Transaction_ID	CreatedAt	Status	task_name	TaskID Lead_ID	AssignedToRole	AssignedToName	AssignedByRole	AssignedByName	StatusUpdatedByRole	StatusUpdatedByName	Service_Name	update_description
332	2023-09-16 17:53:24	New	cask_name	nan nan	/ issigned ionore	, is signed for talline	7.55igireabyrtoie	, is signed by it diffe	Admin	admin	Policy Planner Claim Assistance Service	
333	2023-09-16 17:53:56	Contacted		nan nan							Policy Planner Claim Assistance Service	
334	2023-09-16 17:55:00	Qualified		nan nan							Policy Planner Claim Assistance Service	
335	2023-09-16 17:56:27	Assigned	Receiving Claim Request	151.0 nan			Admin	admin	Admin	admin	Policy Planner Claim Assistance Service	
336	2023-09-27 15:46:24	Assigned	Documenting Claim Details	152.0 nan			Admin	admin	Admin	admin	Policy Planner Claim Assistance Service	
337	2023-10-02 15:15:16	Qualified  Assigned	Reviewing Financial Records	nan nan 153.0 nan							Easy Tax Planner Tax Deduction Optimize	er
339	2023-10-02 15:15:54	Assigned	Calculating Deduction Amounts	154.0 nan							Easy Tax Planner Tax Deduction Optimize	
340	2023-10-02 15:16:35	Qualified		nan nan								
341	2023-10-02 15:16:58	Assigned	Receiving Claim Request	155.0 nan			Admin	admin	Admin	admin	Policy Planner Claim Assistance Service	
342	2023-10-02 15:17:06	Assigned	Ensuring Efficient Claim Process	156.0 nan			Admin	admin	Admin	admin	Policy Planner Claim Assistance Service	
343	2023-10-02 15:17:14 2023-10-02 15:17:22	Assigned  Assigned	Coordinating with Relevant Parties  Documenting Claim Details	157.0 nan 158.0 nan			Admin Admin	admin admin	Admin Admin	admin admin	Policy Planner Claim Assistance Service  Policy Planner Claim Assistance Service	
345	2023-10-02 13:17:22	Assigned	Coordinating with Relevant Parties	159.0 nan			Admin	admin	Admin	admin	Policy Planner Claim Assistance Service  Policy Planner Claim Assistance Service	
346	2023-10-16 17:21:18	New		nan 332.0							Policy Planner Claim Assistance Service	
347	2023-10-16 17:23:03	Contacted		nan 332.0							Policy Planner Claim Assistance Service	
348	2023-10-16 17:24:14	Qualified		nan 332.0							Policy Planner Claim Assistance Service	
349	2023-10-16 17:29:41	Assigned	Receiving Claim Request	160.0 332.0			Admin	admin	Admin	admin	Policy Planner Claim Assistance Service	
350	2023-10-16 17:29:50 2023-10-16 17:35:38	Assigned  New	Documenting Claim Details	161.0 332.0 nan 333.0			Admin	admin	Admin	admin	Policy Planner Claim Assistance Service  Docs Planner Document Organization and Ret	
352	2023-10-26 17:52:51	Contacted		nan 334.0								
353	2023-10-26 17:53:13	Qualified		nan 334.0								
354	2023-10-31 10:57:57	Assigned	Receiving Claim Request	162.0 334.0			Admin	admin	Admin	admin	Policy Planner Claim Assistance Service	
355	2023-10-31 10:58:01	Assigned	Documenting Claim Details	163.0 334.0			Admin	admin	Admin	admin	Policy Planner Claim Assistance Service	
356	2023-10-31 10:58:07	Assigned	Coordinating with Relevant Parties	164.0 334.0			Admin	admin	Admin	admin	Policy Planner Claim Assistance Service	
357	2023-10-31 10:58:14 2023-10-31 16:47:17	Assigned  New	Ensuring Efficient Claim Process	165.0 334.0 nan 336.0			Admin	admin	Admin	admin	Policy Planner Claim Assistance Service  Docs Planner Document Organization and Ret	
359	2023-10-31 10:47:17	Contacted		nan 336.0							Docs Planner Document Organization and Ret	
360	2023-10-31 16:50:45	Qualified		nan 336.0							Docs Planner Document Organization and Ret	
361	2023-10-31 16:52:09	Assigned	Cataloging Documents	166.0 336.0							Docs Planner Document Organization and Ret	ri
362	2023-10-31 16:52:27	Assigned	Creating Digital Storage System	167.0 336.0							Docs Planner Document Organization and Ret	
363	2023-10-31 00:00:00	Pending In-progress	Cataloging Documents  Cataloging Documents	166.0 336.0 166.0 336.0							Docs Planner Document Organization and Ret	
364	2023-10-31 00:00:00	In-progress  Completed	Cataloging Documents  Cataloging Documents	166.0 336.0 166.0 336.0							Docs Planner Document Organization and Ret  Docs Planner Document Organization and Ret	
366	2023-10-31 00:00:00	In-progress	Cataloging Documents	167.0 336.0							Docs Planner Document Organization and Ret	
367	2023-10-31 00:00:00	Completed	Cataloging Documents	167.0 336.0							Docs Planner Document Organization and Ret	done
368	2023-10-31 17:00:59	Qualified		nan nan								
369	2023-10-31 17:02:06	Assigned	Collecting Financial Data	168.0 nan							Easy Tax Planner Automated Tax Calculation	
370	2023-10-31 00:00:00	Pending In-progress	Collecting Financial Data  Collecting Financial Data	168.0 nan 168.0 nan							Easy Tax Planner Automated Tax Calculation	
371	2023-10-31 00:00:00	In-progress  Completed	Collecting Financial Data  Collecting Financial Data	168.0 nan 168.0 nan							Easy Tax Planner Automated Tax Calculation	
373	2023-11-03 11:54:57	Assigned	Documenting Claim Details	169.0 332.0			Admin	admin	Admin	admin	Policy Planner Claim Assistance Service	
374	2023-11-03 11:56:09	Contacted		nan 335.0								
375	2023-11-03 11:57:55	Contacted		nan 335.0								
376	2023-11-03 11:58:59	Qualified Pending	Receiving Claim Barrer	nan 339.0 162.0 334.0			Λ -1 ! -	a alore to			Policy Planner Claire	n a malling
377	2023-10-31 00:00:00	Pending  New	Receiving Claim Request	162.0 334.0 nan 340.0			Admin	admin			Policy Planner Claim Assistance Service  Policy Planner Claim Assistance Service	
378	2023-11-03 13:56:31	New		nan 340.0 nan 341.0							Policy Planner Claim Assistance Service  Policy Planner Claim Assistance Service	
380	2023-11-03 14:55:37	Qualified		nan 335.0								
381	2023-11-04 13:33:02	Contacted		nan 341.0							Policy Planner Claim Assistance Service	
382	2023-11-04 13:35:24	Contacted		nan 341.0							Policy Planner Claim Assistance Service	
383	2023-11-04 13:44:27	Contacted		nan 341.0							Policy Planner Claim Assistance Service	
384	2023-11-04 13:46:12	Qualified  Qualified		nan 341.0 nan 337.0							Policy Planner Claim Assistance Service	
385	2023-11-04 15:27:47 2023-11-04 15:37:49	Qualified New		nan 337.0 nan 342.0					Admin	admin	Docs Planner Compliance Checklist Service	e
387	2023-11-04 15:37:49	New		nan 343.0					Admin	admin	Fund Planner Goal-Based Investment Plan	
388	2023-11-04 15:46:58	Contacted		nan 342.0							Docs Planner Compliance Checklist Servic	e
389	2023-11-04 15:47:21	Contacted		nan 343.0							Fund Planner Goal-Based Investment Plan	ns
390	2023-11-04 15:47:48	Qualified		nan 342.0							Docs Planner Compliance Checklist Service	
391	2023-11-04 15:47:59	Qualified		nan 343.0							Fund Planner Goal-Based Investment Plan	
392	2023-11-04 15:51:14 2023-11-18 16:33:45	Assigned  New	Designing Investment Strategies	170.0 343.0 nan 344.0					Admin	admin	Fund Planner Goal-Based Investment Plan  Docs Planner Compliance Checklist Service	
394	2023-11-18 16:35:27	Contacted		nan 344.0							Docs Planner Compliance Checklist Service	
395	2023-11-18 16:36:38	Qualified		nan 344.0							Docs Planner Compliance Checklist Service	e
396	2023-11-18 16:38:59	Assigned	Identifying Regulatory Requirements	171.0 344.0							Docs Planner Compliance Checklist Service	e
397	2023-11-18 00:00:00	Pending	Identifying Regulatory Requirements	171.0 344.0							Docs Planner Compliance Checklist Service	
398	2023-11-18 00:00:00	Completed	Identifying Regulatory Requirements	171.0 344.0							Docs Planner Compliance Checklist Service	e completed
400	2023-11-18 16:54:18 2023-11-28 10:41:22	Qualified  New		nan 348.0 nan 351.0					Billing Department	SHUBHANGI BIDVE	Docs Planner Compliance Checklist Service	e
401	2023-11-28 10:44:41	New		nan 352.0					Executor	JAYSHREE BHALCHANDRA DHA		
402	2023-11-28 11:32:43	New		nan 353.0							Policy Planner Claim Assistance Service	
403	2023-11-28 11:36:32	Contacted		nan 353.0					Relation Manager	nikita vibhute	Policy Planner Claim Assistance Service	
404	2023-12-01 11:54:25	New		nan 354.0					Billing Department	SHUBHANGI BIDVE		
405	2023-12-01 15:03:46 2023-12-02 17:14:55	New		nan 355.0 nan 356.0					Manager  Executor	CS Pallavi passwala Pranal Thakare	Docs Planner Document Organization and Ret	.[]
406	2023-12-02 17:14:55	New		nan 356.0 nan 356.0					Executor	Pranal Thakare  Pranal Thakare		
408	2023-12-02 17:27:32	New		nan 357.0					Relation Manager	Sandhya jadhav	Easy Tax Planner Automated Tax Calculation	OI
409	2023-12-04 10:03:35	New		nan 358.0					Manager	CS Pallavi passwala	Docs Planner Document Organization and Ret	ri
410	2023-12-04 10:49:04	New		nan 359.0					Manager		Docs Planner Document Organization and Ret	
411	2023-12-04 17:30:31	New		nan 360.0					Executor  Billing Department		Policy Planner Claim Assistance Service	
412	2023-12-05 11:34:46 2023-12-05 15:06:38	Qualified New		nan 353.0 nan 357.0					Billing Department  Manager	SHUBHANGI BIDVE  CA ANKITA JAIN	Policy Planner Claim Assistance Service  Easy Tax Planner Automated Tax Calculation	
414	2023-12-05 15:06:44	New		nan 357.0					Manager	CA ANKITA JAIN  CA ANKITA JAIN	Easy Tax Planner Automated Tax Calculation	
415	2023-12-05 17:49:02	New		nan 361.0					Manager	CA ANKITA JAIN	Easy Tax Planner Automated Tax Calculation	DI
416	2023-12-05 17:54:02	Contacted		nan 361.0					Relation Manager	ETP RM	Easy Tax Planner Automated Tax Calculation	01
417	2023-12-05 17:55:12	Qualified		nan 361.0					Billing Department	SHUBHANGI BIDVE	Easy Tax Planner Automated Tax Calculation	
418	2023-12-06 10:44:47	New		nan 351.0 nan 354.0					Relation Manager  Relation Manager	Sandhya jadhav Sandhya jadhav	Docs Planner Compliance Checklist Service  Docs Planner Document Organization and Ret	
419	2023-12-06 10:45:03	New		nan 354.0 nan 354.0					Relation Manager  Relation Manager		Docs Planner Document Organization and Ret	
421	2023-12-06 11:05:08	New		nan 354.0					Relation Manager		Docs Planner Document Organization and Ret	
422	2023-12-06 11:06:36	New		nan 355.0					Relation Manager	Sandhya jadhav	Docs Planner Document Organization and Ret	ri
423	2023-12-06 14:20:50	New		nan 355.0					Relation Manager	Sandhya jadhav	Docs Planner Document Organization and Ret	ri
424	2023-12-06 17:29:28	Contacted		nan 355.0					Relation Manager		Docs Planner Document Organization and Ret	
425	2023-12-06 17:29:50 2023-12-06 17:33:35	Qualified  New		nan 355.0 nan 362.0					Billing Department  Manager		Docs Planner Document Organization and Ret	
426	2023-12-06 17:33:35	New Contacted		nan 362.0 nan 362.0					Manager  Relation Manager	CS JYOTI AMLEKAR  Sandhya jadhav	Docs Planner Document Organization and Ret  Docs Planner Document Organization and Ret	
428	2023-12-06 17:34:55	Qualified		nan 362.0					Billing Department	SHUBHANGI BIDVE		
429	2023-12-06 17:38:39	Assigned	Cataloging Documents	172.0 362.0	Executor	CS DIPALI	Manager	CS JYOTI AMLEKAR	Manager	CS JYOTI AMLEKAR	Docs Planner Document Organization and Ret	ri
430	2023-12-07 11:55:45	Contacted		nan 350.0					Billing Department	Prasad bhadule		
431	2023-12-07 12:56:38	Qualified		nan 350.0					Billing Department	Prasad bhadule		
432	2023-12-07 17:46:52	Qualified		nan 349.0				_	Billing Department	Prasad bhadule	B. W 5.7	
	2023-12-07 17:53:35	Assigned	Receiving Claim Request	173.0 350.0	Executor	Nikita Mane	Manager Manager	Ganesh kamble	Manager	Ganesh kamble	Policy Planner Claim Assistance Service	
433	2023-12-07 00:00:00	In-progress	Receiving Claim Request	173.0 350.0	Executor	Nikita Mane	Manager	Ganesh kamble	Executor	Nikita Mane	Policy Planner Claim Assistance Service	