Going over the custom label builder

7/27/22 and 8/1/22 and 8/4/22

* What does it do?
  + After playing around with it for over an hour, we got labels to work for each section. Some of them where harder than others but we were able to view labels for customers, PO’s, invoices, and parts. That means that there is a path… it just needs to be refined.
* The old label builder used to be a Window’s app. Now it is a web based app.
* I think that it would be really good to make a number of use cases or user stories – for each section. For example: I’m a new user using this for the first time. I would really like to see a demo video or some training to help me know what I’m getting into. Or I’m a user and my manager has already setup a number of custom labels. How do I get to them? Where do they show up? What can I do if I need to edit something?
  + We need user stories from beginner to advanced.
  + New customer label, edit customer label, view customer label (preview), use customer label. We need every user story.
  + We have PO’s, invoices, parts, customers – we need stories for each section.
* New as of 8/4/22 – what about a custom label’s homepage. It could be tied to the main permission, it could show all of the labels with options to view, edit, create, etc. It would also allow a user to go to one place to find and use the labels. They could pick the label and then the system could prompt for more info – what PO, what invoice number, what client, what item?
  + We already have two permissions. One is the basic and the other one is the admin permission. Back when it was a Window’s app, the basic allowed you to use it for your corp. The admin one allowed you to setup multiple corps. What if we flipped things around a bit? The basic permission just allows you to go to the label homepage and use what already exists. The admin permission would allow you to add, edit, delete, modify, sort, or whatever. Just a thought.
* If we had a homepage for labels, we could base all of the activity out of there. We may also want the normal navigation from the other places but the homepage would give a common starting point for all labels.

What would we like it to do?

* (1) Be able to upload jpeg and png images to any label. Unlimited images per label. Images will be stored remotely based on the label. If an edit is needed, an image may be swapped out through an edit process.
* 1. Images – search for (1) below
* 1) She was having issues saving images to the labels. We did some older images that worked but we couldn’t get anything new to work
* 2. The Build Interface – UI – search for (2) below
  + (2) As of 8/4/22 – We decided to add in a custom label homepage. This will help us organize our efforts on new changes that are needed. We also added in a bunch of notes under section 4 (nav) about what we want the homepage to do and look like. See section 4 below.
    - The new homepage would go under top\_secret/secure/label\_home.cfm (would be a new page)
    - We would need a new help file
    - We need to tweak out the two label permissions and point them to the new homepage. Search this page for permission to get more info that was recorded in another section.
    - We are thinking that the page will have buttons at the top to create new, if admin. The main page will show all existing lables, maybe per section, with links to preview, search and use, edit – if they have permissions, and delete – if they have permissions.
    - We would like a history link, per label to keep track of things. This would be new. It doesn’t exist yet.
  + (2) The top header doesn’t look like the rest of the app. Maybe check the images and top link.
  + (2) I like step 1 (name it or pick an existing label). I like step 2 (pick a size – single or sheet).
  + (2) On step 3 expand the verbiage – what does static or dynamic mean – soften this step a bit… maybe some examples.
  + (2) On step 3, the dynamic drop-down has hard coded words like customer, part, etc. Maybe pull in corp-wide settings for custom verbiage.
  + (2) On step 3, if we choose dynamic and part, it then shows an option to enter a part id and a sub inventory id. Check some spelling. It requires an id (one or more). Maybe put in a predictive drop-down or some easier way to get the information into the form. Also, there are no instruction.
  + (2) and (3) On step 3, in parts, we need both parents and subs. Not everything has both. Be able to do just parents, parents and subs, make it flexible. I think that he is looking for an id number or numbers so that he can look up possible sub attributes. As a note, currently, sub attributes are tied to a specific part category. I could totally envision our users wanting to make a parts label that could bridge multiple part categories. That may require us to take certain fields and tie it to multiple possible values, based on the part category. For example: Let’s say that we put in a field called batch number (top left as a dynamic field). If we tie it to batch number, currently it is only tied to that part category. What if we wanted to use the same label for 10 different part categories and wanted 8 of those categories to map to the batch number (different id or mapping for 8 of the categories but all to the same field or place holder)? What would that look like. Also, what do the labels look like on the 2 part categories that don’t have a mapping? Think about numerous possible scenarios.
  + (2) When going through the parts label, it required id numbers but then the preview wasn’t showing real data.
  + (2) we may want the preview label to open in a new tab. No navigation is currently available other than the back arrow. We need more options.
  + (2) For static labels, the dynamic has to be set to (None) – small bug
  + (2) Cory noticed that she was able to flip flop on the app, but it doesn’t hold the correct label. We have to be careful. If a label is already setup, it may have older data and settings that may not be able to be flipped. For example: Say the original label was setup as a PO label, then for testing we flipped it to a parts label. That shouldn’t be able to happen. It needs to be locked based on the label type. It’s too open.
  + (2) As we were testing, it was failing in multiple spots.
  + (2) If the grid was on the page where you add the label asset (text field or barcode or whatever).
  + (2) When moving things, we can drag and drop but it might be nice to use arrow keys and nudge.
  + There are some notes on EOT # 1455 inside of adilas.
  + (2) The fields don’t rename after deleting – say field 5 gets put on the screen. Then when we delete it, the next one skips 5 and goes right to 6. This is not that big of a deal but it may through off our users. \* We thought that if we used real names, it wouldn’t matter so much about the numbers. Just a thought.
  + (2) We would like to see the grid right off the bat. Currently, you have to check a checkbox.
  + (2) When the field are shown… There is no samples of what they are holding. They are just pink with a number. Also, the tips may need to show actual instructions vs tips.
  + (2) When setting up the fields, the box sizes are all greyed out. It might be nice to be able to edit them. Not sure about this. \* Looking to combine some steps and pieces here.
  + (2) The word “merge fields” is too technical, we need to change that. Maybe call it dynamic fields or data driven fields.
  + (2) We need to work on the header, look and feel, and css.
  + (2) We need the label name to show up at the top so we remember what we are working on.
  + (2) Lots of scrolling and tons of white space. We need that, but it needs to be looked at. I saw certain buttons way down from the end of the forms, etc.
  + (2) When sizing things… it might be nice to be able to zoom in/out, it is really small to deal with.
  + (2) In the grid mode, they are just pink boxes, you have no idea what was what field. They need a name or value or something.
  + (2) In grid mode, you can’t add anything else.
  + (2) We would love to mix and blend steps 4 and 5 together. Make it more of an all in one builder vs step by step forms.
  + (2) We were curious if we could add formatting to certain number fields. For example: plain, dollar format, decimal formatted, etc.
  + (2) From Brandon – Cory had to keep clicking “update” and then “save” and if you didn’t go in the correct order, you would potentially lose that button. Just some finicky clicking and JavaScript.
  + (2) When doing sub inventory, we could get it to work (on a single part label), with sub attributes but it was very particular. We will need to open it up quite a bit and make it more user friendly.

(2) The build interface – multi steps

* + (2) Add help files to step one and two - verbage
  + (2) Decide – allow full edits (name, sizes or types, and underlying data points). Some of this could get very deep. Currently, it is wide open but we can see some potential problems there. The main thing that we want to lock down is the label type (po, invoice, customer, parts). Those are specific. All of the other pieces should be editable. We really need the last couple of steps to be fully editable, every time. Layout, sizes, values, pointers (dynamic fields), etc.
    - Maybe term it as putting in some safety rails
  + (2) Decide – allow for delete – at what point are we locked in and a delete is the only option (name, size, data type – pointing).
  + (2) Modifying existing flow and processes – or – adding new flow and processes – maybe two different sections
  + (2) Steps 4 and 5 need to be merged and built-in together. There is tons of changes that need to be made here… multiple other projects.
* (2) The preview needs to be real time
* (2) When to save, when to update, when to do what… smooth out that process
* (2) On the grid mode, show the label images.
* (2) Request to get all of the label manipulation pieces on one page. This includes the add new label feature buttons, sizes, drag and drop, layout options, display values, fields and all of their values.
* (2) Cory wants to get rid of the tips and turn them into real instructions and/or mini help files or modal pop-ups.
* (2) It might be nice to add in some predictive drop-down options on the custom field mappings.
* (2) On the display mode – currently it shows the field type and a number. That doesn’t mean anything. Let’s help make it really mean something useful.
* (2) What about deleting fields. You can do it currently, but you have to bounce back and forth between screens.
* 2) Ideally, we want the add new buttons, the grids, and the details all on the same page.
* (2) Save as often as you want… Less back and forth or confusing steps. If you want to save, you just save it.
* (2) and (4) On the preview – we ran into a refresh problem. We made the change and it didn’t show up for awhile. We may need help do a force refresh.
* (2) and (4) When finishing up the label building process, it kinda deadends. We have no other navigation options. We could look into multiple tabs or windows or make the navigation more round trip.
* 2) On the grid, we kinda like the snap-to and we kinda don’t like the snap-to feature. Also, is there a way to turn that on/off or change the grid size? That would be really cool and would allow for more custom placements.
* 2) Also, as a note, as we were adding fields and trying to edit things, if you didn’t do the exact right process, it felt like you would lose things. Even it you really didn’t, it felt like you lost some things.
* (2) We did a really big label and on step 5, the field settings and the label could fit on the same page. There was some overlap and it looked a little bit funky.
* (2) On the dynamic fields – we may need a sample or a data dictionary. Some of the fields are not very self-explanatory.
* (2) Possible request – When you select a dynamic field, it might be nice if it gives you a small title as well. For example: Say the dynamic field <<line\_quantity>>. It might be nice if it did something like this: Line Qty: <<line \_quantity>> or Line Quantity: <<line\_quantity>>
* 2) We would like to get some formatting (dates, times, decimals, integers, currency/dollars, commas, etc.). We could build that in on a per field value (hardcode it) or we could let the users select and add in the formatting on the fly.

3) Backend data tie-ins

3. Backend Code - – search for (3) below

* (3) The actual code resides on the content server. Can we get to it? Can we modify it? Is it part of a code repo? Is there a fee or license that needs to be held or kept up to date? Does adilas own it or does Calvin own it?
  + (3) We got some dumps while testing – static labels
  + 3) There are pages called “top\_secret/secure/alb\_send\_customer.cfm”, “top\_secret/secure/alb\_send.cfm”, “top\_secret/secure/alb\_send\_customer\_process.cfm”, “top\_secret/secure/alb\_send\_process.cfm”, and eventually on the content server “https://www.adilascontent.biz/labels/alb\_show\_label\_pdf.cfm”. As a note, alb is short for adilas label builder (alb).
  + (3) We found some old info on the adilas label builder – see this URL - https://data0.adilas.biz/MyEasySoftware/adilas\_label\_builder\_app.cfm
* 3) As a thought, what if we put an issue or request on paper and then tied a screenshot to that issue or request. Let the developer know what we are seeing. That may help in some places.
* (3) As a note, the chevrons are special characters. We can’t just use the keyboard and add multiple less than and greater than symbols. It is a special character. They are smaller and closer together and if you delete it, both values get removed as if they are a single character. This is kinda techy.
* (3) As we were testing… we found that some of the sub inventory pieces on invoices and PO’s need to be built out further. We may need to include some of this development in the process. For example: fields like sub\_reference\_id in the po\_invoice\_lines\_[53] table. The fields exists in the database but have not fully been linked up. Also, if we do end up building this out, we need to go backwards and do some bulk clean-up to update all of the water under the bridge (old database records).
* (3) Talking about cart labels – the cart is just memory in a session. We may need to build based on the invoices or PO’s because they exist in the actual database. They should contain the same information, it is just that the actual invoices or PO’s exist in the database. We can get back to it (the data) and we could even pull it from a different page or source (not tied to the session).
* (3) and (4) On the testing and scenarios… we make huge labels and pull in every possible option. Test all of the pieces.
* (3) As a clean-up process, there are over 10 files in top\_secret/secure that start with the word label. We need to do some clean-up and remove ones that we aren’t using. Most likely, the structure and flow will change with the new changes listed above. We just want to clean-up and sweep the floor when we are done (actually delete or rename files as needed).
* We would like to create a label history database table. This doesn’t exist at this point, but we would like to create and use one. See any of the other history tables for ideas (invoice\_history, customer\_history).

4. Linking and Navigation - – search for (4) below Linking and navigation to the labels

* + (4) On step 3, we only have options of Invoice, PO, Customer, and Parts. This is where the labels will be accessed from. Maybe help with verbiage and samples. What about carts, recipes, cultivation stuff, harvest stuff, other processes, and even mixed sources. \* We decided to hold off on new ones and just build out the current 4 main label types (po, invoices, parts, and customers). If they need more options, maybe look at connecting things or adding access points from the cultivation or production stuff.
* (4) After the fact, when actually requesting a label, be able to leave the quantity blank and treat that just like a zero value. We only want to print the labels that are needed and/or requested.
* (3) and (4) On the testing and scenarios… we make huge labels and pull in every possible option. Test all of the pieces.
* (4) After the fact, when linking to an actual label, to use it, if there are only one label choice, make sure and select it. Basically, if there is only one record count or possible labels for a certain type (PO, invoice, customer, parts) – auto select that label. This on the top\_secret/secure/alb\_send.cfm page.
* On 8/4/22 we had the idea to create a custom label homepage. That would help out in so many ways. We still want to spread out the links to the labels to the different pages, but the homepage would give us a single source to build off of and/or jump back to (say after a label has been saved or modified). This may also allow us to use multiple windows (view the homepage in one, create or edit in another). Just thoughts.
* If we go with the homepage idea (my vote is yes) we need to redo the permission directors (where they point to). That shouldn’t be that big of a deal. We do have to then cascade the changes to all servers.
* Cory and I were talking about current (steps 1-5) and where it could go (2-3 steps total). Say a person wants to create a new label – we could show all four main topic (customer, PO’s, invoices, or parts) with options that show single label or sheet label. If we do it that way, we could skip steps 1, 2, and 3.
  + We also thought that we could assume that every label was dynamic vs the choice between static or dynamic.
  + If editing, we can skip clear to the main fields, sizes, and properties – skip all of the other steps.
    - If they need to edit some of the previous pieces – sizes, single, sheet, etc. – this needs to be special. Most edits will just be what the chosen label looks like and does.
  + If creating new, we can skip right to the name the label and pick the sizes if we have buttons that show the other pieces (see above) – basically, one prior step to the new edit mode. Get them right into the meat of it as quick as possible.
  + After adding it or editing it, they need to be able to preview it based on real data or fake dummy data.
  + On the preview (or actual usage) – we could have a link for preview or actual – this would be a separate page that does some light searching so that we could point the label (live or in preview mode) to some real data. We could use the same page, with a small tweak to the verbiage or flow, for both preview and use live.
  + There were some talks about allowing for a live preview, tied to real data, or doing a dummy data preview (showing actual fields and elements with filler data). Another idea was showing small dotted lines around where the fields would be and what they are pulling in.
  + We were working on some mock-ups… on 8/4/22 it was pretty basic but we can build it out. The file is called custom\_label\_builder\_mock\_ups.png with some different screens. The file is on Brandon’s computer.

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Plan – as of 8/10/22

* Do some better mock-ups. We did a super quick first round. We will do a medium round and then a send them to Chuck for a nicer round. Three rounds of mock-ups in total.
* We need a quote with line items and then the visuals that go along with it.
* We would like to compare current to future – where we are heading
* This may require a multiple page pitch or proposal
* We need them to pay enough. This may be on the $20K type level. We may also need to ask for half up front.
* Allow for change orders, but be able to charge for it.
* Lay it all out – plan, steps, budgets, rough timeframes
* We have some rough notes… everything will need to be refined in order to really pitch a $20K project.
* Review the code to make sure that we can really do what we are saying and pitching.
  + We went through all files in top\_secret/secure/ that started with the word label. We also looked over all of the pages that start with the word “alb\_” (short for adilas label builder). We didn’t go very deep. Mostly looking for session stuff and changing some readonly settings to exclusive for setting values in the session scope. More time will be needed to go through the rest of the pages.