

# Card Controls – Granular Controls Desktop

Moderator Kevin Mihalich  
Date 10/19/2018

## METHOD

- Participants: 8 UserTesting.com participants
- Materials: Axure Prototype
- Method: Unmoderated remote testing / video recording
- Location: Participant's environment
- Miscellaneous: (other details to inform testing situation)

## PROTOTYPE

<https://yw1wu2.axshare.com/#c=2>

## QUESTIONS

- Do users understand what this page/feature is about?
- Do users understand the labels for the different alert/control types?
- Do users understand the difference between setting an alert vs. a decline?
- Can users successfully set up the different alerts/controls?
- Do users understand how to switch between the primary account and secondary/auth buyer accounts?
- Do users understand how to import settings from the primary account to secondary/auth buyer accounts?

## ANSWERS

- 7/8 users were able to understand the granular controls feature on viewing landing page
- 8/8 users understood labels for Spend Levels and Location
- 5/8 users expressed hesitation/uncertainty with Purchase Category and Transaction Types
  - 1/8 users failed task to set up Purchase Category (selected Transaction Types first)
- 8/8 users understood the difference between alerts and declines
- 8/8 users were able to successfully set up the different alerts/controls with no issues
  - 6/8 users failed to save after setting up their alerts/controls
- 7/8 users successfully switched from the primary to the secondary account
  - 3/7 successful users displayed some level of hesitation before switching
- 6/8 users failed the import settings task (did not see/use the import option)

## RECOMMENDATIONS

Based on the Answers and Insights, here is how we're going to proceed with each design Question:

- Missed Save button
    - Add "Not Saved" modal when user tries to navigate away from page without saving
    - Experiment with notification/indicator on card tiles to show changes aren't saved
  - Card Tile Confusion (specifically "How I Use My Card" and "Who I Spend With")
    - Rethink card tile naming and explanatory content
  - Auth Buyer Selection
    - Make more noticeable on page
  - Auth Buyer Import Option
    - Move option from tile to slideout
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## HIGHLIGHT VIDEOS

### Auth Buyer Selection (Pass)

<https://www.usertesting.com/h/9jVdxK9ebyzWBfZ1QPyA?shared=8PSDKXU3>

### Purchase Category (Neutral)

[https://www.usertesting.com/h/LJuSTcvg\\_AEPnN5ytyNS?shared=fFZw9TyQ](https://www.usertesting.com/h/LJuSTcvg_AEPnN5ytyNS?shared=fFZw9TyQ)

### Auth Buyer Import (Fail)

<https://www.usertesting.com/h/7tjhvaVfy81YTx5HzS5p?shared=txE57CF>

### Final Thoughts After Testing

<https://www.usertesting.com/h/munynnpQsMsf8EkvWHO-?shared=VpldT4qi>

### Misc Feedback

[https://www.usertesting.com/h/ERmvPMV\\_cD\\_QxU-3zXfp?shared=SApPeKwh](https://www.usertesting.com/h/ERmvPMV_cD_QxU-3zXfp?shared=SApPeKwh)

## FULL PARTICIPANT VIDEOS & ANSWERS

### Session 1

<https://www.usertesting.com/r/Y-X1446NMfU5yRgjinne->

### Session 2

<https://www.usertesting.com/r/WZsV9ZGv-WL6Sk4C24JB>

# Card Controls – Granular Controls Mobile

Moderator Kevin Mihalich  
Date 10/23/2018

## METHOD

- Participants: 6 UserTesting.com participants
- Materials: InVision Prototype
- Method: Unmoderated remote testing / video recording
- Location: Participant's environment
- Miscellaneous: (other details to inform testing situation)

## PROTOTYPE

<https://alliancedata.invisionapp.com/share/DNONJVZ2HSU>

## QUESTIONS

- Do users understand what this page/feature is about?
- Do users understand the labels for the different alert/control types?
- Do users understand the difference between setting an alert vs. a decline?
- Can users successfully set up the different alerts/controls?
- Do users understand that they need to save their settings?

## ANSWERS

- 6/6 users were able to understand the granular controls feature on viewing landing page
  - 2/6 users expressed confusion on the declines feature (what it is, why it's needed)
- 6/6 users were successful in finding correct tile for Spend Levels
- 4/6 users were successful in finding correct tile for Location Settings
  - 2/2 failing users selected "How I Use My Card" first
  - 1 user appeared to be rushing through the test (tapping through until the correct option opened)
  - 1 user tapped "How I use My Card", then noticed the correct tile and tapped it
- 3/6 users were successful in finding correct tile for Purchase Category
  - 2/3 failing users expressed hesitation/uncertainty between Purchase Category and Transaction Types
  - 1 user appeared to be rushing through the test (tapping through till the correct option opened)
- 6/6 users were able to successfully set up the different alerts/controls with no issues
- 5/6 users failed to save after setting up their alerts/controls

## RECOMMENDATIONS

Based on the Answers, here is how we're going to proceed with each design Question:

- Missed Save button
    - Add "Not Saved" modal when user tries to navigate away from page without saving
    - Experiment with notification/indicator on card tiles to show changes aren't saved
  - Card Tile Confusion (specifically "How I Use My Card", "Who I Spend With", and "Where I Use My Card")
    - Rethink card tile naming and explanatory content
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## HIGHLIGHT VIDEOS

Location Settings (Neutral)

<https://www.usertesting.com/h/ZKHxz6kL4ES7unh6qzsn?shared=VVnr0EV3>

Purchase Category (Fail)

<https://www.usertesting.com/h/Q2bQny7ZJGcqrW7uSzYy?shared=KFJOYBtn>

Saving (Fail)

<https://www.usertesting.com/h/VctFSKtWpsV3GHCpHjku?shared=7-n9T8Wg>

Final Thoughts After Testing

<https://www.usertesting.com/h/6QiS262yCYsstaxbpC7?shared=jRAjjsAS>

Misc Feedback

<https://www.usertesting.com/h/qpzYsxfP-XcfuyRxV6sm?shared=4n73nm-n>

## FULL PARTICIPANT VIDEOS & ANSWERS

Session 1

[https://www.usertesting.com/r/7Ysq7imxF\\_b5zRJXD12](https://www.usertesting.com/r/7Ysq7imxF_b5zRJXD12)

Session 2

<https://www.usertesting.com/r/Nx3qPyq4MYrLGsYMgMfh>

Session 3

<https://www.usertesting.com/r/qzrtWcM7iwwqSphB4a11>