Edgar Arroyo

Jordany Gonzalez

Andres Melendez

Jeffrey Reid

June 11, 2024

ALPHA Team

Willson Financial Case Study

**Business Rules**

1. **Client Management**
   1. Each client has a unique ID.
   2. Each client must have a first name, Last name, address, phone number, and email.
   3. Clients are added to the system with a recorded date.
2. **Asset Management**
   1. Each asset is linked to one client
   2. Each asset has a unique ID.
   3. Assets have a type value and acquisition date.
3. **Transaction Management**
   1. Each transaction is linked to one client.
   2. Each transaction has a Unique ID
   3. Transactions have a type, amount, and date**.**
4. **Employee management**
   1. Each employee has a unique ID.
   2. Each employee must have a first name, last name, position, and hire date.
   3. Employees can manage multiple clients, and each client can be managed by multiple employees. (This will make it a many-to-many link on the ERD)
5. **Billing Management**
   1. Each billing record is linked to one client.
   2. Each billing record has a unique ID.
   3. Billing records have a billing date and amount.

**Assumptions:**

**So for the assumptions I am going to add a few that will help us answer the questions required to answer in the case study for example.**

How many clients have been added for each of the past six months?

The business will track client additions monthly

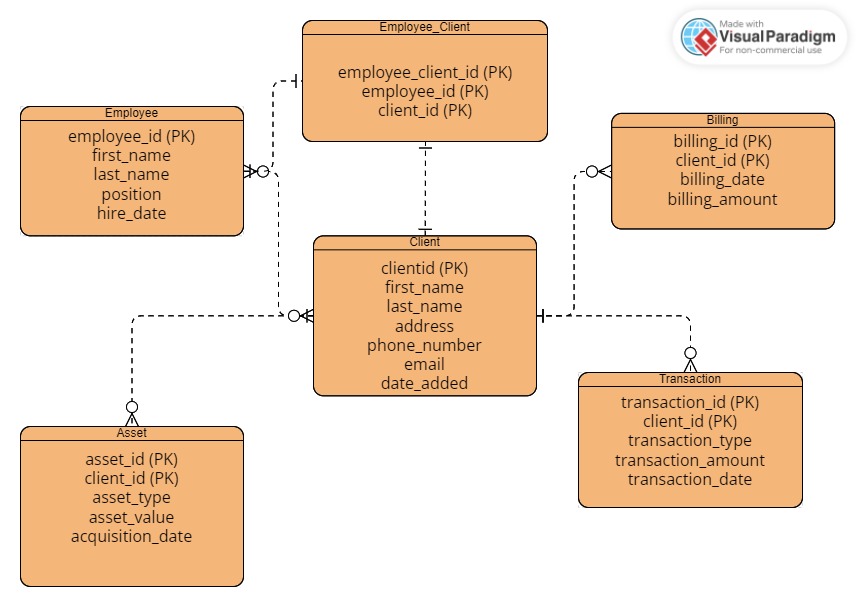
What is the average amount of assets (in currency) for the entire client list?

The business will calculate average asset value and track client transactions

How many clients have a high number (more than 10 a month) of transactions?

Clients can have multiple assets and transactions

**ERD**

****