

Client: Sunny Li

Program Requested: Finance and Business Database

Interview Documentation:

Interview Transcript #1 :

Sean Jin: Hello Sunny, I heard that you have a business, which incorporates services and educational camps. These camps generate revenue and income for you and your business partners, which in turn allows you to prosper further and become more wealthy. Do you have any problems or quality of life concerns that exist inside your company?

Sunny : Right, so right now our company utilizes google sheets to track our finances. Oftentimes, data must be manually calculated and isn't as secure or user-friendly as our company would like.

Sean Jin: Ok, I think that I can make a difference in aspects such as user compatibility, security, and accessibility for your business.

Sunny: Awesome! What do you have in mind?

Sean Jin: I will create a website and a program that will both separate your finances into different categories, manage admins and administrator's permissions, and as well as calculating and processing the total revenue and spendings distributed throughout your business.

Sunny : Sounds great! Within our company I manage our finances and expenses. Usually they fall into wages, donations and subscriptions. I think it would be extremely helpful if within this program, there could be a place to track this information. Would that be possible?

Sean Jin: Yes, this is definitely achievable using my knowledge of databases and sequels. I will be able to accomplish this task, as well as calculating expenses and other investments as well.

Sunny : Sounds great, we can go along with this for now, and discuss future problems as we proceed along our journey.

Sean Jin: Alright, thank you so much for your time, I will contact you next time for further details and information regarding the specifics of the requested program.

End of Conversation # 1

Interview Transcript # 2:

Sean Jin: Hello Sunny, I have done some extensive research and thinking regarding the program you have requested. I have a general idea of how I am going to code the program, but I will need more specific information from you.

Sunny: The main outcome of this program I would like is a more efficient and easy way of tracking finances. Usually our expenses and earnings come from certain categories or groups - like subscription payments, wages and giveaways - so it would be really useful if you could find a way to track this information.

Sean Jin: Yes, this is possible with my knowledge of sql and arrays. I will implement a more efficient way of calculating data, visibility, and storage. In the database for your finances, how would you like to structure them?

Sunny: The way we do it right now is on a base level, our company organizes data into three tables: one for spendings, one for earnings and one combining the two. If that could be somehow incorporated into this application, that would be great. Usually for these tables we would include a brief title description of the transaction taking place, one of the aforementioned categories along with the party involved in the transaction. I also want something that can calculate the total profit in a specific year, and the amount left in that specific year with regards to past years as well. From there, something that I still struggle with is visualizing the data I input and gauging the overall trends within our finances. So if there was a way that you could take all the inputted data and visualize it, I think that would be really useful. Perhaps totalling spendings and revenue, graphing spending vs profits or revenue/spendings over time etc.

Sean Jin: Ok sure, this is a lot to take in, but I will code a program that will perform all of your requested tasks. Should there be anything else I should know about?

Sunny: Nope, that is it for now!

Sean Jin: Thank you for your time Sunny, this interview has told me a lot about your vision on designing the financial calculator. Again, thank you so much for your investment of time into this meeting, and I look forward to the end product of this program. Also, I will be asking for the google spreadsheets of your spendings, revenue, and revenue v.s spendings in the near future.

Sunny: Thank you as well, see you next time!

End of Conversation # 2

Interview transcript # 3 Final Interview, feedback from client after code is done:

Sean Jin: Hello Sunny, nice to see you again! Here is my finished product, I hope the program is to your liking. What are your thoughts on the program?

Sunny: Thank you so much! I love the structure of data you used in the program and it is definitely and my team will be able to incorporate it into our work. All of the suggestions you implemented in your program definitely helped cater to my business. In particular, the login functionality makes my data secure and the reset password function ensures I

can access my data. However, there are some things that I would like to add or do differently.

Sean Jin: Oh? How so? Please do tell me so I can improve my future ambitions.

Sunny: When using the update/add data feature I noticed that if I accidentally misentered data I'm forced to restart the process of entering all my details again. Another place for improvement could be allowing the user to exit a process they haven't finished.

Sean Jin: Ok, thank you for the feedback, is there anything else I should know?

Sunny: Just another suggestion, since many companies have loans and mortgages, I think it would be beneficial if you could include these calculations in your program.

Sean Jin: Thank you for the valuable critique, I will definitely learn and improve on this in the future.

Sunny: With all that being said, these potential improvements are only minor detriments to the finished product. These weaknesses are not critical to the functionality of the program, and only small impacts towards the user-interface. Overall, the program is very well done, and definitely provides a more user-friendly experience compared to what I was using previously, the google sheets.

Sean Jin: Thank you again, for being my client, for helping me throughout my journey, for spending your valuable time with me. Thank you for everything, truly.