Information Architecture – Business Requirements

As part of the information architecture design project for Contoso, your team has undertaken interviews with key stakeholders and users in the Finance departments across the company. Your task is to rationalize the information that has been gathered. You are focusing on three areas:

* Sales Ledger (Sales Invoices)
* Purchase Ledger (Purchase Invoices)
* Expenses

You have a series of interview transcripts that you need to analyze. From these, your goal is to identify the following:

* Content Types
* Site columns, together with the associated column type

## **Interview 1 – Contoso Research Sales Ledger Team Leader**

“We deal with all of the invoices that Research sends out to our customers. Our invoices are pretty standard, but our biggest issue is processing queries. We have to match the invoice to the query. This is easy if the customer has the invoice number, because that is unique and we can just look it up on the system. It becomes more complex when they don’t have this.

“Currently, we track all customers by:

* Customer name.
* Customer number.

“Some of the smaller customers never have any idea about their customer number. So we are often left to search by customer name. You would think that would be easy, but a lot of these companies are known by different names. It could be ABC Corp, or A-B-C Corporation, or just ABC. You know what I mean. It depends who writes up the invoice and what they normally call the customer.

“Most of the queries are about where they need to pay. Of course, we have all our customers on 90-day payments terms, so we just need to know when we sent the invoice. All of the invoices have the following information recorded:

* Invoice date
* Invoice due date
* Status, which can be:
  + Invoiced, for ones that are still within their 90-day payment period.
  + Deferred, for ones for which payment has been deferred due to some reason.
  + Paid, when they have been paid.
  + Outstanding, for ones that have run over the 90-day payment term.

“The Finance Manager has to report all of this to the board, so we need to be able to identify these numbers quickly and accurately.”

“Oh, and of course we need to be able to find out the amounts. Mostly this is to sort out amounts that are over a given limit: the FM may want all the sales invoices over $5,000, or something like that.”