alice purchases last quarter".