

BI Agent Chatbot (Sales)

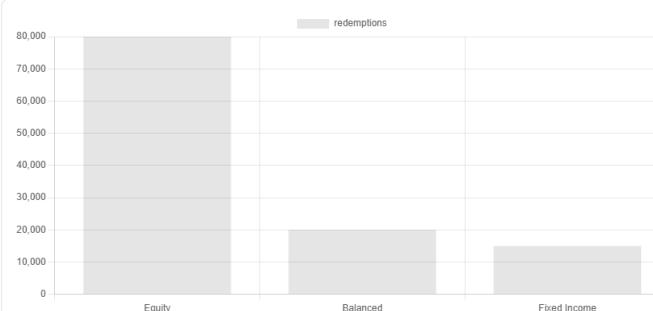
Ask a question...

Ask

USER

Show redemptions by fund type last quarter

ASSISTANT



USER

Purchases by wholesaler last quarter

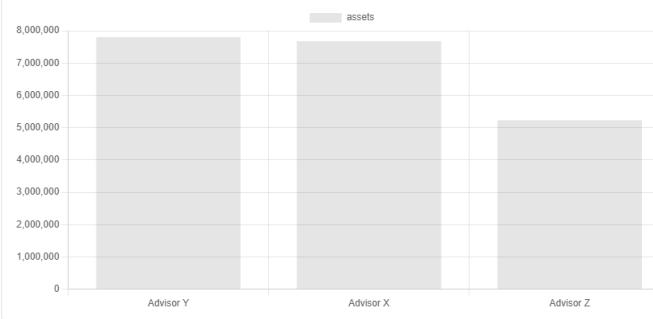
ASSISTANT



USER

Assets by advisor

ASSISTANT



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".