Project Outline Database Management

Nicolas Echeverri R

1. Problem Domain and Purpose

The purpose of this database is to help a bank manage and track commissions related to customers and relationship managers. This system will monitor customer-manager assignments, manage commissions generated by savings accounts and credit cards, and generate detailed reports on the performance and commissions earned by each relationship manager. The goal is to provide bank employees with a tool to centralize customer and manager information, while automating commission calculations.

2. Key Functionalities

Customer Management: The database will track personal details, contact information, and financial products (savings accounts, credit cards) for each customer.

Relationship Manager Assignment: Each customer will be assigned to a relationship manager responsible for maintaining the relationship and managing the customer's financial products.

Commission Management: The database will automatically calculate commissions based on the percentage associated with the customer's savings accounts and credit cards.

Goal Tracking: The system will track the goals for each relationship manager in terms of commissions earned from specific financial products.

Reporting: The system will generate detailed reports on earned commissions, customer assignments, and each relationship manager's goal achievement.

3. What the Database Should Track

Customers: Personal details of each customer, including name, address, phone number, email, financial products, and the date they joined the bank.

Relationship Managers: Contact information of the managers responsible for the customers.

Commissions: Data on the commission percentages associated with financial products (credit cards and savings accounts).

Commission Payments: Information on commission payments due to each manager based on the performance of their assigned customers.

Commission Goals: Each manager's commission target, detailing the commissions earned from specific products such as credit cards or savings accounts.

4. Types of Reports

Commission by Manager Report: Shows the commissions earned by each relationship manager, broken down by product type (credit card, savings account).

Goal Achievement Report: Compares established targets with commissions earned by each relationship manager.

Customer Assignment Report: Lists the customers under each relationship manager, including the financial products they manage.

Commission Payment Report: Displays pending and completed commission payments for each manager based on the performance of the customers they manage.

5. Information in the Databases

Customers: Stores customer information, including names, contact details, and the financial products they hold (savings accounts, credit cards).

Attributes: ClientID, ClientName, ClientAddress, ClientPhone, ClientEmail, DateJoined, ManagerID, SavingAccount, CreditCard.

Relationship Managers: Stores contact information for the managers responsible for customers.

Attributes: ManagerID, ManagerName, ManagerPhone, ManagerEmail.

Commissions: Stores commission percentages for credit cards and savings accounts.

Attributes: ManagerID, PercentageCommissionCreditCard, PercentageCommissionSavingsAccount.

Commission Payments: Records commission payments due to each manager based on the commissions generated.

Attributes: ManagerID, AmountToPay.

Commission Goals: Sets commission goals for each manager, based on the financial products they manage.

Attributes: ManagerID, CreditCardCommission, SavingAccountCommission.

6. Relationships

Customers to Relationship Managers: One-to-many relationship. A relationship manager can be assigned to multiple customers, but each customer can only have one manager.

Relationship Managers to Commissions: One-to-many relationship. Each manager has an associated commission percentage based on the financial products of the customers they manage.

Relationship Managers to Commission Payments: One-to-many relationship. Each manager can have multiple commission payments based on customer performance.

Relationship Managers to Commission Goals: One-to-one relationship. Each manager has a set of goals to achieve.

This structure enables the bank to efficiently manage the relationship between customers, managers, and their related commissions, while producing detailed reports on performance and assignments.

Diagram Key
- Queries
- Table
- Forms

Clients
ClientID, ClientName, ClientAddress, ClientPhone, ClientEmail, DateJoined, ManagerID, SavingAccount, CreditCard

Commisions
ManagerID, PercentageCommisionCreditCard, PErcentageCommisionSavingsAccount,

GoalPerManager
ManagerID, CreditCardCommision, SavingAccountCommision

Client Summary With Relationship Manager

Client Summary With Relationship Manager

Commisions To Pay

Form New Client

Form New RelationShip Manager

RelationshipManager
ManagerID, ManagerName, ManagerPhone, ManagerEmail