Build a Financial Documents Assistant using Qdrant and Mistral.ai

Link: https://n8n.io/workflows/2335-build-a-financial-documents-assistant-using-qdrant-and-mistralai/

Template description

This n8n workflow demonstrates how to manage your Qdrant vector store when there is a need to keep it in sync with local files. It covers creating, updating and deleting vector store records ensuring our chatbot assistant is never outdated or misleading.

Disclaimer

This workflow depends on local files accessed through the local filesystem and so will only work on a self-hosted version of n8n at this time. It is possible to amend this workflow to work on n8n cloud by replacing the local file trigger and read file nodes.

How it works

- A local directory where bank statements are downloaded to is monitored via a local file trigger. The trigger watches for the file create, file changed and file deleted events.
- When a file is created, its contents are uploaded to the vector store.
- When a file is updated, its previous records are replaced.
- When the file is deleted, the corresponding records are also removed from the vector store.
- A simple Question and Answer Chatbot is setup to answer any questions about the bank statements in the system.

Requirements

- A self-hosted version of n8n. Some of the nodes used in this workflow only work with the local filesystem.
- Qdrant instance to store the records.

Customising the workflow

This workflow can also work with remote data. Try integrating accounting or CRM software to build a managed system for payroll, invoices and more.

Want to go fully local?

A version of this workflow is available which uses Ollama instead. You can download this template here: https://drive.google.com/file/d/189F1fNOiw6naNSlSwnyLVEm_Ho_IFfdM/view?usp=sharing

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