

Your numbers, explained

Product overview · Dashboards and AI analysis by CreoLabs

Creo Vision is a web portal where your team reads the figures that run the business and asks questions about them in plain language. CreoLabs loads your data, builds the dashboards with you, and keeps them up to date. Your people log in with a browser or a phone. There is nothing to install.

In one sentence: dashboards your team reads in a minute, and an analyst that answers the follow-up question.

1 What you get

Dashboards built for your business

Key figures with the change against the previous period. Charts, tables, pivot tables and funnels on your own data. Pages and tabs for each topic or role, in your colours and with your logo.

Ask in plain language

Type a question. Vision AI queries your data and answers with a chart, a table and a short explanation. Ask a follow-up in the same conversation. Save the answers you want to keep.

Each person sees their part

Access is set by dashboard, by page and by data. A team lead sees their team. A manager sees the whole picture.

A guide for every dashboard

Each dashboard has a Guide: a short overview, then an explanation of every chart and figure on the page. New users do not need a training session to read it.

Analyses that repeat

An analysis defined once runs again on fresh data. It reports findings, recommends actions, and checks whether the advice it gave last time worked.

On the phone too

Pages have their own phone layout. Add the portal to the home screen and it opens like an app, always on live data.

Filters and comparison

Choose a period and filter by the things that matter to you, such as team, country or product. Compare the period with the one before it, or with the same period last year.

Smart Insights

A page can point out what changed and what needs attention. You start from the exceptions instead of scanning every chart.

Take it with you

Export a chart as an image or its rows as a file. Export a page or an AI answer as a PDF for a meeting or an email.

2 What an answer looks like

A user asks: "How did first deposits do this month compared with last month, by country?"

SAMPLE DATA First deposits fell from 411 to 289 this month, a drop of about 30%. The average deposit rose from \$449 to \$483, so fewer clients deposited but each one deposited more. Two countries account for most of the drop. Recommended action: review lead allocation for those two countries before changing targets.

The answer comes with the chart and the table behind it, so the reader can check every figure. The numbers above are made up for this example.

3 How it works

1. **We connect your data.** Your systems are loaded into a Creo Sense app on a schedule. Every figure has one agreed definition, so two reports never disagree.
2. **We build the dashboards with you.** Pages for each role, in your colours and with your logo, each with its Guide.
3. **Your team logs in.** Everyone opens their own dashboards, asks follow-up questions, and gets the same numbers.

4 Who sees what

- **By dashboard:** a user sees only the dashboards given to them.
- **By page:** inside a dashboard, a user sees only the pages given to them. Other pages are not listed.
- **By data:** a rule can limit a user to their own rows, for example one team, one desk or one partner. Charts, tables and AI answers all follow the rule.
- **By feature:** Vision AI and the prepared analyses are switched on per user.

5 Optional: work with Claude directly

Teams that use Claude can connect it to their data through the CreoLabs BI connector and ask Claude questions in their own Claude account. This is optional and separate from the portal. It needs a paid Claude plan and your own Qlik account. Two short guides explain the setup: *Connect Claude to CreoLabs BI* and *Instructions for Claude*.

6 Getting started

- **Already a customer:** open vision.creo-labs.com and choose [Log in](#). Your administrator gives you the account.
- **New to Creo Vision:** ask CreoLabs for a walkthrough on your own data.
- **Next reads:** *Viewer quick start* for everyday use, and *Asking Vision AI* for good questions.