**Purple Team: Dylan Bonis, Robert Duvall, Melinda Guthman, Meg Kellenberger** :

12/4/22, Module 11.1 Assignment, Willson Financial

**Final ERD:**

Diagram

Description automatically generated

**Changelog:**

12/1/22

Added Transaction\_ID

Added\_Transaction Type

Changed Customer to Client to better fit prompt

Added Employee\_Address and Employee\_Phone

Removed Employee and Job? (Though they are still part of the database for function)

12/2/22

Changed Transaction Type to Function Table w/ Function ID and Function\_Name

Changed Client to Customer due to it being a reserved word

Added Date\_Added to Customer table

12/9/2022

Changed client\_id to customer\_id in Asset for ERD

**Report 1:**

**File Name:** report\_1\_added\_customer\_mguthman.py

**Business Need:** How many clients have been added for each of the past six months?

**Description:** This report is created to pull the amount of customers added in the past six months. First, we query the customer table by counting all the records that were added in a month. Then, we will query for the actual customer information. For each month, we iterate through the queries and display the information needed.

**Text

Description automatically generatedResults Screenshot:**

**Report 2:**

**File Name:** report\_2\_average\_assets\_rduvall.py

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

**A picture containing diagram

Description automatically generatedDescription:** This report will specifically query the ASSET\_WORTH column from the ASSET table. By using the SQL function "AVG", we are able to pull the data from the specified column and calculate the average of said data. The result is then printed, giving us a total of average of the total assets.

**Results Screenshot:**

**Report 3:**

**File Name:** report\_3\_high\_transactions\_dbonis.py

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

**Description:** This report will query the transaction table in the Willson Financial Database. For each month in the year, the transaction history will be selected, count the number of transactions, and sorted by the customer name. Then, if transactions do exist for that month, the report will iterate through the list of transactions and display the count of transactions, and the customer name, if there are more than ten. If there are less than ten for a given customer in a given month, nothing will display.

**Text

Description automatically generatedResults Screenshot:**