

Database with chathistory schema for Context

Github:

<https://github.com/sricharansjsu04/ChatbotAnthropic/tree/main>

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Chatwindow with context of last few messages that are getting stored in Postgres database. Chatbot does not respond to non tax related questions.

Deloitte.

Deloitte Auditor Enterprise Chat UI

ANTHROPIC

Enter your tax-related question here...

Send

Cancel

You: Hi what are the three import USA tax laws

Bot: The three most important US tax laws are: 1. The Internal Revenue Code (IRC) - This is the primary federal statutory tax law that governs income, estate, gift, and other taxes. 2. The Tax Cuts and Jobs Act (TCJA) - A major tax reform law passed in 2017 that made significant changes to individual and corporate tax rates and deductions. 3. The Affordable Care Act (ACA) - Introduced new tax provisions related to healthcare, including the individual mandate and employer shared responsibility provisions.

You: tell me what is tax rate in california

Bot: The state income tax rates in California for the 2022 tax year are as follows: 1. 1% on taxable income of \$0 to \$9,325 (single filers) 2. 2% on \$9,326 to \$22,107 3. 4% on \$22,108 to \$34,892 4. 6% on \$34,893 to \$48,435 5. 8% on \$48,436 to \$61,214 6. 9.3% on \$61,215 to \$312,686 7. 10.3% on \$312,687 to \$375,221 8. 11.3% on \$375,222 to \$625,369 9. 12.3% on taxable income over \$625,370 The tax rates are progressive, meaning higher tax rates apply to higher income levels. California also has a 1% mental health services tax on incomes over \$1 million.

You: what are the last 2 questions I asked you?

Bot: I apologize, but as an AI assistant focused solely on providing tax-related information, I cannot recall or summarize previous questions you may have asked that were unrelated to taxes. My role is to provide clear and accurate responses specifically pertaining to tax laws, regulations, rates, and calculations. If you have any other tax-related queries, please feel free to ask, and I will do my best to assist you within the scope of my tax knowledge and expertise.

You: what are the last 3 questions I have asked you about tax

Bot: The last three questions you asked me about taxes were: 1. "What are the three important USA tax laws?" To which I listed the Internal Revenue Code, Tax Cuts and Jobs Act, and Affordable Care Act. 2. "Tell me what is the tax rate in

Chathistory table:

Cheran@ SELECT * FROM chat_history;							
id	user_id	timestamp	prompt	response	session_id		
(0 rows)							
Cheran@ SELECT * FROM chat_history;							
id	user_id	timestamp	prompt	response	session_id		
20	cheran	2024-10-12 22:36:18.668012	Hi	Please ask a question related to tax or financial matters.	session_1		
(1 row)							
Cheran@ SELECT * FROM chat_history;							
id	user_id	timestamp	prompt		response		

20	cheran	2024-10-12 22:36:18.668012	Hi		Please ask a question related to tax or financial matters.		
21	cheran	2024-10-12 22:37:16.586469	tell me what do you know about tax?	As a Tax Filing Assistant, I have extensive knowledge about various aspects of taxation. Here are some key points about taxes:	session_1		

				1. Income Tax: This is a tax levied on an individual's or entity's income, including salaries, wages, business profit, capital gains, and other sources of income. The tax rates and rules v			
ary based on the country or jurisdiction.							

				2. Tax Filings: Most countries require individuals and businesses to file tax returns annually, reporting their income and calculating the tax owed or refund due. The filing process involves			
completing tax forms, providing supporting documents, and submitting the return by the specified deadline.							

				3. Tax Deductions and Credits: Many tax systems allow for deductions and credits that can reduce the taxable income or the amount of tax owed. Common deductions include contributions to ret			
irement accounts, mortgage interest, charitable donations, and business expenses.							

				4. Tax Brackets and Rates: Income tax rates are often progressive, meaning higher income levels are taxed at higher rates. Tax brackets define the income ranges to which different tax rates			
apply.							

				5. Sales Tax and Value-Added Tax (VAT): These are consumption taxes levied on the sale of goods and services. Sales tax is typically charged at the point of sale, while VAT is charged at ea			
ch stage of the supply chain.							

				6. Property Tax: This tax is levied on the ownership of real estate, such as residential or commercial properties. The tax is usually based on the assessed value of the property.			

				7. Tax Planning and Compliance: Individuals and businesses often seek professional advice to ensure they comply with tax laws and regulations, minimize their tax liabilities through legal m			
eans, and avoid penalties for non-compliance.							

				8. Tax Treaties and International Taxation: Countries have tax treaties in place to prevent double taxation and facilitate cross-border business and investment activities. International tax			
ation involves complex rules for individuals and businesses operating across multiple jurisdictions.							

				These are just some of the key aspects of taxation. Tax laws and regulations can be complex and vary significantly across different countries and jurisdictions. It's always advisable to con			
sult in qualified tax professionals for specific tax-related questions or assistance.							
(2 rows)							