How do I use Ask AI to explore my data?

Before You Start: This book assumes you already know how to open Vantage from the Custom Widget on the Converse Home Page, and that you're looking at a dashboard. If you haven't done that yet, see *How do I use the Custom Widget?* first.

Overview

Ask AI lets you ask a question about your dashboard's data in plain language and get back an answer — as a short written summary, a chart you can pin, or both — without building a widget yourself.

When to Use

Use this feature when:

- You want a quick answer to a specific question about your data, without building a widget yourself
- You want a narrative summary of what's happening on a dashboard — key findings, what's working, what needs attention
- You want to turn an AI-generated answer into a permanent widget on your dashboard

Concepts

Vantage AI Panel – The Ask AI chat panel, opened from the Ask AI button on any dashboard

Sources – The data sources, shown as chips at the top of the panel, that Ask AI draws on to answer questions for this dashboard

Suggested Questions – Ready-made questions Ask AI offers before you've asked anything, tailored to this dashboard's data

Question Limit – Each dashboard allows up to 10 questions (shown as “Question X of 10”); Get AI Insights also counts toward this same limit

Pin to Dashboard – Turns a chart from an AI answer into a permanent widget on the dashboard

Try Next – Follow-up questions Ask AI suggests after answering, based on what you just asked

Thumbs Up / Thumbs Down – Feedback you can give on an answer, which feeds into how Ask AI answers in future (see *How do I improve the AI's answers over time?*)

AI Insights – A one-click button that asks Ask AI to summarize the dashboard as a whole, organized into What's Working, Needs Attention, Anomalies, and Recommendations, with 2–3 pinnable widgets

Set Up Guide

1. Open a dashboard and click **Ask AI** (bottom-right) to open the Vantage AI panel
2. Check the **Sources** chips at the top to see which data sources Ask AI is drawing on for this dashboard
3. Either click one of the **Suggested Questions**, or type your own question in plain language in the box at the bottom and send it
4. Review the answer — a short written response, usually alongside a chart or KPI Ask AI generated for it
5. Click **Pin to Dashboard** if you want to keep that chart as a permanent widget
6. Give the answer a thumbs up or thumbs down if you want to confirm or correct it
7. Click one of the **Try Next** suggestions to keep exploring, or ask another question of your own
8. To get an overview instead of asking one question, click **Get AI Insights** — it returns 2–3 key findings as KPIs, charts, and a short written summary, organized into What's Working, Needs Attention, Anomalies, and Recommendations, each with its own Pin to Dashboard option

Best Practices

Ask specific questions for sharper answers — “What's the trend in daily activations from Aug 1 to Aug 17?” gets a more useful answer than “how are we doing”

Remember each dashboard has a shared pool of 10 questions and AI Insights requests — pace your exploration, since Get AI Insights counts toward the same limit as a typed question

Use thumbs up / thumbs down to shape future answers, not just to react — Vantage AI's memory and corrections rely on this feedback over time

Pin only the charts you actually want to keep — a pinned chart becomes a real widget on the dashboard, visible to anyone who opens it

Related Links/FAQs

Related pages in this book:

- How do I improve the AI's answers over time?

FAQs

Does asking a question in Ask AI change my dashboard?
No — asking a question only shows you an answer in the panel. Nothing is added to your dashboard unless you click Pin to Dashboard.

What counts toward the 10-question limit?
Both typed/suggested questions and Get AI Insights requests count toward the same limit of 10 per dashboard. [TODO: confirm the reset period — daily, per session, or otherwise]

Can I ask about data that isn't shown on the dashboard?
[TODO: confirm — the Sources chips suggest Ask AI is scoped to specific data sources tied to the dashboard, but whether it can reach beyond what's visibly charted isn't confirmed]

Version Notes

Last Updated: Oct 2026

Revision #1 — Drafted from direct exploration of the Vantage AI panel on the demo account (Program Activation & Partner Payout — Internal dashboard): confirmed the Ask AI button, Sources chips, Suggested Questions, Pin to Dashboard, thumbs up/down feedback, Try Next follow-ups, and the Get AI Insights button and its four-category output (What's Working, Needs Attention, Anomalies, Recommendations). The question-limit's reset period, and whether Ask AI reaches beyond the dashboard's own data sources, are flagged TODO.

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