

BillingAgent RAG Sample - Invoice Policy

Purpose and target agent

This sample PDF is designed for the agent_template_backend BillingAgent. It contains searchable billing rules and examples that can be indexed by the RAG embedding generator.

Agent	billing_agent
Primary tool examples	consultar_fatura, consultar_pagamentos
Recommended namespace	billing_agent or default
Typical user questions	Why is my invoice higher? What payments are pending? What is the due date?

Billing policy summary

A customer invoice can contain fixed monthly charges, prorated charges, value-added services, taxes, credits, discounts and late payment fees. The agent must explain the invoice using the available context and must not invent values that are not present in tools or documents.

- If the user asks about a specific invoice, prefer the invoice_id from BusinessContext.contract_key.
- If the user asks about the line or subscriber, use BusinessContext.customer_key mapped to msisdn.
- If payment status is needed, call consultar_pagamentos before giving a final answer.
- If the document and the tool disagree, prioritize tool data and cite the document as policy context only.

Prorated charge rule

A prorated charge appears when a plan, service or add-on starts or changes in the middle of the billing cycle. The BillingAgent should explain that the first invoice after activation can include a partial period plus the recurring monthly charge.

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Example explanation:  
The invoice is higher because it includes a prorated charge for the new service activation  
plus the regular monthly amount for the current cycle.
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The agent should avoid promising a credit unless the tool or business policy explicitly confirms that a credit applies.

Recommended retrieval validation questions

- What is a prorated charge?
- When should billing_agent call consultar_pagamentos?
- Which BusinessContext field should be mapped to msisdn for billing?
- Can the agent invent invoice values if the tool does not return them?