**Documentation for Classification Scenario**

**Determining Expected Customer Journey**

Customer journey is the sequence of pages that a user visits during the entire quote process as it moves eventually to a terminal state. This journey is not always identical, as in some cases pages might be visited multiple times. For example, adding multiple vehicles to an auto policy might show visiting the same "addauto" page multiple times before moving on.

**Quote Status**

To get the status of a quote, find the latest record associated with that quote where the QuoteStatus column is present (is not null). This is the current status of the quote.

**Example Query For Quote Status**

DECLARE @classification NVARCHAR(50)

SET @classification = 'Comedy Troupes'

DECLARE @startDate DATETIME

DECLARE @endDate DATETIME

SET @startDate = '2025-02-01'

SET @endDate = '2025-03-01'

DECLARE @tenantId INT

SET @tenantId = 8

SELECT

pvd.SessionID,

MAX(pvd.QuoteStatus) AS QuoteStatus,

MAX(pvd.QuoteNumber) AS PolicyNumber,

MAX(am.AgencyName) AS AgencyName,

MAX(am.AgentName) AS AgentName,

MAX(pvd.AccountNumber) AS AccountNumber,

MAX(pvd.LineOfBusiness) AS LineOfBusiness,

MAX(pvd.SaveDateTime) AS SaveDateTime

FROM FlattenPageViewData pvd

JOIN AgencyMapping am ON pvd.UserID = am.AgentName

WHERE pvd.[formData.ddlClassification] = @classification

AND pvd.SaveDateTime BETWEEN @startDate AND @endDate

GROUP BY pvd.SessionID

ORDER BY MAX(pvd.SaveDateTime) DESC;

**Quote Premium**

Like Quote Status, find the newest record where PremiumAmount is present for a given quote number. The value of PremiumAmount in this record is the quote premium. If the quote status is "Bound", this will be the final premium paid by the customer.

**Agency Health Analysis**

This analysis will be done on page event data over a specific timeframe for a specific agency. Ensure that any rows in the dataset that fall outside of the given date range are only used for comparing against the target date range for trend analysis.

**Detecting Quotes for a particular classification**

Selecting the Classification option from the dropdown and a particular date range displays a table containing information like Agency Name, Agent Name, Quotation Number, Account Name, Line of Business (LOB), Quote Status, Date/Time, and Session ID for quotation numbers in that status.

**Detecting System Errors**

Any quote that has a record where errorType is not null and the record isn't an UW issue.

**Detecting User Drop Off**