

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

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
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