# User Guide: Financial Data Interactive QA Bot

## How to Use the Bot

### Step 1: Run app.py Using Anaconda

Follow these steps to install and run the application in an Anaconda environment:  
  
1. \*\*Install Anaconda:\*\*  
 • Download and install Anaconda from https://www.anaconda.com if it's not already installed.  
  
2. \*\*Create a New Environment:\*\*  
 • Open the Anaconda Prompt.  
 • Run the following command to create a new environment named project\_env with Python 3.9:  
 ```  
 conda create --name project\_env python=3.9  
 ```  
 • Activate the environment:  
 ```  
 conda activate project\_env  
 ```  
  
3. \*\*Navigate to the Project Directory:\*\*  
 • Use the cd command to navigate to the root directory of your project:  
 ```  
 cd path/to/your/project\_directory  
 ```  
  
4. \*\*Install Dependencies:\*\*  
 • Install the required packages from requirements.txt using pip:  
 ```  
 pip install -r requirements.txt  
 ```  
  
5. \*\*Run the Application:\*\*  
 • Use Streamlit to run the app.py script:  
 ```  
 streamlit run app.py  
 ```  
  
6. \*\*Access the Application:\*\*  
 • Open the provided URL (e.g., http://localhost:8501) in your web browser to access the interactive QA bot.

Or

Just access this link

<https://pdfappchatbot-ic7fnd9mwrjxrhyxkhsutl.streamlit.app/>

### Step 2: Upload Documents

• Click the 'Choose a PDF file to extract content' button on the left sidebar.  
• Select a PDF document containing financial data. Examples include quarterly reports, income statements, or budget summaries.

### Step 3: Ask Questions

• Type your question in the 'Enter your question' box.  
• Examples of valid questions:  
 ○ What are the total expenses for Q2 2023?  
 ○ Show the operating margin for the past 6 months.

### Step 4: Create a Gemini API Key

• Visit Gemini AI Studio at: https://studio.gemini.com.  
• Log in with your credentials.  
• Navigate to the 'API Keys' section.  
• Click 'Create New API Key' and provide a name for the key.  
• Copy the generated key and save it securely. You will use this key in the bot to connect to the Gemini API.

### Step 5: Interpret the Bot's Responses

• The bot will analyze the document and provide a detailed answer based on the context.  
• If the bot cannot find the answer in the document, it will respond: 'Answer is not available in the context.'

## Example Interaction Scenarios

The bot is tailored for financial queries. Below are some example interactions demonstrating its capabilities.

### Example Query 1: What are the total expenses for Q2 2023?

Response: The total expenses for Q2 2023 are $250,000. This includes $150,000 in operational costs and $100,000 in marketing expenses.

### Example Query 2: Show the operating margin for the past 6 months.

Response: The operating margin for the past 6 months averages 15%, with a high of 18% in April 2023 and a low of 12% in January 2023.