Appendix A: First Consultations

Date: Sunday December 17, 2023

Time: 5:00PM

Before conducting this interview, I had already spoken to my client about his desire for a website to keep track of his credit card rewards. This interview was to go more in depth and ask clarifying questions.

Transcription

Me: Why do you like traveling?

Client: Because you get to see places and I like seeing the landmarks like the one in Seattle and Grand Canyon and New York. I like seeing those landmark places and just being able to experience a different place.

Me: How often do you travel?

Client: Twice maybe a year.

Me: I know you mentioned earlier, before, to me that you like it [traveling] because it breaks up your routine. Can you expand on that?

Client: A lot of times you do the same thing over and over again. You go to work, you go to dinner, you do the same routine basically. So by you traveling you do something else other than your usual stuff. Plus, when you get back from the traveling the home feels so much sweeter every time.

Me: You mentioned to me before you had a problem with keeping track of your points and miles. Could you expand on that?

Client: Yeah so I have been using points to do our travel. Which means I have to sign up with different credit cards, sign up with different programs and hotels and different miles program. So it's easy to get lost with all of the amount of points with a specific program. The same with credit cards- it's easy to forget when I have to close the credit card. There's a lot of stuff you need to keep track of.

Me: What is your current system of keeping track of points and miles?

Client: I use an excel sheet to keep track of my credit cards and points that I earn from each of the different programs.

Me: Why is your current system a problem?

Client: It's actually not a problem, but if there could be something better I think that would be nice. One way would be to be able to access it wherever I am and just be able to go to a web page and be able to track it from there. Right now I keep it on an excel file so that means I have to keep it in one place on the computer.

Appendix B: Switching to four tables

I asked my client to send an example of what his current organizational method was, and below is the attachment he sent. He excluded the data in some columns, as I told him beforehand that this would be shown to my advisor and he should exclude sensitive data.

In a consultation with my advisor, he noticed that several items were repeated. Thus, we came up with the solution to break up the card table into four tables: the cards table, the programs table, the people table, and the rewards type table. My client was informed of this suggestion and agreed with it.

ANTHONY

Card	Current Points	Frequent #	UserName	Credit Line	Date Open	Date Close	Annual Fee	Level	Notes
Citi Hilton Hhonors	7,000				2013	03-14-14		Silver	40k point spend 1K in 4 months
Travelocity Barclays	3,000				2013	03-14-14			
Chase Ritz Carlton	6,300				07-07-13	07-13-14	395	Gold	1 night free spend 2K in 3 months 395
Chase Hyatt	10,000				07-05-13	07-19-14	75	Platinum	2 nights free spend 1K in 3 months
Chase British Airways	10,200				11-04-13	11-19-14	95	Blue	50k points; 2.5 x pts BA tkt; 1.25 x pts everything les
Amex Business Gold	0				01-28-14	12-04-14	175		50k points; 5,000 spend in 3 months
Amex Business SPG	3,000			3/15/2014	01-10-15	65			25K spend; 5,000 spend in 3 months
Chase United MileagePlus	5,000				03-20-14	03-14-15	95		50k points; 2,000 spend in 3 months
Citi Hilton Hhonors	7,000				3/15/2014	04-02-15	95		2 free weekend nights after 2,500 spend in 3 months PAID 95
Citi AAdvantage Executive	15,500				6/28/2016	06-06-15	450		100K points; 10K spend in 3 months; PAID 450-200=250
Barclays Arrival	7,000				7/24/2014	07-19-15	85		40K pints; 3,000 spend in 3 months
Barclay Hawaiian Airlines	3,900				10/20/2014	10-10-15	89		35K points; 1,000 spend in 3 months PAID 89
Amex JetBlue TrueBlue	10,000				1/6/2015	11-15-15	45		20K points 1,000 spend in 3 months
Capital One Venture	30,000				3/4/2015	02-06-16	59		40K pints; 3,000 spend in 3 months
Chase Sapphire	15,000				11-08-13	02-05-16			converted to no annual fee
Target	200				2012	02-06-16			
Citi Premier	10,500				3/18/2015	03-03-16	125		50K points; 3,000 spend in 3 months
Amex Personal Gold	0				4/7/2015	04-01-16	175		50K points; 3,000 spend in 3 months
Amex Blue	1,000				2003	06-19-16			
Citi Prestige	17,500				8/13/2015	07-09-16	450		50K points; 3,000 spend in 3 months PAID 350
Amex SPG Anthony	4,000				Jul-13	07-09-16	95	Preferred	25k point s; 5,000 spend in 6 months PAID 65
Chase Fairmont	5,000				7/9/2014	08-14-16	95		2 nights free spend 3K in 3 months thru paid 95 8/2015
Citi AAdvantage Platinum	9,100				2/1/2014	01-21-17	95		50k points; 2,500 spend in 3 months; 2/8/2016 waived 95 annual fee
Chase British Airways	10,000				01-13-16	01-25-17	95	Blue	50k points after $2k spending, additional 25K after $10K and another 25K after $20K
Amex Business Gold	0				02-16-16	02-18-17	175		75K points; 5,000 spend in 3 months
Citi Best Buy	4,000				06-01-16	02-18-17			20K points first purchase
Barclays Arrival	7,500				03-28-16	02-22-17			40K pints; 3,000 spend in 3 months
Amex Delta Gold	10,000				04-30-16	04-16-17			50K points +50 statement credit after 1,000 spend in 3 months
Citi AAdvantage Business	12,000				05-10-16	04-16-17			50K points; 3,000 spend in 3 months
Citi AAdvantage Gold	10,000				08-14-16	09-17-17			25K points; 750 spend in 3 months
Citi Hhonors Reserve					08-13-16	09-17-17			2 nights; 2500 spend in 3 months
Amex Business SPG					03-29-16	03-01-18			35k point s; 5,000 spend
Chase Hyatt	13,000				03-01-16	08-02-18	75	Platinum	2 nights free spend 1K in 3 months
Amex Delta Platinum converted to Blue	3,100				06-03-17	09-01-18	195		75K points + 100 statement credit after 4,000 spend in 3 months
Chase Sapphire	25,000				11/1/2016	10-01-18	95		50k point s; 4k spend in 3 months; 01/13/2017 got the bonus
Barclays Red Advantage	7,500				1/10/2015	01-06-19	95		50K points 1st spend in 3 months PAID 89; 1/1/2016 waived 2nd annual fee; 12/17/2016 waived annual fee $89 for 2017; waived annual fee for 2018
Barclays Hawaiian Airlines	20,000				02-27-17	02-02-19	89		50K spend 1K in 3 months; 2018 waived annual fee
Amex Ascend Hilton	10,000				02-01-18	02-02-19	95		100K spend Hilton
Capital One Venture	20,000				02-28-18	02-21-19	95		50K spend 95 fee
Citi AAdvantage Platinum	1,500				03-18-19	03-28-19			ineligible for bonus
Amex Delta Blue	3,100				08-01-18	05-19-19	0		No annual fee converted from Amex Delta Platinum to Blue
Barclays Jet Blue	15,000				11-09-17	12-01-19	95		60K spend 95 fee
Amex Delta Gold	10,000				04-17-19	02-01-20	95		60K spend 3K and $50 credit; 95 fee
Capital One Savor	10,000				09-23-18	03-29-20	95		50K spend 95 fee; 2019 waived 95 fee
Amex Hilton Aspire	10,000				08-01-19		450		150K spend 4K
Citi Premier Thank You	10,000				07-01-18		95		50K spend 95 fee
Chase Sapphire					04-22-21	04-25-22			80K 4K spend + $50 credit
Chase Marriot					09-25-21	09-19-22			125K 5K spend +1 free night up to 50K
Citi AAdvantage Platinum					09-03-19	11-13-22	99		will get the fee 99 back in Dec 3 statement
Alaska Airlines (BofA)	16,000				09-17-20	11-12-22	75		40K 2 k spend +25 K spend 8K in 6 months
Capital One Venture X					11-14-21	11-15-22	395		100K 10K spend; 395 fee
Chase British Airways	18,700				04-16-22	05-05-23	95		100K 5K spend
Amex Hilton Surpass	10,000				06-01-22		95		130K + $130 Hilton credit for 2K Spend
Premier Standard	2,500				1999				
Premier Platinum	12,500				1999				
Chase Freedom	13,300				11-23-08				
Macys	2,000				12-01-18				
Target	2,500				08-13-19				
Chase Ink Business Plus	5,000				1/1/2014		95		50k points; 5,000 spend in 3 months
Chase Hyatt	24,000				9/1/2018		95		40K spend 3k + 20 K spend 6K 95 fee

(note to the right of the Alaska Airlines row: "will get refunded back with a check")

CYNTHIA

Card	Current Points	Frequent #	UserName	Credit Line	Date Open	Date Close	Annual Fee	Level	Notes
Chase British Airways Cynthia	15,000				12/1/2013	12-17-14	95	Blue	50k points; 2.5 x pts BA tkt; 1.25 x pts everything else PAID 95
Chase United MileagePlus	15,000				3/18/2014	03-21-15	95		50k point s; 2,000 spend in 3 months
Chase Ink Business	12,000				5/1/2014	04-04-15	95		60k point s; 5k spend in 3 months
Chase Sapphire	5,000				5/1/2014	04-13-15	95		40k point s; 3k spend in 3 months
Barclays Arrival	8,000				7/24/2014	07-03-15	85		40K pints; 3,000 spend in 3 months
Barclays Hawaiin Airlines	12,000				9/10/2014	09-09-15	89		35K points; 3,000 spend in 3 months PAID 89
Amex Business Gold	0				12/1/2014	12-10-15	175		75K points; 10K spend in 3 months;
Chase Amazon Visa	9,000				2012	03/05/2016			
Citi AAdvantage Platinum	13,000				4/28/2014	04-01-16	95		50k points; 3k spend in 3 months; 4/4/2015 spend $95 and they will give $95 credit back
Citi Premier	9,500				5/24/2015	05-24-16	125		50k pints; 3,000 spend in 3 months
Amex Personal Gold					6/7/2015	06-07-16	195		50K pints; 1K spend in 3 months
Chase Freedom	20,000				12/1/2014	06-07-16	0		20K points; 500 spend in 3 months
Capital One Venture	30,000				9/9/2015	08-13-16	59		40K pints; 3,000 spend in 3 months
Chase Fairmont	5,000				02-01-15	02-01-17	95		2 nights free spend 3K in 3 months
Chase Southwest Premier	5,000				3/4/2016	03-04-17	95		50K points; 2,000 spend in 3 months
Amex Delta					05-01-16	05-13-17			30K points + 100 statement credit after 1,000 spend in 3 months
Citi AAdvantage Gold	15,500				08-14-16	08-15-17			25K points; 750 spend in 3 months
Amex Business Gold					06-01-16	06-01-17			75K points; 5,000 spend in 3 months
Amex Delta Platinum	10,000				07-09-17	07-10-18	195		75K points + 100 statement credit after 4,000 spend in 3 months
Chase British Airways	24,000				8/1/2017	09-03-18	95		50k point s; 2.5 x pts BA tkt; 1.25 x pts everything else PAID 95
Barclay Aviator Red	20,000				9/24/2017	09-29-18	95		60k point s; PAID 95
Banc Of America Premier Reward	21,000				12/2018	01-09-19			50k point s; PAID 95
Citi Thank You	10,000				2013				closed
Barclay JetBlue	14,000				3/1/2018	03-17-19			60K spend 95 fee
Chase Hyatt	15,000				3/18/2016	03-18-19	75	Platinum	2 nights free spend 1K in 3 months
Chase Sapphire	25,000				9/17/2016		95		50k point s; 4k spend in 3 months
Citi Bus Plat Advantage	10,000				1/01/2016	10-06-19			70K spend 95 fee
Barclay Arrival	8,000				2/22/2016		85		40K pints; 3,000 spend in 3 months; 2/23/2017 converted to no annual fee
Chase Southwest	16,000				2/5/2020	03-07-21	95		75K points; 3K spend in 3 months
Chase Sapphire	16,900				12/1/2020	01-06-22	95		60K points; 3K spend in 3 months
Chase Marriott Bonvoy					4/15/2021	04-25-22	95		100K points; 4K spend in 3 months
Capital One Venture X					04-16-22	04-01-23	395		75K 4K spend; 395 fee
Citi AAdvantage Platinum	22,000				12-16-22	12-02-23	99		50K 2.5K spend
Chase Freedom (conversion)	12,000				9/17/2016		95		50k point s; 4k spend in 3 months
Amex Blue	10,000				2/1/2018				
Chase Hyatt	18,000				10/9/2019		95		50k point s; 4k spend in 3 months
Alaska Airlines (BofA)					06-14-20	07-07-23	75		65K spend 8K in 6 months
Chase British Airways	18,700				05-25-22		95		100K 5K spend
Citi Premier	11,000				10-10-22		95		80K 4K spend
Chase Ink Business Preferred	6,000				11-26-23		95		100K points 8K spend in 3 months

(note to the right of the CYNTHIA header: "30k points; 5,000 spend in 6 mins")

Appendix C: Final Consultation

Date: Monday March 31, 2025

This interview was conducted while my client first interacted and used the final web application product. Hypothetical information was already inputted into the web application for all tables. I had asked my client to state what his opinions were while he interacted with the web application during the interview.

Transcription

Client: I like the login 'cause it got the username and the password. And then the password is, I don't know how you call this, hidden. So this is kinda of like a standard login username password. And then you got the submit and there's also "Forgot password?" so I like that part.
My client inputs the wrong username.
Me: You have to capitalize your name.
My client successfully logs in and interacts with the web application's home page.
Client: Yeah I think I like it. It's got the main cards, the programs, the people or the person, and the types or the hotel or groceries and airline. Actually I would do cashback: hotel, airlines, and then cashback. Those are the ones. The types. Then I got the search. I can do the edit.
My client tests the delete and edit functions further.
Client: Cool. So looks like all the functionalities are working. I am able to add, I am able to edit, I am able to delete, and then search.
My client tests the functionality of the web application more.
Client: Ok cool. So it's doing everything we talked about, basically.

After recording the interview, I went back and asked my client what he thought I could improve on. He had two comments: the design of the web application could look better and he would prefer if the search would return all that began with the query string. For example, instead of the letter "A" returning "Alex," "Bella," "Rihanna," and "Prisha" it would return only "Alex."