We want to thank you for your time to answer our questions. This document is a summary of our interview.

Department responsibilities and current situation

Keeping track of customer data in a collection of word documents.

Changes in customer information don’t get through to the other departments.

Datafields:

Quotation number = unique id

Potentional customer = checkbox

Last contact date paired with actions taken then

Future contact date paired with actions planned to be taken

Sales percentage = discount (Manual field)

Privileges

All same privileges within Sales.

No other department should edit. Access to see bold text fields only.

Miscellaneous

Overview of customers that haven’t paid yet.

Keep track of non-paying customers.

Make project on hold when customer hasn’t paid yet.

Flag projects as pending to make it possible to view the project.

Single account for the Sales department.