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Biz Genie 1.0.0 – Setup Guide

Biz Genie is a modular, LLM-based chatbot solution. It allows customers to query their enterprise data using English sentences instead of traditional database queries. Users can simply type questions—like asking for sales numbers or inventory levels—and the chatbot automatically translates these into SQL queries, fetches the relevant data, and presents the results back to the users in the form of text, charts and tables.

You can choose to implement the

1. Chatbot
2. Chatbot & Dashboards (AI + BI)
3. Chatbot & Dashboards & Collaboration Tool (Microsoft Teams, Slack)

This solution is designed to make data insights faster and more accessible, especially for users who are not technically proficient. It reduces the need for IT or analyst support, speeds up decision-making, and supports features like session history and context management, so users can ask follow-up questions naturally. The chatbot connects with most leading database platforms, ensuring flexibility and scalability as business needs grow.

Biz Genie supports two predefined **roles**: **Admin** and **User**. Each account is assigned one of these roles, which determines what actions the person can perform within the application.

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1. Roles in Biz Genie

Depending on the **assigned role** — either **Admin** or **User** — you will have access to different capabilities within the Biz Genie:

1.1. Admin Capabilities

Admins can:
1. Create and manage other Admin accounts
2. Create User accounts with name, email, and login credentials
3. Configure and update the LLM (Large Language Model) used by the chatbot
4. Set up and maintain data source connections
5. Create and manage datasets
6. Create, view, and update dashboards
7. Assign and manage tags for users, datasets, and dashboards
8. Modify global application settings
9. Use the chatbot on any dataset to query data
10. Bookmark commonly used queries for easy reuse
11. View chat history and monitor resource usage (tokens, cost)

1.2. User Capabilities

Users can:
1. Use the chatbot on dataset assigned to them to query data
2. View dashboards assigned to them
3. Bookmark commonly used queries for easy reuse

2. Getting Started

The following steps are required to configure the application before using it on your enterprise data.

2.1. Use EC2 Key Pair for SSH Access

Follow these steps for SSH access your launched EC2 instance using PuTTY:

1. Launch **PuTTY**

2. In the **Session** section:
    - **Host Name (or IP address)**: ubuntu@<your-ec2-instance-public-ip>
      (Replace ubuntu with correct user depending on AMI: ec2-user, centos, etc.)
    - **Port**: 22
    - **Connection type**: SSH

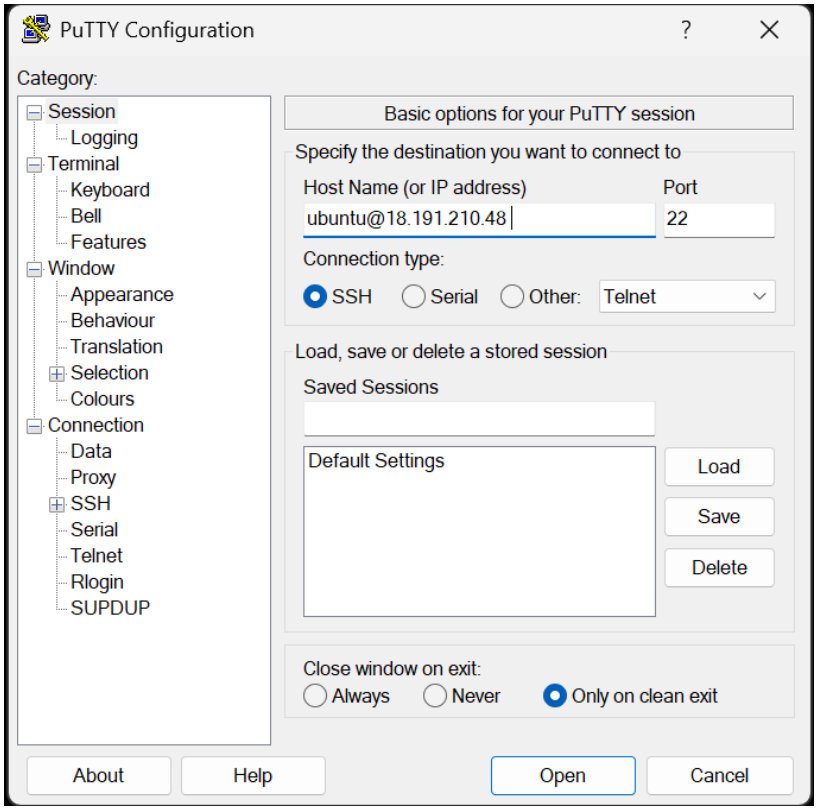

Image 1: Configure PuTTY session with EC2 public IP

3. **Load the .ppk Key**
    - In the **left pane**, go to: Connection → SSH → Auth→ Credentials
    - Click **Browse** next to "Private key file for authentication"
    - Select your .ppk file (e.g., keypair.ppk)

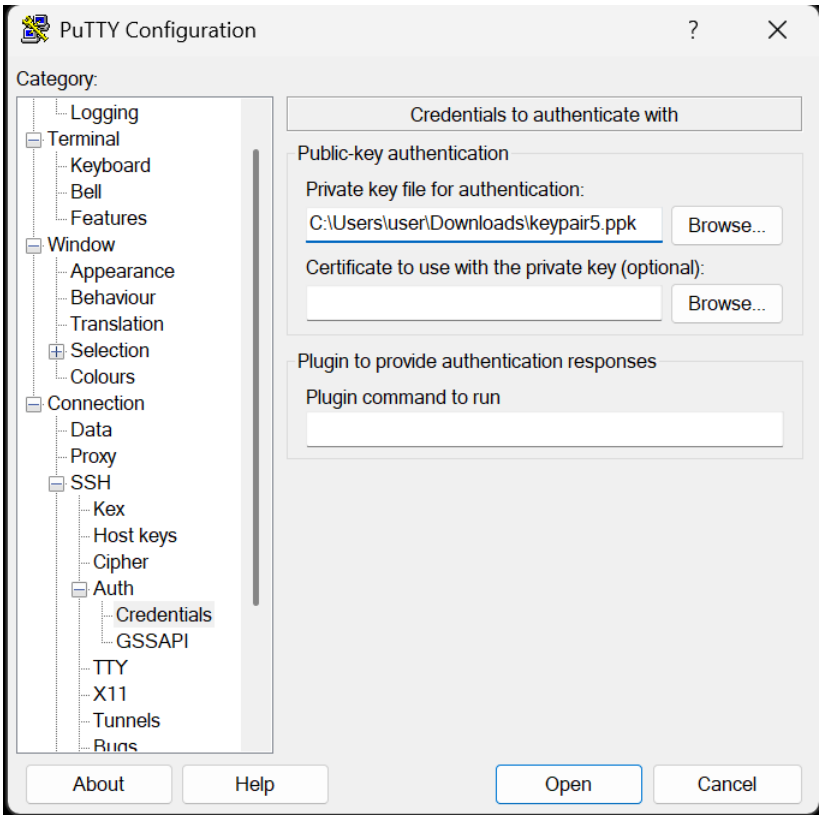

Image 2: Load the EC2 private key (.ppk) in PuTTY for SSH authentication

4. **Connect**
    - Click **Open**
    - **Accept** the connection
    - You should now be logged in to your EC2 instance

Note: This AMI does not use default or static passwords for login. Access is enabled only via EC2 key pair authentication.

2.2. Login using the vadmin

The **first-time login** is done using a vadmin account to configure the organization's profile and initial settings. Once the company profile is configured, additional Admin and User accounts can be created and granted access.

The details for logging into the Biz Genie tool are as follows:
Application URL: http://<server_IP_address>
Default Username: vadmin
Default Password: Vadmin321$

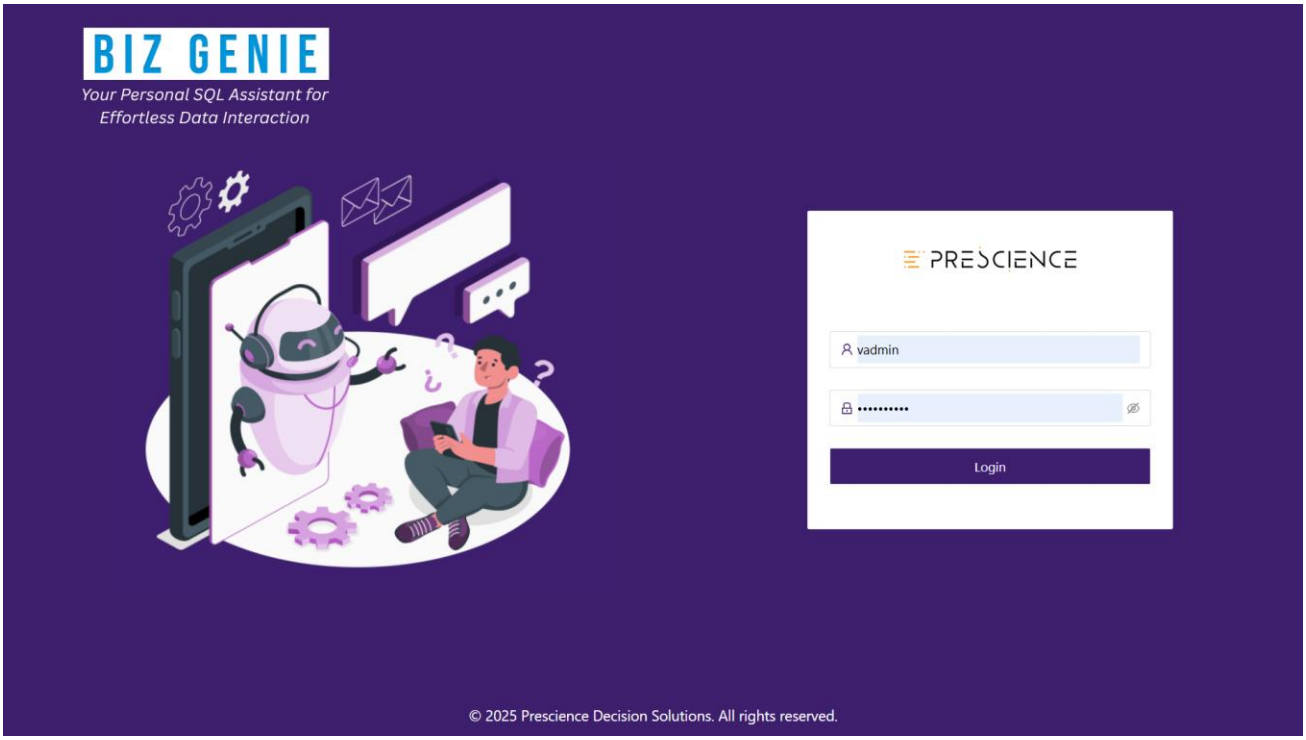

Image 3: Login page

2.3. Change Password

After logging in using the default vadmin credentials, it is strongly recommended to update the password to ensure account security.

Follow the steps below to change the password:

1. **Click on the user icon** (top-right corner of the page)

2. From the dropdown menu, select **Change Password**

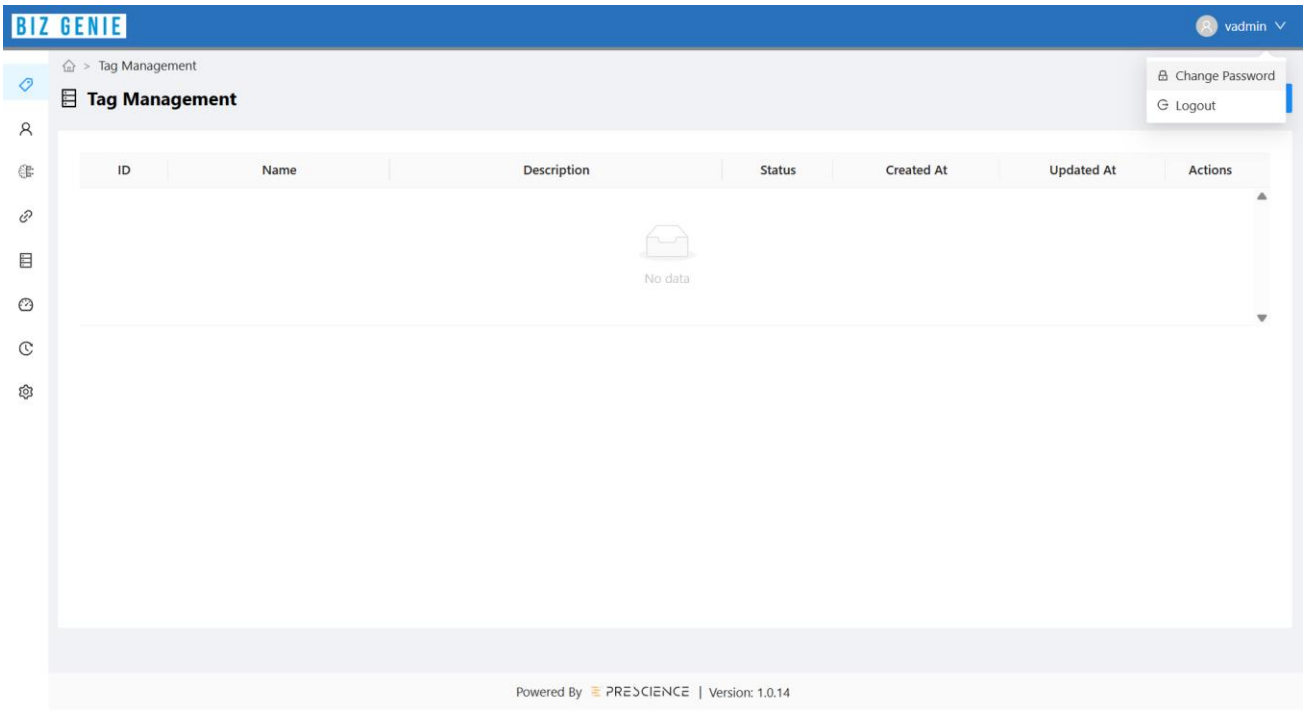

Image 4: Accessing Change Password from user menu

3. A "Change Password" dialog box will appear
4. In the **New Password** field, enter your new password
5. In the **Confirm Password** field, re-enter the new password to confirm
6. Once both fields are filled correctly, click on the **Update** button

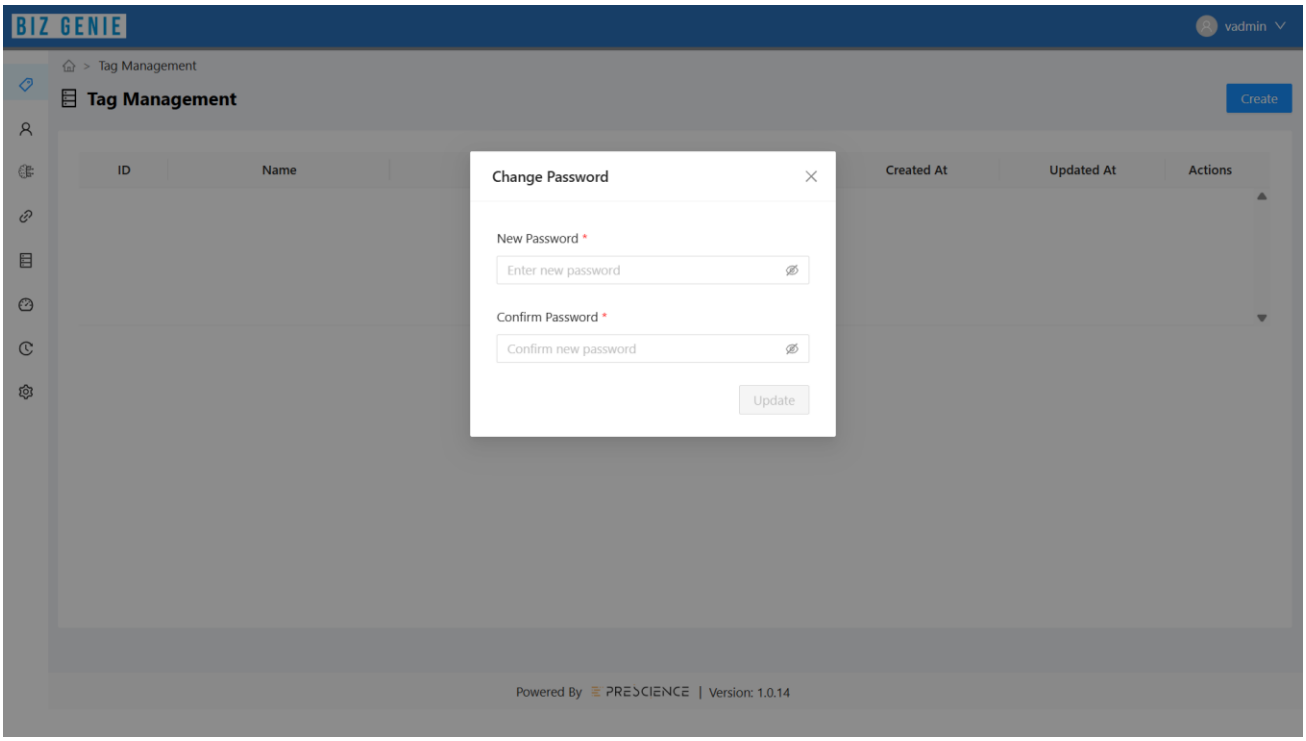

Image 5: Change Password dialog box

2.4. Update Company logo

To set up your company logo to display on the login page, follow these steps:

1. From the sidebar, click on the gear icon (⚙) to open the Settings section
2. Locate the UI Settings (JSON) Field
3. Update the login_logo_url Attribute
4. Replace the current URL with the new logo URL
5. Next to the UI settings JSON box, click Save to apply the changes
6. After logout, your company logo will appear on the login page

Note: Ensure the image URL used for login_logo_url is publicly accessible and in .png or .jpg format for proper rendering

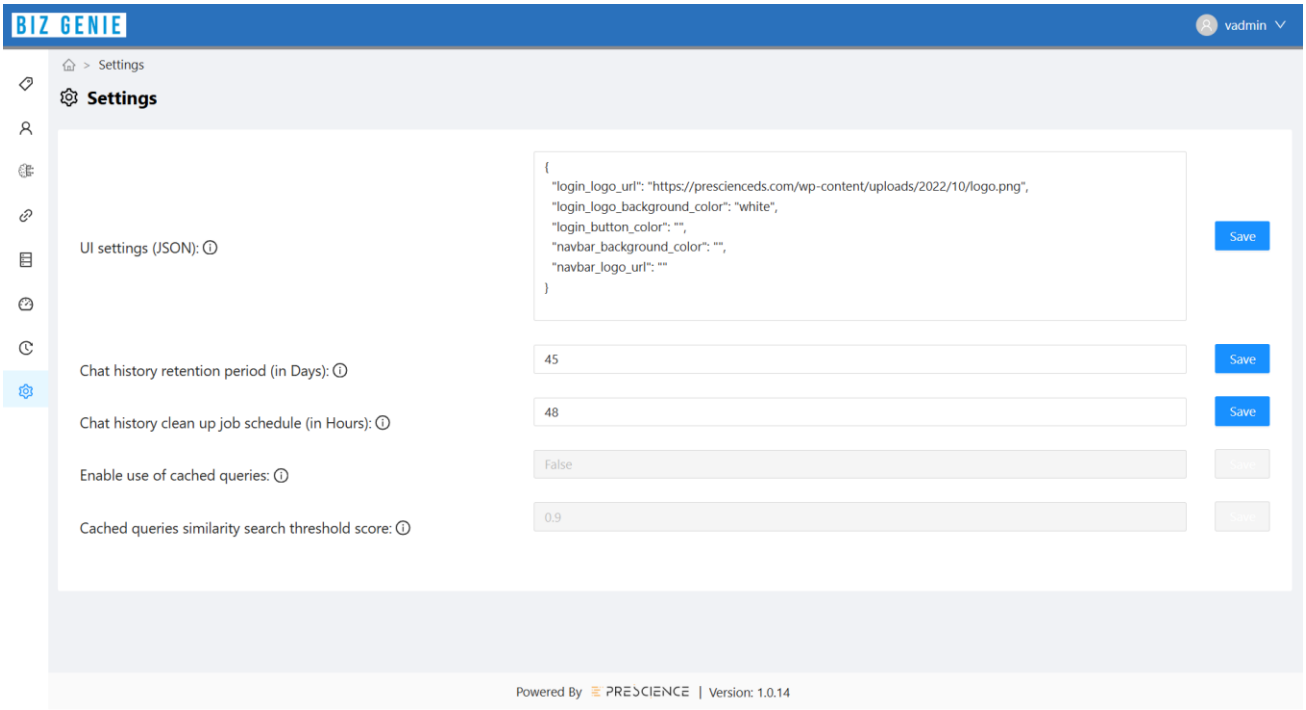

Image 6: Settings page to update company logo

3. Tag Management

Use the **Tag Management** section to create, update, and delete tags. Tags are used to control access by linking users to specific datasets and dashboards. By assigning tags to both users and datasets, the system ensures that each user can only query and view content relevant to them. This tagging mechanism forms the foundation of access control within the Biz Genie tool.

3.1. Create a Tag

Navigate to the sidebar and click on the **Tag icon**. This will take you to the **Tag Management** page, where existing tags are listed.

Click the blue **"Create"** button in the top right corner of the Tag Management page.

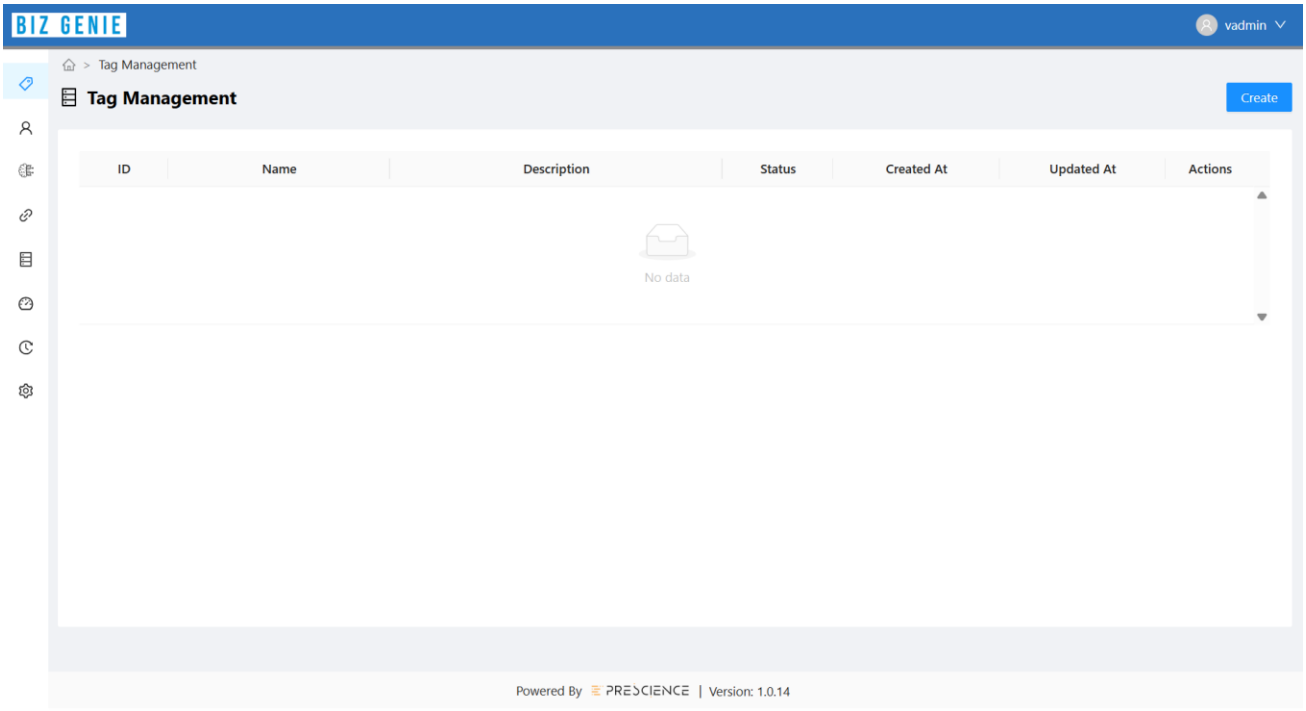

Image 7: Click "Create" to add a new tag

A dialog box labelled **"Create Tag"** will appear.

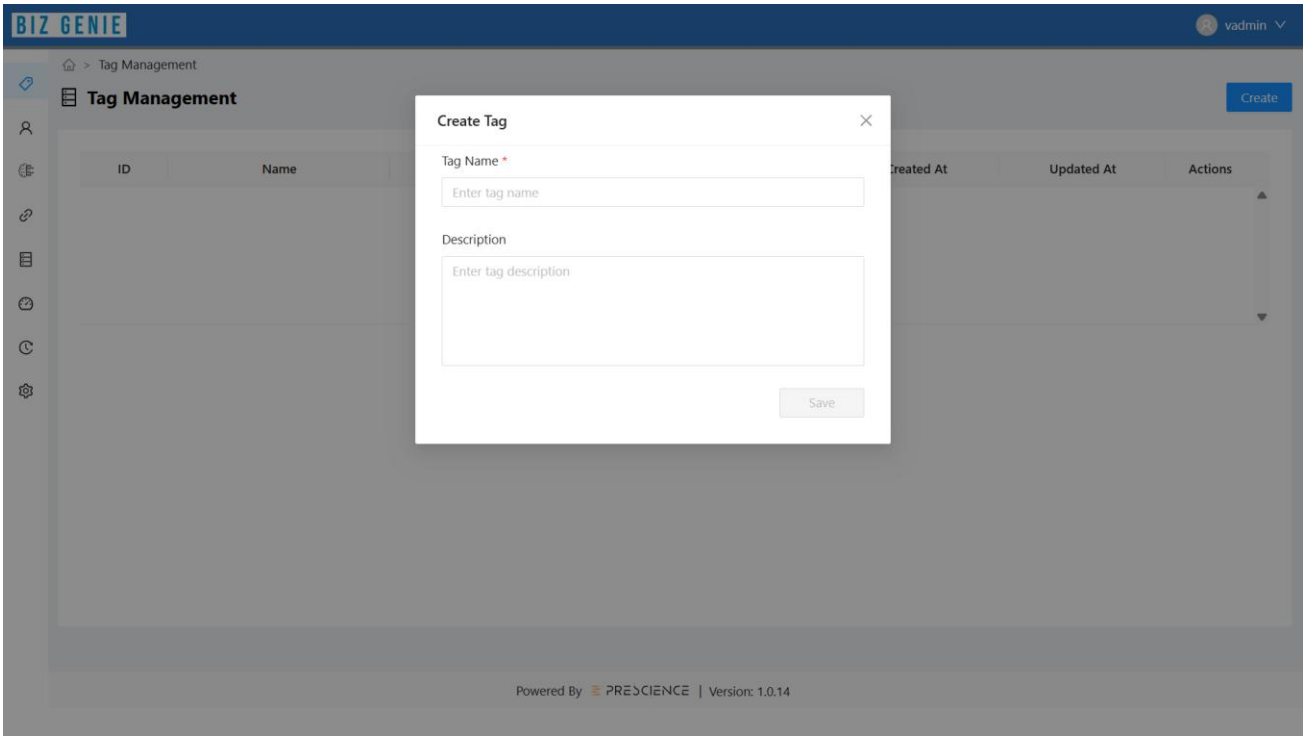

Image 8: Create Tag dialog box

Enter the **Tag Name** (e.g., "sales").

Provide a short **Description** (e.g., "Creates a sales tag").

Then click the **Save** button.

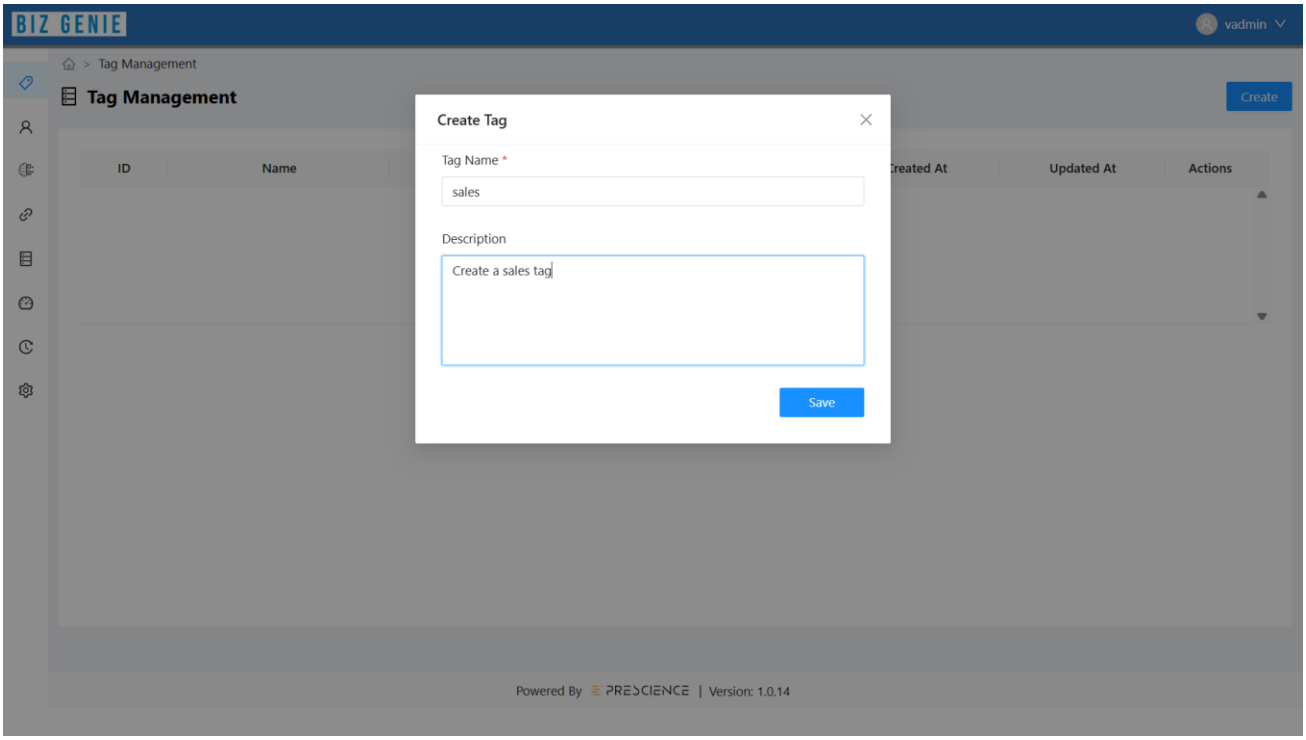

Image 9: Enter tag details

After saving, the new tag will appear in the Tag Management list with its ID, Name, Description, Status, and timestamps.

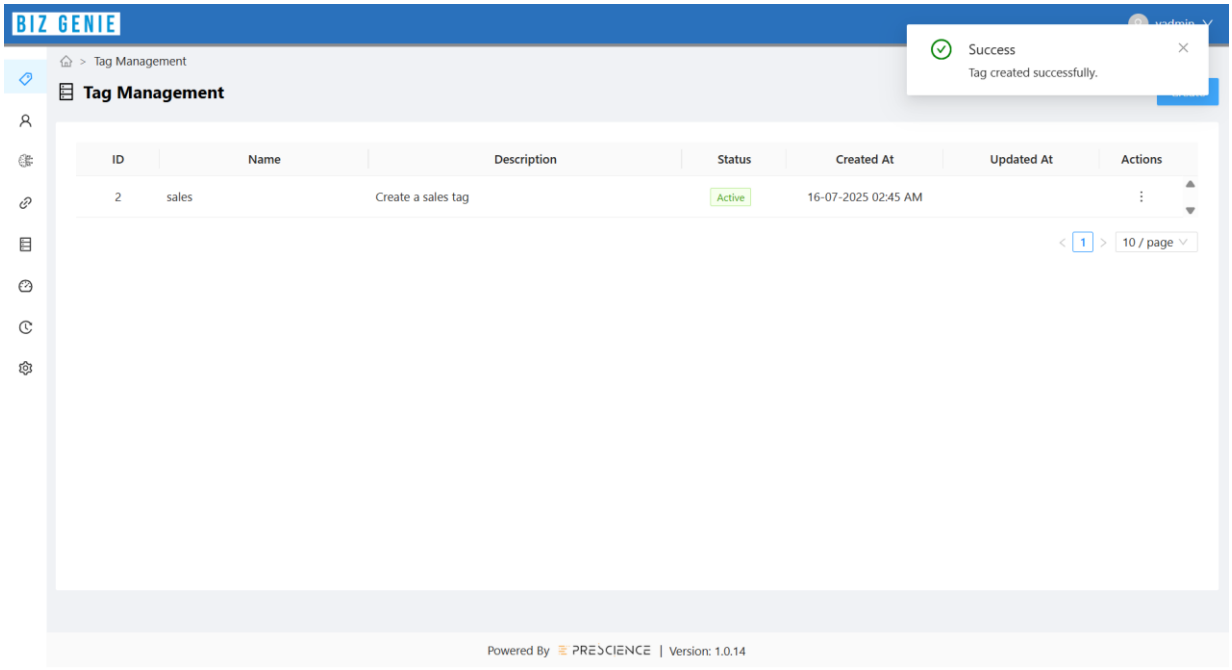

Image 10: Confirm the tag is created

4. User Management

The User Management section allows administrator to create and manage user accounts with specific roles such as “Admin” or “User”. This setup ensures secure access control for team members based on their responsibilities, such as analytics, business use, or IT operations.

4.1. Create a User

Go to the sidebar and click the **User icon** to open the **User Management** page. Here, you can view existing users along with their Username, GUID, Role Tags, Status, and timestamps.

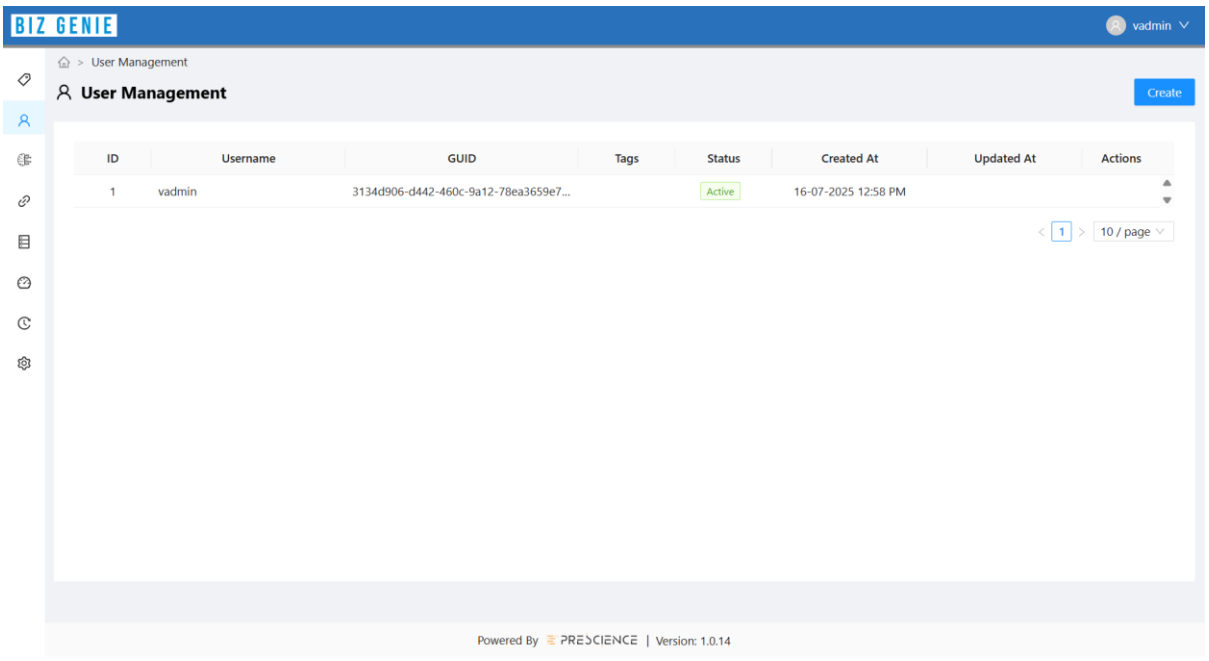

Image 11: Navigate to User Management page

Click the blue **“Create”** button on the top right of the User Management page.

Fill in the following required fields:

- **First Name** (e.g., *Prescience Decision Solutions*)
- **Last Name** (e.g., *Pvt. Ltd.*)
- **Email ID** (e.g., *info@presienceds.com*)
- **Username** (e.g., *prescience*)
- **Password & Confirm Password**
- **Assign Role** (select either *Admin* or *User*)
- **Tags** (e.g., *Sales*, *Analytics*, etc.)

Click **Save** once all fields are filled.

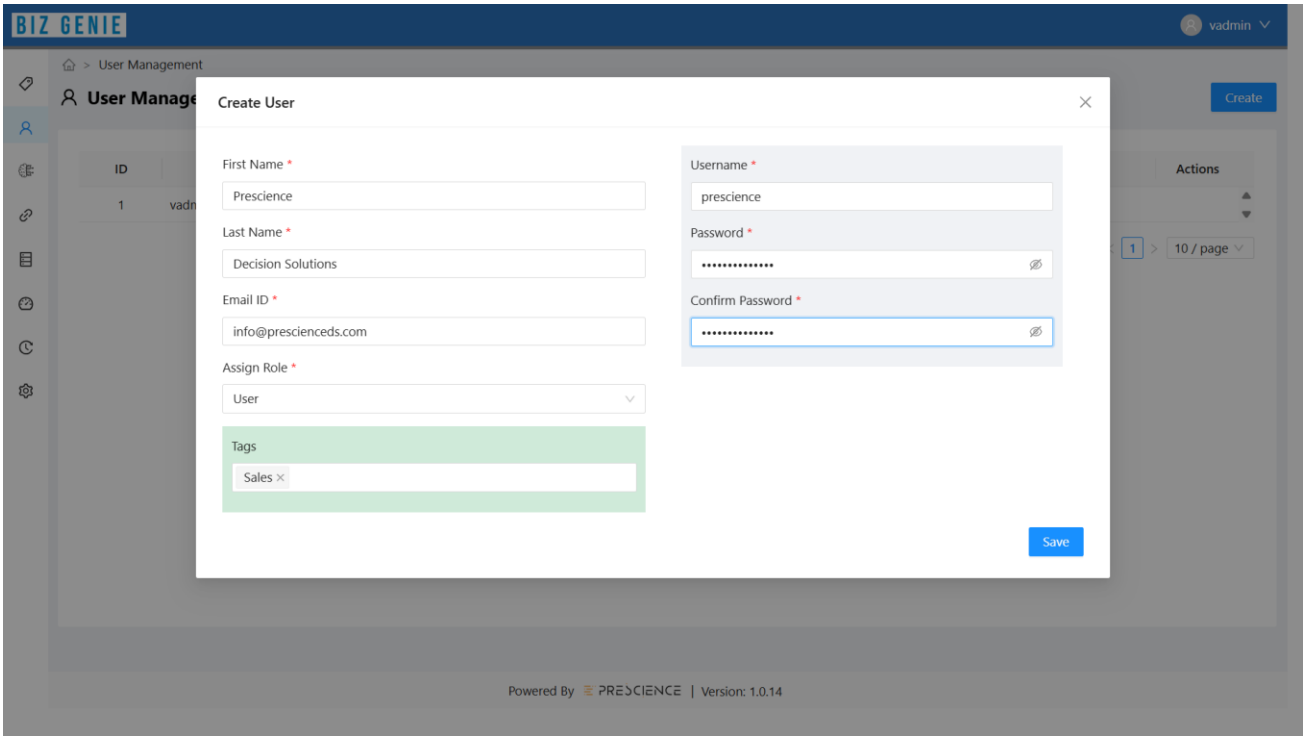

Image 12: Enter user details and assign role

A green success notification will appear on the top right confirming the user was created. The new user will now appear in the user list with their GUID, assigned tags, and status as “Active.”

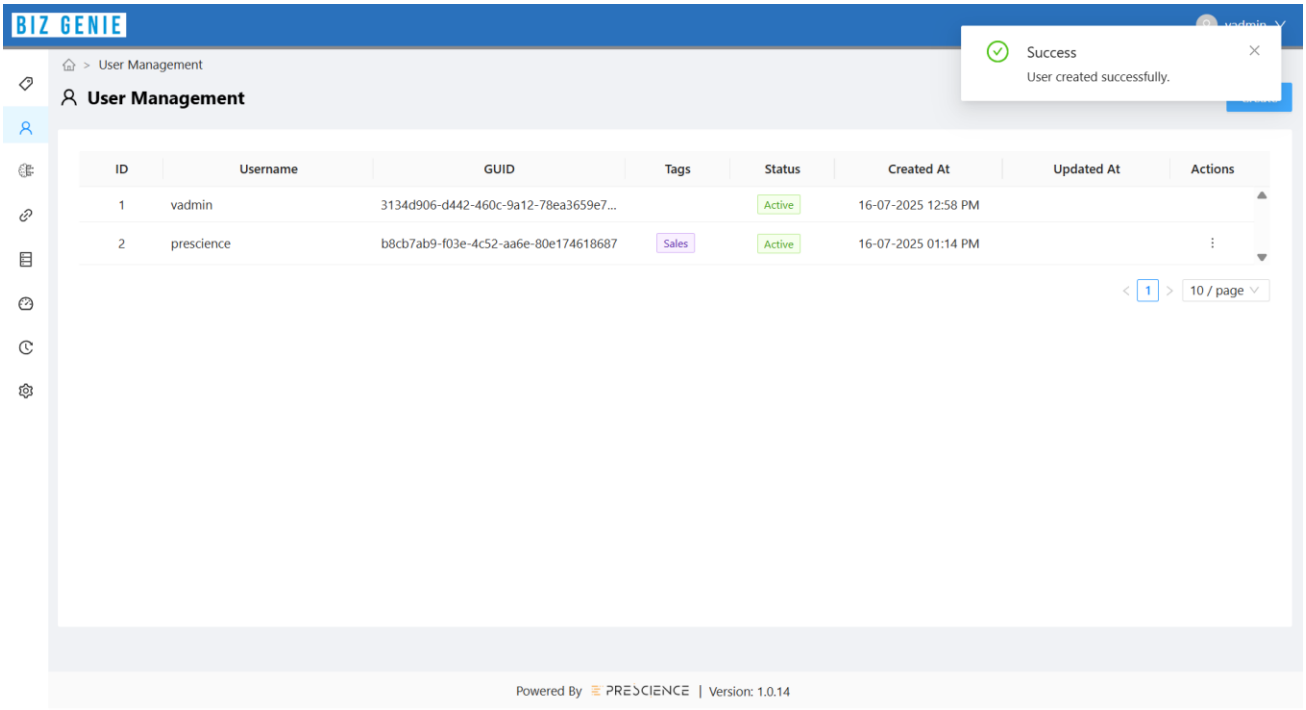

Image 13: User created successfully

5. LLM Configuration

The **LLM Configurations** section allows Admin users to connect a Large Language Model (LLM) that powers the chatbot's ability to understand and respond to natural language queries. The configuration includes details like provider type, model name, and authentication settings (e.g., Azure OpenAI credentials). Admins can also update or delete existing configurations as needed.

5.1. Creating an LLM Configuration

Follow these steps to create and configure an LLM for your Biz Genie instance:

Click the **LLM icon** in the sidebar. This opens the LLM Configurations page, where existing configurations will be listed.

Click the blue **Create** button at the top right corner.

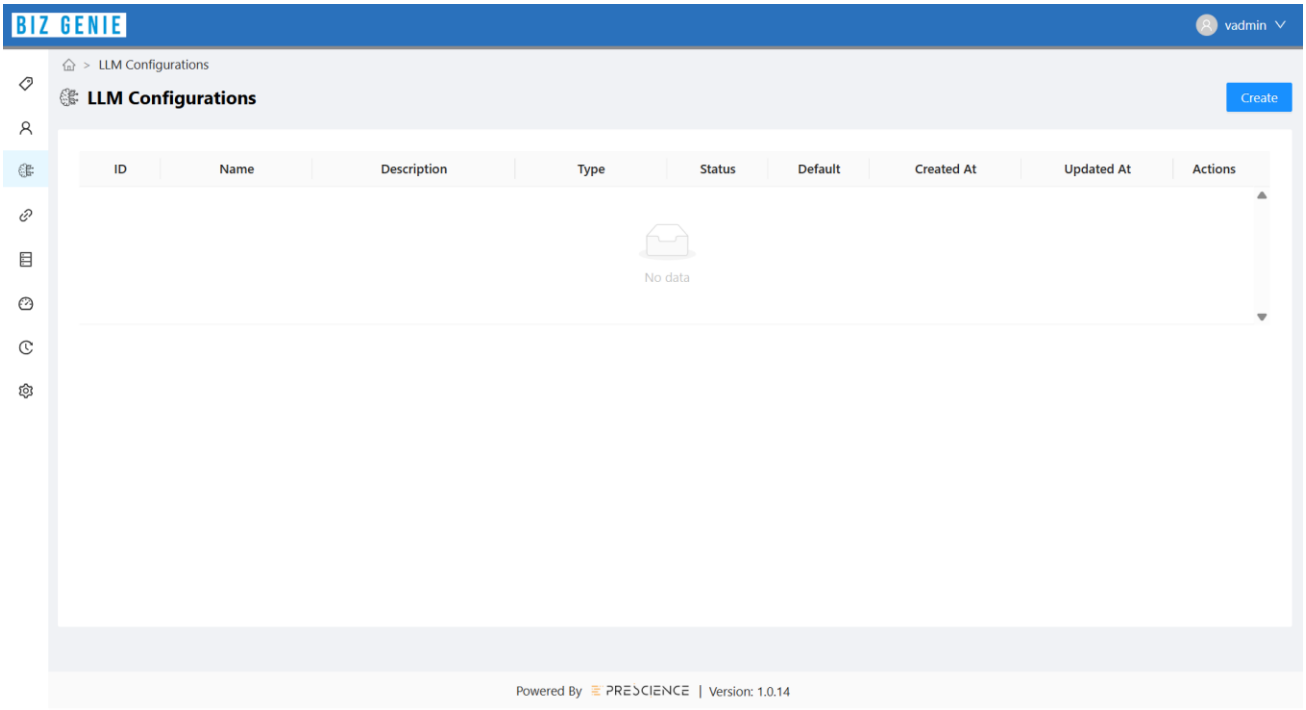

Image 14: LLM Configurations page – No existing LLMs

Fill out the form:

- **Type**: Select your LLM provider (e.g., *Azure OpenAI*)
- **Name**: A friendly name for the model (e.g., *azure open ai*)
- **Description**: Short note on what this LLM is for (e.g., *LLM used to respond to your queries*)
- **Settings**: Add API configuration JSON with the following fields:

```
{       "azure_openai_endpoint": "<Your Endpoint>",
        "azure_openai_api_key": "<Your Key>",
        "azure_deployment_model": "<Model Name>",
        "azure_openai_api_version": "<API Version>"
}
```

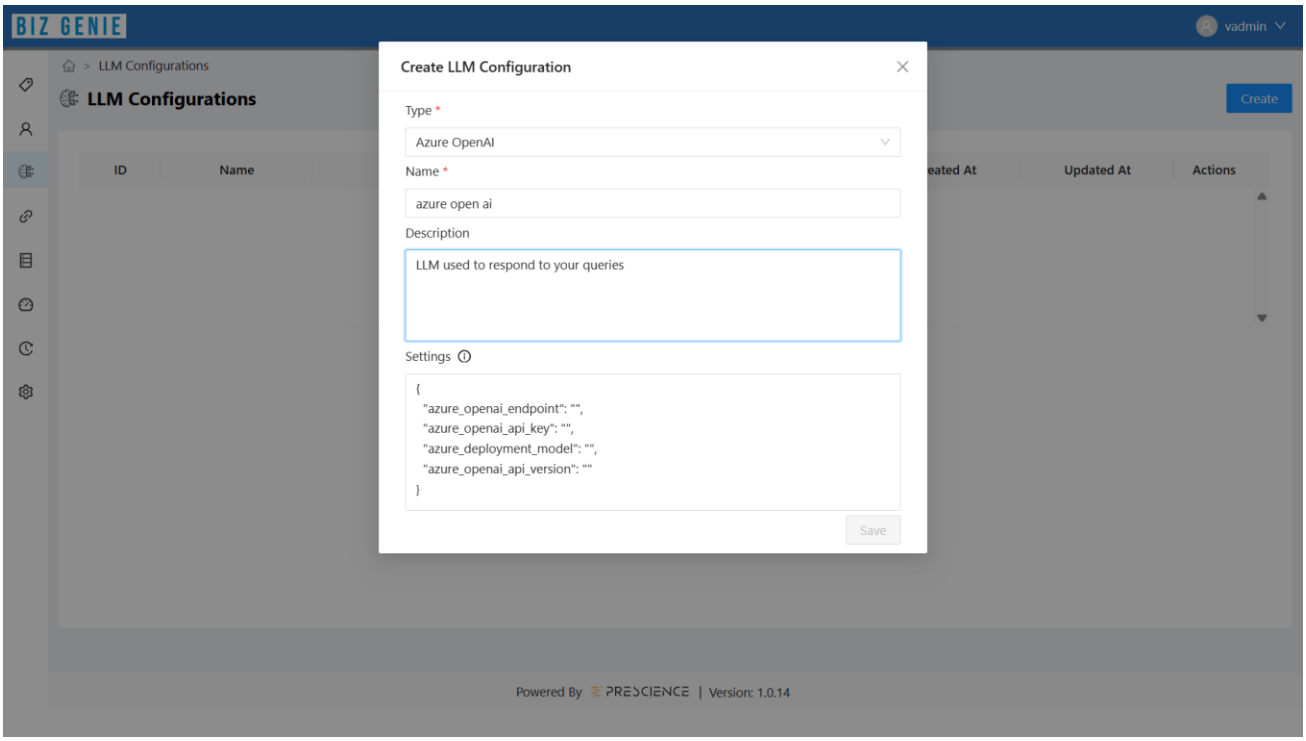

Image 15: Fill in LLM Configuration details

Click **Save** to create the configuration.

After saving, a success notification will appear, and the new LLM configuration will be listed.

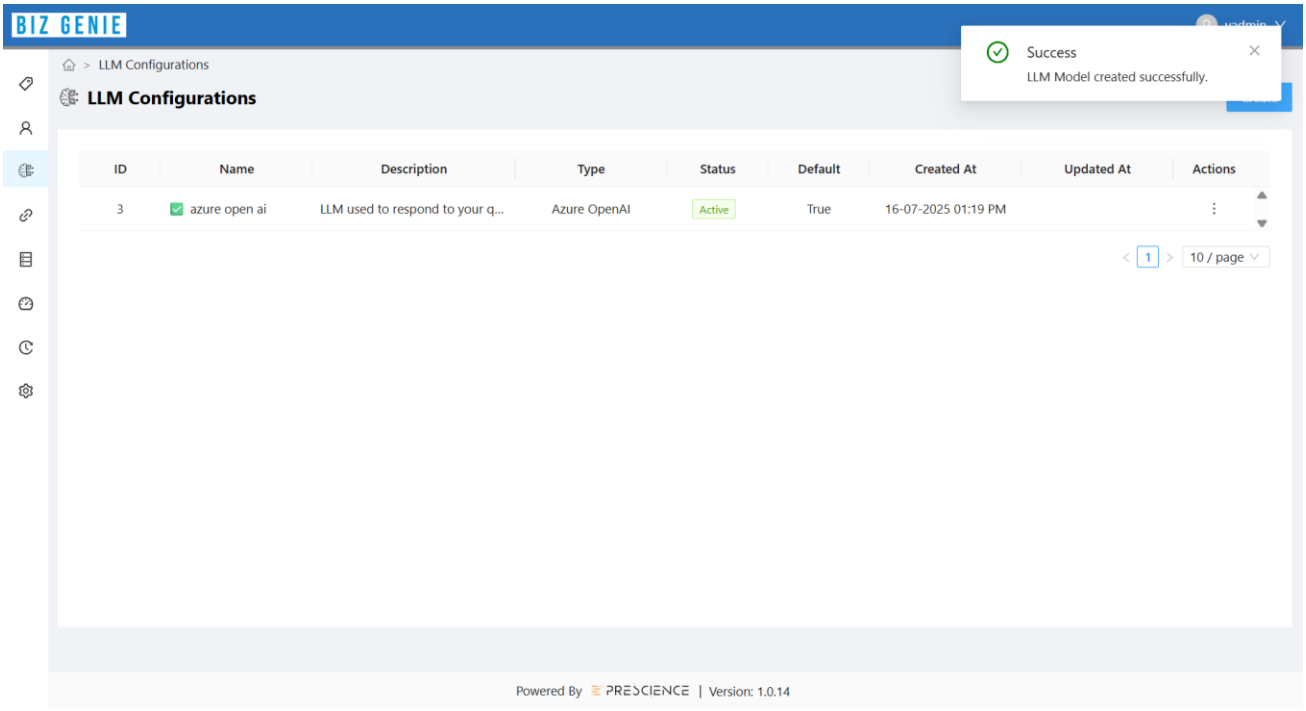

Image 16: LLM Configuration created successfully

6. Datasource Connections

The **Datasource Connections** section allows Admin users to connect external databases to the Biz Genie platform. These connections serve as the backbone for all query operations—datasets are loaded from these sources, and the chatbot uses them to fetch data in response to user queries.

Biz Genie currently supports popular databases including **PostgreSQL**, **MySQL**, and **MSSQL**. Admins can **create, update**, and **delete** these connections. Each connection includes essential parameters like hostname, port, database name, and credentials.

6.1. Creating a Datasource Connection

Follow the steps below to create a new database connection that Biz Genie can query:

Click the **Datasource icon** on the sidebar to open the **Datasource Connections** screen. This is where all existing connections are listed with details like Name, Type, Test Status, and timestamps.

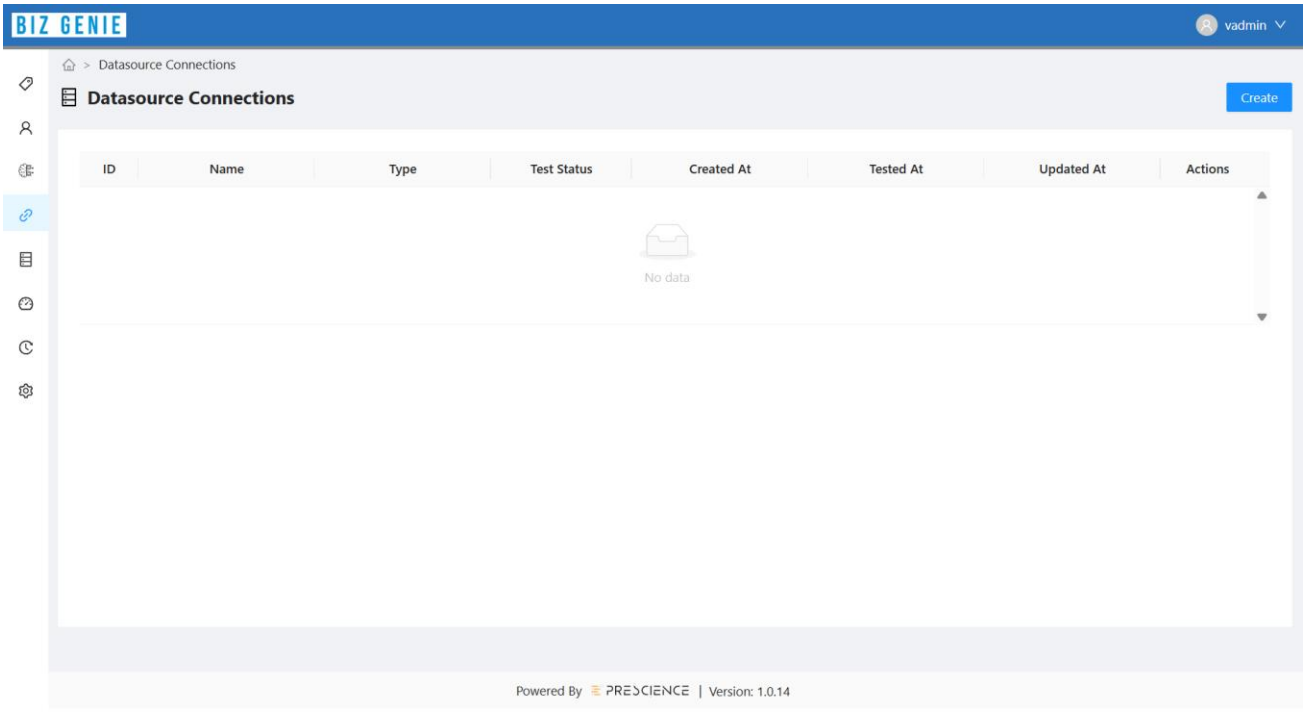

Image 17: Datasource Connections – No existing connections

Click the blue **Create** button on the top-right of the page. A popup will appear prompting for connection details.

Fill in the fields:

- **Type**: Select the database type (e.g., PostgreSQL)
- **Name**: Enter a connection name (e.g., Postgres_Connection)
- **Hostname/Address**: The hostname or IP of your database server
- **Port**: Port number used by the DBMS (e.g., 5432 for PostgreSQL)
- **Database Name**: The name of the database to connect to (e.g., postgres)
- **Username** and **Password**: Database credentials

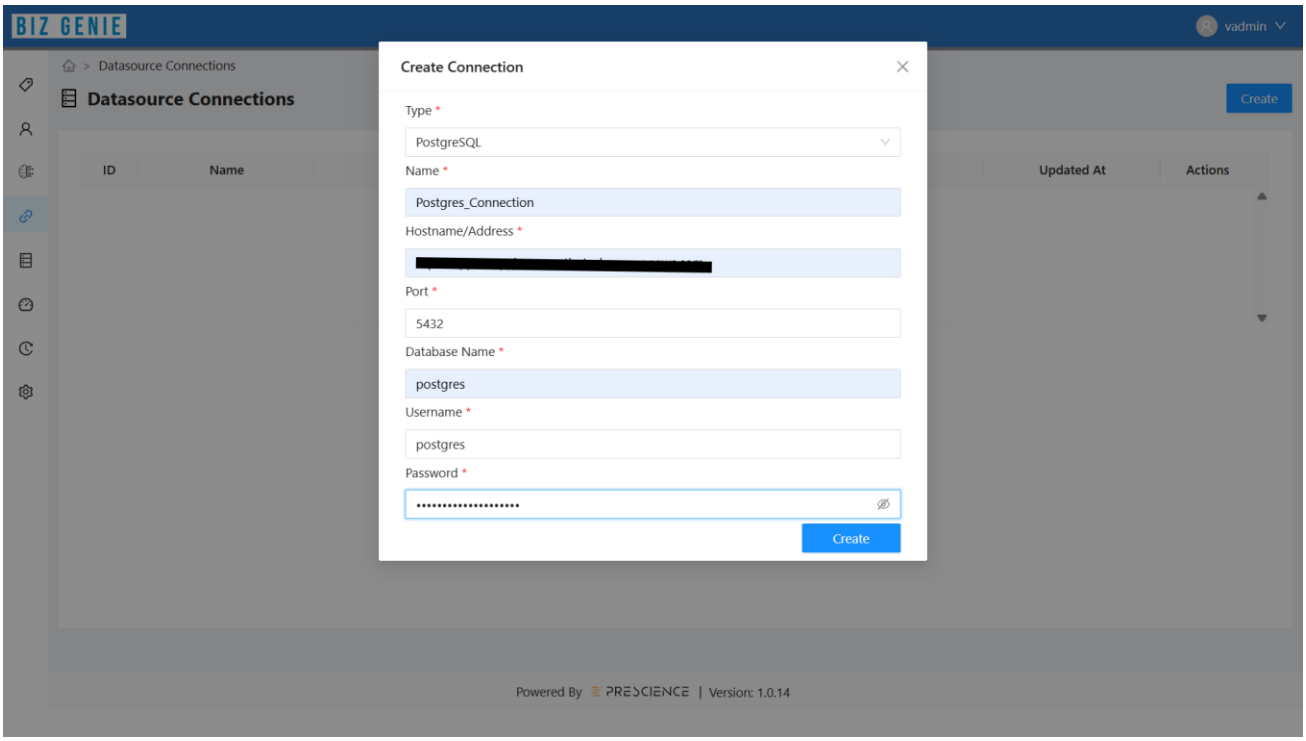

Image 18: Enter connection details

Click **Create** once all fields are filled.

Once the connection is created, it is automatically tested. A green **Success** message confirms that the connection is valid.

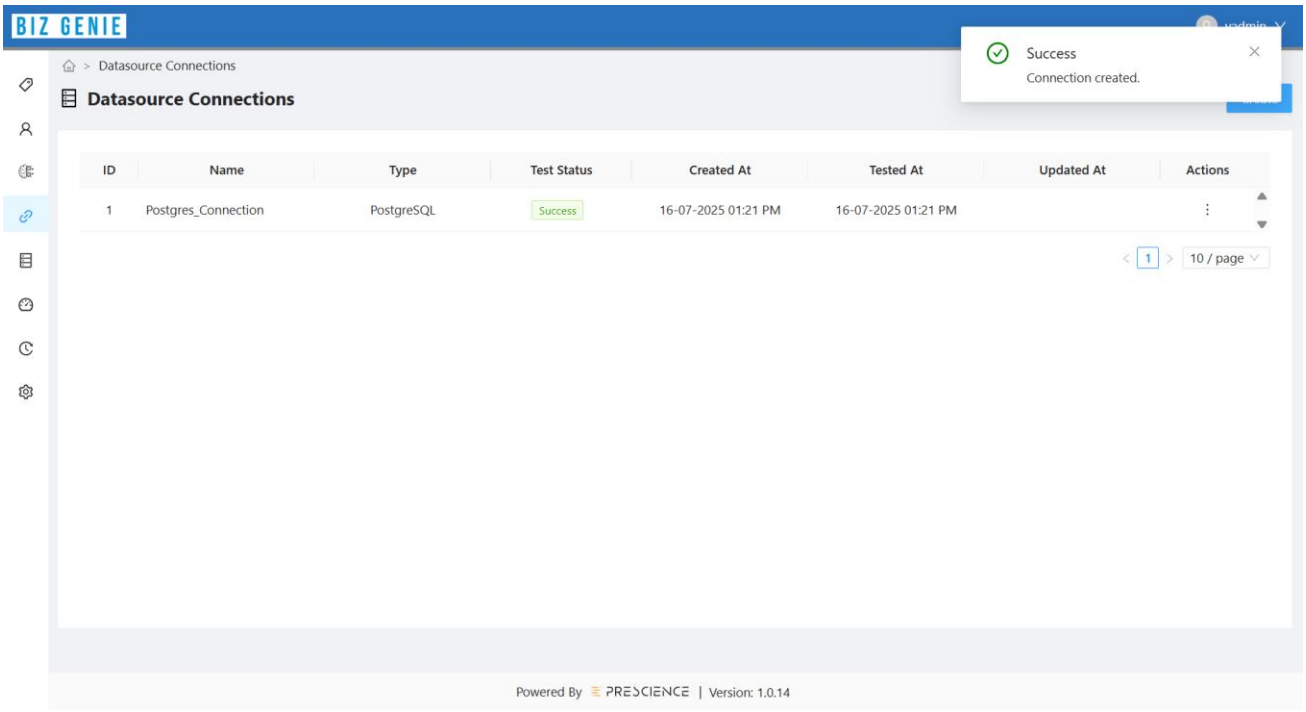

Image 19: Connection created successfully

7. Dataset Configurations

The **Dataset Configurations** section allows Admin users to register datasets that users can query through the Biz Genie. A dataset is typically a table from a connected database. You can tag datasets using previously created tags, so that only users with matching tags can access them. Admins can also update or delete existing dataset configurations as needed.

Once a dataset is configured and tagged, it becomes queryable via natural language in the chatbot interface for users who have been granted access.

7.1. Creating a Dataset Configuration

Follow these steps to add a dataset from an existing database connection:

Click the **Dataset icon** in the sidebar to open the Dataset Configurations screen. You will see an empty table if no datasets are configured yet.

Click the blue **Create** button on the top-right corner. A configuration dialog appears with several tabs. The default tab is **Configuration Details**.

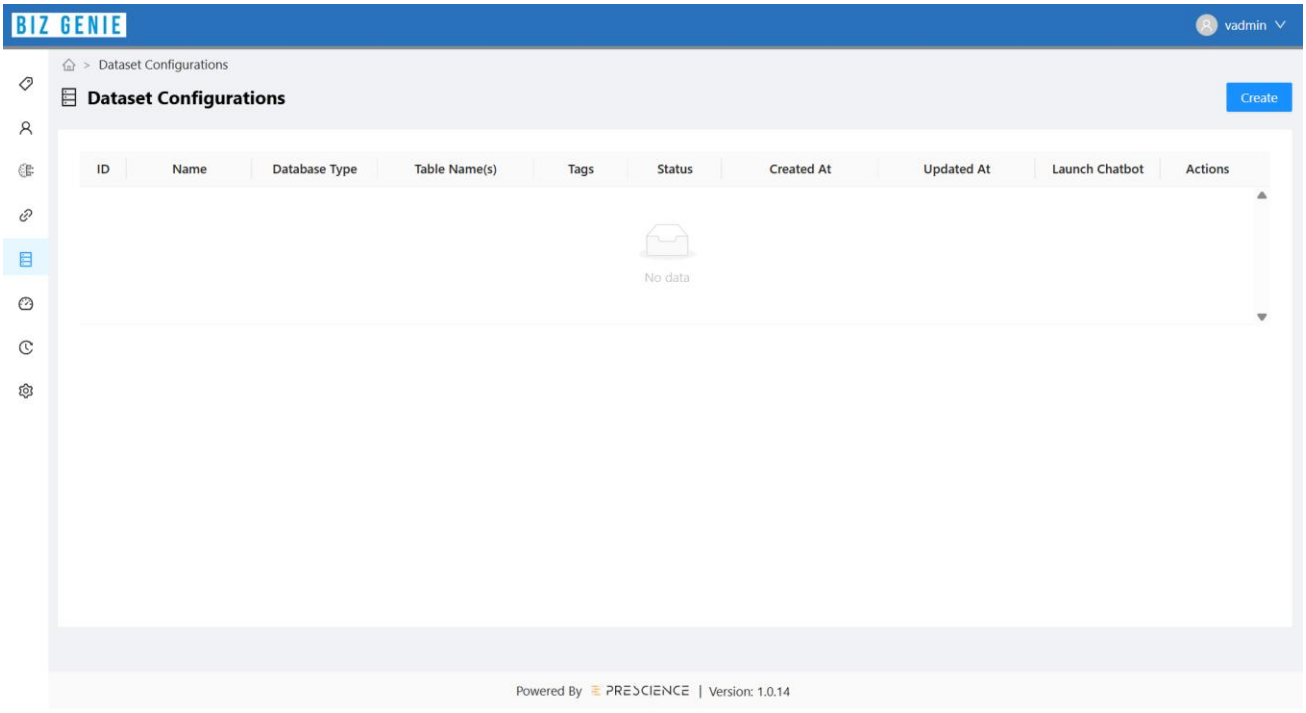

Image 20: Dataset Configurations page – No existing datasets

Fill in the following fields to configure the dataset:

- **Name**: Enter a friendly name for your dataset (e.g., *Sales Dataset*)
- **Tags**: Select relevant access tags (e.g., *Sales*)
- **Select Connection**: Choose from the existing data source connections (e.g., *Postgres_Connection*)
- **Table Schema Name**: Specify the schema name (e.g., *public*)
- **Table / View Names**: You can now specify one or more table or view names that should be part of the dataset
    - To include a **single table**, enter the table name directly (e.g., ecom_sales_dnd)
    - To include **multiple tables**, enter their names **comma-separated**
    - To include **all tables** under the given schema, enter an asterisk (*)

You'll also see a preview of the connection settings below for verification. Click **Save** when complete.

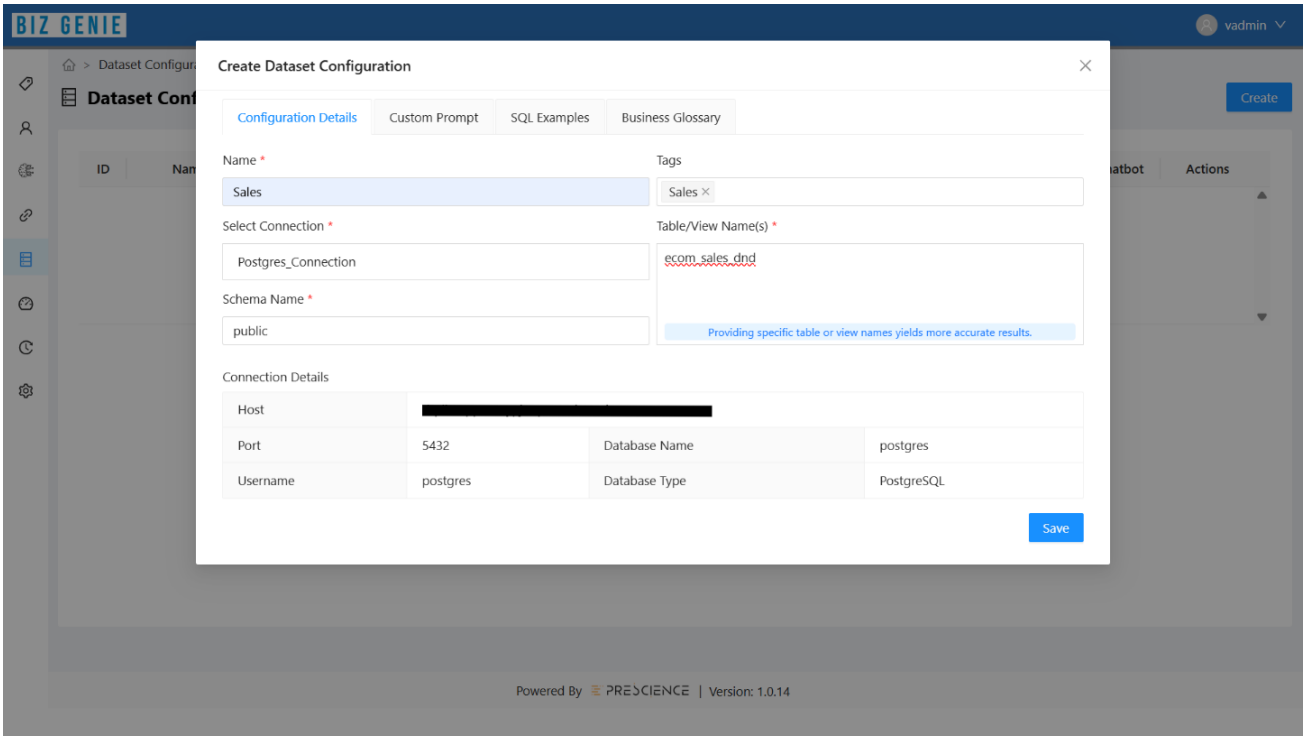

Image 21: Enter dataset configuration details

A success message will appear, and the dataset will now be listed with its status as *Active*. You will also see options to **launch the chatbot** directly for that dataset or perform further actions (edit/delete) using the actions menu.

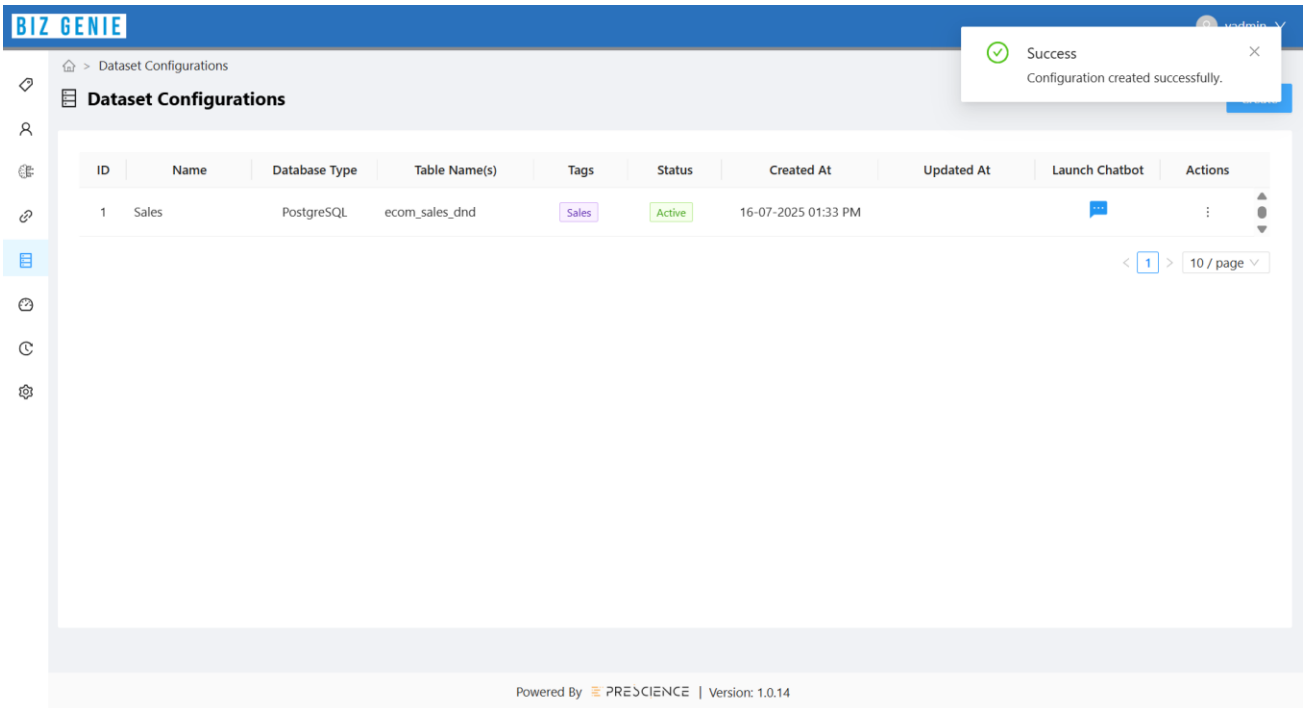

Image 22: Dataset configuration created successfully

7.2. Additional Dataset Configuration Settings (Optional)

Once the basic Configuration Details are added for a dataset, additional configuration options are available across four tabs: **Custom Prompt**, **SQL Examples**, and **Business Glossary**. These help fine-tune the chatbot's understanding of the dataset, especially for complex or domain-specific queries. While these configurations are optional for basic use, they are highly recommended for datasets with ambiguous column names, multiple joins, or domain-specific logic.

To configure these additional options for a dataset, you need to open the **Update Dataset Configuration** dialog box.

1. Locate the dataset to be configured in the Dataset Configurations page (e.g. *Sales Dataset*)
2. Under the **Actions** column, click on the three-dot menu
3. Select the **Update** option from the dropdown

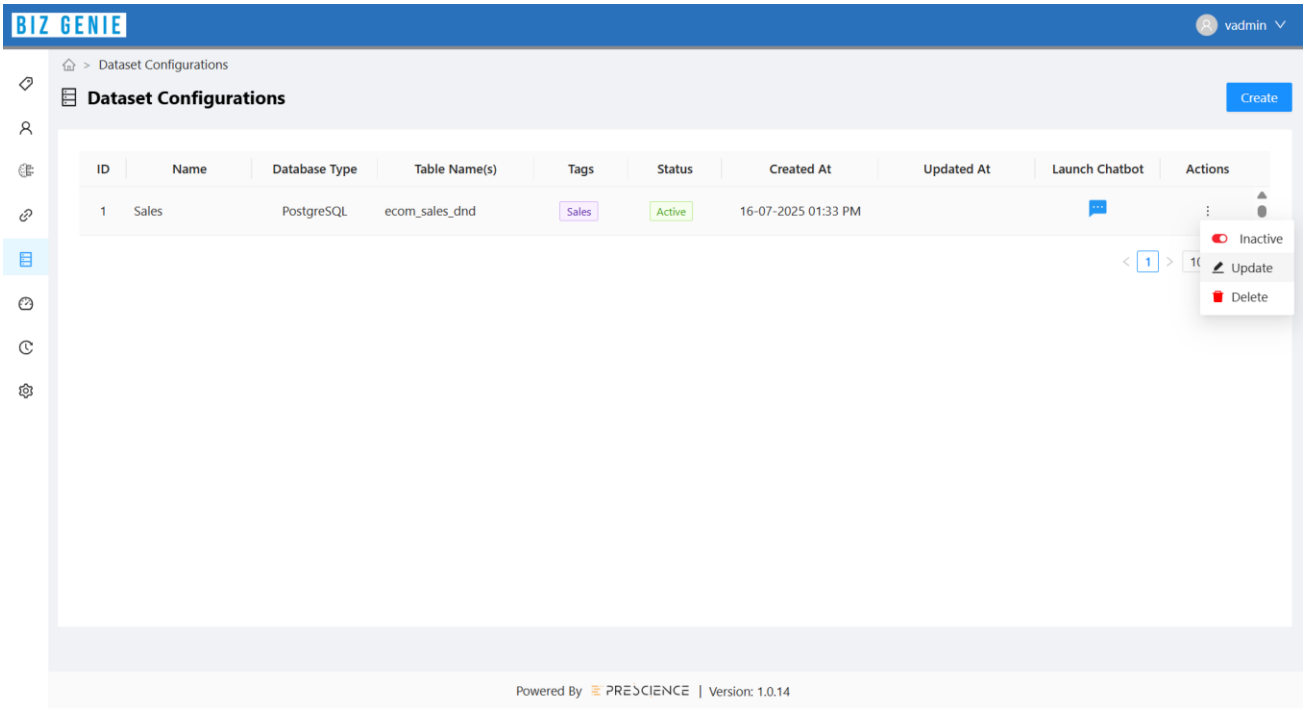

Image 23: Update action on created dataset

This will open the **Update Dataset Configuration** dialog box, where you can access the following additional tabs:

- **Custom Prompt**
- **SQL Examples**
- **Business Glossary**

Each tab is explained below:

Custom Prompt tab defines how the chatbot should interpret and generate SQL queries based on natural language inputs. It includes logic for handling temporal references (e.g., "this year", "next quarter") and limits on data returned. At the bottom of the tab, you will find two buttons:

- **Default Prompt** – Click to view the default prompt logic configured for query interpretation
- **Prompt Macros** – Click to open a popup listing all available prompt macros. These macros are placeholders that dynamically resolve to values such as the current date, month, year, previous year, etc

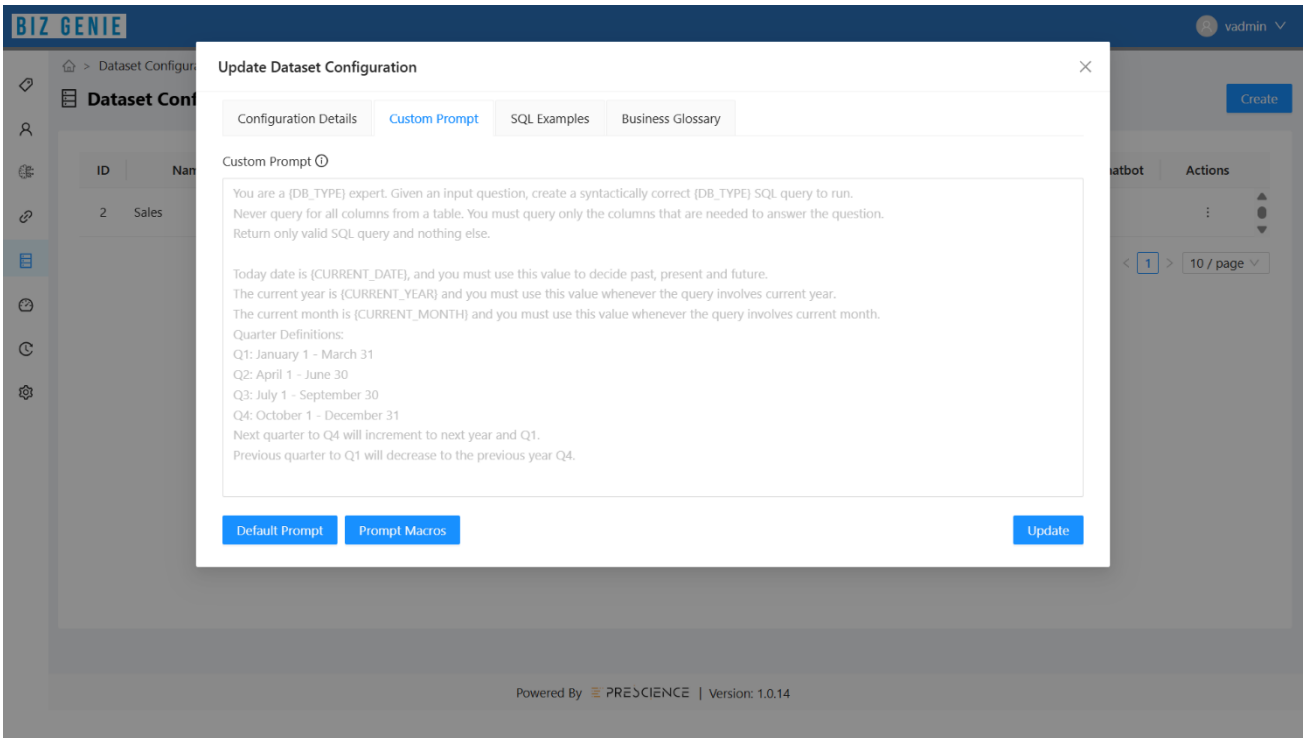

Image 24: Shows sample configuration for the Custom Prompt

SQL Examples tab allows you to provide sample user questions and the corresponding SQL queries. Click on **Add** button to an SQL Example. This opens an **Add SQL Example** dialog to add the examples one at a time:

- **Question** – Enter a natural language input (e.g., "Top 5 customers this year")
- **SQL Query** – Enter the matching SQL statement that answers the question

Each example is stored individually and can be **edited** or **deleted** as needed.

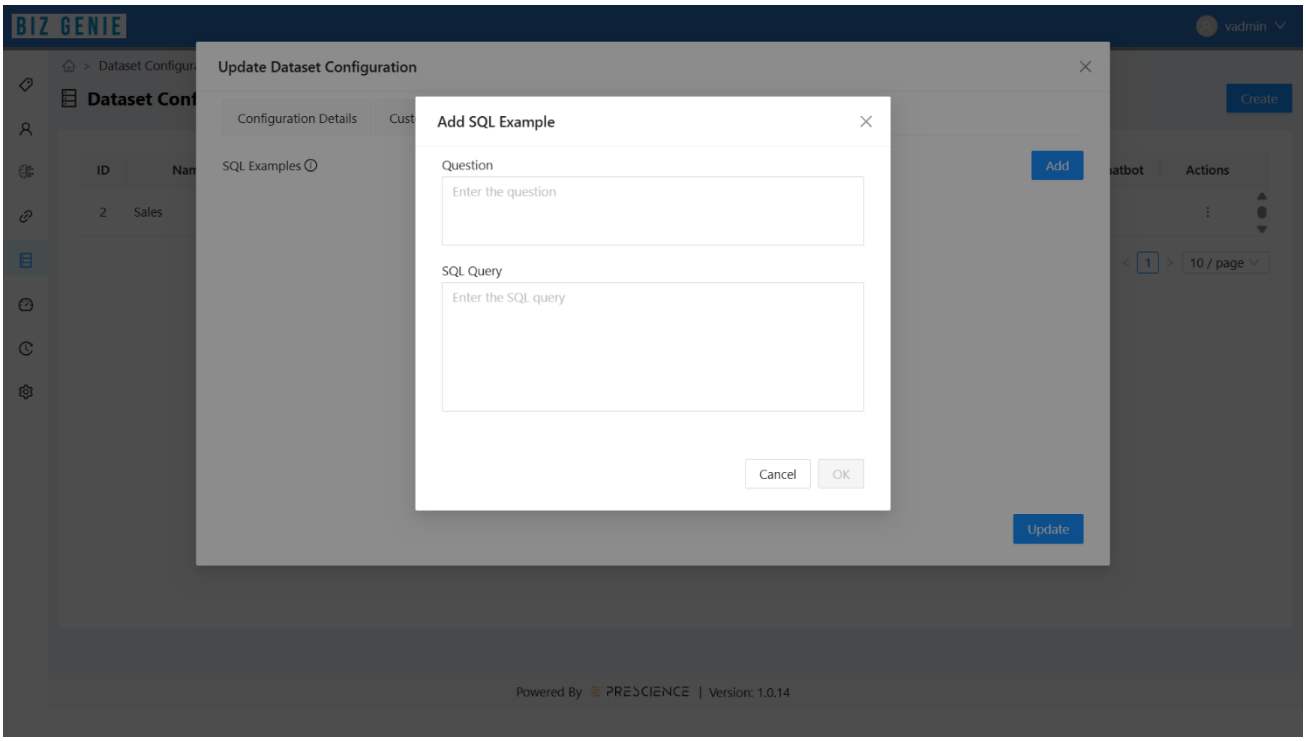

Image 25: Shows sample SQL examples

Business Glossary tab helps the chatbot recognize synonyms, abbreviations, or internal terminology used in the dataset.

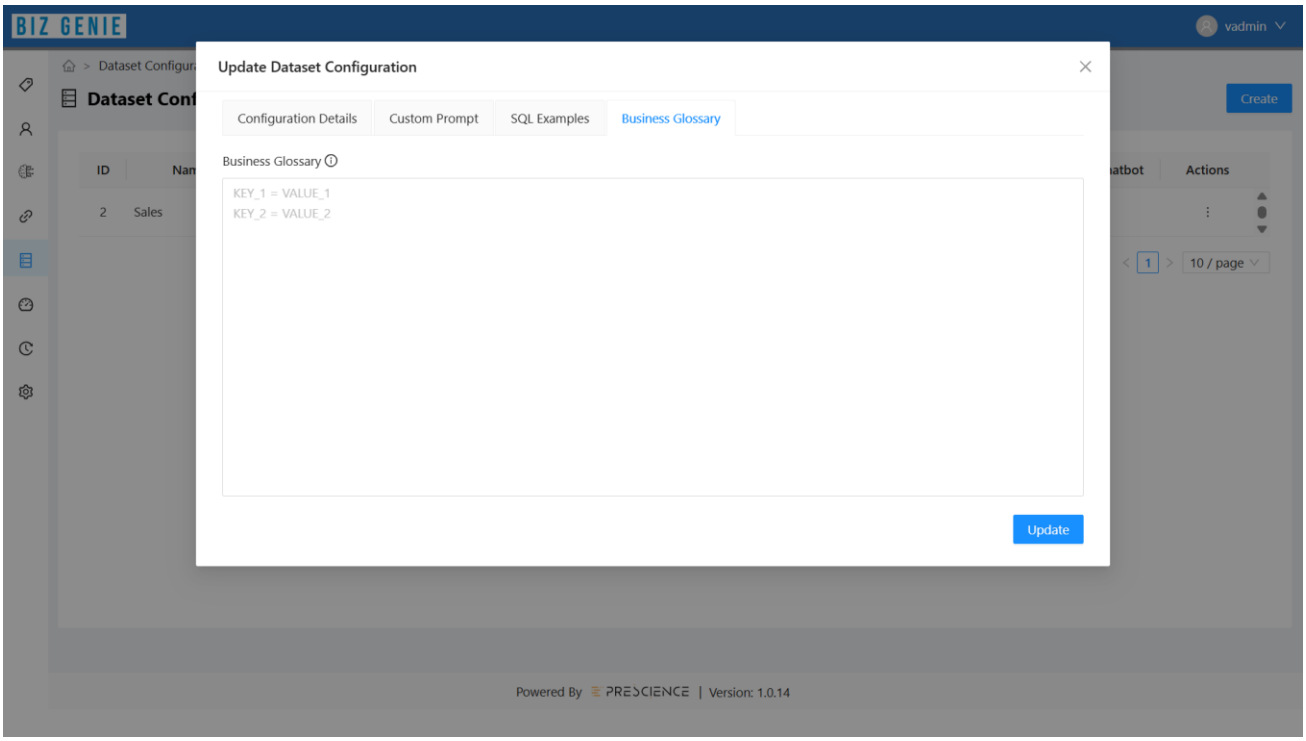

Image 26: Displays example mappings and business terminology translations

8. Dashboard Creation using Apache Superset

To create and manage dashboards that can be embedded into the Biz Genie application, you need to log in to **Apache Superset**, an open-source data exploration and visualization platform integrated with the chatbot.

8.1. Login to Superset

You can access the Superset application using the following credentials:
URL: http://<server_IP_address>:8088/login/
Default Username: admin
Default Password: Spadmin@123$

Open the Superset login page in your browser and enter the username and password provided above. Click the **Sign In** button.

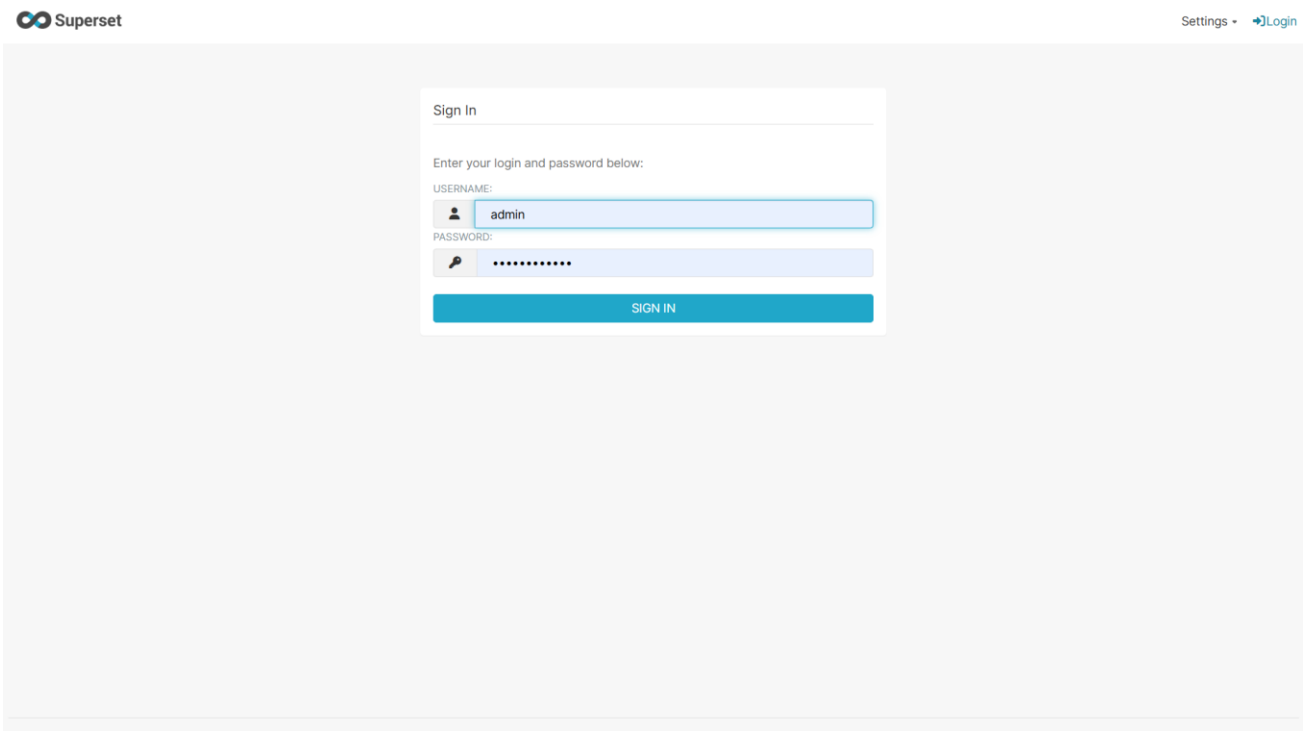

Image 27: Apache Superset login page

After successful login, you'll be redirected to the **Superset Home** screen. From here, you can access:

- Recently viewed charts, dashboards, and saved queries
- Options to create new dashboards and charts
- Navigation menus for **Dashboards**, **Charts**, **Datasets**, and **SQL Lab**

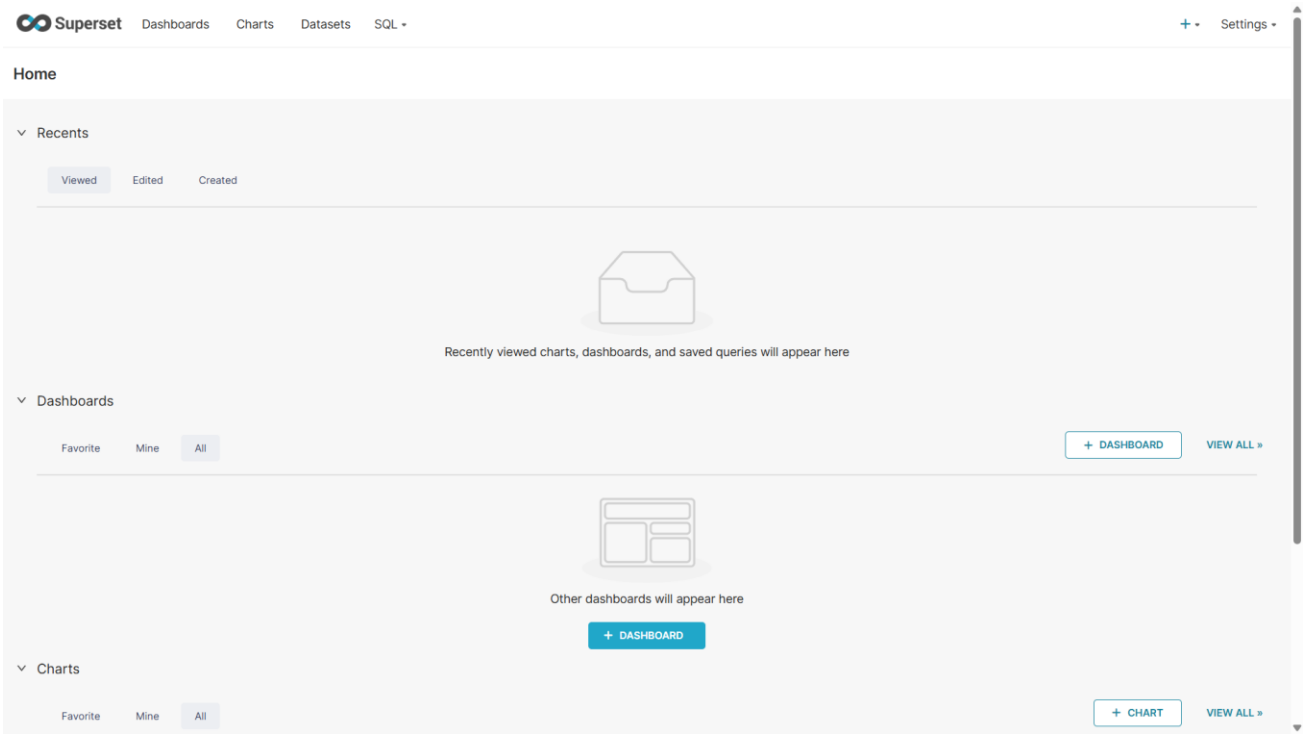

Image 28: Superset homepage (post-login view)

8.2. Connecting a Database in Apache Superset

To begin creating dashboards in Apache Superset, you must first connect to a database where your dataset resides (e.g., the same PostgreSQL connection used in Biz Genie). This enables Superset to access and visualize your enterprise data for dashboard creation.

Superset supports many databases, including PostgreSQL, MySQL, SQLite, and others via SQL Alchemy URIs.

Follow the steps below to create a new database connection in Superset:

From the Superset homepage, click on the **Settings** dropdown at the top right. Under the **Data** section, click on **Database Connections**.

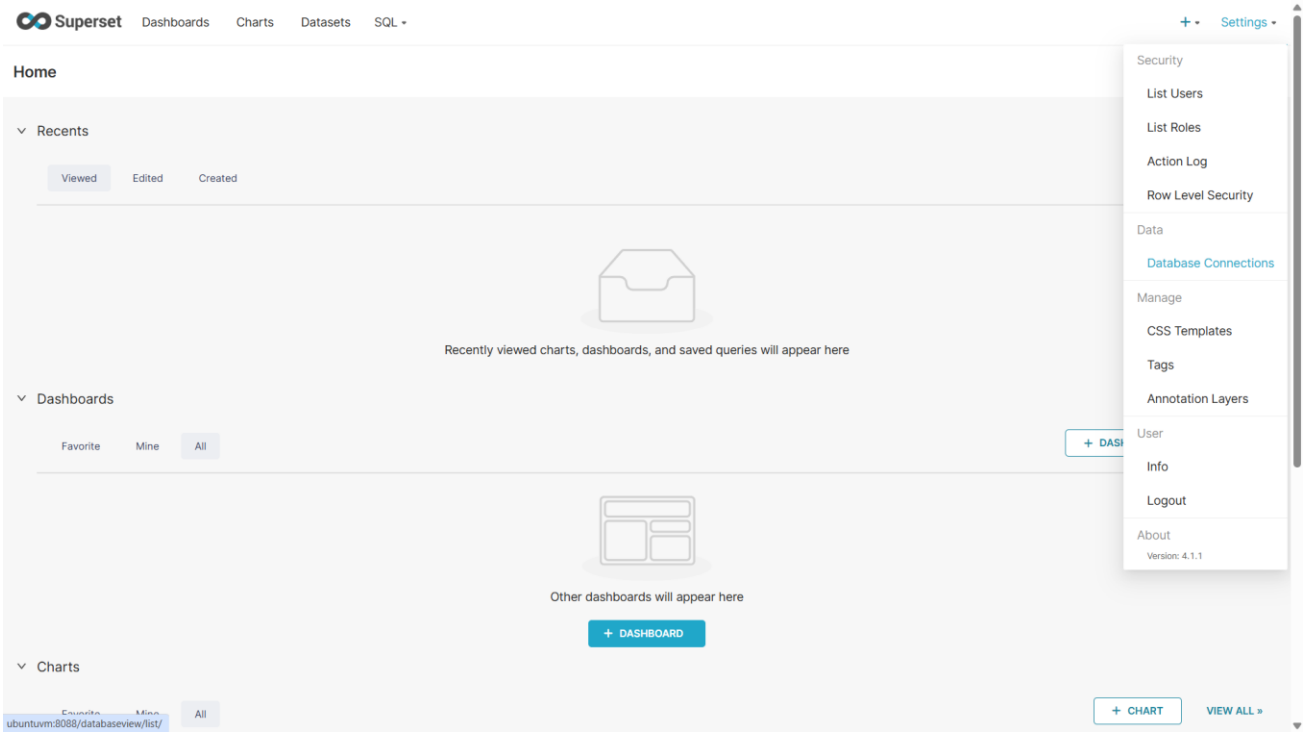

Image 29: Access Database Connections from Settings

The **Databases** screen will open, listing all existing database connections (empty by default). Click the blue **+ DATABASE** button in the top-right corner.

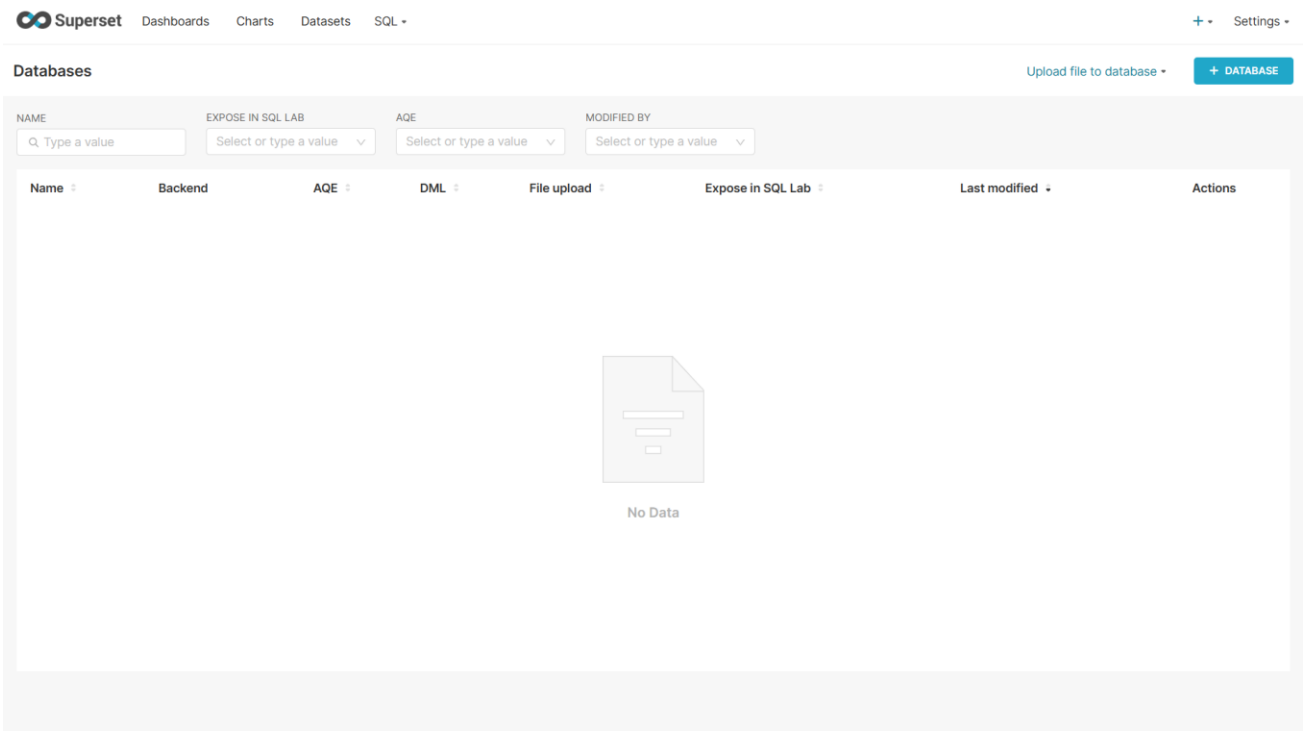

Image 30: Database management view (empty state)

In the pop-up, select the database engine you want to connect. For example, click on **PostgreSQL**.

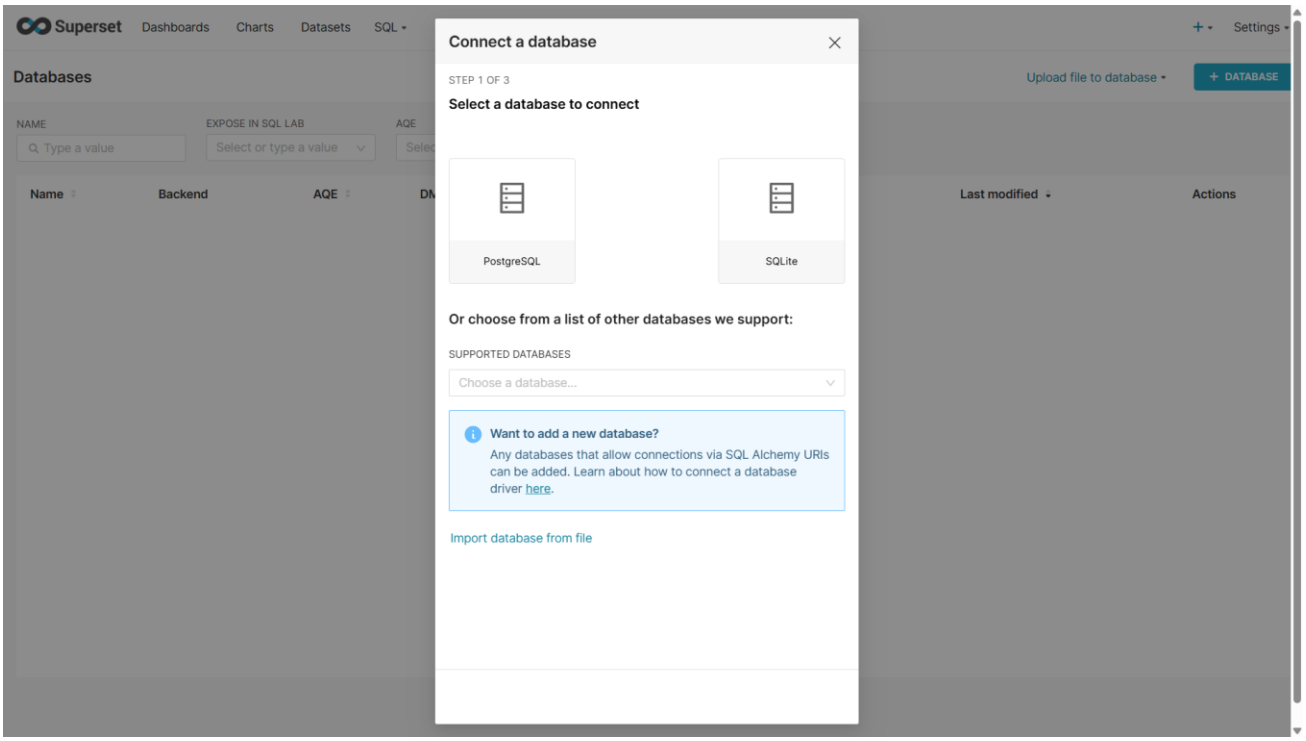

Image 31: Select database type

Enter the required connection details:

- **Host:** Database server address
- **Port:** Default port (5432 for PostgreSQL)
- **Database Name:** e.g., postgres
- **Username:** e.g., postgres

- **Password:** Database password
- **Display Name:** Friendly name shown in Superset

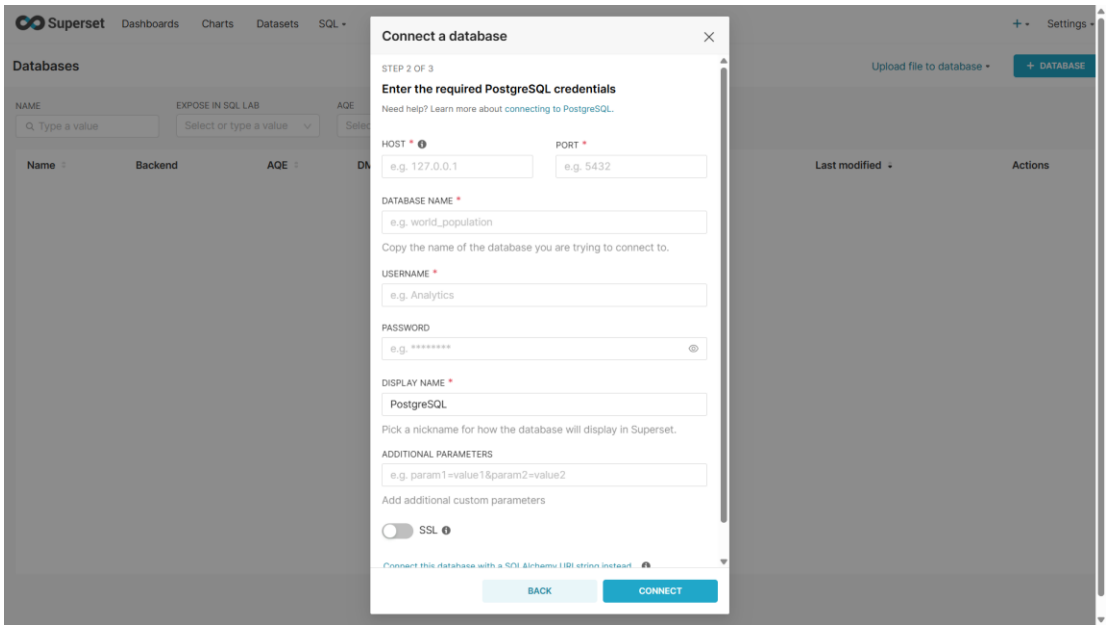

Image 32: Enter database credentials

Review the connection details. Then click **Connect**.

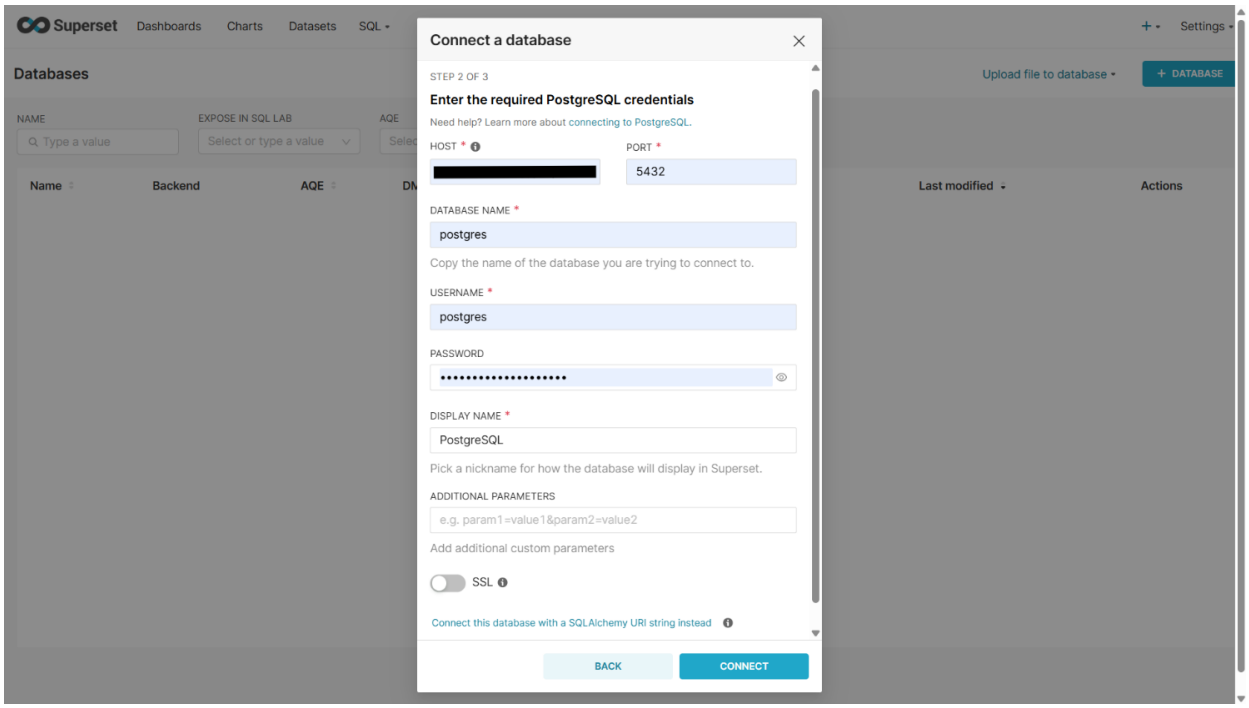

Image 33: Finalized connection details

If your credentials are valid, Superset will show a **Database connected** message. You can now choose to immediately create a dataset or go to SQL Lab.

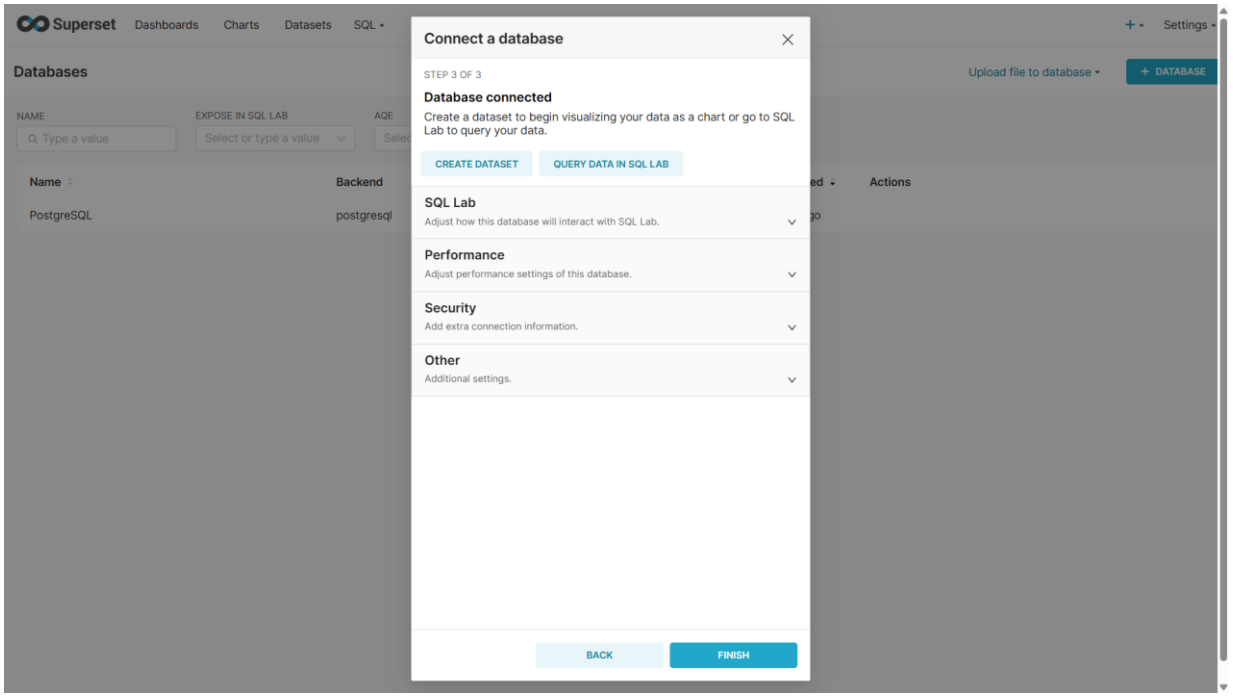

Image 34: Connection confirmation

From the **Connection Confirmation** screen above, click **Create Dataset** to initiate the dataset creation process.

8.3. Creating a Dataset and Generating Charts in Superset

Once the database connection has been configured, the next step is to create a dataset in Apache Superset. This dataset serves as the foundation for building visualizations like bar charts, pie charts, and other analytics components. These charts will later be used to compose the Sales Dashboard and embed it into the Biz Genie application.

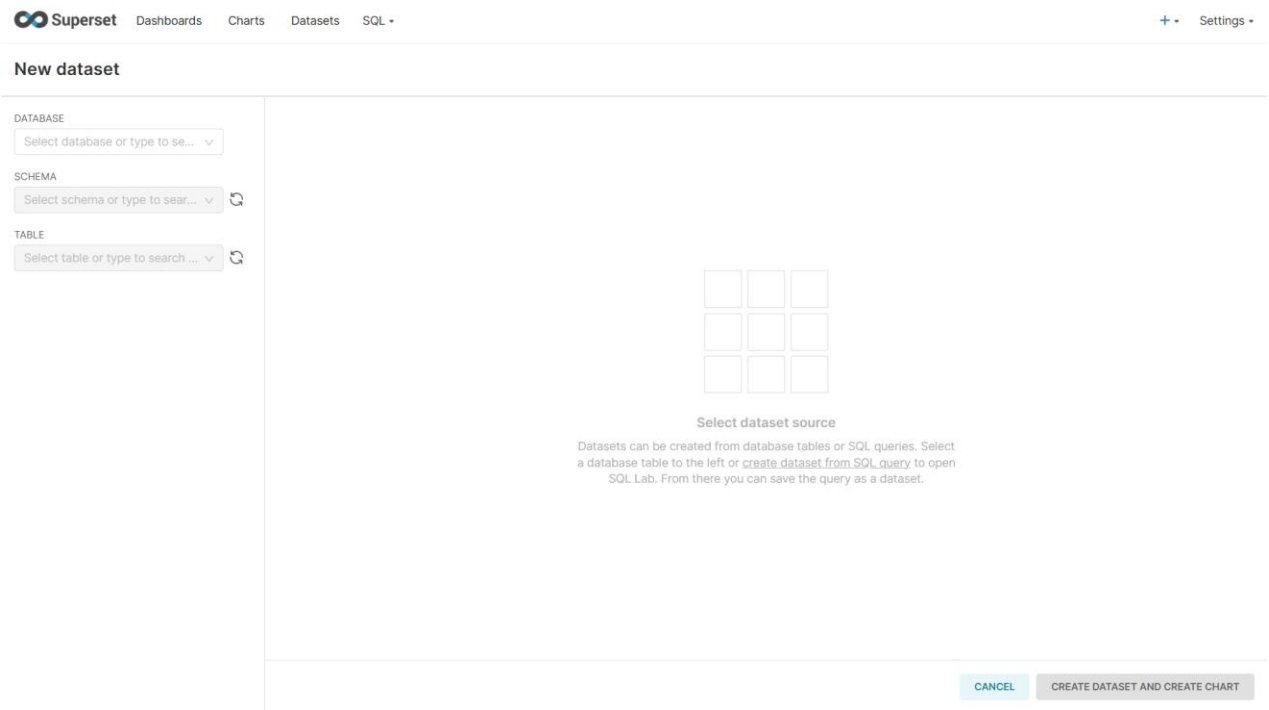

Image 35: New dataset setup screen

From the **Database** dropdown on the left, choose the PostgreSQL database you connected earlier.

Choose the **Schema** (e.g., public) and the **Dataset** (e.g., ecom_sales_dnd) that contains your sales data.

You will see a list of dataset columns and their data types (e.g., Product Name, Quantity, etc.).

Click **Create Dataset and Create Chart**.

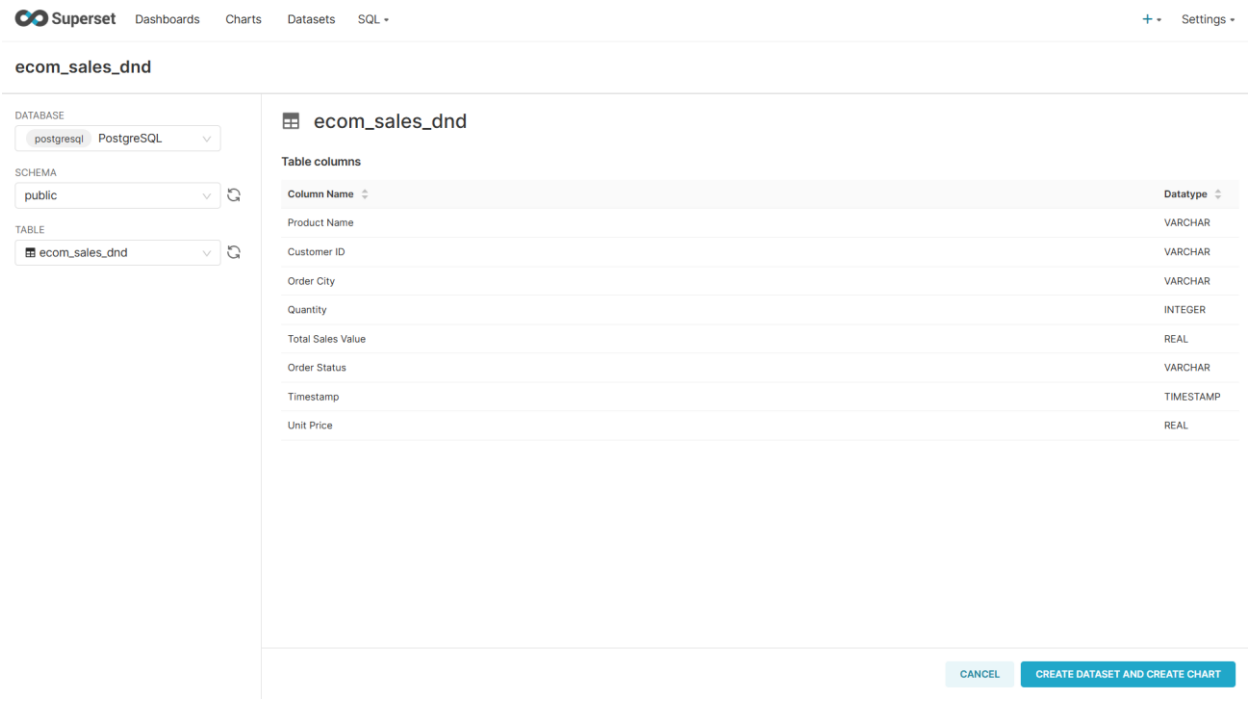

Image 36: Dataset preview

After saving the dataset, Superset opens the chart creation interface. The newly created dataset (ecom_sales_dnd) will already be selected under **Choose a dataset**.

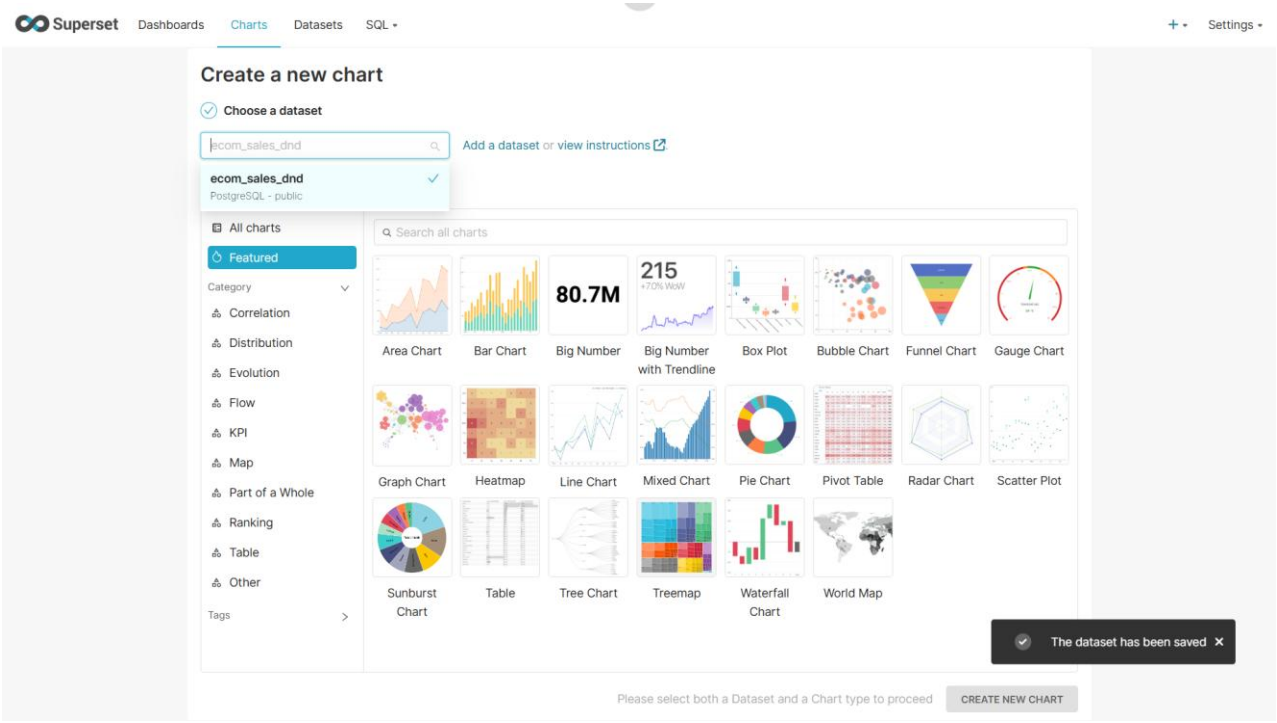

Image 37: Chart builder with dataset selected

Choose your preferred chart type from the available options. In this example, we proceed with a **Bar Chart**.

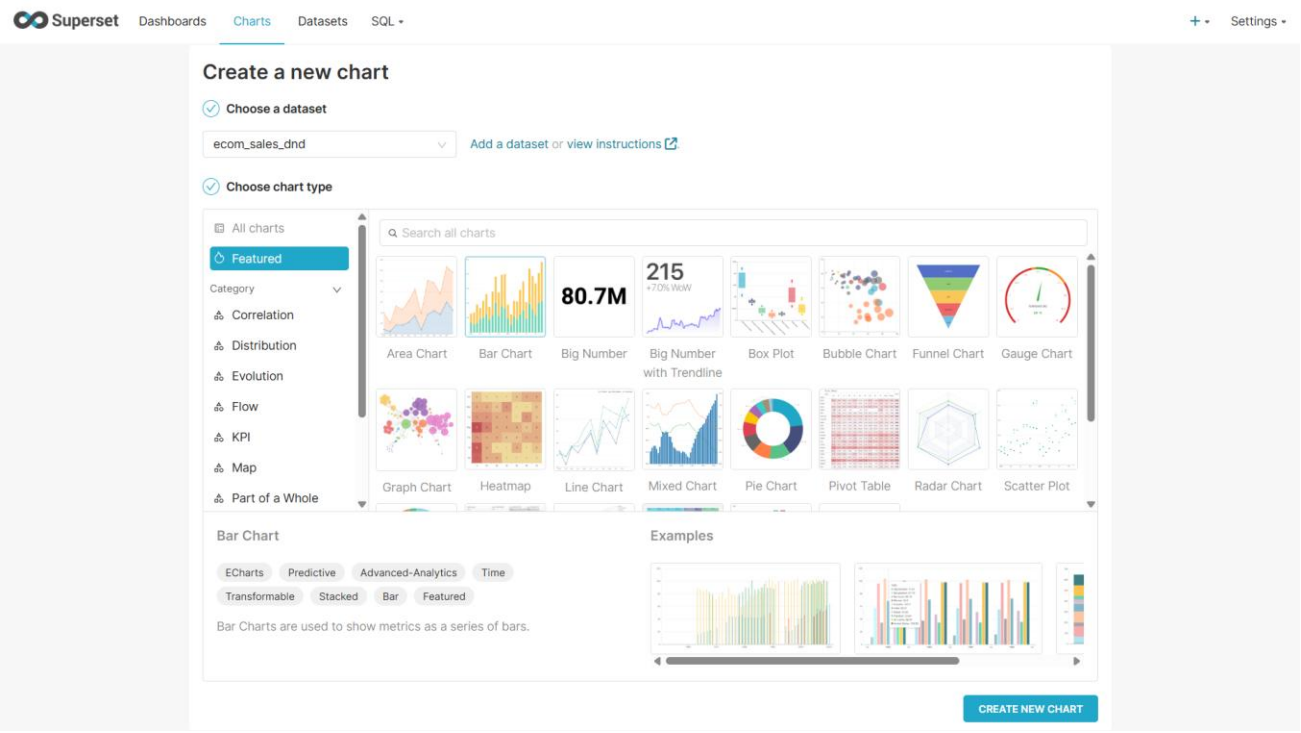

Image 38: Select Bar chart

On the chart configuration screen:

- Drag appropriate fields to X-Axis (e.g., Product Name)
- Drag aggregation like COUNT(*) or SUM(Total Sales Value) to Metrics
- Apply filters as needed (e.g., by timestamp or product segment)

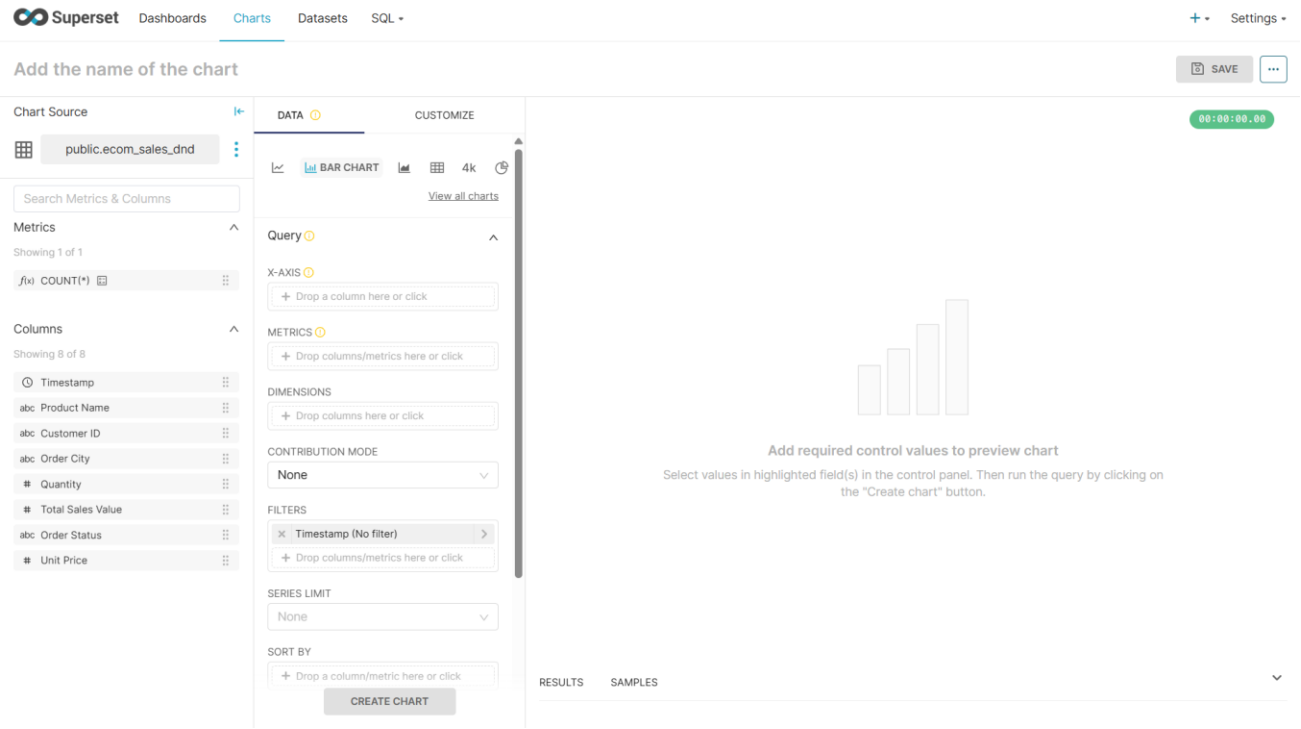

Image 39: Configure the Bar chart

After setting these fields, click **Create Chart** or **Save** to add it to your Superset workspace.

Once the first chart is created, users can continue to create **multiple charts** using the same ecom_sales_dnd dataset by navigating to the **Charts** tab in the Superset menu and clicking **+ Chart**. Users can select different chart types (e.g., Line Chart, Pie Chart, Table) and configure them with relevant dimensions and metrics based on their business needs. These charts will collectively serve as the building blocks of the **Sales Dashboard**, which will be created in the next step and embedded into the Biz Genie application.

8.4. Creating a Dashboard in Apache Superset

Once your charts have been created from the dataset (e.g. ecom_sales_dnd), the next step is to compile these into a dashboard. Dashboards help organize multiple charts into a single, cohesive visual report, which can then be embedded into the Biz Genie application for easy access.

Follow these steps to create a new dashboard in Superset:

From the Superset homepage, click on the **Dashboards** tab in the top navigation bar.

You will be taken to the **Dashboards page**, which displays all previously created dashboards.

Click the **+ DASHBOARD** button in the top-right corner.

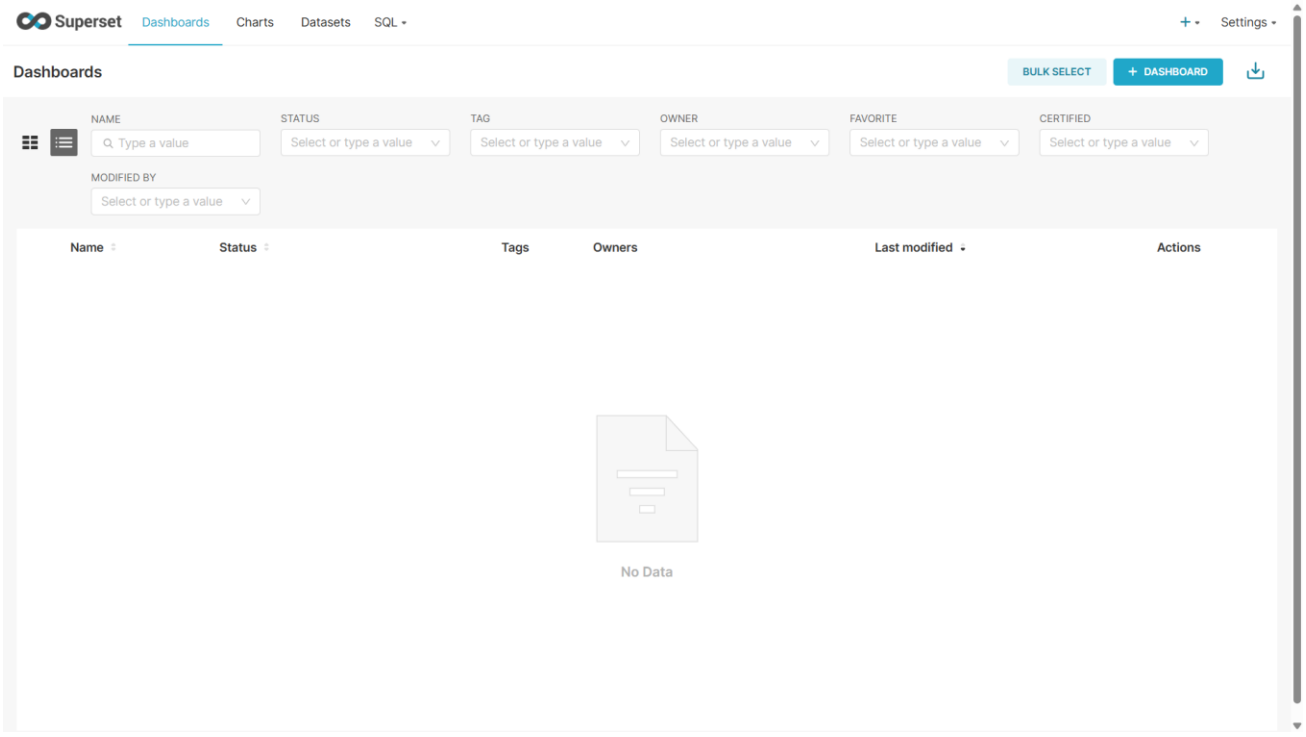

Image 40: Navigate to Dashboards and click "+ DASHBOARD"

A new dashboard editor opens titled [untitled dashboard].

On the right panel, you will see a list of charts you've previously created (e.g., Total Revenue, Units Sold).

Drag and drop the desired charts into the central canvas.

Optionally, click **+ CREATE A NEW CHART** to build a new visualization directly from this view.

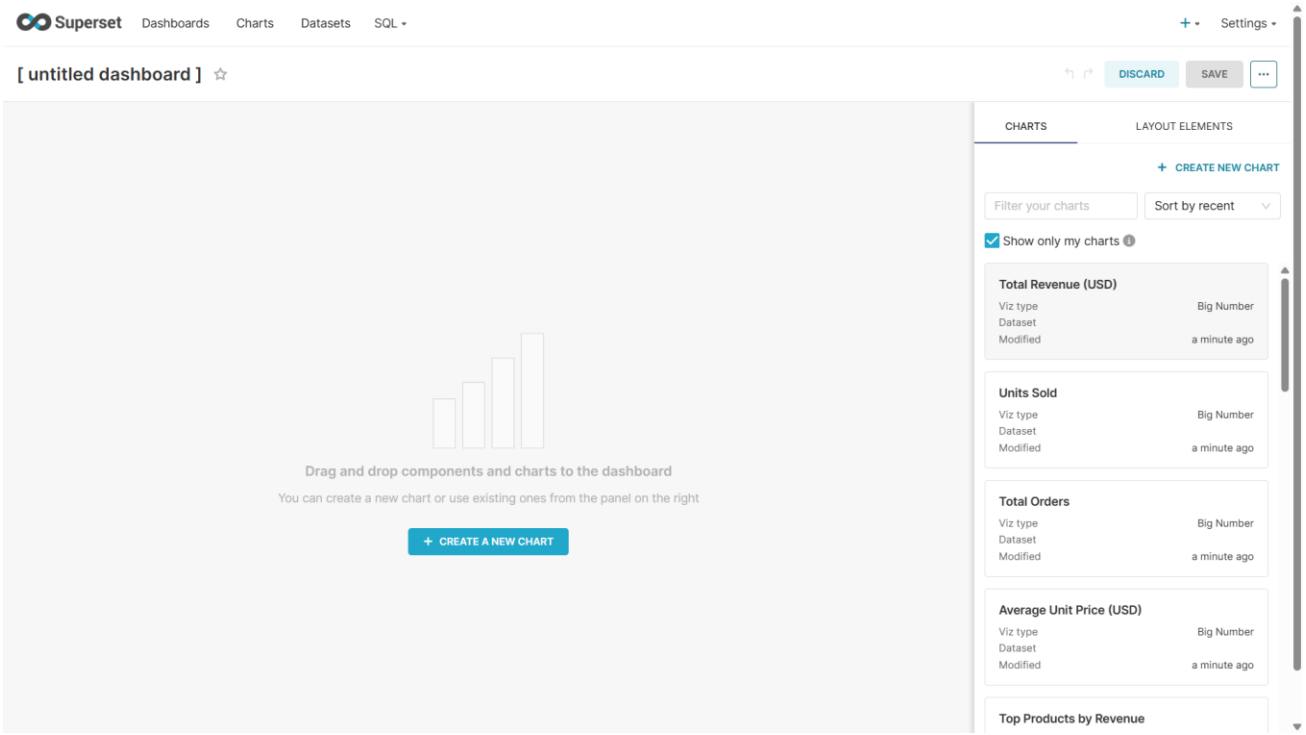

Image 41: Drag and drop charts to build the dashboard layout

You can organize the layout using grid snapping, adjust size, and align charts for better visual flow.

Use the left panel to add **filters** (e.g., by Product, City, Status) to make your dashboard interactive.

Once satisfied with the arrangement, click **SAVE** in the top-right corner.

Give your dashboard a name (e.g., **Sales Dashboard**) and finalize the save.

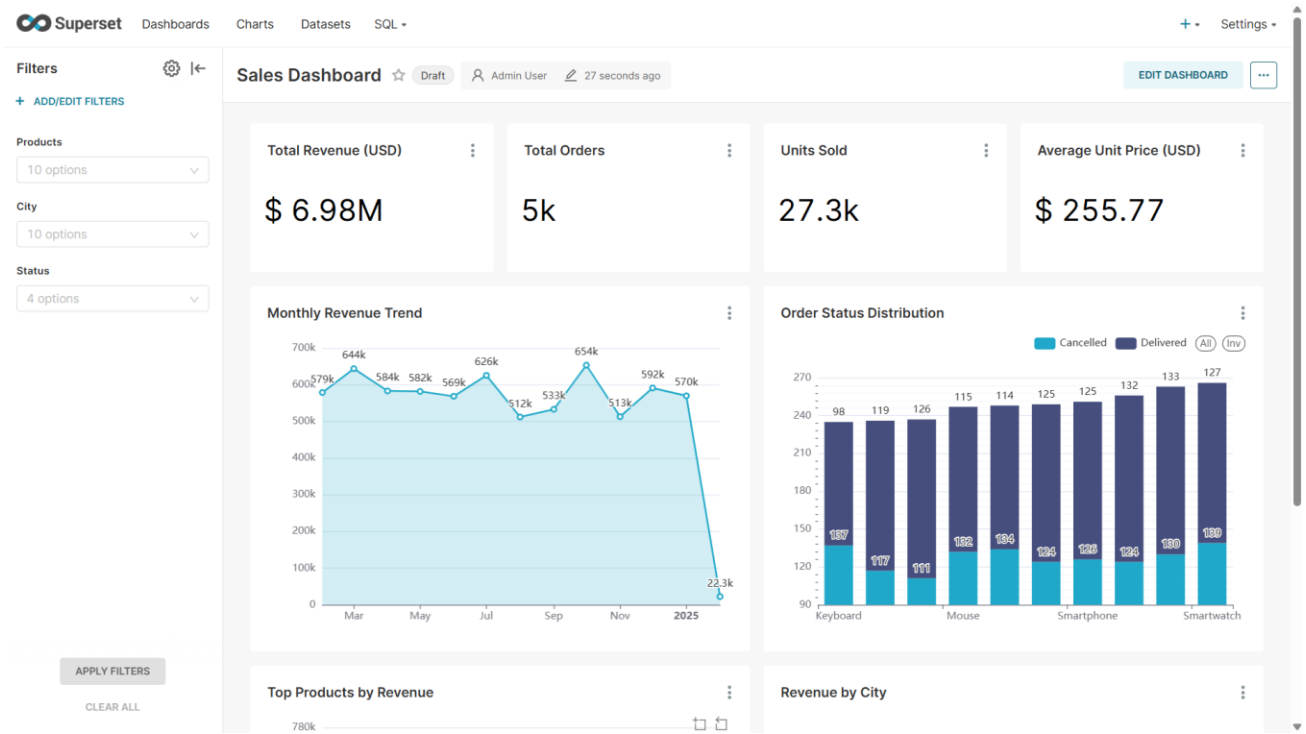

Image 42: Final Sales Dashboard with metrics and filters

8.5. Tagging a Superset Dashboard

Tags play a crucial role in the Biz Genie by enabling role-based access control. When you tag dashboards in Apache Superset, these tags are used to determine which users in the Biz Genie can view which dashboards. A user can only see dashboards that are tagged with the same labels assigned to their user profile.

Follow these steps to Tag a Dashboard in Superset:

From the Superset dashboard screen, click on the **Settings** menu at the top-right corner. Under the **Manage** section, click on **Tags**.

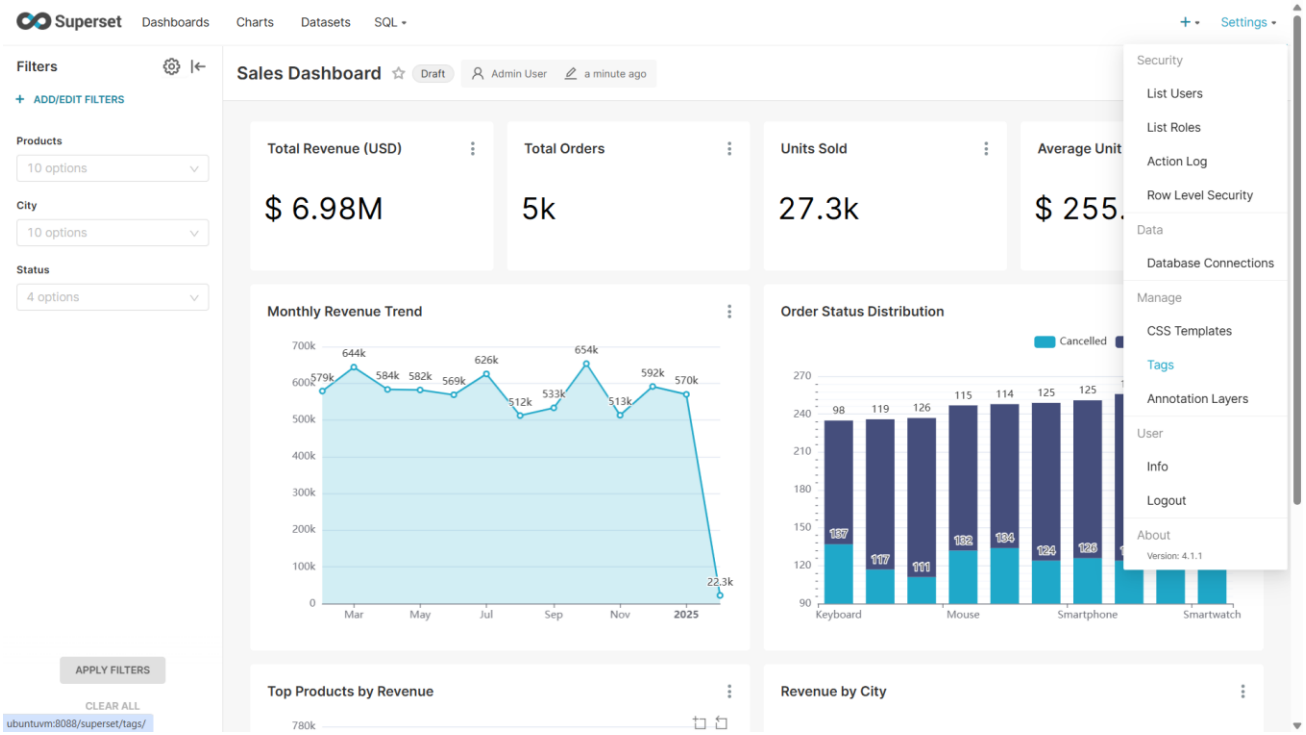

Image 43: Navigate to tags via Settings

On the Tags page, click on the **+ TAG** button in the top-right corner.

A **Create Tag** dialog will open.

- **Tag Name**: Enter the tag name (e.g., Sales)
- **Description**: Provide a brief description (e.g., This creates sales tag)
- **Dashboards**: Select the dashboard you just created (e.g., Sales Dashboard)

Click **Save**.

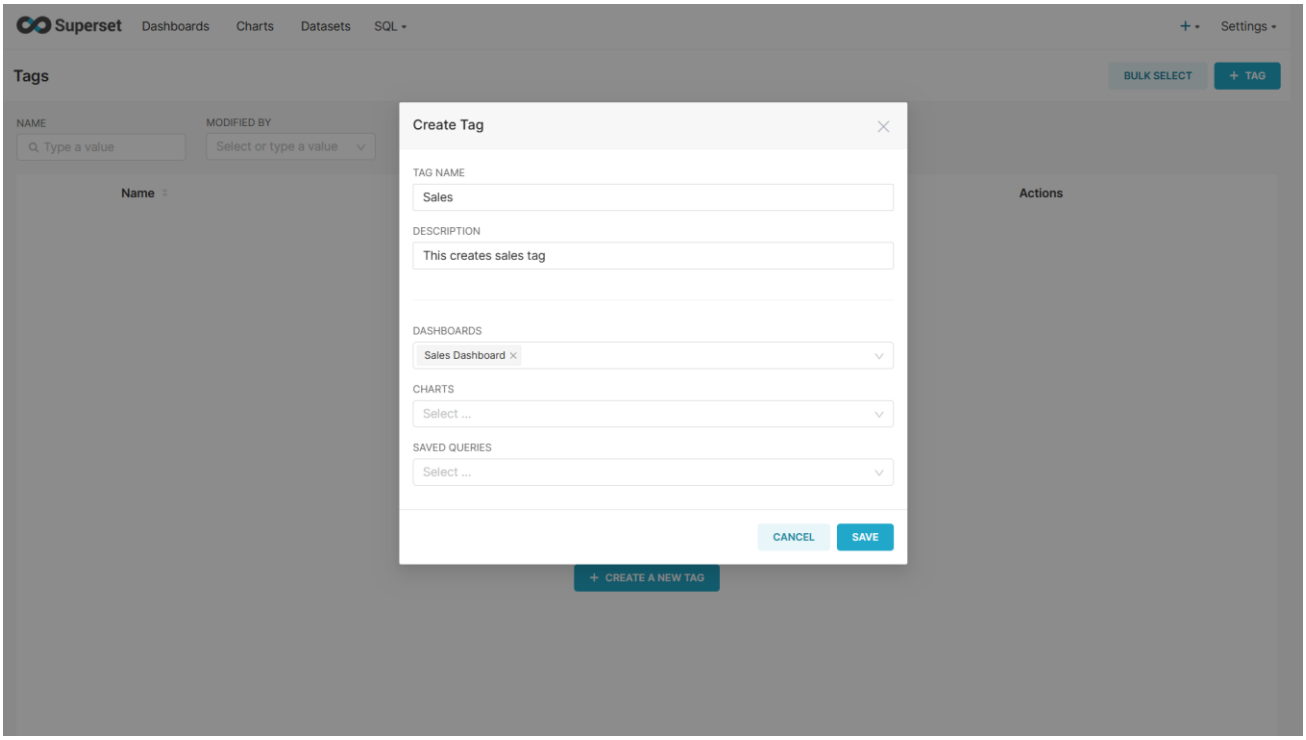

Image 44: Fill out tag details and link to Sales Dashboard

After saving, a success notification will appear in the bottom right corner saying **"Tag created"**. You'll see the tag listed in the Tags table.

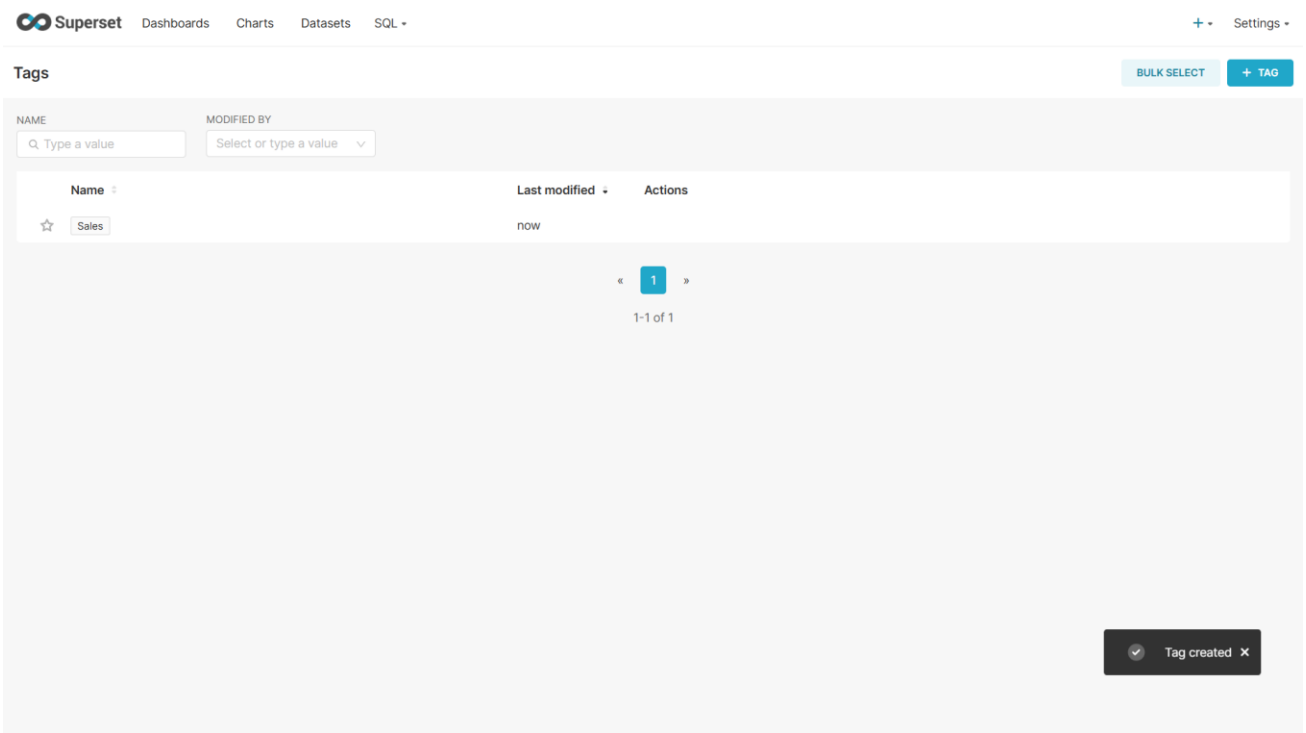

Image 45: Tag list confirmation

8.6. Embedding the Superset Dashboard

Once the dashboard is created and tagged appropriately, the final step is to embed it into the Biz Genie application. This allows users to view the dashboard directly within the chatbot interface, making it a seamless data exploration and visualization experience.

Follow these steps to Embed a Superset Dashboard:

Navigate to your dashboard in Superset. Click the three-dot menu at the top-right corner of the screen and select **"Embed dashboard"** from the dropdown.

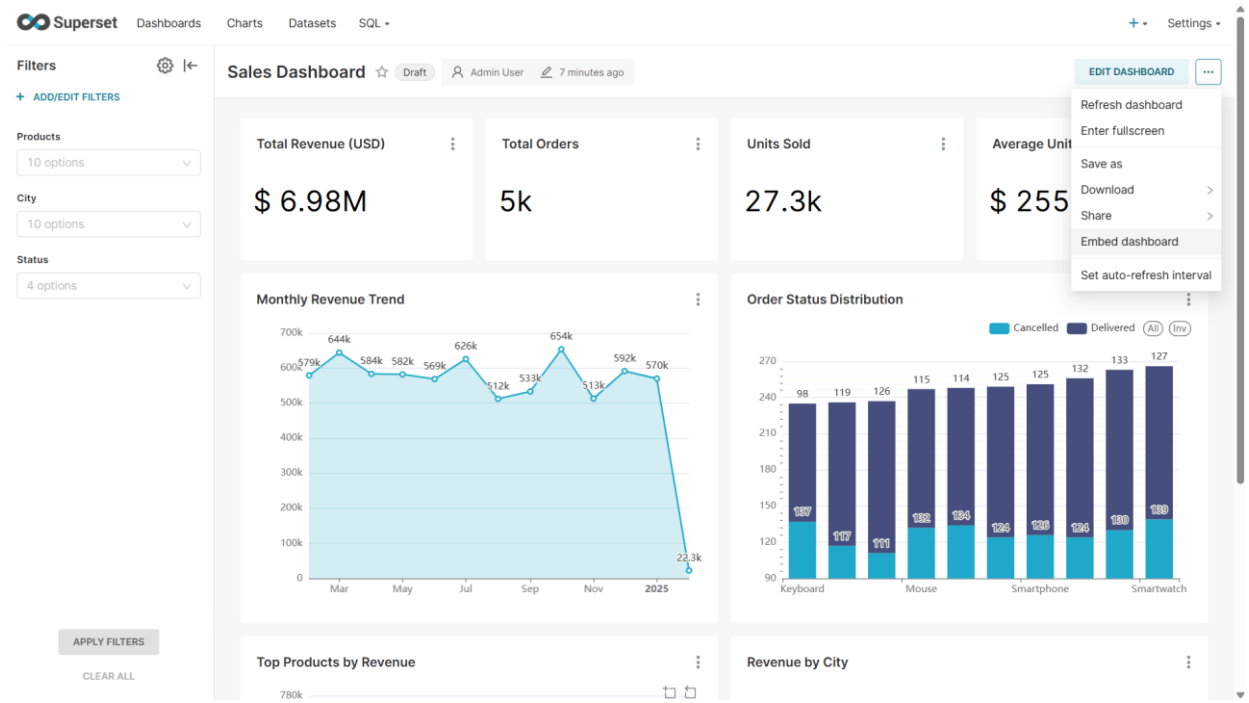

Image 46: Click on "Embed dashboard" from the Sales Dashboard menu

Click **"Enable Embedding".**

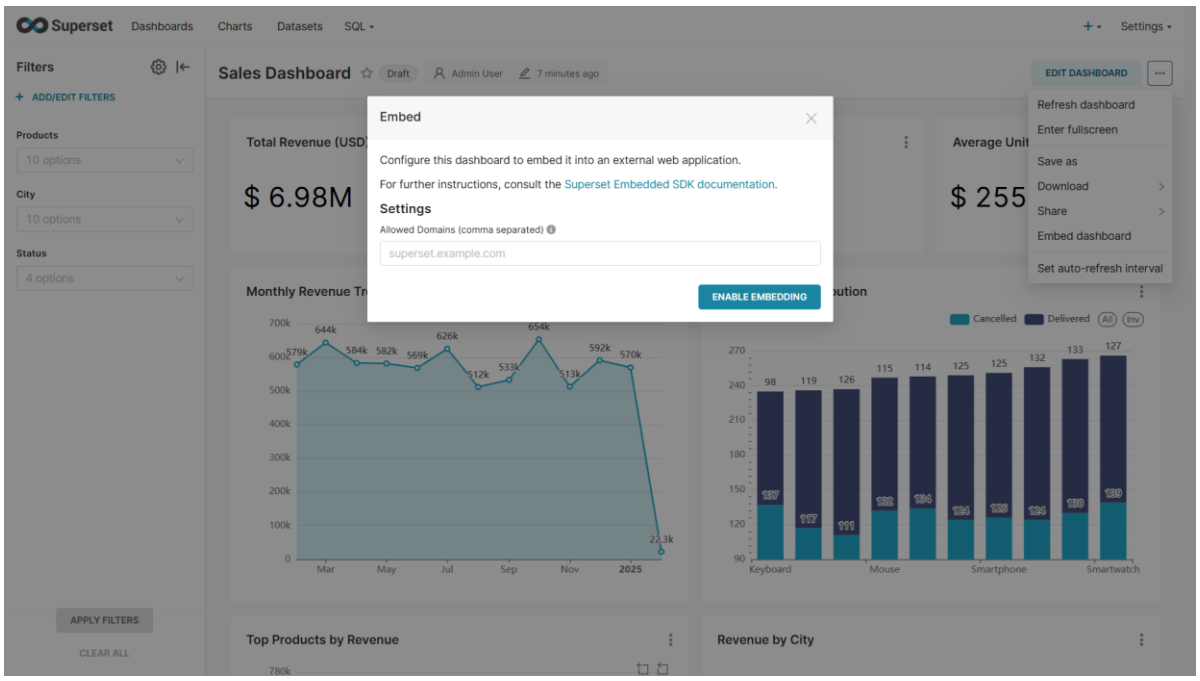

Image 47: Click "Enable Embedding"

Dashboard has now been embedded into your Biz Genie application. You can close the dialog box without making any changes.

9. Viewing the Embedded Dashboard in Biz Genie

Once the Sales Dashboard is created and embedded from Apache Superset, users with the corresponding tag (e.g., “Sales”) can view it directly within the Biz Genie application. This integration enables seamless access to interactive visualizations and KPIs alongside the chatbot, creating a unified analytics workspace.

Follow these steps to view the embedded dashboard:

Navigate to your Biz Genie login page. Enter your assigned credentials (**Username**: vadmin and **Password**: Vadmin321$) and click **Login**.

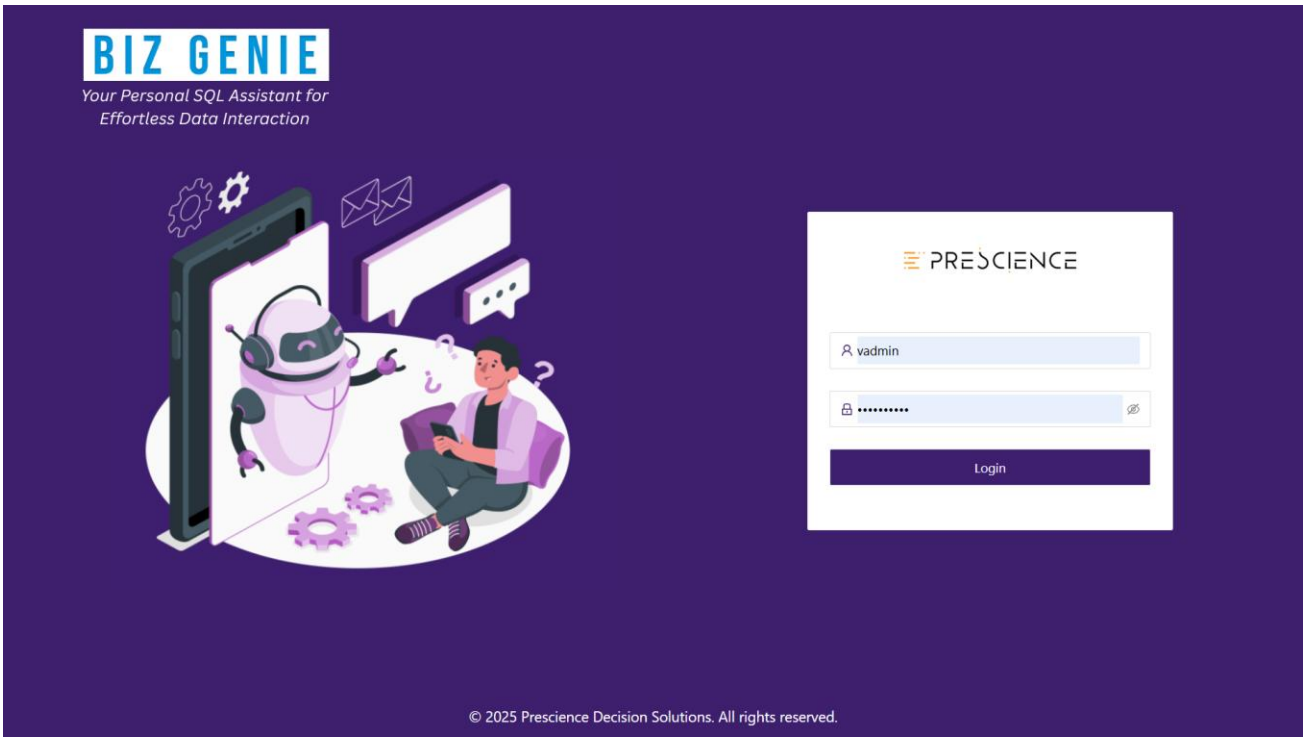

Image 48: Login to Biz Genie

To access your dashboards, hover over the **Dashboards icon** in the sidebar. You will see the **Sales Dashboard** (or any dashboard linked to your tag) appear as a selectable option.

Click on **Sales Dashboard** to open it.

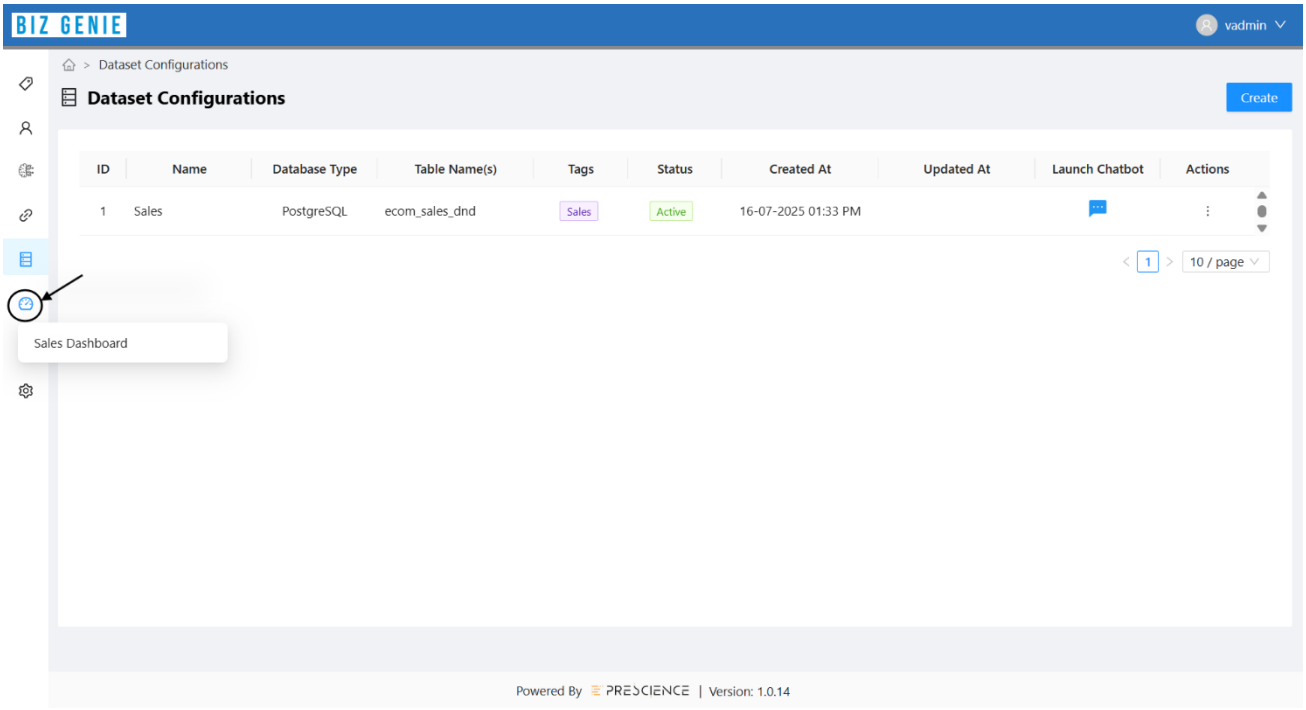

Image 49: Sidebar hover showing Sales Dashboard

The embedded Superset dashboard will be displayed directly within the Biz Genie interface, allowing you to interact with charts, filters, and KPIs in real-time.

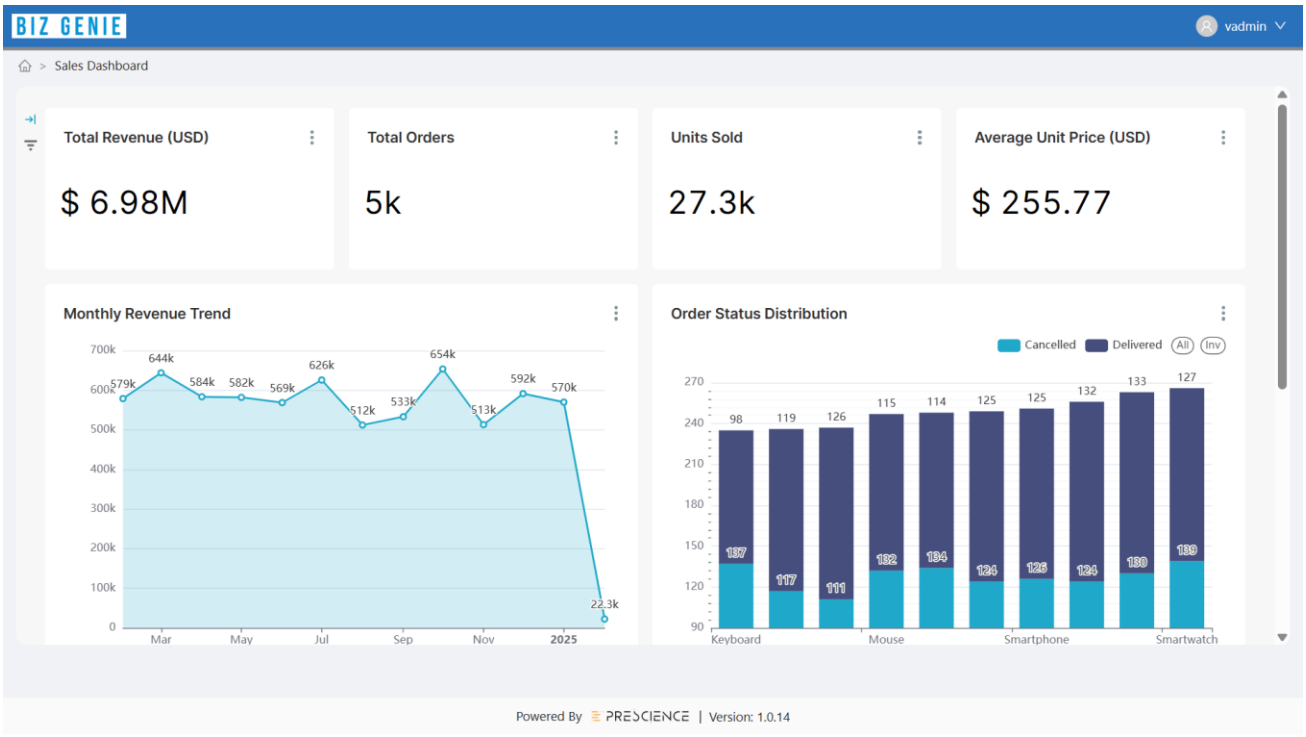

Image 50: Embedded Sales Dashboard display

10. Logging in as a User

Once the dashboard is embedded and the user account is created (as done previously in User Management section) with the appropriate tag (e.g., “Sales”), users can log into the Biz Genie platform using their credentials. The interface offers two powerful tools side by side: a **Chatbot tab** for querying data and a **Dashboard tab** for viewing linked dashboards. This provides users with real-time insights and context while interacting with the data.

10.1. Access the Chatbot and Linked Dashboards

Follow these steps to log in as a User to access the Chatbot and Linked Dashboards:

Navigate to the application URL (http://<server_IP_address>) in your browser.

Enter the User role login credentials (e.g., Username: prescience, Password: ******) that you had created in the User Management section.

Click the **Login** button.

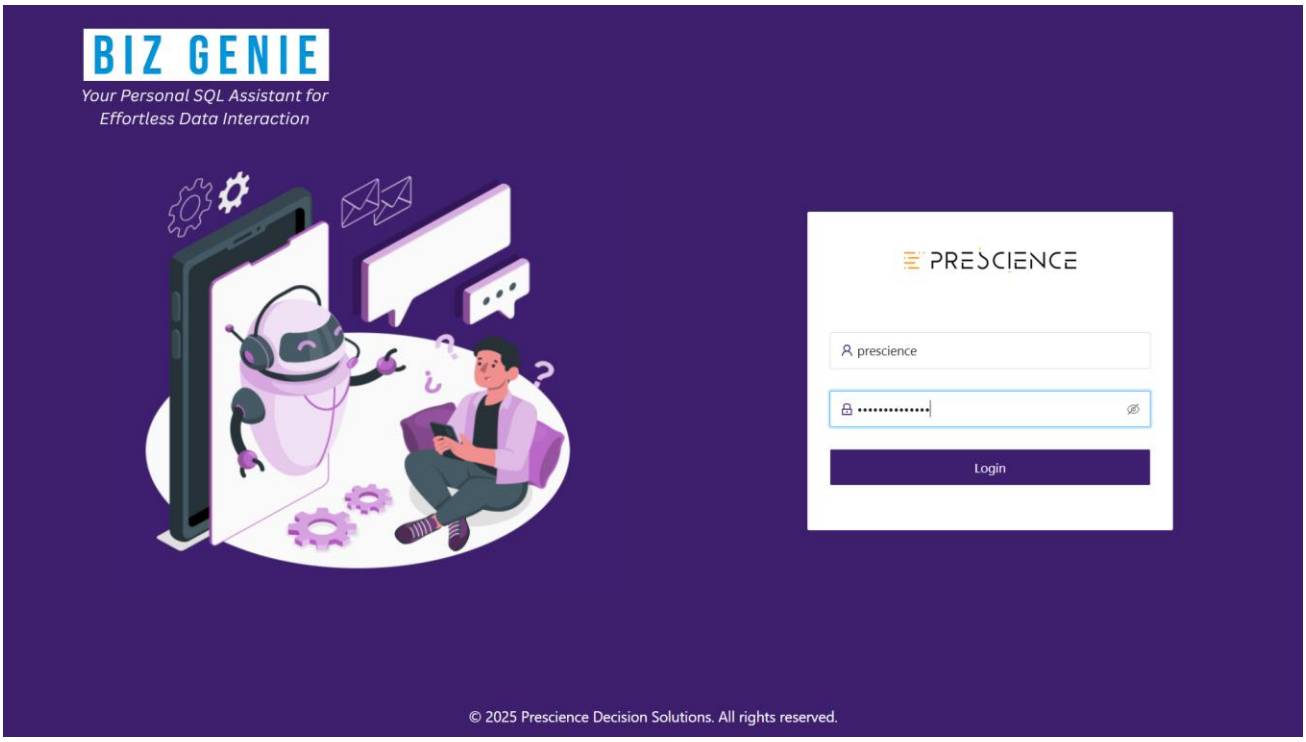

Image 51: User login screen

After logging in, the application will open in the **Chatbot tab** by default. This is where the user can type in their questions in plain English. The chatbot will interpret the query, generate SQL, fetch results, and return visual or tabular insights.

Image 52: Chatbot screen with Dashboard tab collapsed

To view the linked dashboard, expand the **Dashboard tab** on the left-hand side by clicking the arrow icon. Sales Dashboard (which shares the common "Sales" tag with the user and dataset) will appear in the list.

Click on **Sales Dashboard** to display it.

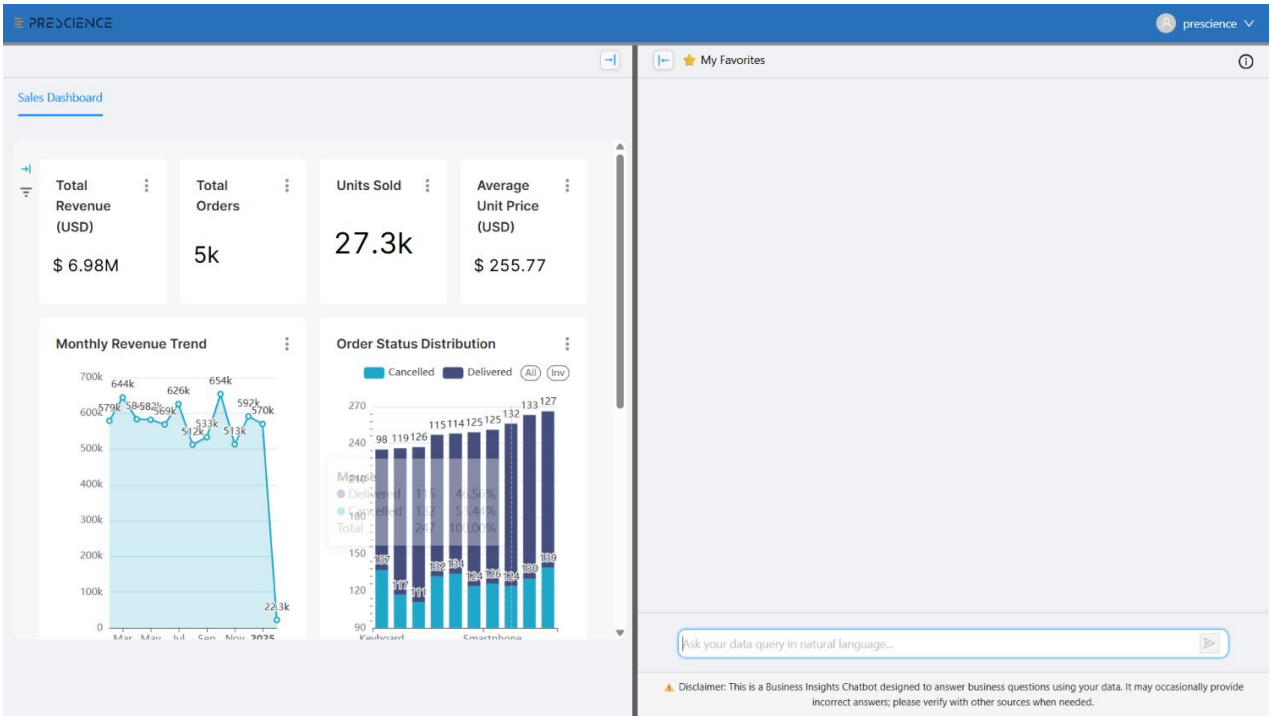

Image 53: Sales Dashboard visible in the expanded Dashboard tab

Note

- Dashboards shown are filtered based on tags shared between the user and dataset (e.g., "Sales")
- Users can use these visual dashboards as a reference while interacting with the chatbot.
- The dashboard appears within the same interface, allowing seamless data discovery and querying

10.2. Querying the Chatbot Using Natural Language

Once a user logs into the Biz Genie platform, they can begin interacting with the chatbot using natural language. This feature allows non-technical business users to extract insights from datasets without needing to write SQL queries manually. The chatbot translates user queries into SQL, executes them against the relevant dataset, and presents the results in a human-readable format.

In this step, we will walk through how a user can ask a business question, like “Top 5 products in 2025,” and view the response within the chatbot interface.

In the chatbot input box at the bottom of the screen, type a natural language question. For example: Top 5 products in 2025.

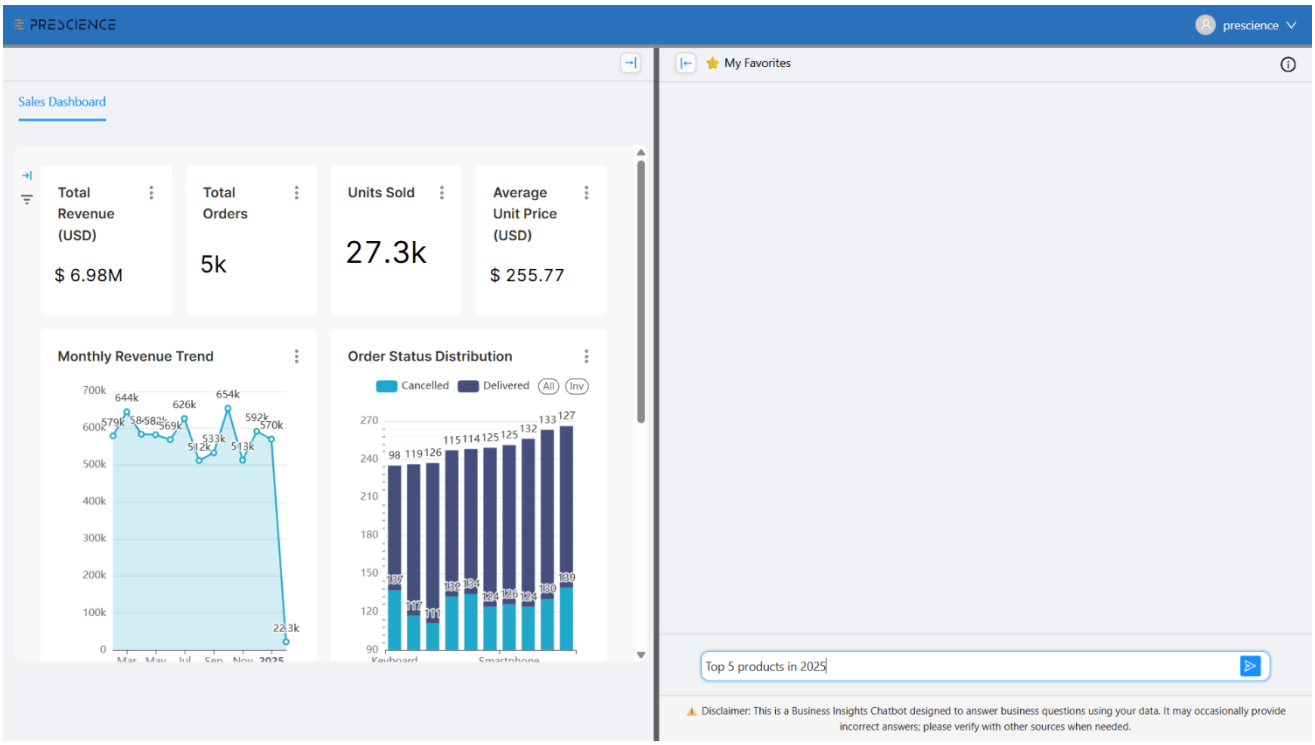

Image 54: Query is typed into the input box

Press **Enter** or click the send icon (➤) next to the input box.

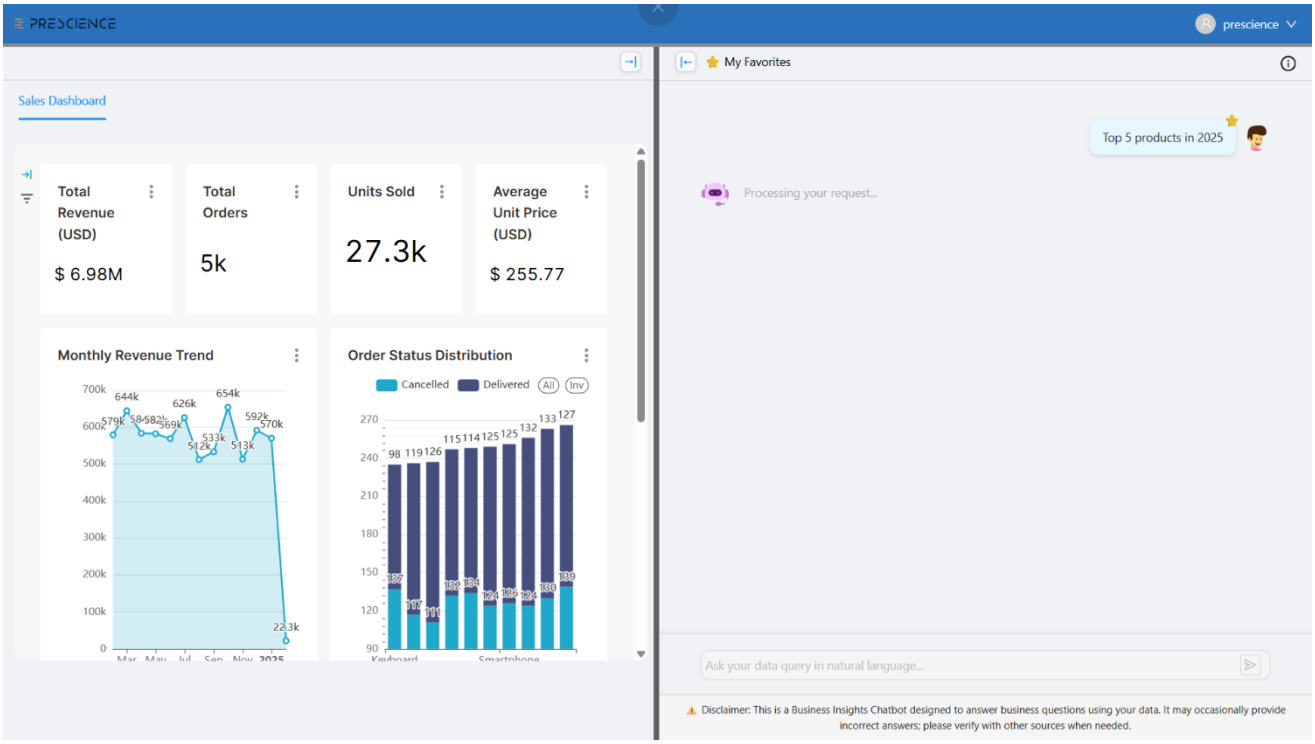

Image 55: Chatbot shows "Processing your request..." while generating the response

After a few seconds, the chatbot will respond with the answer based on the dataset assigned to the user.

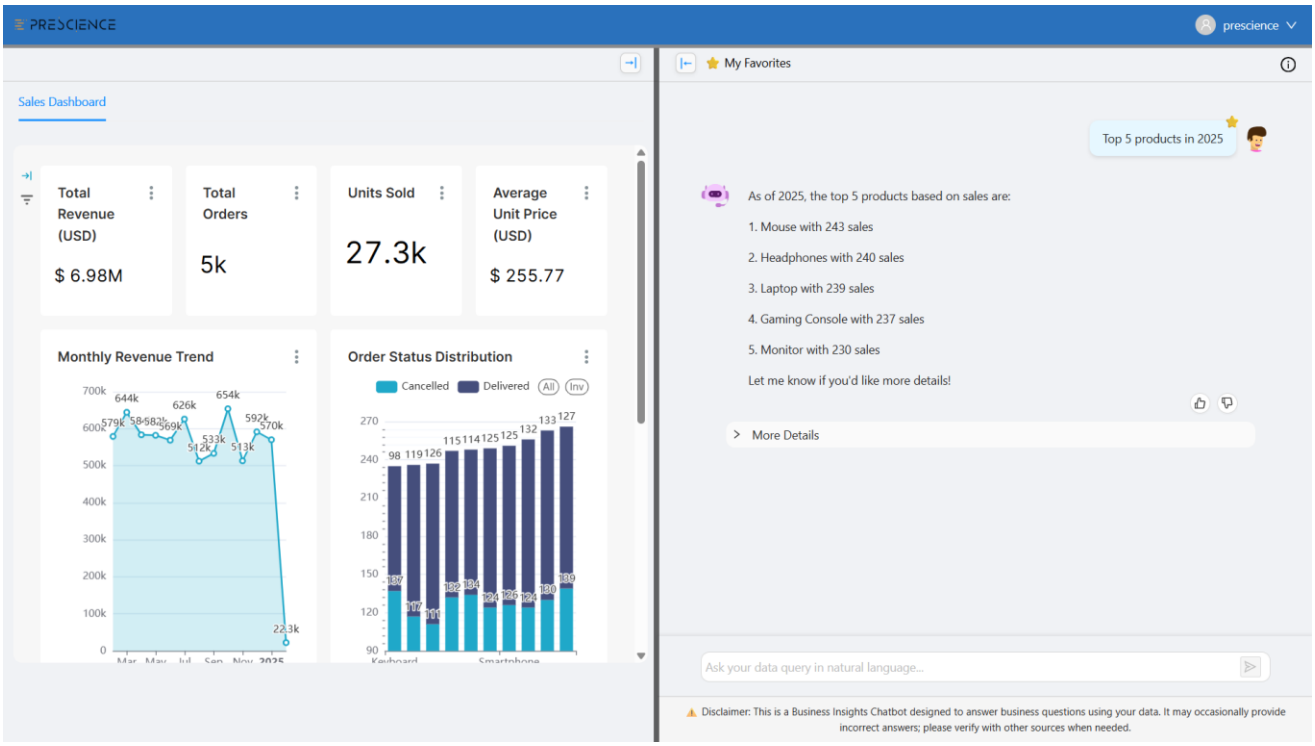

Image 56: Result is displayed in the conversation pane

🟧 **Feedback Feature**: At the end of each chatbot response, users can provide feedback using the thumbs up (👍) or thumbs down (👎) icons. This feature allows users to express whether the response was helpful or not. Feedback collected here can be used to fine-tune and improve chatbot performance over time.

10.3. Exploring Detailed Visualizations in the Chatbot

After a user submits a query to the chatbot (e.g., “Top 5 products in 2025”), the chatbot not only returns a textual summary of the result but also offers an expandable **More Details** section. This section provides a deeper analytical view of the result using different visualization types (Table, Bar Chart, Line Chart, Area Chart) and includes the ability to export the data in CSV format. These tools empower users to interpret results more intuitively and share them for further analysis.

Follow these steps to Explore the “More Details” Section:

Click on the **More Details** dropdown below the chatbot response. This section is collapsed by default.

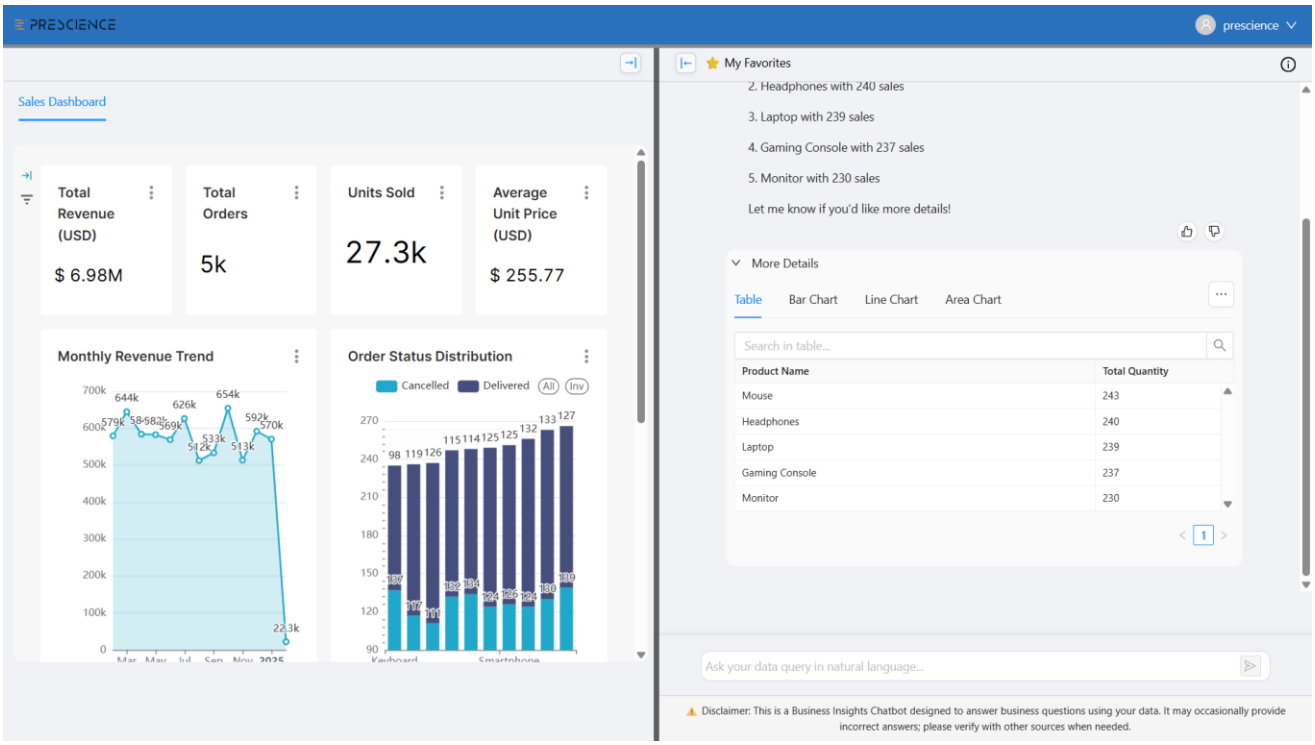

Image 57: Expand the “More Details” section

Use the tabs to switch between different visual formats:

- **Table**: Displays raw data in tabular form
- **Bar Chart**: Displays sales comparison using vertical bars
- **Line Chart**: Plots sales trend across items
- **Area Chart**: Highlights volume of sales with shaded areas

Each chart is dynamically generated based on the same query result.

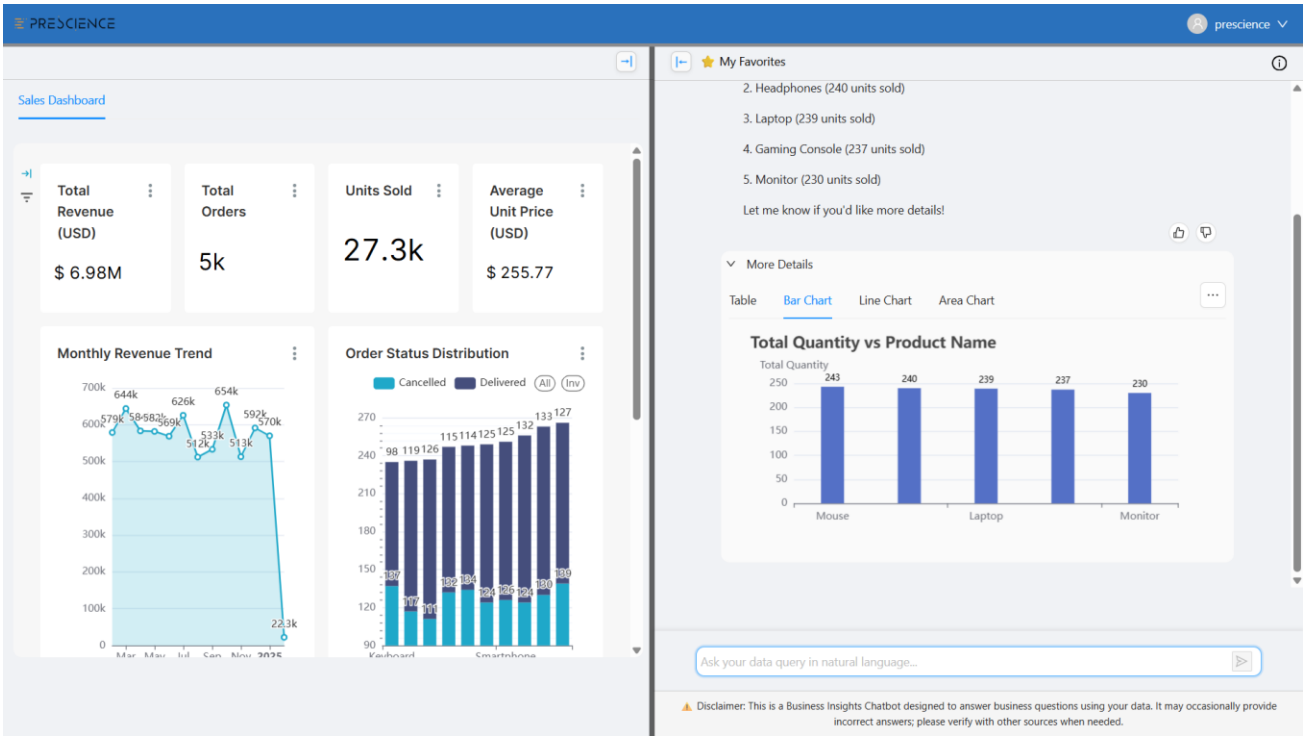

Image 58: Bar chart view

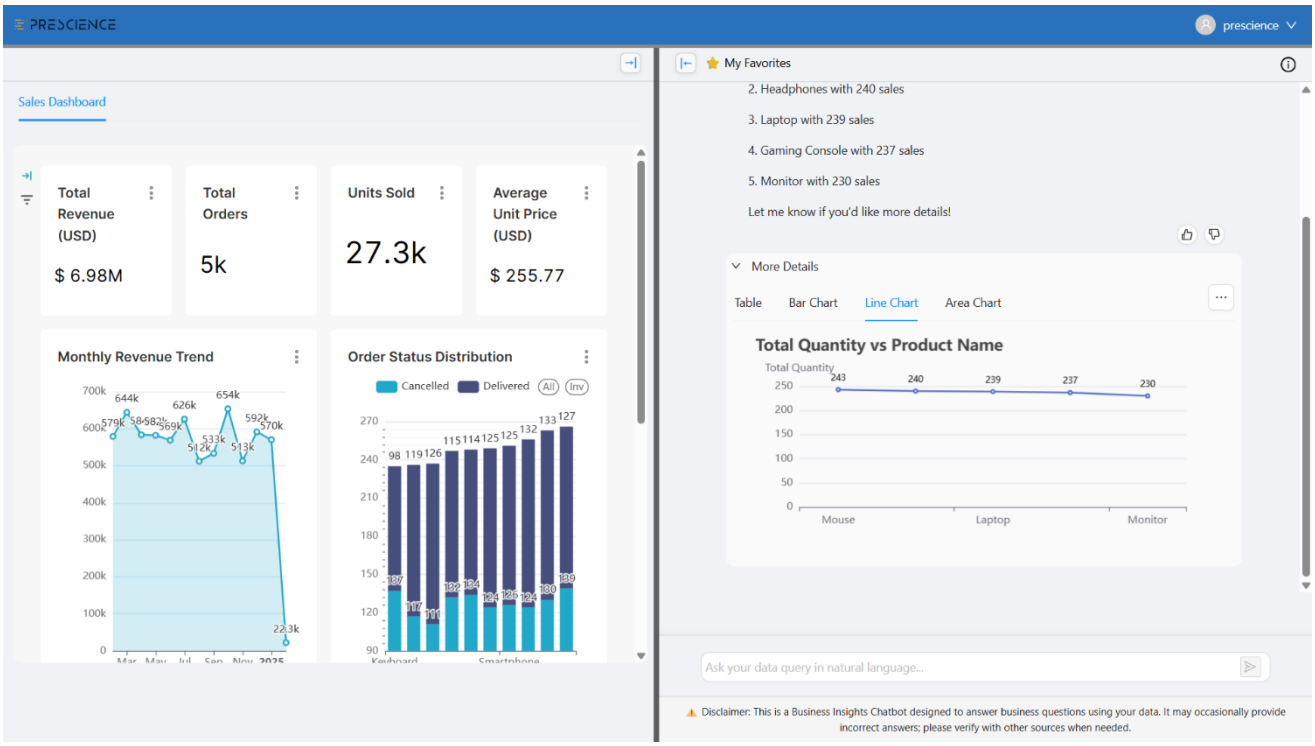

Image 59: Line chart view

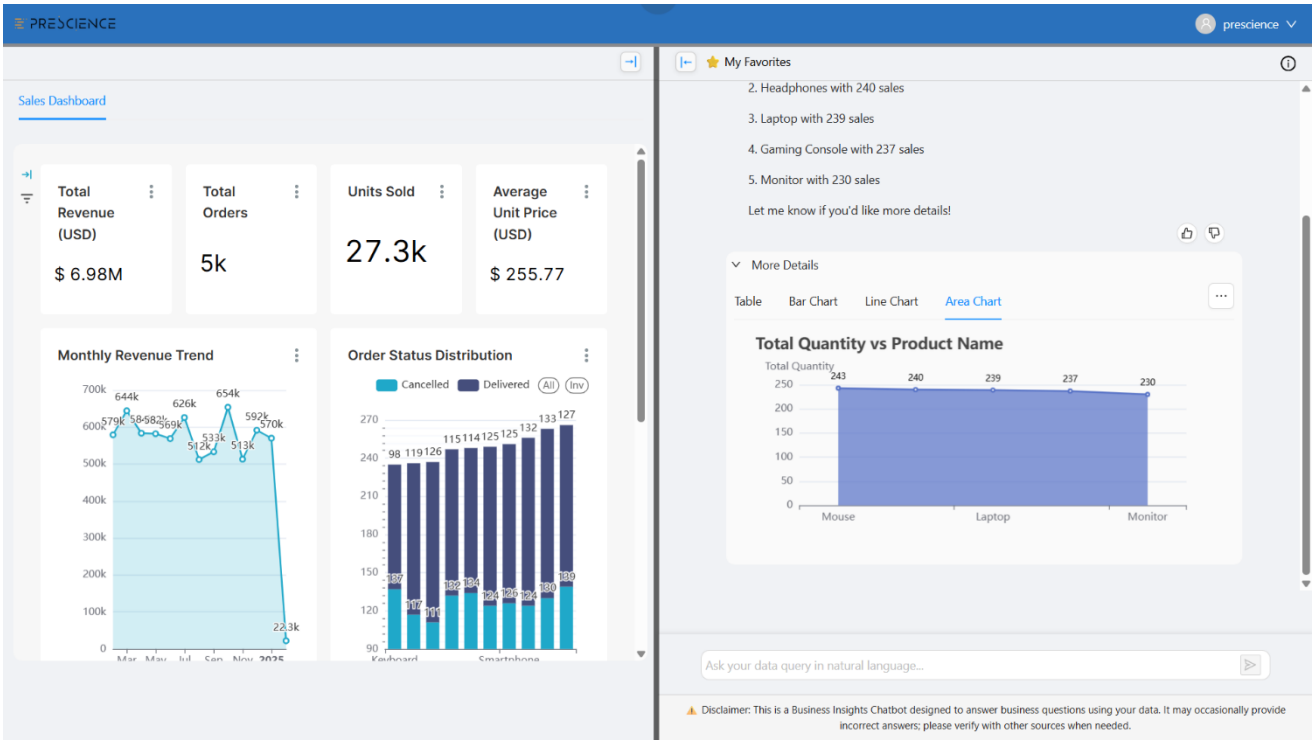

Image 60: Area chart view

Click on the **three-dot menu** on the right corner of the More Details section and select **Export as CSV**. This allows users to download and share the tabular data for offline analysis.

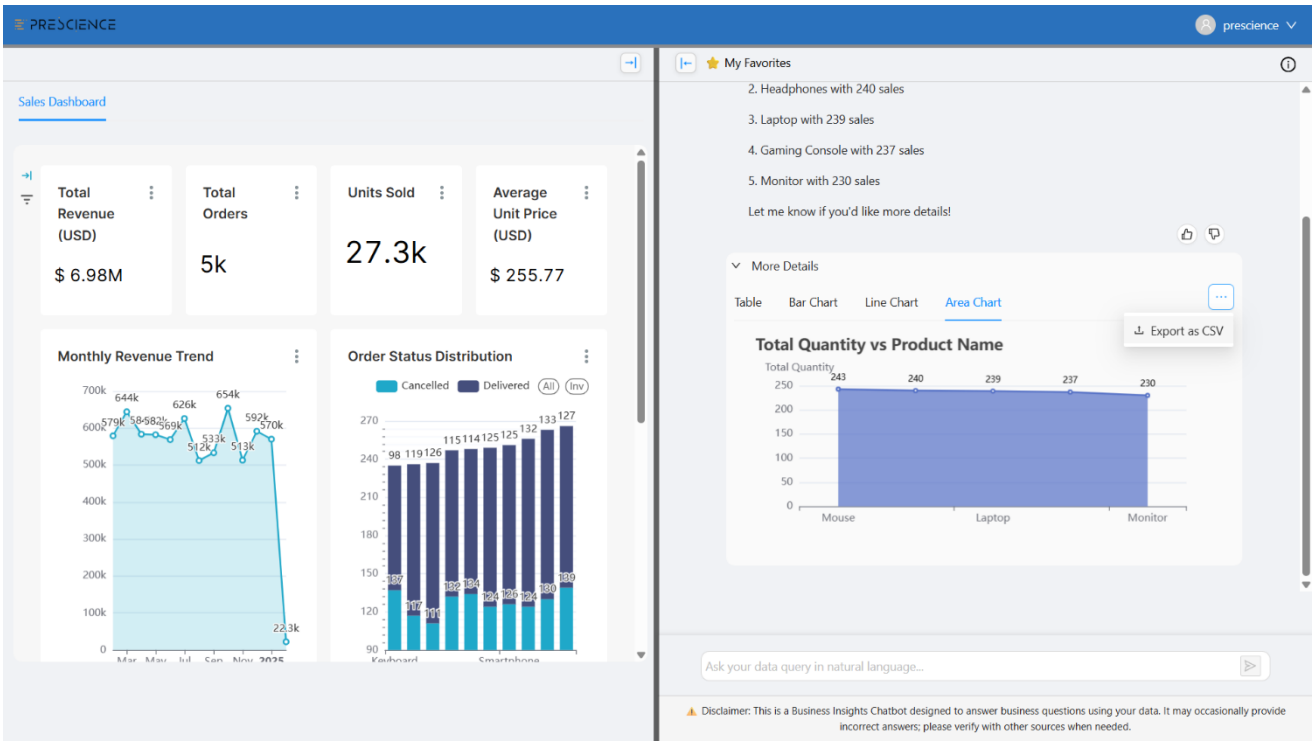

Image 61: Export the result as CSV

10.4. Follow-up Querying with Session Context

One of the key advantages of the Biz Genie is its ability to maintain **conversational context**. Users can ask **follow-up questions** like “last year” without restating the original query, and the chatbot intelligently infers context from previous interactions (e.g., “Top 5 products in 2025”) to provide a relevant response (e.g., for 2024). This allows for a more natural, human-like conversation flow.

Follow these steps to ask a follow-up question using Session Context:

In the chatbot input box, type a context-aware follow-up question such as **“last year”**. This assumes the chatbot has previously answered a question like “Top 5 products in 2025”.

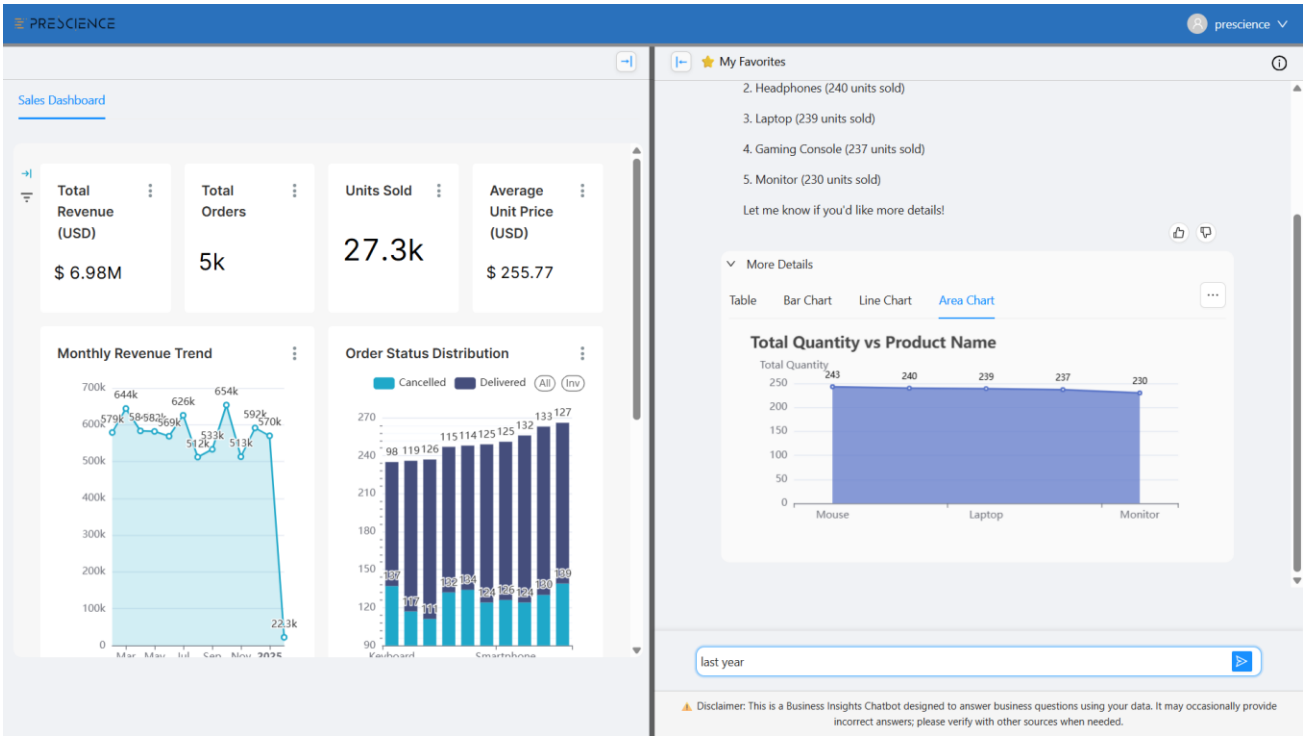

Image 62: Enter the follow-up query

After hitting the **send** icon or pressing **Enter**, the chatbot processes your request using **session history and context** from the last query.

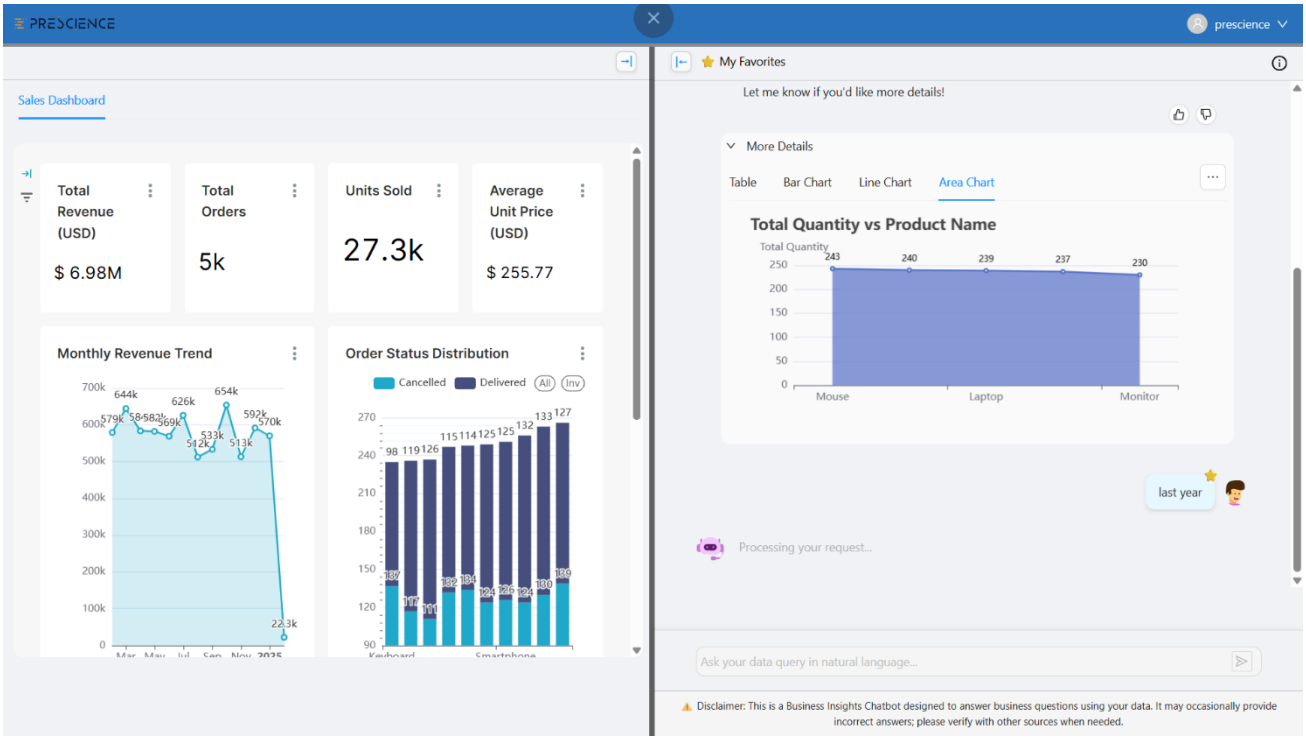

Image 63: Chatbot processes the query

The chatbot returns a new response, automatically translating “last year” into the correct time period (e.g., 2024) and displays the top-selling products for that year.

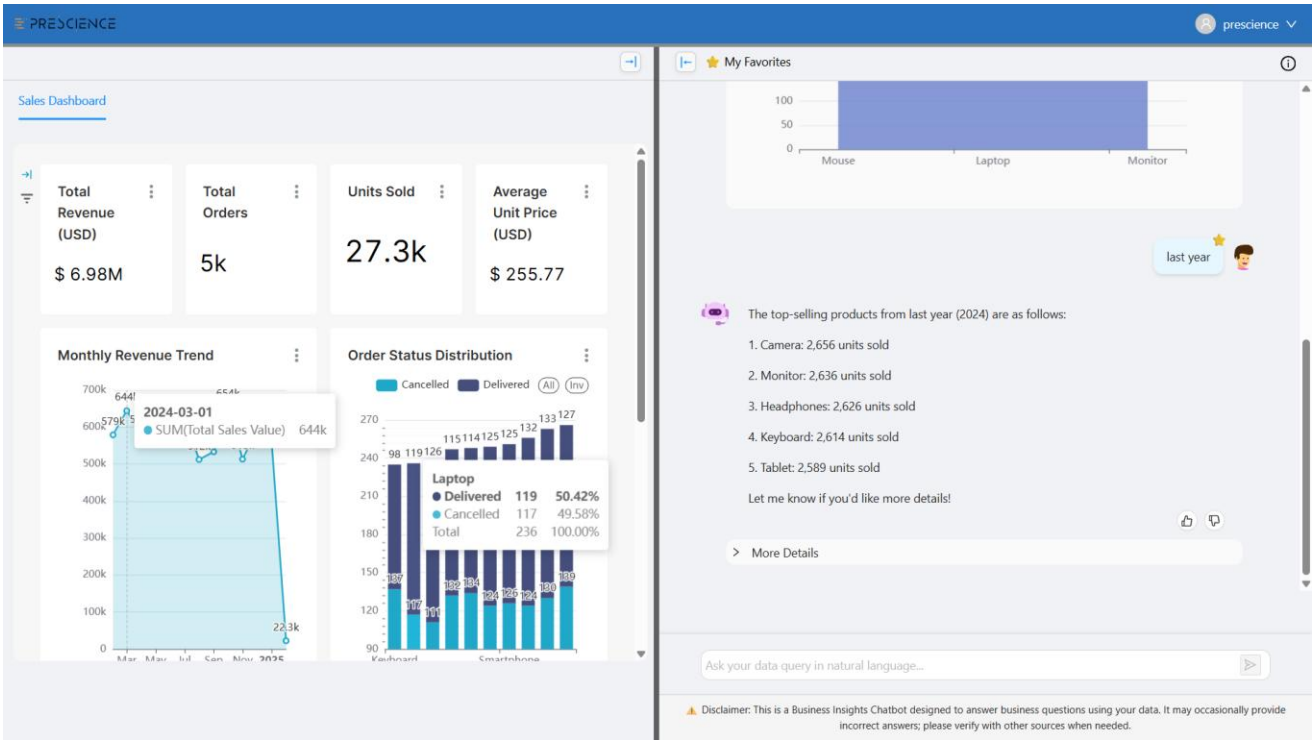

Image 64: Chatbot returns a list like “Top 5 products in 2024” with quantities

10.5. Bookmarking Queries for Quick Reuse

The Biz Genie allows users to bookmark frequently used queries. This feature saves time by letting users run a saved query again with a single click instead of typing it out each time. Bookmarked queries appear in the **My Favorites** section and can be selected to instantly populate the input box with the corresponding query.

Follow these steps to bookmark a query and reuse it:

Once the chatbot returns an answer to your query, click on the **star icon** next to the user message bubble to bookmark it.

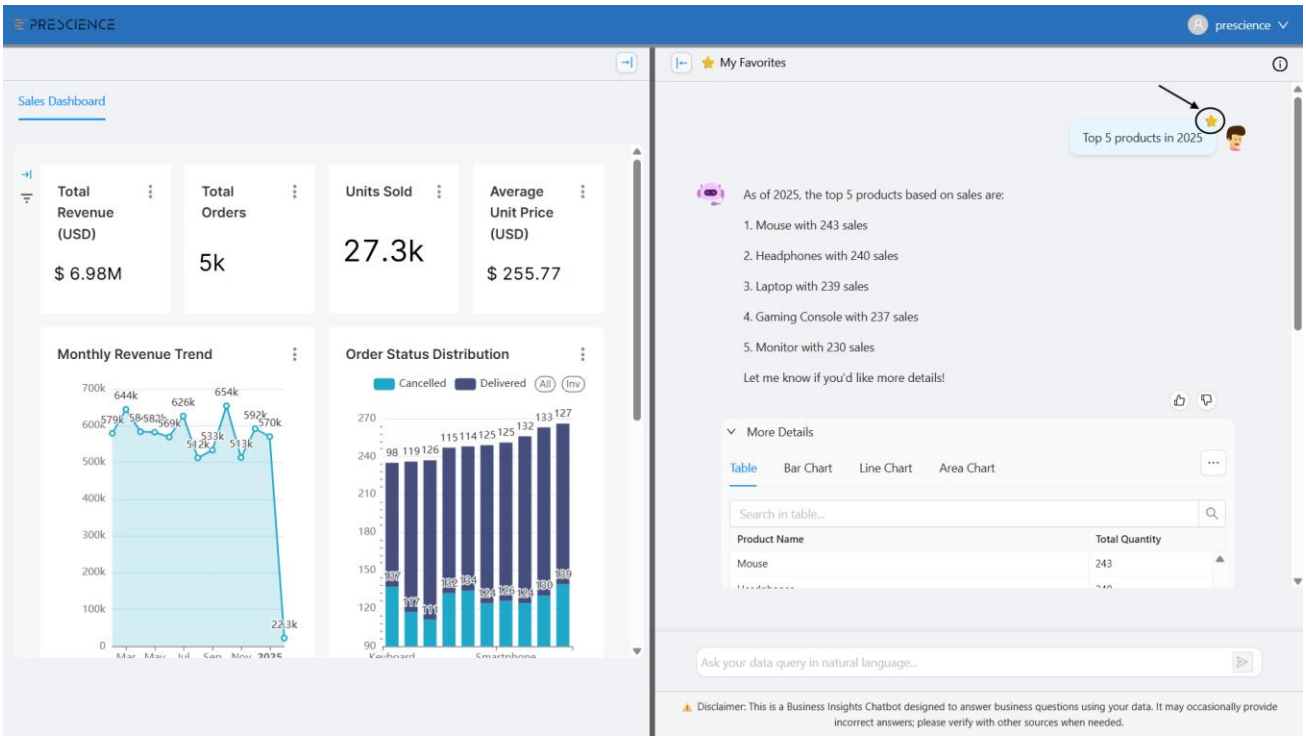

Image 65: Star icon clicked for "Top 5 products in 2025"

After clicking the star icon, a dialog box titled **Add Favorite** appears.

- In the **Name** field, enter a recognizable name for your bookmark (e.g., Top 5)
- The **Description** field is **automatically populated with the query text** on which you clicked the star icon
- If you wish to modify the bookmarked query for better clarity or rephrasing, you can **edit the Description field**

Click **Add** to save the bookmark.

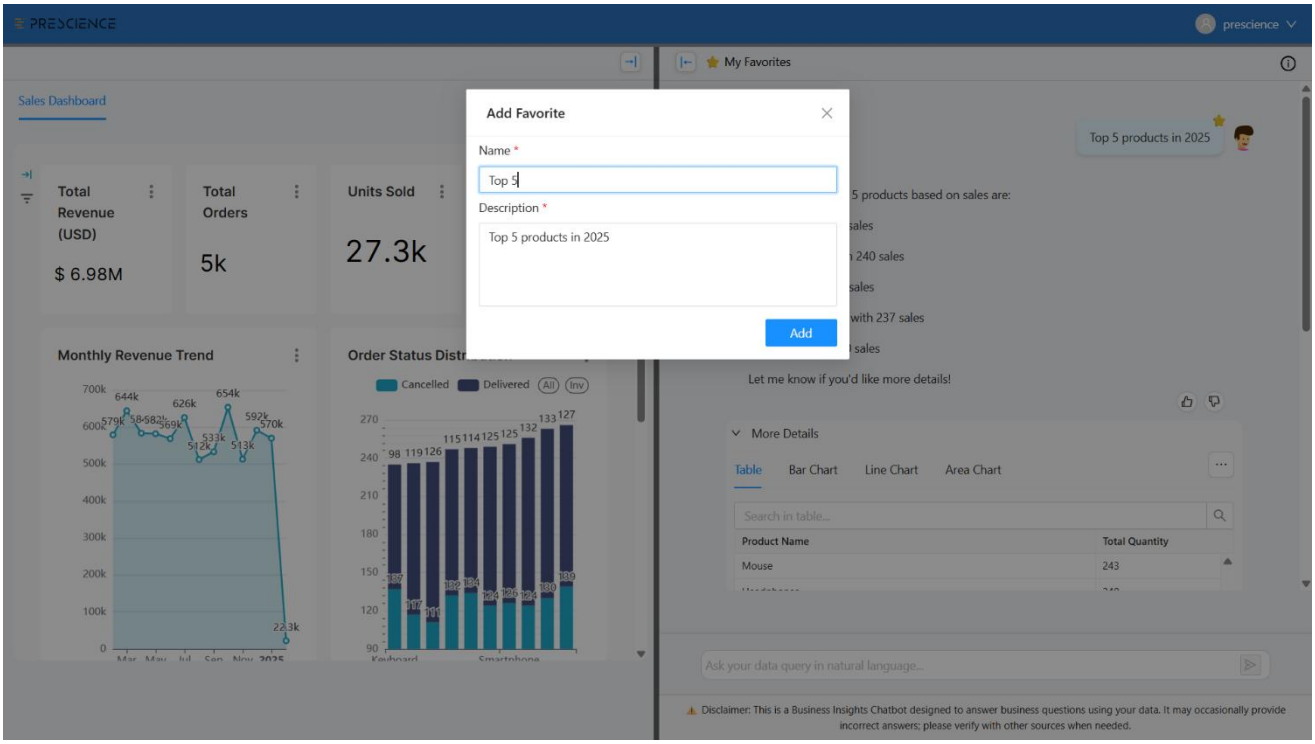

Image 66: Enter bookmark name and Modify description (If needed)

A green notification appears in the top-right corner confirming that your query has been added to Favorites.

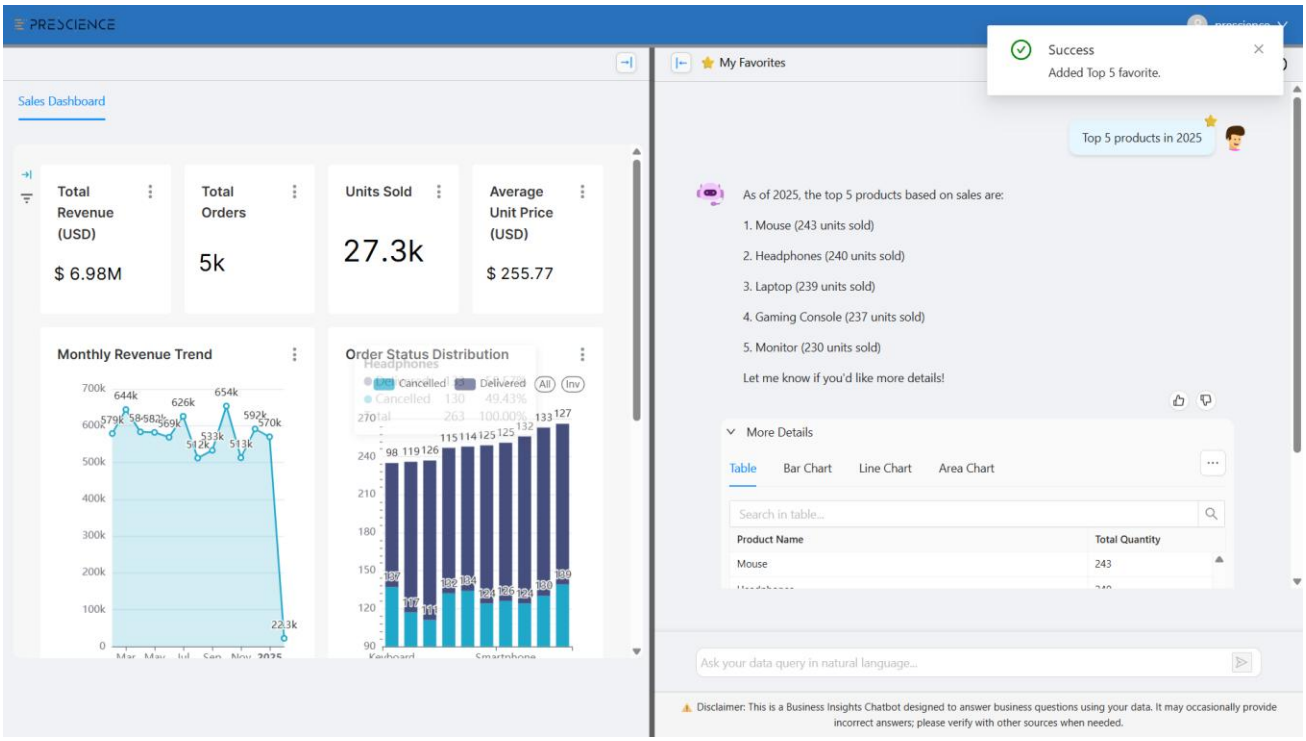

Image 67: Confirmation of bookmark saved

Your bookmarked query now appears under **My Favorites** on the top of the chat panel.

Click on the saved favorite (e.g., Top 5) and the query **automatically populates the chatbot input box**.

You can now hit **Enter** or click the **send icon (➤)** to execute the query again without retyping.

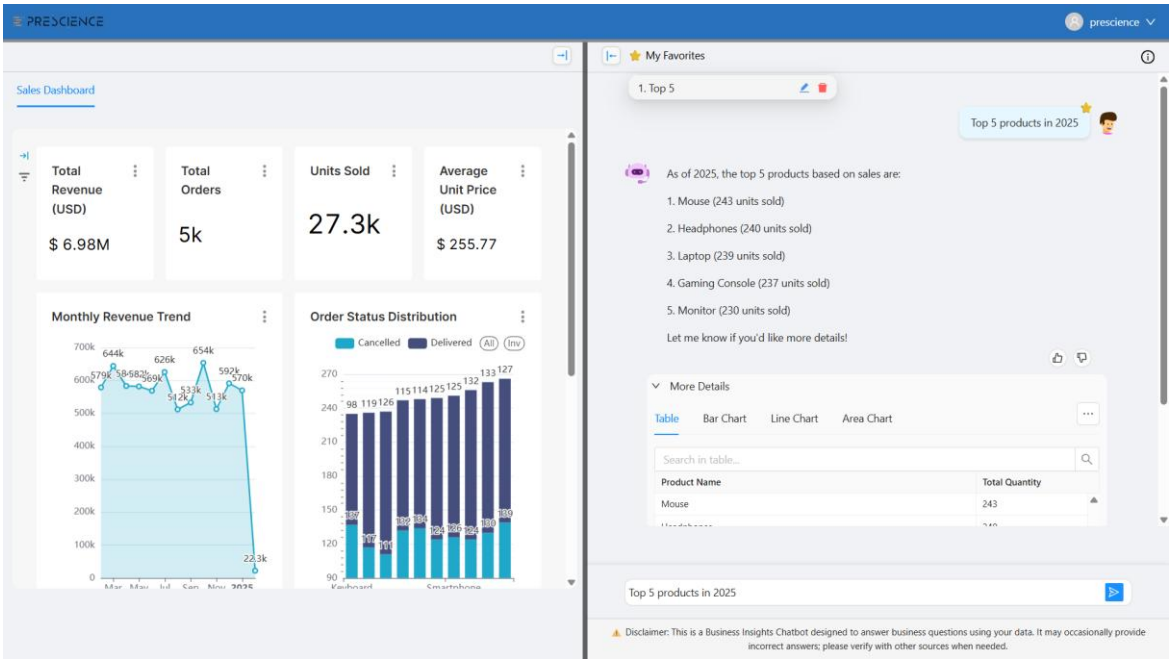

Image 68: Use the bookmark to reuse a query

11. Viewing Chat History (Admin Only)

The **Chat History** section provides administrators with visibility into all queries made by users within the system. This feature allows Admins to monitor how user questions are interpreted by the LLM, review the generated SQL queries, track resource usage (tokens and cost), view user feedback, and take actions to improve future query handling.

Follow these steps to view Chat History:

Go to the application URL (http://<server_IP_address>) and log in using the vadmin credentials:

- **Username:** vadmin
- **Password:** Vadmin321$

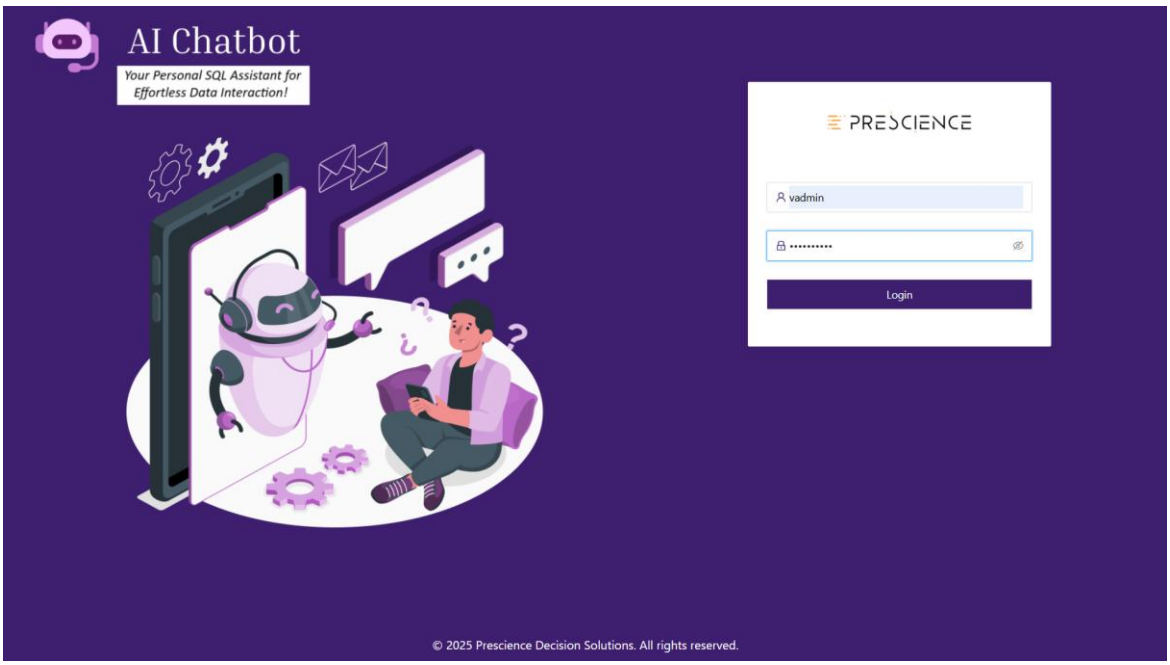

Image 69: Login as vadmin

After logging in, click the **Chat History icon** (🕑) from the left-hand sidebar.

The Chat History page will display a list of all previously executed queries in tabular format. Each row in the table includes the following information:

- **User Question**: The natural language query entered by the user
- **Translated SQL Query**: The SQL statement generated by the LLM based on the user's input
- **Tokens Used**: Displays input, output, and total tokens consumed to process the query
- **Cost**: The associated token cost of the query execution
- **Timestamp**: The date and time when the query was submitted
- **User Feedback**: Displays whether the user gave a thumbs up (👍) or thumbs down (👎) on the chatbot's response. This helps identify which responses were considered helpful by users
- **Actions**: Allows Admins to add a specific user question and its corresponding SQL translation directly as a new entry under SQL Examples for the related dataset

Example:
For the query "Top 5 products in 2025", the chatbot generated a SQL query on the public.ecom_sales_dnd table and used 865 total tokens at $0.0031 cost. The follow-up query "last year" was interpreted correctly with 957 tokens used.

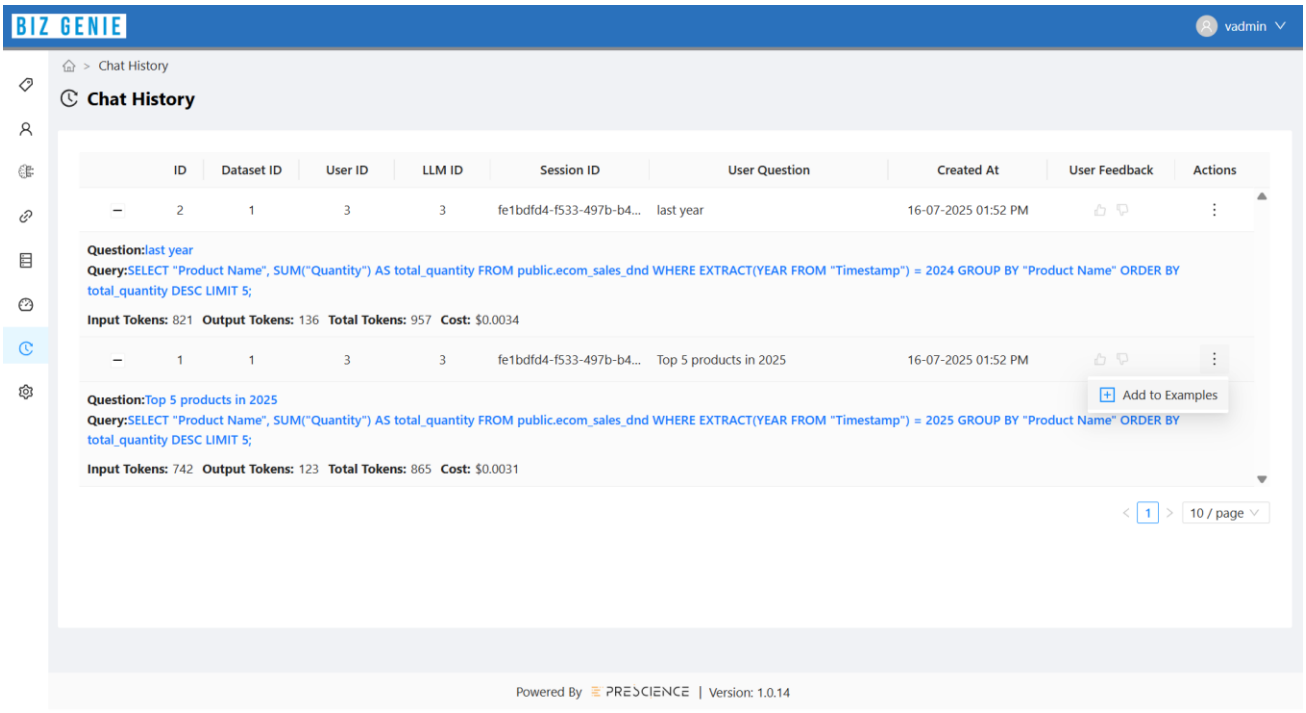

Image 70: Navigate to Chat History section

12. License Installation

How to purchase a license?
To purchase a license, reach out to Prescience Support at info@prescienceds.com. Our team will get back to you shortly.

Contact us:
In case of any sales and support queries, drop an email to info@prescienceds.com and our team will get back to you shortly.