BillingPlatform

FEATURE SHEET

BillingPlatform AI Report Builder

In today's fast-paced business world, data isn't just numbers—it's the key to strategic insight.

BillingPlatform's AI Report Builder transforms data discovery by letting you ask questions in plain language. As a natural extension of BillingPlatform's metadata-driven platform, it harnesses advanced AI and natural language processing to instantly generate comprehensive, actionable reports. Simply type your query into an intuitive chat interface, and in seconds, you'll receive organized data complete with lightweight visualizations, pivoting tools, and clickable links to underlying records. Plus, you can save, share, and even review the generated code or SQL for deeper analysis.

Discover a smarter, faster way to unlock high-value insights and drive your business forward with AI Report Builder.

How BillingPlatform's AI Report Builder Works

Users can submit requests for data by typing their requests directly into an easy-to-deploy and use interactive dialog box in the user interface. Simply type a request and either press the "enter" key or arrow Icon. While the AI is trained in English, it understands many languages so users can speak their request in the language of choice.

Results are returned in a table format and can also be manipulated through light-weight pivoting and visualization. To pivot results, simply drag and drop column headings to refine results. Results can also be aggregated, filtered and sorted to satisfy reporting requirements.

Requests can be saved for future access. Saving results also saves any visualizations configured prior to saving. This allows for easy access to requests completed in the past.

Results can be displayed in charts for easy visualization.

Reports can be shared with specific team members or based on role and exported in CSV format for further analysis.

The Importance Of Training

While data is a fundamental component for the development and functioning of AI, training is equally important and part of the lifecycle of an AI solution both during development and also over time.

The AI has been trained on the BillingPlatform standard data model. The training process involves asking questions and evaluating the results generated by the AI, then correcting and refining the results. The AI is capable of "learning" from these corrections and expanding that learning to other scenarios.

Because the system is continuously learning, input is highly valued. If you experience unhelpful or incorrect results, a "Training Request" mechanism is available to help this process. As a result, this solution becomes better over time.

Dashboard

Billing Models   **Monthly Revenue**

AI

Use Case Examples

Here are some sample requests:

Show all unallocated payments by customer

Here are some variants:

Show all unallocated payments by account

Unallocated payments by account

Show all accounts with a past due balance greater than 10000

Show quarterly billings by product and account from 2022 to 2024

If the results don't contain the columns you want, you can specify them in your request like so:

Show all unallocated payments by customer. Include Payment Id, Unallocated Amount Customer Name and Payment date

CONTACT US

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Benefits To Customers

BillingPlatform's AI Report Builder offers several significant benefits to customers, enhancing their overall experience with technology and information retrieval.

Enhanced usability

- Interact with the system using written or spoken language to retrieve and analyze information quickly and easily
- Reduce the learning curve with a user friendly interface. There is nothing to learn, it just works!
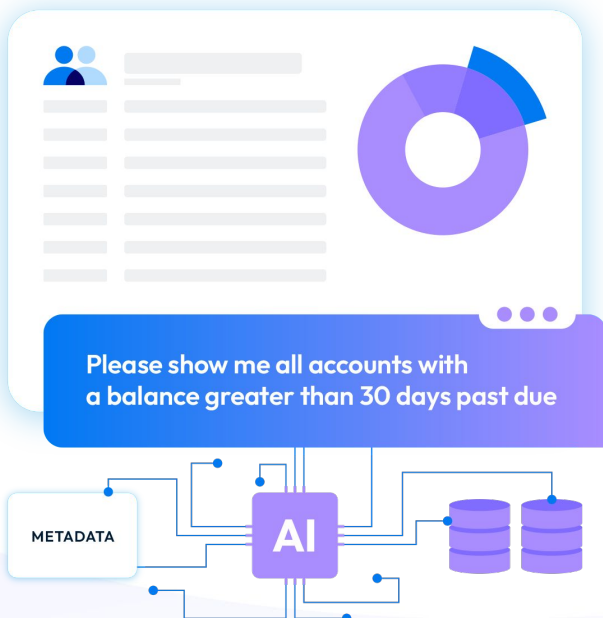
Streamline processes

- Simplify complex transactions by allowing users to communicate their requests in their own words
- Interpret queries quickly and receive relevant results
- Navigate to records in the app directly by clicking on links in the results window
- Reduce the time spent searching for information

It's great for Techies too!

- AI Report Builder includes a window that shows you the SQL code used to generate the results of your request
- Use the SQL generated by the AI for integrations or for use in advanced reports
- Modify and reprocess the SQL directly in the window to further refine your query and see the results in real time

Please show me all accounts with a balance greater than 30 days past due

METADATA

AI

BillingPlatform AI Report Builder offers effortless information retrieval allowing users to find data using spoken or written inquiries, intuitive reporting to generate custom reports and a user-friendly interface that just works.

Learn how to improve your organization's productivity with BillingPlatform's AI Report Builder.

Learn more at
billingplatform.com or **contact@billingplatform.com**