

User Guide: FDH - GenAI enablement

Please follow this user manual as a self-help guide. However, for further support, please reach out on [Business] WMT DST GenAI Hypercare Teams Channel. Contact Taylor LeSueur for access to the channel.

Overview

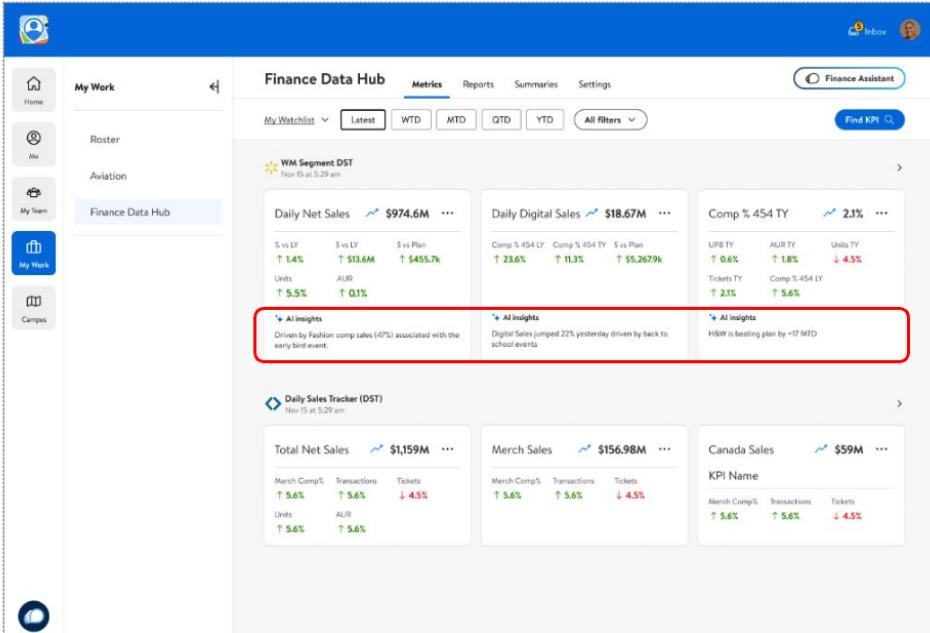
The FDH-GenAI Enablement Project integrates **Generative AI-powered insights** and a **Finance Assistant chatbot** into Walmart's Finance Data Hub (FDH).

The goal is to enable faster, more intuitive exploration of business performance through natural language questions and automated insights directly within reports.

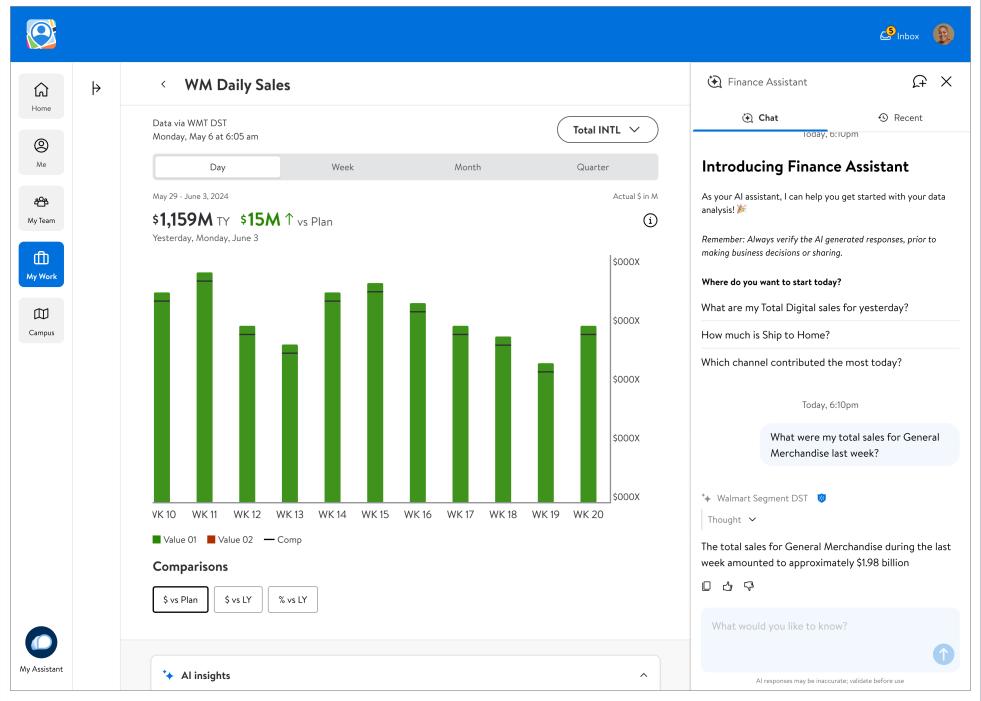
- **Time Savings:** Automates routine analyses—users gain actionable insights in seconds, not hours.
- **Democratized Data:** Lowers technical barrier; anyone can ask “Why did sales dip?” without SQL or Power BI expertise.
- **Proactive Insights:** To understand the drivers of anomalies or material shifts occurring

Features/Functionality:

This release includes two functionalities, AI Insights and Finance Assistant.

Feature	Image
<ul style="list-style-type: none">• AI Insights: Proactive Insights to understand the Performance and drivers of KPIs and its Impact across (L1 -L4) Levels	

- Finance Assistant (Chatbot):** Ask natural language questions and receive instant summaries, insights, and visualizations for Deep dives.



Reports Supported:

For the August launch, we are targeting the following 8 reports:

Report Type	Report Name	Release Date
DST Report	Walmart DST 3.0	July Release
DST Report	Sam's DST 3.0	August Release
DST Report	International DST	August Release
DST Report	Consolidated DST	August Release
P&L Report	WMT CP P&L	August Release
P&L Report	Sam's MEC P&L	August Release
P&L Report	International (Rainbow) P&L	August Release
P&L Report	Corporate P&L	August Release

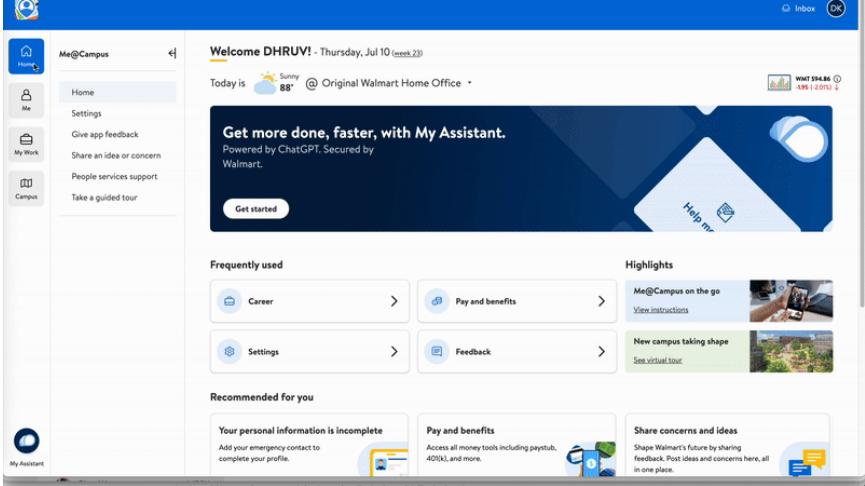
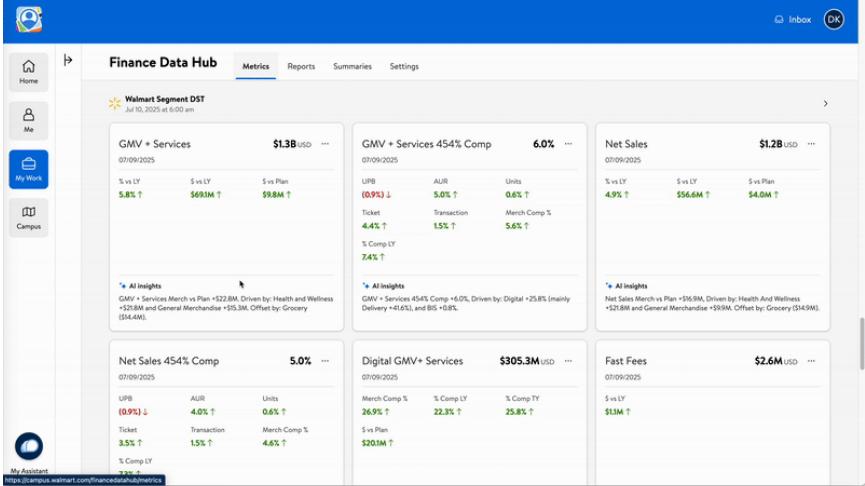
Helpful Links

Section	Link
Access the FDH Platform	[Insert FDH Platform Link]
FDH GenAI Walkthrough Video	[Insert Video Demo Link]
Feedback Form	[Insert Feedback Form Link]
Project Documentation	FDH-GenAI Enablement- (Report Agent)

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- [3. Feature highlights](#)
- [4. FAQs on \(Data,Access,Security,Support\)](#)
- [5. Known Issues & Backlog Tracker](#)

1. How to Access the Tool

Step	Detail	Image
Access the FDH platform within Me@Campus	<p>Link: https://campus.walmart.com/financedatahub/metrics</p> <p>Steps:</p> <ol style="list-style-type: none"> 1. Go to My Work > Finance Data Hub > Metrics 	
Access insights in multiple locations	<ol style="list-style-type: none"> 1. Metrics 2. Drill - down 3. Summary 4. Report 	

Access Chatbot	<p>2. Drill - down</p> <p>3. Summary</p> <p>4. Report</p>	<p>The screenshot shows a dashboard titled "GMV + Services" with a subtitle "Data via Walmart Segment DST Jul 10, 2025 at 6:00 am". It includes navigation links for Home, Me, My Work, and Campus, along with a "My Assistant" icon. The main area displays a bar chart for July 10, 2025, comparing actual sales ("GMV + Services > Plan") and plan values. The Y-axis ranges from \$0 to \$1.8B. The chart shows mixed performance across different days, with some bars above and some below the plan line.</p>

1.2 Report Menu and Capabilities

Users can refer to the table below to quickly understand what each report supports—such as key metrics, comparisons, hierarchies, time periods, and visualizations—with helpful examples of insights and chat queries for reference

Report Type	Report Name	Capabilities at Glance	Examples for Insights/Chat
DST Report	Walmart DST 3.0	<p>KPI Coverage: Finance Metrics - Net Sales, Daily GMV Sales, Digital Sales, Fast Fees Basket Metrics - Transaction Count, Unit Count, AUR, UPB, Ticket Size</p> <p>Comparison Types: Allows comparison vs Last Year, LY%, 454 Comp %, and Plan. Plan values are not available for basket metrics.</p> <p>Merchandise Hierarchy: Insights available at SBU and Department levels.</p> <p>Location Hierarchy: Insights available at Region, Division, and Subdivision levels.</p> <p>Channel Hierarchy: Insights supported for Instore, Delivery, and Pick-up channels.</p> <p>Time Periods: Daily**, WTD*, MTD**, QTD**, HTD*, and YTD** ** - supported based on both fiscal and comp 454 calendars * - supported based only on comp 454 calendar</p> <p>Visualizations: Line, bar, pie charts, and tables supported.</p> <p>Out of Scope: Consumption, Fulfillment metrics, Geographical and Waterfall visualizations not supported.</p>	<p>Insight 1: "Daily Net Sales for Subdivision A vs Plan during QTD shows a 5% miss driven by weak Instore performance."</p> <p>Insight 2: "Comp % 454 TY (GMV + Services) vs LY% is up 8% for Department X, led by strong digital sales"</p> <hr/> <p>Chat 1: "What was Daily GMV Sales + Services for Delivery channel last week WTD?"</p> <p>Chat 2: "Show a bar chart of Digital Daily Sales vs Plan for Region B this month MTD."</p>

DST Report	Sam's DST 3.0	<p>KPI Coverage: Finance Metrics - Net Sales (excluding fuel), Total eCommerce Basket metrics - Transaction Count, Unit Count, AUR, UPB, Ticket Size</p> <p>Comparison Types: Allows comparison vs Last Year, LY%, 454 Comp %, and Plan. Plan values are not available for basket metrics.</p> <p>Merchandise Hierarchy: Insights available at SBU and Department levels.</p> <p>Location Hierarchy: Insights available at Region, Division, and Subdivision levels.</p> <p>Channel Hierarchy: Insights supported for Instore, Delivery, and Pick-up channels.</p> <p>Time Periods: Daily, WTD, MTD, and QTD time periods supported.</p> <p>Visualizations: Line, bar, pie charts, and tables supported.</p> <p>Out of Scope: Consumption, Fulfillment, Geographical visuals, and Waterfall charts not supported</p>	<p>Insight 1: Net Sales (excluding fuel) vs Plan is up 6% for Region West during QTD driven by strong eCommerce growth.</p> <p>Insight 2: Basket metrics for Delivery channel show a 3% LY% increase in Subdivision A this month MTD.</p> <hr/> <p>Chat 1: Show Total eCommerce sales vs LY% for Department X during WTD.</p> <p>Chat 2: Provide a table of 454 Comp TY by Region for Daily view yesterday.</p>
DST Report	International DST	<p>KPI Coverage: Supports Total Merch Sales and Country-wise Merch Sales (Canada, China, Chile, CAM, Mexico, Africa, PhonePe).</p> <p>Comparison Types: Allows comparison vs Last Year, LY%, Plan, and 454 Comp %.</p> <p>Merchandise Hierarchy: Insights available at SBU and Department levels.</p> <p>Location Hierarchy: Insights available at Country, Region, Division, and Subdivision levels.</p> <p>Channel Hierarchy: Insights supported for Instore, Delivery, and Pick-up channels.</p> <p>Time Periods: Daily, WTD, MTD, and QTD time periods supported.</p> <p>Visualizations: Line, bar, pie charts, and tables supported.</p> <p>Out of Scope: Consumption metrics, Fulfillment metrics, Geographical visuals (e.g., map view), and Waterfall charts not supported</p>	<p>Insight 1: Total Merch Sales vs Plan is up 4% during QTD, driven by strong growth in China and Mexico.</p> <p>Insight 2: Country-wise Merch Sales for Canada show a 2% decline vs LY% this month MTD, mainly due to weaker Instore performance.</p> <hr/> <p>Chat 1: Show Merch Sales for Chile vs Plan during WTD.</p> <p>Chat 2: Provide a table of Country-wise Merch Sales for CAM, Mexico, and Africa for Daily view yesterday.</p>
CDST Report	Consolidated DST	<p>KPI Coverage: Supports Total Company Net Sales and Country-wise Net Sales for Walmart U.S., Sam's Club, and International.</p> <p>Comparison Types: Allows comparison vs Last Year, LY%, Plan, and EFC.</p> <p>Time Periods: Yesterday, WTD, MTD, and QTD time periods supported.</p> <p>Visualizations: Line, bar, pie charts, and tables supported.</p> <p>Out of Scope: Consumption metrics, Fulfillment metrics, Geographical visuals (e.g., map view), and Waterfall charts not supported.</p>	<p>Insight 1: Total Company Net Sales vs Plan is up 5% during QTD, driven by strong performance in Walmart U.S. and International markets.</p> <p>Insight 2: Sam's Club Net Sales vs LY% is flat this month MTD despite growth in eCommerce.</p> <hr/> <p>Chat 1: Show Walmart U.S. Net Sales vs Plan for Daily view yesterday.</p> <p>Chat 2: Provide a table of Country-wise Net Sales for Sam's Club, International, and Walmart U.S. during WTD.</p>
P&L Report	International (Rainbow) P&L	<p>KPI Coverage: Supports Total GMV, eComm Net GMV, Net Sales, Operating Income, Net Income, Gross Profit, and SG&A for Total International.</p> <p>Comparison Types: Allows comparison vs Last Year, LY%, Plan</p> <p>Time Periods: Latest, WTD, MTD, and QTD time periods supported.</p> <p>Visualizations: Line, bar, pie charts, and tables supported.</p> <p>Out of Scope: Country-level splits, Consumption metrics, Fulfillment metrics, Geographical visuals, and Waterfall charts not supported.</p>	<p>Insight 1: Total International Net Sales vs Plan is up 3% during QTD, driven by strong eComm Net GMV.</p> <p>Insight 2: Operating Income vs LY% is down 2% this month MTD for Total International due to higher SG&A expenses.</p> <hr/> <p>Chat 1: Show Total GMV vs Plan for Total International during WTD.</p> <p>Chat 2: Provide a table of Net Income and Gross Profit for Total International for Daily view yesterday.</p>

2. Edge Cases & Behavior Notes

These are key scenarios to be aware of for accurate interpretation of data and insights from the platform.

Edge Case	Behavior
- Walmart Fiscal Week: Saturday–Friday	<p>Walmart's fiscal week begins on Saturday and ends on Friday. As a result:</p> <ul style="list-style-type: none">If a user asks "What are this week's sales?" on a Saturday, they may see zero or incomplete data, because:<ul style="list-style-type: none">The week has just startedSaturday's data has not closed yet <p>Recommendation: On Saturdays, users should ask "What were last week's sales?" to retrieve a complete set of weekly data.</p>
- Report Refresh Timing (e.g., 5 a.m. CST)	<p>Report data is refreshed on a schedule, typically around 5 a.m. CST, though it may vary depending on the specific report.</p> <ul style="list-style-type: none">If a user opens the platform at 4 a.m CST., the most recent day's data will not yet be visible. The report will still show data up to two days ago.Once the refresh occurs (after 5 a.m.), the previous day's data becomes available. <p>Recommendation: Users should expect to see updated numbers only after the report refreshes. If accurate same-week or daily data is needed, they should check post-refresh.</p>
- Chatbot Interaction:	<ul style="list-style-type: none">Tips: Use clear, focused questions (e.g., "What drove gross profit this quarter?").Best Practices:<ul style="list-style-type: none">Reference filters or periods inline ("for Q2 2025 in Canada").If questions are asked with reference to fiscal and comp 454 calendars in the same chat window and incorrect time period or response is suspected, please try asking the question again in a new chat window.Avoid: Predictive queries (e.g., "What will sales be tomorrow?") as only historical data is supported.

- Drivers and Basket Metrics:

For questions asking for drivers, the default behavior is to provide a breakdown by hierarchy. If basket metrics are expected instead, they need to be specified in the question.

Example questions and response:

- Question: What drove the net sales for last month?
Response:

What drove the net sales for last month?

Walmart Segment DST

Thought ▾

For your question about what drove net sales for last month, I analyzed net sales (Actual Dollar Amount) for the last completed fiscal month, which is June 2025, using the fiscal calendar. The results are broken down by Merchandise SBU (Strategic Business Unit) to identify the main drivers.

Here are the results for June 2025:

Merchandise SBU	Net Sales (\$M)	454 Comp YoY Growth (%)
Grocery	\$24,690.4M	2.7%
General Merchandise	\$9,951.9M	3.1%
Health And Wellness	\$4,310.2M	20.7%
Fuel	\$384.4M	-
Unknown	\$381.0M	46.7%
Unassigned	\$4.1M	-30.9%

Key drivers:

- Grocery was the largest contributor to net sales with \$24,690.4M, growing 2.7% year-over-year on a 454 comp basis.
- General Merchandise followed with \$9,951.9M, up 3.1% 454 comp YoY.
- Health And Wellness showed the strongest growth rate at 20.7% 454 comp YoY, with \$4,310.2M in net sales.
- The "Unknown" SBU had a high growth rate (46.7%), but its dollar contribution was much smaller at \$381.0M.
- Fuel and Unassigned categories contributed minimally.

External factor: Father's Day occurred in both this year and last year, so there was no event-driven difference for June.

Summary: Net sales for last month were primarily driven by strong performance in Grocery and General Merchandise, with Health And Wellness showing the highest growth rate. No major event differences were observed compared to last year.

- Question: Which basket metrics drove the net sales for last month?
Response:

Which basket metrics drove the net sales for last month?

Walmart Segment DST

Thought ▾

For last month (Fiscal Jun 2025), the basket metrics driving net sales were as follows:

- Transaction Count: 650.3M
- Average Unit Retail (AUR): \$5.73
- Unit Count: 6,931.2M
- Units Per Basket (UPB): 10.66
- Ticket: \$59.90

All basket metrics showed positive growth compared to last year:

- Transaction Count increased by 5.7M (+0.9%)
- Average Unit Retail increased by \$0.19 (+3.7%)
- Unit Count increased by 73.6M (+1%)
- Units Per Basket increased by 0.02 (+0.2%)
- Ticket increased by \$2.09 (+3.9%)

This indicates that higher average prices (AUR), more transactions, and slightly larger baskets all contributed to the net sales performance for last month.

3. Feature highlights:

AI Insights	
Description	Image
Click on the time filters to change the insight shown on the report	<p>The screenshot shows the AI Insights interface with a bar chart titled "GMV + Services". The chart compares "GMV + Services > Plan" (green bars) and "GMV + Services < Plan" (red bars) across months. A tooltip at the top left says "\$12.4B GMV + Services (\$39.1M) - \$ vs Plan". The Y-axis ranges from \$0.0B to \$4.0B.</p>
Provide your feedback by clicking the emoji	<p>The screenshot shows the AI Insights interface with a "Thumbs up feedback" modal open. The modal asks "Why did you upvote these insights?" with three radio button options: "Saved me time", "Insightful", and "Other". It also has a "Comments" input field and a "Submit" button.</p>
Finance Assistance Chat	
Description	Image

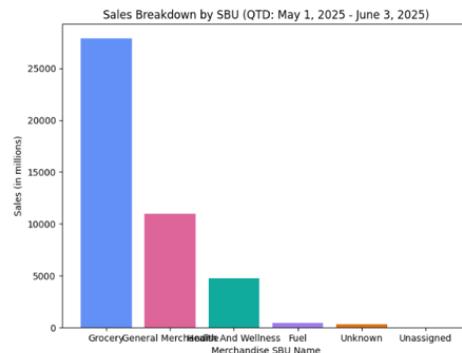
Data Visualization

Give me a bar chart for sales broken down by SBU

Walmart Segment DST 3.0

Thought ▾

Here is the bar chart showing the sales breakdown by SBU for the Quarter-to-Date (QTD) period from May 1, 2025, to June 3, 2025:



This feature is only available for Desktop in this release. It is under development for Mobile.

Comparison Analysis

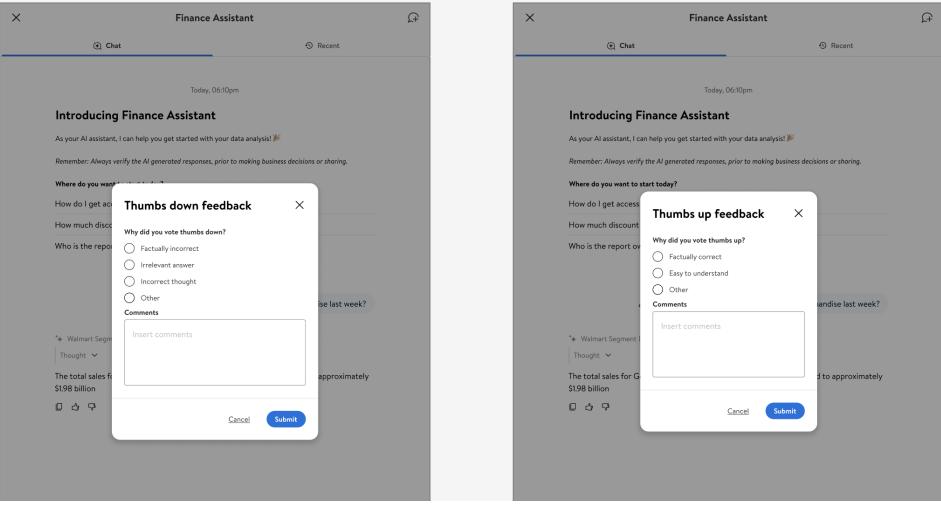
compare Plan and LY net sales ?

For Yesterday (2025-07-13), here is the comparison of Net Sales:

Metric	Value
Actual Net Sales	\$1,389.2M
Plan Net Sales	\$1,364.9M
Last Year Net Sales	\$1,412.4M

- Actual Net Sales exceeded Plan by \$24.3M.
- Actual Net Sales were \$23.2M lower than Last Year.

This provides a clear comparison of Plan and Last Year net sales for the most recent day available.

<p>Hierarchical Driver Breakdown</p>	<p> breakdown Net sales by Hierarchy drivers breakdown for yesterday ?</p> <p> Here is the breakdown of Net Sales by Merchandise SBU (Strategic Business Unit) for yesterday (2025-07-13). The metric used is Actual Dollar Amount (Net Sales), and the breakdown is by SBU hierarchy driver:</p> <table border="1" data-bbox="491 291 1073 508"> <thead> <tr> <th>Merchandise SBU Name</th><th>Net Sales (\$M)</th><th>454 YoY Growth (%)</th><th>YoY Growth (%)</th><th>Plan Delta (\$)</th></tr> </thead> <tbody> <tr> <td>Grocery</td><td>\$946.2M</td><td>6.4%</td><td>3.6%</td><td>\$1.3M</td></tr> <tr> <td>General Merchandise</td><td>\$336.2M</td><td>7.6%</td><td>-8.2%</td><td>\$20.1M</td></tr> <tr> <td>Health And Wellness</td><td>\$86.2M</td><td>20.4%</td><td>-19.7%</td><td>\$14.5M</td></tr> <tr> <td>Fuel</td><td>\$11.5M</td><td>-5.0%</td><td>-14.0%</td><td>-\$2.0M</td></tr> <tr> <td>Unknown</td><td>\$9.1M</td><td>-18.3%</td><td>-21.5%</td><td>-\$5.5M</td></tr> <tr> <td>Unassigned</td><td>-\$0.01M</td><td>-120.0%</td><td>-104.7%</td><td>-\$4.0M</td></tr> </tbody> </table> <ul style="list-style-type: none"> • Grocery contributed the highest net sales at \$946.2M, with a 6.4% 454 YoY growth. • General Merchandise was next at \$336.2M, with a 7.6% 454 YoY growth. • Health And Wellness saw the highest 454 YoY growth at 20.4%, though its YoY growth was negative. <p>This table provides a clear view of which merchandise areas are driving net sales performance for yesterday.</p>	Merchandise SBU Name	Net Sales (\$M)	454 YoY Growth (%)	YoY Growth (%)	Plan Delta (\$)	Grocery	\$946.2M	6.4%	3.6%	\$1.3M	General Merchandise	\$336.2M	7.6%	-8.2%	\$20.1M	Health And Wellness	\$86.2M	20.4%	-19.7%	\$14.5M	Fuel	\$11.5M	-5.0%	-14.0%	-\$2.0M	Unknown	\$9.1M	-18.3%	-21.5%	-\$5.5M	Unassigned	-\$0.01M	-120.0%	-104.7%	-\$4.0M
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<p>Trend Analysis</p>	<p> show meTrend analysis for net sales for last week ?</p> <p> Here is the daily net sales trend for last week (2025-07-05 to 2025-07-11). The metric used is Actual Dollar Amount (Net Sales), shown for each day:</p> <table border="1" data-bbox="491 798 670 1058"> <thead> <tr> <th>Date</th><th>Net Sales (\$M)</th></tr> </thead> <tbody> <tr> <td>2025-07-05</td><td>\$1,292.7M</td></tr> <tr> <td>2025-07-06</td><td>\$1,270.3M</td></tr> <tr> <td>2025-07-07</td><td>\$1,272.7M</td></tr> <tr> <td>2025-07-08</td><td>\$1,210.6M</td></tr> <tr> <td>2025-07-09</td><td>\$1,229.2M</td></tr> <tr> <td>2025-07-10</td><td>\$1,260.2M</td></tr> <tr> <td>2025-07-11</td><td>\$1,422.4M</td></tr> </tbody> </table> <ul style="list-style-type: none"> • Net sales were relatively stable throughout the week, with a noticeable peak on Friday, July 11th, reaching \$1,422.4M. • The lowest sales day was Tuesday, July 8th, at \$1,210.6M. <p>This trend shows a steady performance with a strong finish at the end of the week.</p>	Date	Net Sales (\$M)	2025-07-05	\$1,292.7M	2025-07-06	\$1,270.3M	2025-07-07	\$1,272.7M	2025-07-08	\$1,210.6M	2025-07-09	\$1,229.2M	2025-07-10	\$1,260.2M	2025-07-11	\$1,422.4M																			
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<p>Feedback for chat responses</p>	 <p>The screenshot shows two side-by-side instances of the Finance Assistant interface. Both instances have a dark gray header with the title "Finance Assistant" and navigation buttons for "Chat" and "Recent". Below the header, there is a message from the AI assistant: "Introducing Finance Assistant. As your AI assistant, I can help you get started with your data analysis! 🚀 Remember: Always verify the AI generated responses, prior to making business decisions or sharing." A "Today, 06:10pm" timestamp is visible above the messages.</p> <p>The left instance displays a "Thumbs down feedback" dialog box. It contains fields for "How do I get access?" (dropdown: "Walmart Segment"), "How much discount?", "Who is the report owner?", and "Comments" (text area: "Insert comments"). Below these fields are radio buttons for "Why did you vote thumbs down?": "Factually incorrect", "Irrelevant answer", "Incorrect thought", and "Other". At the bottom are "Cancel" and "Submit" buttons.</p> <p>The right instance displays a "Thumbs up feedback" dialog box, which is nearly identical to the left one but lacks the "How much discount?" field. It also contains fields for "How do I get access?", "Who is the report owner?", and "Comments" (text area: "Insert comments"). Below these fields are radio buttons for "Why did you vote thumbs up?": "Factually correct", "Easy to understand", and "Other". At the bottom are "Cancel" and "Submit" buttons.</p>																																			

4. FAQs

Q1: How often is the data refreshed?

A: Metric-level data refreshes hourly; report-level summaries update daily.

Q2: Can I create my own KPI?

A: Not in this release—you can suggest new KPIs via the “Feedback” button, which the team reviews weekly.

Q3: What if the AI answer seems off?

A: Use thumbs-down feedback with comments; the model is continuously retrained on your input.

Q4: How is security handled for insights and chat features?

A: SSO & RBAC: You access the system using your existing FDH/My Assistant credentials, and you can view only the data permitted by your role. Even for Encryption, All requests and responses are TLS-encrypted in transit and encrypted at rest.

Q5: How fresh is the data used for insights?

A: Near Real-Time Sync: Underlying APIs push new FDH data as soon as each refresh completes.(i.e 5 am CST). With Cache Invalidation, AI outputs are automatically invalidated after every full dataset refresh, preventing stale insights.

Q6: How is accuracy ensured?

A: Every answer cites its source report or dataset, with clickable links back to the original FDH report. Users can provide thumbs-up/down feedback and comments, which feed into a continuous-learning pipeline to improve accuracy.

Q7: What support options are available if I need help?

A: You can reach out Gen AI Team members via

Q8: Plots show up on Desktop, but not on Mobile?

A: This feature is only available for Desktop in this release. It is under development for Mobile.

Support Channels:

- **Email:** FDH.Support@walmart.com
- **Teams:** #FDH-GenAI-Help channel
- **Phone:** [Phone number]
- **Training:** Live webinars and on-demand training modules are available via the Learning Portal.

5. Known Issues & Backlog Tracker

Priority	Description	Status	Notes
P3	Chart visualizations are not using Walmart brand colors	Backlog	Aesthetic alignment task; no impact on functionality

Use this section as a living table to track current issues, severity, and progress.