**1-Brokerage Table Descriptions**

|  |  |
| --- | --- |
| **Column Name** | **Description** |
| client\_name | Name of the client |
| policy\_number | Policy number associated with the client |
| policy\_status | Status of the policy (e.g., active, inactive) |
| policy\_start\_date | Start date of the policy |
| policy\_end\_date | End date of the policy |
| product\_group | Group to which the product belongs |
| Account Executive | Account executive managing the policy |
| branch\_name | Name of the branch associated with the policy |
| solution\_group | Group to which the solution belongs |
| income\_class | Class or category of income |
| Amount | Amount associated with the policy |
| income\_due\_date | Due date for income related to the policy |
| revenue\_transaction\_type | Type of revenue transaction (e.g., premium, fee) |
| renewal\_status | Status of policy renewal (e.g., pending, completed) |
| lapse\_reason | Reason for policy lapse |
| last\_updated\_date | Date when the policy information was last updated |

1. **policy\_status**: This field indicates the current status of the insurance policy, such as "Active," "Cancelled," "Expired," or "Pending."
2. **policy\_start\_date**: This column records the date when the insurance policy became effective or started providing coverage.
3. **policy\_end\_date**: This column records the date when the insurance policy expires or ends.
4. **product\_group**: This field categorizes the insurance policies into different groups based on the type of insurance product they belong to, such as "Life Insurance," "Health Insurance," "Property Insurance," etc.
5. **Account Executive**: This column contains the name or identifier of the insurance agent or account executive responsible for managing the policy.
6. **branch\_name**: This field specifies the name or identifier of the branch office associated with the insurance policy.
7. **solution\_group**: This column categorizes the insurance policies into groups based on the specific solutions or packages they offer to customers.
8. **income\_class**: This field categorizes the policyholders based on their income class, such as "new," "renewal," "cross sell," etc.
9. **Amount**: This column typically represents the monetary amount associated with the insurance policy, such as the premium amount, coverage amount, or transaction amount.
10. **income\_due\_date**: This field records the due date for payment of insurance premiums or other income-related transactions.
11. **revenue\_transaction\_type**: This column categorizes the revenue transactions associated with the insurance policies, such as "Premium Payment," "Claim Payout," "Renewal Bonus," etc.
12. **renewal\_status**: This field indicates whether the insurance policy has been renewed or is up for renewal, typically denoted as endorsement, inception, lapsed, renewal
13. **lapse\_reason**: This column records the reason for policy lapses or cancellations, such as "Non-payment of Premium," "Policyholder Request," "Death of Insured," etc.
14. **last\_updated\_date**: This field contains the date when the information in the dataset was last updated or modified.

**2-Fees Table Descriptions**

|  |  |
| --- | --- |
| **Column Name** | **Description** |
| client\_name | Name of the client |
| branch\_name | Name of the branch associated with the client |
| solution\_group | Group to which the solution belongs |
| Account Executive | Account executive managing the client |
| income\_class | Class or category of income |
| Amount | Amount associated with the income transaction |
| income\_due\_date | Due date for the income transaction |
| revenue\_transaction\_type | Type of revenue transaction (e.g., payment, fee, etc.) |

**3-Budget Table**

|  |  |
| --- | --- |
| **Column Name** | **Description** |
| Branch | Name of the branch associated with the employee |
| Employee Name | Name of the employee |
| New Role2 | New role or position assigned to the employee |
| New Budget | Budget allocated for the new role |
| Cross-sell Budget | Budget allocated for cross-selling initiatives |
| Renewal Budget | Budget allocated for renewal activities |

**4-Invoice Table Descriptions**

|  |  |
| --- | --- |
| **Column Name** | **Description** |
| invoice\_number | Unique identifier for the invoice |
| invoice\_date | Date when the invoice was generated |
| revenue\_transaction\_type | Type of revenue transaction (e.g., payment, fee, etc.) |
| branch\_name | Name of the branch associated with the transaction |
| solution\_group | Group to which the solution belongs |
| Account Executive | Account executive managing the client |
| income\_class | Class or category of income |
| client\_name | Name of the client associated with the transaction |
| policy\_number | Policy number associated with the transaction |
| Amount | Amount associated with the income transaction |
| income\_due\_date | Due date for the income transaction |

**5-Meeting Table Descriptions**

|  |  |
| --- | --- |
| **Column Name** | **Description** |
| Account Executive | Account executive responsible for the meeting |
| branch\_name | Name of the branch associated with the meeting |
| global\_attendees | Number of attendees for the global meeting |
| meeting\_date | Date when the meeting is scheduled or occurred |

**6-Opportunity Table Descriptions**

|  |  |
| --- | --- |
| **Column Name** | **Description** |
| opportunity\_name | Name or identifier of the opportunity |
| opportunity\_id | Unique identifier for the opportunity |
| Account Executive | Account executive managing the opportunity |
| premium\_amount | Amount associated with the premium for the opportunity |
| revenue\_amount | Amount associated with the revenue for the opportunity |
| closing\_date | Date when the opportunity is expected to close |
| stage | Current stage of the opportunity – Qualify opportunity, Propose solution, Negotiate |
| branch | Branch associated with the opportunity |
| specialty | Specialty related to the opportunity |
| product\_group | Group to which the product associated with the opportunity belongs |
| product\_sub\_group | Subgroup to which the product associated with the opportunity belongs |
| risk\_details | Details related to the risk associated with the opportunity |