Finance AI Agent User Guide

Introduction Welcome to the Finance AI Agent Application, a state-of-the-art tool designed to assist financial professionals with tasks such as financial analysis, statement evaluation, and trend identification. The application utilizes advanced AI technology to streamline financial processes, providing precise insights and enhancing productivity in financial tasks.

Conversation Management

Understanding Threads A "thread" refers to the ongoing conversation between the user and the agent, preserving context and details from prior interactions. By maintaining a single thread, the agent can respond more coherently and accurately to follow-up questions.

- **Starting a New Conversation:** If a user wishes to initiate a fresh discussion, they can click on the **New Chat** button, which will begin a new context.
- **Ending a Conversation:** To permanently delete a conversation, users can click the **End Chat** button. Once a chat is ended, it cannot be recovered.
- **Resuming a Conversation:** Users can return to earlier conversations by selecting the desired thread from the dropdown menu at the top of the agent dashboard. To restart or continue the interaction, click the **Start Chat** button.

Session and Browser Storage Conversations are securely stored in a database. This enables users to return to previous chats even after refreshing the page or closing the browser. The only way to delete a chat permanently is by using the **End Chat** button, which removes it entirely from the system.

Document Management

Interacting with Financial Documents The Finance AI Agent allows users to upload and interact with financial documents such as Excel spreadsheets, PDF files, and Word documents through a custom-built vector database. Users can query these documents to gain insights, calculate financial ratios, and identify trends efficiently.

To Upload a Document:

1. Click the **Browse** button.
2. Select the desired files from your computer.
3. Click **Upload.**

Once the upload is confirmed, the document will be ready for interaction, allowing the agent to analyze its contents and provide detailed feedback or calculations.

Functions

Export Insights for Copying This function allows users to export text-based insights and analysis for copying purposes. This can be used for creating reports or sharing findings with stakeholders.

Process:

1. Confirm the content to be exported.
2. Execute the export function.

Example Interaction:

- **User:** "I want to export the financial analysis insights for copying."
- **Agent:** "Please confirm the content you want to copy."
- **User:** "Confirmed, please export it."
- **Agent:** "Please click the copy button in the sidebar to access your text."

Performing Financial Analysis The Finance AI Agent is capable of analyzing uploaded financial statements and providing interpretations based on standard financial metrics.

Example Workflow:

1. Upload a financial statement.
2. Query the agent: "Calculate the current ratio and provide a brief interpretation."
3. Review the agent's response, which will include the calculation and its implications.

Fine-Tuning the Agent The performance of the Finance AI Agent can be enhanced by training its model on high-quality data. Users can save conversations that produce particularly effective or accurate outputs for future training purposes.

To Fine-Tune the Agent:

1. Identify conversations that demonstrate high-quality performance.
2. Click on the **Fine-Tune** button, and the conversation will be saved for training.

This ensures continuous improvement, enabling the agent to offer more precise and relevant insights over time.