

## *A2 Client Interview Transcript:*

**Date:** 21/09/2023

**Mode of Interview:** Physical

**Interviewer:** Good afternoon, sir. Thank you for meeting with me again. I've developed a plan and I'd like to discuss it with you to make sure it aligns with your needs.

**Client:** Hi, I'm eager to hear what you've come up with.

**Interviewer:** Thank you. Based on our previous conversation, I'm planning to develop a **web application that will be accessible from both your Macbook and Windows desktop**, so you won't be restricted to only one device. Your financial data will be **securely stored in a free online database** that uses robust encryption to protect your finance information. Also, I'm going to integrate the **official Google authentication system** into the application, so you should be able to securely log in and out with your Gmail accounts so that you can manage your personal and office budgets separately.

**Client:** Yes, I'd like to ensure that my data is kept secure, especially considering that I have to manage many business transactions and so I wouldn't want that data to be leaked somehow!

**Interviewer:** Of course sir. The application will also have all the basic functionalities for your finance management purposes. You can **add incomes and expenses in the home page** and **view five of your recent most transactions at a click of a button** since you mentioned in our last meeting that you liked having access to your recent transactions in your previous pen-and-paper system.

**Client:** Yes, I recall mentioning that.

**Interviewer:** And in order to be able to manage your transactions effectively, **I will implement a category system**. Editing and deleting transactions will no longer involve manually re-calculating finances as the **application will update in real-time for any changes you make for your transactions**.

**Client:** That sounds great! I see that you've really planned things out.

**Interviewer:** Thanks. I'll also include a **reports feature that will generate graphs to visualize your monthly finance information for your incomes, expenses and balances**. You'll also be able to **monitor your monthly transactions category-wise**. I will also include a comprehensive transactions filtering feature that will allow you to **filter transactions by income or expenses, categories, date added, and amount** so that you do not have to spend a lot of time to find a transaction. Of course, each operation you perform like adding or editing transactions will be accompanied by an **appropriate status alert** to inform you if the operation was successful, if you've made a mistake in inputting details, or if there was an error.

**Client:** That's exactly what I wanted.

**Interviewer:** One last thing, are there any additional features or adjustments you'd like to request at this stage?

**Client:** Nothing comes to my mind at the moment. I'm happy with the solution you've proposed.

**Interviewer:** Great then! I'll proceed with development based on this plan. I'll keep you updated on my progress and we can make adjustments as needed.

**Client:** Thanks for your hard work on this. I'm looking forward to using the application!

**Interviewer:** Thank you, sir. I'm excited to develop this solution.