🎉 START HERE - Life Insurance Dashboard

Welcome! You have everything you need to deploy your Syntex Data dashboard.

📬 What You Got

All files for a complete AI-powered life insurance dashboard:

- ✅ Streamlit app with Syntex Data branding

- ✅ AI insights powered by Claude

- ✅ Interactive charts and analytics

- ✅ Risk & upsell identification

- ✅ Jupyter Notebook for easy deployment

🚀 Fastest Way to Deploy (3 Options)

Option 1: Use Jupyter Notebook ⭐ RECOMMENDED

1. **Open:** `DEPLOY_FROM_JUPYTER.ipynb` in Jupyter

2. **Run:** Each cell in order (Shift + Enter)

3. **Follow:** The step-by-step instructions

4. **Done!** Your dashboard will be live

Why this is easiest:

- No terminal commands to remember

- Everything in one place

- Clear instructions for each step

- Handles errors gracefully

Option 2: Quick Command Line

```
bash
```

```
# 1. Generate data
python generate_sample_data.py

# 2. Test locally
streamlit run streamlit_app.py

# 3. Deploy to GitHub
git init
git add .
git commit -m "Initial commit"
git remote add origin https://github.com/YOUR_USERNAME/YOUR_REPO.git
git push -u origin main

# 4. Go to share.streamlit.io and deploy
```

Option 3: Use GitHub Desktop

1. Download GitHub Desktop: https://desktop.github.com

2. Open GitHub Desktop

3. File → Add Local Repository

4. Select this folder

5. Commit changes

6. Publish to GitHub

7. Deploy on share.streamlit.io

🔑 You'll Need

Before deploying:

☐ GitHub account (free at github.com)
☐ Anthropic API key (get at console.anthropic.com)

That's it!

📊 Files Overview

File	Purpose
DEPLOY_FROM_JUPYTER.ipynb	🎯 **START HERE** - Deployment guide
streamlit_app.py	Main dashboard application
requirements.txt	Python dependencies
generate_sample_data.py	Creates test data
.streamlit/config.toml	Syntex Data theme colors
README.md	Complete documentation

✨ Quick Test (Without Deploying)

Want to see it locally first?

```bash
# 1. Install dependencies
pip install -r requirements.txt

# 2. Generate sample data
python generate_sample_data.py

# 3. Create secrets file (optional, for AI features)
echo 'ANTHROPIC_API_KEY = "your-key"' > .streamlit/secrets.toml

# 4. Run the app
streamlit run streamlit_app.py
```

Opens at: http://localhost:8501

🎯 What You'll See

When you run the dashboard:

1. **Sidebar** - Upload CSV, view stats

2. **Metrics** - 4 key cards (customers, coverage, risk, opportunities)

3. **4 Tabs:**
   - 📈 Overview - Charts & AI insights
   - 🎯 Upsell - Opportunity recommendations
   - ⚠️ Risk - High-risk customer analysis
   - 🤖 AI Chat - Ask questions about data

🔐 Adding Your API Key

For Local Testing:

```bash
echo 'ANTHROPIC_API_KEY = "sk-ant-your-key"' > .streamlit/secrets.toml
```

For Streamlit Cloud:

1. App Settings → Secrets
2. Paste: `ANTHROPIC_API_KEY = "your-key"`
3. Save

Without API key: Everything works except AI insights and chat.

📊 Using Your Data

Upload Through UI (Easiest):

- Click "Upload CSV" in sidebar
- Select your file
- Done!

Replace Sample Data:

```bash
cp your-data.csv data/life_insurance_data.csv
```

Required columns:

- primary_full_name, dob, insurance_face_amount

- policy_type, tobacco_use, has_medical_conditions

- hospitalization_history, height, weight, state

- (See README.md for complete list)

🎨 Branding

Already customized with **Syntex Data** colors:

- **Primary:** Burnt Orange (🟧 #B75400)

- **Secondary:** Charcoal Gray (⬛ #5B3333)

- **Background:** Light (⬜ #EBFFF7)

To change:

- Edit `.streamlit/config.toml` for colors

- Edit `streamlit_app.py` line ~85 for company name

🆘 Common Issues

"No module named 'streamlit'"

```bash
pip install -r requirements.txt
```

"No data loaded"

```bash
python generate_sample_data.py
```

"Git not found"

- Install from: https://git-scm.com/downloads

"Permission denied" on GitHub

- Use Personal Access Token, not password

- Get at: https://github.com/settings/tokens

📚 Where to Get Help

1. **DEPLOY_FROM_JUPYTER.ipynb** - Detailed walkthrough

2. **README.md** - Complete documentation

3. **Streamlit Docs** - https://docs.streamlit.io

4. **GitHub Docs** - https://docs.github.com

✅ Quick Deployment Checklist

☐ Open DEPLOY_FROM_JUPYTER.ipynb

☐ Run all cells in order

☐ Create GitHub repository

☐ Push code to GitHub

☐ Deploy on share.streamlit.io

☐ Add API key in secrets

☐ Test live app

☐ Share with team!

🎉 You're Ready!

Three ways to proceed:

1. **Best:** Open `DEPLOY_FROM_JUPYTER.ipynb` and follow along

2. **Quick:** Test locally with `streamlit run streamlit_app.py`

3. **Manual:** Follow README.md deployment steps

Built by Syntex Data

Unlock the Power of AI. From Data to Deployment.

🚀 Let's deploy your dashboard!