Step-by-Step Guide for Using the Financial Data QA Bot

Deployed QA Bot Interface to upload PDF documents with P&L tables, ask financial questions and view answers alongside the relevant tablesegments.

1. Uploading the Financial Statement (P&L PDF)

- Step 1: Click on the "Upload PDF (P&L Statement)" button.
- Step 2: Browse your file system and select the Profit & Loss (P&L) PDF that you wish to upload.
    - The document should contain detailed financial data like revenue, expenses, net income, etc.

    If no document is available, click on "Sample Financial Statement.pdf" at the right bottom corner to upload a sample pdf.

2. Asking Questions

- Option 1: Select Predefined Queries
    - After uploading the PDF, you can select one or more predefined queries from the dropdown list. These queries are specifically tailored to extract financial data, such as:
        - "What is the gross profit for Q3 2024?"
        - "What is the net income for 2024?"
        - "How much was the operating income for Q2 2024?"
        - "Show the operating margin for the past 6 months."
        - "What are the total expenses for Q2 2023?"
    - These queries will help you get specific answers based on the financial data from the uploaded PDF.
- Option 2: Type Custom Queries
    - If you have specific queries in mind that are not covered by the predefined options, you can type them into the Textbox field.
    - Write your custom queries separated by commas within quotes.

        For example:"What is the net income for Q4 2024?, What is the operating margin for Q3 2024?"

3. Interpreting the Responses

- Output 1: Retrieved Financial Data Segments
    - After you submit your queries, the bot will retrieve relevant rows from the financial data and display them in the "Retrieved financial data segments separated by ---" table.

- ○ These rows show the exact pieces of financial data that were retrieved from the PDF based on your queries.
- ● Output 2: Answers
  - ○ The "Answers" textbox will display the responses to your queries.
  - ○ The bot processes the relevant sections of the document and provides the best possible answers to your financial questions based on the extracted data.
  - ○ For example, if you ask for the net income for 2024, the bot will display the calculated net income as per the data found in the PDF.

Tips for Best Results:

- ● Accuracy of Queries: Be as specific as possible with your queries to get more precise answers. For example, instead of asking, "What is the profit?" ask, "What is the gross profit for Q3 2024?"
- ● Correct Format: Ensure the PDF you upload is a valid financial statement with clearly structured tables for better data extraction.

This setup enables a seamless interaction with the bot, allowing users to easily extract financial data from their P&L statements and get accurate answers to specific queries about their financial performance.