Criterion A: Initial consultation

Date: Saturday 3rd, 2012 - Location of interview: San Salvador – El Salvador
Time: 5:30 p.m.
Name and position of interviewee: Maria Concepcion Alas de Linares, at the left side of the interview.
“English translation from a Spanish original”

What’s your business about?

It’s about an accounting firm that we have since 22 years ago, in which we offer services based on accounting, auditing, consulting, and everything related to tax and fiscal.

What exactly is the current problem in your system?

The problem we currently have is that: to control the clients it has become a bit difficult, because we need to keep control of every single one of them and sometimes the documents get lost and we need them categorized by dates, correlatives and a really detailed control because we currently have it manually, sometimes we need to keep updated some information and right now we can’t control it.

What is your plan to solve it?

Well, we currently need to hire a program that is computerized in which it gives us what we need. We have the equipment, but we don’t have the program, so we would need a program which gives us every single bit of information in the moment we need it.

Can you give more detail about your proposed solution(s)?

Well I would think that to solve this problem: the program needs to be able to give us the listing of all the clients, detail with all of their information separated by sectors, dates, by correlatives and all of the services that we provide. So doing that at a level of continued closures and updating the information every day so that at the end of the month we have all of the evidence in the right moment. That is basically what we would need.

For what exactly would you use the application?

We would need it to keep all of the information so that it doesn’t get lost, in the right place and mostly that it works immediately, so that we can obtain it. We have the equipment but we don’t have the program.

How much information would you be storing in it?

It’s around 125-150 clients, but the information of each and every one of them is about: Address, all of the services that we provide, the correlatives, the payment type, the information is a lot that would be needed to input in every client, and apart from that we would need to have dates of the services we provide so we can not only help them but also other clients.

What do you plan to accomplish with this system?

Well, accomplish goals that we already have defined, but right now we aren't succeeding, we aren't being efficient enough when we need all of their information, while using a program that gives us every piece of information everything would become much simpler.

How often do you plan to update the system?

I would like that the system saves every day, and at the end of every month that also the program is also updating itself, that way when someone needs something everything is detailed and ready. That's basically all.