BizBrain

AI-Powered Business Intelligence

User Manual

A complete, step-by-step guide to every feature. Written for people who don't consider themselves technical — no jargon, no assumed knowledge.

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bizbrain.rumonz.com

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1. About BizBrain

BizBrain is a business intelligence tool that does the analysis for you. You upload the documents and spreadsheets you already have — a profit and loss statement, a sales export, a contract — and BizBrain reads them, pulls out the numbers, and tells you what they mean.

It is built for business owners and small finance teams who do not have a data analyst. You do not need to know formulas, write queries, or build charts. You ask questions in ordinary English and get answers.

What it does

- **Scores your business health** from your own figures, and shows exactly how it reached that score.
- **Reads documents** — summarises them, flags risks, pulls out tables, translates them.
- **Analyses spreadsheets** — checks data quality, spots unusual values, forecasts trends.
- **Answers questions with charts** — type a question, get a graph.
- **Writes reports** — board-ready PDFs, PowerPoints, or Excel files.
- **Automates routine work** — reports that generate and email themselves on a schedule.
- **Drafts marketing content** — press releases, posts, crisis statements.
- **Edits images** — remove backgrounds, resize for social media, compress.

A principle worth understanding

Throughout BizBrain, **the AI reads and writes words, but the app calculates the numbers.** When you ask for a chart, the AI decides which columns to use and what kind of chart suits the question — then the app does the arithmetic on your actual rows. When you upload a P&L, the AI finds the figures in the document but never estimates one that isn't there.

This matters because an AI that invents a revenue figure is far more dangerous than one that admits it couldn't find it. If BizBrain cannot determine something, it leaves it blank and says so.

> **Important:** BizBrain gives you information to make decisions with. It is not a substitute for an accountant, and its AI-generated text should be read before you send it to anyone.

2. Getting started

Creating your account

1. Go to **bizbrain.rumonz.com**.
2. Click **Register free** at the top right, or **Create free account** in the middle of the page.
3. Choose whether you are signing up as **A company** or **An individual**. If you pick company, you'll be asked for the company name — this becomes your workspace name.
4. Fill in your full name, work email, mobile number, and country.
5. Choose a password of at least 8 characters.
6. Tick the box to accept the Terms of Service and Privacy Policy.
7. Click **Create account**. You are signed in immediately.

Or click **Continue with Google** to register with a Google account instead — no password to remember.

Your free trial

Every new account starts with **14 days of the Professional plan, free, with no card required**. You get the full product, not a cut-down version.

When the trial ends your account moves to the Free plan. **Nothing is deleted** — your documents, data, and reports all stay. You simply get lower monthly limits until you choose a paid plan.

Signing in

1. Go to bizbrain.rumonz.com and click **Log in**.
2. Enter your email and password, then click **Sign in**. Or use **Continue with Google**.

> **If you get locked out:** After 5 wrong passwords your account locks for about 15 minutes. This protects you from someone guessing your password. Wait, or use "Forgot your password?" to reset it immediately.

Resetting a forgotten password

1. On the sign-in page, click **Forgot your password?**
2. Type your email address and click **Send reset code**.
3. Check your email for a **6-digit code**. It is valid for 10 minutes.
4. Enter the code and choose a new password.
5. Click **Set new password**, then sign in as usual.

If the code doesn't arrive, check your spam folder. You can request a new one — each new code cancels the previous one.

3. Understanding the screen

Every page in BizBrain shares the same layout.

The left sidebar

This is how you move around. From top to bottom:

Item	What it's for
Company switcher	At the very top. Shows which business you're currently looking at. Click it to switch between your companies, add a new one, or manage them.
Home	Your business health dashboard.
Documents	Upload and analyse files — PDFs, contracts, reports.
Analytics	Upload and explore spreadsheets and CSV data.
AI Chat	Ask questions in plain English.
Reports	Generate professional reports.
Automations	Set up work that runs by itself.
Marketing & PR	Campaign tracking and AI content writing.
Image Tools	Edit and prepare images.
Integrations	API keys and webhooks for connecting other tools.
Admin	Only visible to the product owner.
Settings	At the bottom. Companies, team, billing, password.

The top bar

- **Search box** — for finding things across the app.
- **Bell icon** — notifications.
- **Your name and company** — click for Settings, Profile, or Sign out.

The green WhatsApp button

In the bottom-right corner of every page you'll see a green **BizBrain Support** button. Click it to start a WhatsApp conversation with support. It works from any screen.

Working with several companies

If you run more than one business, each gets its own separate workspace with its own documents, figures, and reports. Nothing is shared or mixed between them.

1. Click the company name at the top of the sidebar.

2. Pick a company from the list to switch to it.
3. The whole app — Home, Documents, everything — now shows that company only.
4. To add or remove companies, click **Add a company** or **Manage companies** in the same menu.

4. Home — your business health

Home answers one question: *how is my business doing?* It is built entirely from figures you provide. Nothing here is invented or estimated.

Getting your figures in

Until you add figures, Home shows an **Add your business figures** panel. There are three ways to fill it.

Option A — Upload a file (easiest)

1. In the **Add your business figures** panel, make sure the **Upload a file** tab is selected.
2. Drag a profit and loss statement, income statement, or monthly summary onto the dotted box — or click it to browse. PDF, CSV, or Excel, up to 20MB.
3. Wait a few seconds while it reads the figures.
4. Read the green confirmation box. It tells you how many months it found, and warns you about anything it couldn't read.

> **How it handles missing figures:** BizBrain only records numbers it can actually find in your document. If your file has no cash balance, that field stays empty rather than being guessed. A month with no revenue figure is skipped entirely, and it tells you which one.

Option B — Type the figures in

1. Click the **Enter manually** tab.
2. Choose the month.
3. Fill in what you know. **Only Revenue is required** — leave anything else blank.
4. Click **Save figures**.

Blank fields are not scored against you. They are simply left out of the calculation.

Option C — Load sample data (to see how it looks)

1. Click **Load sample** in the grey box.
2. Twelve months of example figures appear so you can see a fully populated dashboard.
3. An orange banner reminds you this is sample data, not yours.
4. Click **Clear sample** to remove it. This only removes sample rows — your real figures are untouched.

Reading the Business Health Score

The score runs from 0 to 100 and is calculated from five factors:

Factor	Weight	What it measures
Profitability	30%	Net profit margin — how much of your revenue you keep.
Growth	25%	Revenue change compared to last month.
Margin quality	20%	Gross margin — revenue minus direct costs.

Factor	Weight	What it measures
Cash position	15%	How many months you could operate at the current burn rate.
Retention	10%	What percentage of customers you lose each month.

Underneath the score you'll see a bar for each factor, showing how it contributed. Factors you haven't given data for are greyed out with a note explaining what to add.

> **Data coverage:** In the top-right of the score card you may see something like "60% data coverage". This tells you how much of the score is backed by real figures. A score built from revenue alone is less reliable than one built from revenue, costs, cash, and churn — and BizBrain says so rather than presenting every score as equally solid.

The figures across the top

Card	Meaning
Revenue	Total sales for the latest month, with the change versus the previous month.
Net profit	What's left after all costs, with the margin percentage.
Cash	Your cash balance, and how many months of runway that represents if you're losing money.
Customers	Total customers and the monthly change.
Gross margin	Revenue minus direct costs, as a percentage.
Receivable days	How long invoices take to get paid. High numbers mean your cash is stuck with customers.

What needs attention

Below the figures is a panel listing anything concerning — low runway, operating at a loss, revenue falling sharply, slow collections, thin margins, high churn. These are calculated by fixed rules from your numbers, not written by AI, so they are consistent and you can always trace why one appeared.

If nothing is wrong, it says so plainly.

Charts and recommendations

- **Revenue & profit** — your revenue trend over time.
- **Cash position** — how your cash balance has moved.
- **Customer growth** — customer count over time.
- **Recent Reports** — your last few generated reports, click to open.
- **AI Recommendations** — three suggested actions, written from your actual figures. These refresh each time you upload new data.

5. Documents

Upload a document and BizBrain reads it for you — summarising it, flagging risks, pulling out tables, and answering questions about it.

Uploading a document

1. Click **Documents** in the sidebar.
2. Drag a file onto the dotted box, or click to browse. Accepts PDF, TXT, MD, and images (PNG, JPG, WebP), up to 20MB.
3. The file appears in the list below with a status badge.
4. Wait for the badge to change from **Pending** to **Analyzing…** to **Ready**. This takes a few seconds.
5. Click the document name to open it.

The document screen

Three areas: tools on the left, the document in the middle, and the AI panel on the right.

The five tabs on the right

Tab	What it shows
AI Chat	Ask questions about this document. Type in the box at the bottom and press Enter.
Summary	An executive summary plus key insights.
Risks	Potential problems — financial, legal, or operational.
Tables	Any tables or figures found, extracted into a proper table you can read.
Translate	Translate the summary into another language.
Tools	Results from the tools on the left appear here.

If a tab says "Not analyzed yet", click **Generate insights**.

Document Tools (left side)

Summarize

Produces the executive summary and key insights.

1. Click **Summarize**.
2. The Summary tab opens and fills in.
3. If nothing appears, click **Generate insights**.

Translate

Translates the document's summary into another language. 18 languages including Bengali, Hindi, Urdu, Arabic, Spanish, French, and Chinese.

1. Click **Translate**.
2. Pick a language from the dropdown.
3. Click the **Translate** button.
4. The translation appears below and is kept, so you can translate into several languages and compare.

Extract Tables

Finds tables and structured figures and lays them out properly.

1. Click **Extract Tables**.
2. The Tables tab opens with whatever it found.
3. If the document has no tabular data, it tells you.

OCR / Recognize Text

Reads text out of an image using optical character recognition.

1. Open an image file (PNG, JPG, or WebP).
2. Click **OCR / Recognize Text**.
3. The recognised text appears in the Tools tab, with a confidence percentage.

Convert to Word

Turns a PDF into an editable Word (.docx) file.

1. Open a PDF.
2. Click **Convert to Word**.
3. A .docx file is created and appears in the Tools tab.
4. Click **Download** to save it.

Compress PDF

Makes a PDF smaller.

1. Open a PDF.
2. Click **Compress PDF**.
3. The result shows how much smaller it got.
4. Click **Download**.

Merge PDF

Joins several PDFs into one.

1. Open the PDF you want **first** in the merged file.
2. Click **Merge PDF**.
3. Tick the other PDFs in the order you want them. A number shows their position.
4. Click **Merge**. The combined file appears in your Documents.

Split PDF

Breaks a PDF into separate files.

1. Open a PDF.
2. Click **Split PDF**.
3. Choose **Every page separately**, or **Extract a range** and type the page numbers.
4. Click **Split PDF**. Each piece becomes its own document.

> **Limits of these tools: Convert to Word** carries across text, headings, and bullet lists, but not images or table grids. A PDF doesn't store that structure, so no tool can recover it perfectly. **Compress PDF** removes redundant structure but cannot shrink embedded photographs — expect modest savings. **OCR** works on image files, not scanned PDFs. **Protect PDF** is greyed out because password encryption needs software that can't run on this platform.

6. Analytics

Analytics is for spreadsheets and CSV files — any data you want to explore. This is separate from Home: use Home for your own company's financial position, and Analytics for any dataset at all, including data that isn't yours.

Uploading data

1. Click **Analytics** in the sidebar.
2. Drag a CSV or Excel file onto the box, or click to browse. Up to 20MB.
3. Wait for the status to reach **Ready**.
4. Click the dataset name to open it.

The Overview tab

- **Data Quality** — a score out of 100, broken into Completeness (how much is filled in), Validity (whether values match their column type), Consistency (whether whole rows are well-formed), and Uniqueness (how much repetition there is).
- **AI Summary** — a plain description of what the dataset contains, plus key observations.
- **Data Preview** — the first 10 rows, with each column labelled by its detected type.

The Ask & Chart tab

Type a question in plain English and get a chart back.

1. Click the **Ask & Chart** tab.
2. Type a question — for example *Total sales by region*, or *Average order value by product*. Or click one of the suggested questions.
3. Click **Chart it**.
4. A bar, line, or pie chart appears, along with how many rows were used.

> **How this works:** The AI chooses which columns to use and what kind of chart fits your question. **The app then calculates every number from your actual rows.** If some cells couldn't be read as numbers, it tells you how many were left out rather than counting them as zero.

The Trends & Forecast tab

If your data has a date column and a numeric column with at least three months of history, BizBrain projects the next three months. The chart shows actual figures as a solid line and projections as a dashed line.

> **About forecasts:** The forecast assumes the current trend simply continues. It does not account for seasonality, promotions, or anything happening outside your data. Treat it as a rough direction, not a prediction.

The Anomalies tab

Lists values that sit unusually far from their column's average — more than 2.5 standard deviations. High severity means 3 or more. Each entry names the column, the row number, the value, and how far out it is. Useful for catching data-entry errors and genuine outliers.

The Ask AI tab

A conversation about your dataset. Ask follow-up questions in ordinary language. Answers are based on the column structure and a sample of rows, and it will tell you when a precise whole-dataset figure can't be derived from that sample.

Exporting your analysis

Each tab has its own export button producing its own document — not one combined file.

1. Open the tab you want to export.
2. Click **Export overview (PDF)**, **Export forecast (PDF)**, or **Export anomalies (PDF)**.
3. Or click **Excel** for a spreadsheet version with formatted tables and filters.

The **Source file** button downloads your original upload, not the analysis.

7. AI Chat

A general conversation with BizBrain. Use it for business questions, or attach one of your files to ask about it specifically.

Starting a conversation

1. Click **AI Chat** in the sidebar.
2. Type your question at the bottom and press Enter — or click one of the suggested questions.
3. Your conversation is saved and appears in the list on the left.
4. Click **New chat** to start a fresh one.

Chatting about one of your files

1. Click **Chat with a file**.
2. Pick a document or dataset from the list.
3. A new conversation opens, grounded in that file. A banner at the top shows which one.
4. Ask away — answers come from the file's contents.

Managing conversations

- Click any conversation in the left list to reopen it.
- Hover over one and click the bin icon to delete it.
- Conversations are private to you — colleagues in the same workspace cannot see them.

8. Reports

Generates a professional report — written narrative and all — from your data.

Creating a report

1. Click **Reports** in the sidebar, then **New Report**.
2. Choose a template (see the table below).
3. Set the date range.
4. Choose the tone: **Professional**, **Casual**, or **Technical**.
5. Choose the data source — your company's dashboard figures, or one of your Analytics datasets.
6. Choose the format: **PDF**, **PowerPoint**, or **Excel**.
7. Click **Generate Report**. It takes a few seconds.
8. When it's ready, review the preview and click **Download**.

Template	Best for
CEO Report	Executive overview with highlights, KPIs, and recommendations.
Financial Report	Financial performance, trends, and forecasts.
Marketing Report	Campaign performance, channels, and ROI.
Sales Report	Sales performance, pipeline, and revenue.
Board Presentation	Concise, governance-focused, strategy-led.

> **Where the numbers come from:** Every figure in a report comes from your real data and is calculated before the AI is involved. The AI writes the summary and recommendations *around* those numbers — it never produces the numbers itself.

9. Automations

An automation is a sequence of steps that runs by itself — on a schedule, when you upload a file, or whenever you click Run.

Creating an automation

1. Click **Automations**, then **New Automation**.
2. Give it a name, for example "Weekly CEO Report".
3. Choose a trigger: **Manual** (you click Run), **On upload** (runs when a file is added), or **Schedule** (daily, weekly, or monthly at a chosen hour).
4. Add steps by clicking them from the list below. They run in order, top to bottom.
5. For the email step, type the recipient addresses, separated by commas.
6. Click **Create Automation**.

Step	What it does
Analyze latest document	Runs AI analysis on your most recently uploaded document.
Analyze latest dataset	Runs quality scoring, anomaly detection, and forecasting on your newest dataset.
Generate report	Creates a report from your current data.
AI summary of workspace	Writes a short summary of your current business metrics.
Email the latest report	Sends your most recent completed report as a PDF attachment.
Record notification	Writes an entry to the activity log.

Running and managing

- **Run now** — runs it immediately, whatever its trigger.
- **Pause** / **Resume** — stops or restarts scheduled and upload-triggered runs.
- **Bin icon** — deletes it.
- Each automation shows how many times it has run, its success rate, and estimated time saved.

> **When a step fails:** If a step fails, the run stops there rather than continuing. This is deliberate — carrying on after a failure usually produces misleading results.

10. Marketing & PR

Two tabs: tracking what's happening, and writing content.

Command Center

- **Reach, Engagement, Leads, CAC** — totals across your campaigns. CAC is cost per acquired customer.
- **Campaign Performance** — a table of each campaign's numbers.
- **Brand Sentiment** — a score out of 100 based on recorded mentions, with positive, neutral, and negative counts.
- **Recent Brand Mentions** — what's being said, and where.

AI Content Studio

1. Click the **AI Content Studio** tab.
2. Choose what to write: **Press Release**, **Social Post**, **Email Campaign**, or **Crisis Response**.
3. Write a brief in the box — the announcement, the audience, the key points. The more you give it, the better the result.
4. Click **Generate**.
5. Read the draft, then click **Copy** to take it elsewhere.

> **About generated content:** The AI writes only from your brief. It will not invent statistics, quotes, or customer names. If your brief is thin, you'll get something short rather than something padded with fiction. Always read a draft before publishing it.

11. Image Tools

Edit images you've uploaded through Documents. You can select several at once and apply the same operation to all of them.

Using an image tool

1. Upload your images first via **Documents**.
2. Click **Image Tools** in the sidebar.
3. Choose a tool from the six options at the top.
4. Set any options that appear for that tool.
5. Click the images you want. A tick appears on each selected one.
6. Click **Process image** (or **Process N images**).
7. Results appear below with a **Save** button for each.

Tool	What it does
Remove Background	Cuts out the subject and makes the background transparent. Uses AI that recognises the subject, so it works on people and products, not just plain backdrops.
Enhance Image	Sharpens, improves contrast, and lifts colour.
Resize for Social	Resizes to a platform preset — Instagram Square, Portrait or Story, Facebook, LinkedIn, X/Twitter, YouTube Thumbnail, or Pinterest Pin. Choose crop-to-fill or pad-to-fit.
Convert Format	Converts between WebP (smallest), PNG (lossless, supports transparency), and JPG (most compatible).
Compress	Reduces file size, with a quality slider.
Rotate / Flip	Rotates 90, 180, or 270 degrees.

Deleting images

- Hover over an image and click the bin icon in its corner.
- Or select several and click **Delete selected**.
- Results have their own bin icon too.

> **Worth knowing:** Deleting here also removes the image from Documents — they share the same storage. **Enhance Image** improves detail that already exists; it cannot add detail that was never captured. Background removal takes 15 to 40 seconds per image and may be unavailable on some installations.

12. Integrations

For connecting BizBrain to other software. Most people will not need this — it is aimed at developers.

API Keys

An API key lets another program access your BizBrain data.

1. Click **Integrations** in the sidebar.
2. Type a name for the key, for example "Accounting system".
3. Click **Generate**.
4. **Copy the key immediately.** It is shown once and cannot be retrieved later.
5. To revoke a key, click the bin icon. Anything using it stops working straight away.

> **Keep keys private:** Treat an API key like a password. Anyone holding it can read your workspace data. Only owners and admins can create or revoke keys.

Webhooks

A webhook tells another system when something happens in BizBrain.

1. Enter the https address that should receive the notification.
2. Click the events you want — document uploaded, dataset analysed, report generated, and so on.
3. Click **Add webhook**.

Connected Apps

Google Drive, Slack, Gmail, HubSpot, Salesforce, Notion, Google Sheets, Shopify, QuickBooks, and Dropbox are listed here. These are marked **Soon** — the connections are in development and not yet available.

13. Settings

Companies

Add, rename, switch between, or delete the businesses you track.

1. Go to **Settings** → **Companies**.
2. To add one: type a name and optional industry, then click **Create company**.
3. To switch: click **Switch to** next to a company.
4. To rename: click **Rename**, edit, and save.
5. To delete: click the bin icon and confirm.

> **Before you delete:** Deleting a company permanently removes all of its documents, datasets, reports, and figures. This cannot be undone. You cannot delete your only company. Each company has its own plan — billing is per company, not per account.

Team members

1. Go to **Settings** → **Manage members**.
2. Type a colleague's email address.
3. Choose **Member** or **Admin**.
4. Click **Send invite**.

Roles: **Owner** can do anything including delete the company. **Admin** can manage settings, billing, and team. **Member** can use the app and delete only their own uploads.

Billing & Usage

Shows your current plan, what you've used this month against your limits, and the available plans. Bars turn amber when you approach a limit. Click **Upgrade** to change plan, or **Manage billing** to update payment details.

Password

1. Go to **Settings** → **Password**.
2. Enter your current password, then your new one (at least 8 characters).
3. Click **Update password**. You stay signed in.

14. Admin

This section is visible only to the product owner. If you don't see **Admin** in your sidebar, it doesn't apply to you.

Creating a tester account

1. Click **Admin** in the sidebar.
2. Fill in the tester's name, email, and a temporary password (8+ characters).
3. Choose their **access level** — Free, Starter, Professional, Business, or Enterprise.
4. Choose an **access duration** — 7, 14, 30, or 90 days, or no expiry.
5. Click **Create tester**.
6. Share the password with them securely. It cannot be retrieved later.

Managing accounts

- Each account shows its plan and how many days of access remain.
- Change the plan from the dropdown next to an account.
- Extend access using the **Extend…** dropdown.
- Delete an account with the bin icon — this removes their workspace and all their data.

The owner account has no plan limits, no AI quotas, and never expires.

15. Plans and limits

Plan	Price	Uploads /mo	AI ops /mo	Automations	Team
Free	$0	5	100	0	1
Starter	$12/mo	50	1,000	5	1
Professional	$29/mo	250	5,000	25	5
Business	$69/mo	1,000	20,000	100	25
Enterprise	Custom	Unlimited	Unlimited	Unlimited	Unlimited

Annual billing saves roughly 20%.

Uploads counts documents and datasets together. **AI operations** counts anything using AI — chat messages, document analysis, report generation, content writing. Both reset at the start of each month.

If you reach a limit, BizBrain tells you which one and what to do. Nothing is deleted — you simply can't add more until the month resets or you upgrade.

16. Troubleshooting

Problem	What to do
"Rate limit reached"	The AI service allows a limited amount of work per minute across all users. Wait a minute and try again, ideally with a smaller file.
Account locked	Five wrong passwords locks the account for 15 minutes. Wait, or use **Forgot your password?** to reset immediately.
Reset code didn't arrive	Check your spam folder. Codes expire after 10 minutes — request a new one if needed.
Upload rejected	Check the file type is supported and it's under 20MB. Documents accept PDF, TXT, MD, and images. Analytics accepts CSV and Excel.
"No financial periods found"	The document needs dated figures — a P&L, income statement, or monthly summary. A scanned PDF with no text layer won't work.
Score shows low data coverage	You haven't provided all the figures. Add cost of goods sold, cash balance, and customer numbers to raise it.
Analysis stuck on "Analyzing…"	Refresh the page. If it says Failed, open it and click **Generate insights** to retry.
"Not analyzed yet"	Click **Generate insights** on that tab.
Reached a plan limit	Wait for the month to reset, or upgrade in Settings → Billing.

17. Getting help

Click the green **BizBrain Support** button in the bottom-right corner of any page to start a WhatsApp conversation with our support team.

WhatsApp: **+880 1719 390400**

When reporting a problem, it helps enormously to include:

- What you were trying to do.
- What happened instead, including any message shown on screen.
- Which page you were on.
- A screenshot, if you can.

A closing note

BizBrain is designed to be honest about what it knows. When it can't read a figure, it leaves it blank. When a score is based on partial data, it says so. When a forecast is a simple projection rather than a prediction, it tells you.

That is deliberate. A tool that quietly fills gaps with plausible guesses is far more dangerous than one that admits uncertainty — especially when you're making decisions about your business with it.

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