INSURANCE FILES AND TABLES DESCRIPTION

File Name	Key Columns	Description	Relationships
Opportunities	opportunity_id, opportunity_name, premium_amount, revenue_amount, stage, closing_date, branch, product_group, product_sub_group	Stores sales opportunities (potential deals) and their status.	Linked with **Meetings** via Account Exe ID. Connected to **Invoices** (to track which opportunities converted into payments).
Meetings	Account Exe ID, Account Executive, meeting_date, branch_name, global_attendees	Tracks client interactions and meetings handled by Account Executives.	Related to **Opportunities** via Account Exe ID.
Individual Budget	Branch, Sales person ID, Employee Name, New Budget, Cross sell budget, Renewal Budget	Defines yearly sales targets and budgets per employee/branch.	Linked to **Brokerage** and **Fees** using Salesperson ID / Account Exe ID.
Fees	client_name, branch_name, solution_group, Salesperson ID, income_class, Amount, income_due_date, revenue_transaction_type	Contains additional charges or fees applied to clients/policies.	Connected to **Brokerage** via client_name, branch_name, solution_group. Linked to **Invoice** using revenue_transaction_type.
Brokerage	client_name, policy_number, policy_status, policy_start_date, policy_end_date, product_group, Account Exe ID,	Central dataset with details of insurance policies sold and maintained.	Linked with **Invoice** via policy_number. Connected with **Fees** (same client/policy). Linked with

	branch_name, solution_group, income_class, Amount, income_due_date, renewal_status, lapse_reason		**Budgets** via Account Exe ID.
Invoice	invoice_number, invoice_date, policy_number, client_name, branch_name, solution_group, income_class, Amount, income_due_date	Records all financial transactions and payments from customers.	Connected to **Brokerage** via policy_number, to **Fees** via client_name, and to **Opportunities** (conversion tracking).