**Prompts for Classification Scenario**

1. How many quotations are currently in the Submission/Draft status for each of the classification?
2. Which classification has the maximum number of bound quotations? / Which classification has the most successful quotations?
3. List the classifications that have more quotations in the Quoted status than in the Bound status.
4. Which classification has quotations only in the Submission/Draft status and not in any other status?
5. Who are the agents handling Submission/Draft quotations in the Construction classification?
6. How can I check the status of my quotation number?
7. List the agents associated with successful quotations for each classification.
8. What errors have agents encountered for their quotations in the Quoted status?
9. Do all quotation numbers in the Quoted status have errors?
10. Show me the agents for successful quotes in each classification.

**Summary Metrics:**

* + **Total Quotes Received:** 749
  + **Quotes in Draft/Quoted Status in the past month:** 12% (93 quotes)
  + **Expired Quotes:** 19% (145 quotes)
  + **System Error Halted Quotes:**
  + **Underwriting (UW) Halted Quotes:** 14% (108 quotes)

**Priority Issues:**

* + Most UW Blocks have occurred for classifications that are not in appetite. For example, there are 20 Submissions were for Petals Florist Classification, 18 Submission for Plumbers Classification.
  + Customers spent an average of 7.73 seconds on the UW Questions page and dropped off at that page due to the UW Block.

**Recommendations:**

* + **Improve User Interface:**  Investigate drop-offs on UW Questions page
  + **System Update:** Find cause of Null Pointer Exception
  + **Underwriting Efficiency:** Automating some manual underwriting checks or improving communication workflows can reduce underwriting halted quotes.

**Not in Appetite Issues**

    - Errors with type [UW Block] have API errors

    - API Errors can have 3 types of values

    - [Not in Appetite] is when that business type is not supported

- [ERROR Api.Json…] is when the application has an error or requires further review.

- ~~NULL is when it can be categorized as “Other Error”~~

**Sample Output:**

Not in Appetite Issues

    - Other Error: 95

    - Not in Appetite: 5

    - ERROR Api.Json… : 8

**Summarize the data**

* Show the number of API Error and categorize them as per the above description.
* Note the count of other errors. If there is any trend or clustering in the error messages, that should be noted as well.

**Prompts:**

* What are the different UW issues?
* How many categories of UW issues are there?
* How many business/industry are not in appetite?
* Which business/industry are not in appetite?
* How many business/industry encountered the error in UW Block?

**Supporting Query**

WITH DistinctEvents AS (

SELECT

pvc.UserId AS AgentName,

pvc.SessionId AS SessionID,

pvc.TenantId,

pvc.ErrorMessage AS ErrorMessages,

pvc.PageName AS PageName,

COALESCE(pvc.APIError, 'Other Error') AS APIError,

pvc.QuoteNumber AS QuotationNumber,

pvc.AccountNumber AS AccountNumber,

pvc.LineOfBusiness AS LOB,

am.AgencyName,

pvc.ErrorType,

pvc.SaveDateTime,

pvc.PolicyNumber AS PolicyNumber,

(SELECT TOP 1 pvc2.[Event.Context]

FROM [dbo].[FlattenPageViewData] pvc2

WHERE pvc2.SessionId = pvc.SessionId

AND pvc2.[Event.Key] = 'ddlClassification'

) AS Classification,

ROW\_NUMBER() OVER (

PARTITION BY

pvc.UserId, pvc.SessionId,

CASE WHEN SiteName = 'PL CSS' THEN pvc.PolicyNumber ELSE pvc.QuoteNumber END,

pvc.AccountNumber

ORDER BY pvc.SaveDateTime DESC

) AS rownum

FROM

[dbo].[FlattenPageViewData] pvc

LEFT JOIN

[dbo].[AgencyMapping] am

ON pvc.UserId = am.AgentName

WHERE

CONVERT(DATE, pvc.SaveDateTime) BETWEEN '2025-02-05' and '2025-03-05'

AND pvc.TenantId = 8

AND pvc.ErrorMessage IS NOT NULL

AND pvc.ErrorType = 'UW Block'

AND (SiteName IS NULL OR SiteName = '' OR SiteName = SiteName)

)

SELECT

ErrorType,

APIError,

ErrorMessages,

Classification, --STRING\_AGG(Classification, ', ') AS

COUNT(\*) AS ErrorCount,

STRING\_AGG(AgentName, ', ') AS AgentsInvolved,

STRING\_AGG(SessionID, ', ') AS Sessions,

PageName, --STRING\_AGG(PageName, ', ') AS

STRING\_AGG(QuotationNumber, ', ') AS QuoteNumbers,

STRING\_AGG(PolicyNumber, ', ') AS PolicyNumbers,

STRING\_AGG(AccountNumber, ', ') AS AccountNumbers,

STRING\_AGG(LOB, ', ') AS LOBs,

STRING\_AGG(AgencyName, ', ') AS Agencies,

MAX(SaveDateTime) AS LatestOccurrence

FROM

DistinctEvents

WHERE

rownum = 1

GROUP BY

APIError, ErrorMessages, ErrorType, Classification, PageName

ORDER BY

APIError asc,

LatestOccurrence DESC;