Label Notes – 2/7/17

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* Labeling in the point of sale process – focus here
* Some of the issues we have seen – operational
	+ We may not feel super intuitive or straight forward
	+ We are logical, but we have to explain it
	+ We need to label for bulk or per-packaged
	+ We have needs on PO’s, invoices, and carts
* Labeling on the item level, sub level, even grandchild level
* Are we talking industry specific or just point of sale type transactions?
* QR codes – tons of possible functionality
* We potentially might want to use labels all over the system
	+ What are the mappings and/or rules?
	+ Think all of the main 12 players
* Maybe the term “label” is either too generic
* Make the labels logical and intuitive (logic means it makes sense and is controllable – intuitive means where does it show up)
* What about a virtual flex grid level for labeling…
	+ Rules on where to appear and what to show (more virtual rules and assignments)
* From a marketing and setup position, we need to have a super customized tool to label everything. Let the client use the system as they need.
* If we empower the users – compliance changes from us to them
* We may want to use both QR codes and basic barcode – let them choose.
	+ There is a limit on the normal barcode
	+ The QR code could be numeric, alpha, lists (we also need a mask and a key for a list), and/or web addresses
		- We could record date/time, reoccurring, promotions, campaigns, discounts, sales, coupons, referrals, etc. We want to make the cart the more intuitive piece that works with a QR code and then knows what to do.
		- We can put almost anything into the QR code… that is half of the battle. The other half is pulling it out and knowing what to do. What are the rules and what we want it to do. What are the mappings, logic, rules, etc… This gets into smart cart.
	+ What action do you want it to have? Maybe preset some rules and formulas, etc.
* Think of the smart group functionality – rules and assignments
* We have had many requests to use a drag and drop functionality
* We need a robust mapping option – maybe even with some logic
* Maybe set the position, size, font, character limit, and value (dynamic and hardcoded)
* Maybe do some research on what other companies do and what things look like.
* What about colors and logos? Look and feel? Watermarks? How deep do we go?
* Labeling is really important – branding and marketing… it needs to match that company and their branding
* People have to test their labels – they need a builder of sorts
* This could also apply to reports
* Be able to set different sizes and then be able to move the pieces around
* We may need to feed in dome of the defaults
* We want the users to control more and the developers to control less
	+ Empower the people/users
	+ Labels, carts, rules, assignments
* Settings – logic, look and feel, function and form
* Think about the adilas check writing app – lots of similar stuff to what we are looking for
* On the display… maybe prefill the number of characters – for example: YYYYYYYYYYYYYYY
* Flash – maybe update the look of it and add in drag and drop
	+ iOS and Mac (Apple) has issues
	+ What about HTML5 – drag and drop, CSS, etc.
	+ Other research and training
* What about hardware… we currently don’t dictate what they have to use
	+ Maybe we could make suggestions on hardware – not requirements but suggestions
	+ Things keep changing… thermal transfer, ink, laser, etc.
	+ Testing is a challenge
	+ What about continuous feed… receipts, labels, etc.
		- This would be a set size (across or wide) and then unlimited going down (height)
* Let’s try to integrate all of the pieces into a single system that allows for multiple usage options
* Barcoding is useful in lots of different scenarios
	+ Maybe help and educate them as to pros, cons, good, bad, etc.
	+ One of the keys is education and training
* We are almost giving the users a level of programming functionality – make it easy
* They want to blame someone if it goes wrong… (AKA Danny) ☺
* We are seeing more and more demands from state entities
* Think of naming, mapping, aliases when setting up the labels.
* What about formulas and other simple logic.
* Using the custom label app would be an extra charge – we need to fund it.
	+ Kelly compared it to milk vs. juice – they choose
	+ It currently costs $300+ for a custom label
	+ We have a community funded project set at a $40,000 project – guest-a-ment
* Another known complaint is being able to configure the cart and add smart cart logic
* We may need to define some rules – prior to letting them just play and play
* Without going too deep… labels could help with conversions
* What about labels tying clear out to time/date, prices, conversions, promotion codes, campaigns, coupons, discounts, and other smart cart logic
* Labels are way bigger than a small 2 x 3 or 4 x 6 piece… What if it was a poster, a full page, an ad, a coupon, etc.
* What about customer/patient/client based QR codes – get more info and/or go somewhere when you get home – auto login – more details – etc.
* What about a label homepage… They could pick and choose what they want
* Be able to map to different spots (physical pages inside of adilas). Maybe think of how the “paperwork” option works. We currently have something similar for Trinity Fastners. Look into that functionality. We may want to change the link verbage from “paperwork” to “paperwork and labels”. Either way, tie-in to similar type logic.
* We may need some PowerPoint slide shows to help show them.
* The tools are only as good as the instructional pieces of the same…
* The interface helps make things easier.
	+ Think templates
	+ Reusable pieces
	+ Common things
	+ Copy other or base off of something else
* Ultimately, we need to get the whole thing out to a permission, settings, rules, and assignments type level. That is huge.
	+ Boundaries, usage, goals, penalties, options, sizes, and other permissions and settings
* Thing of what, where, when, how, why, how many. We could use verbage such as: capture, show, print, output, type, categories, flags, tags, place, etc…
* Time needs to be considered
* We already have some fun saving options for my saved favorites (saved custom reports)
* As a side note, we see this custom label app touching everywhere…
* Think forward – what about new talent? What about developing new code? Who is going to maintain it?
* What if we could program a QR code to add something to the cart, auto print the label, and show that someone has claimed one for checkout. Just an idea…
* Think of a virtual shopping cart for building the label – I need some of this, some of that, and all of this. Drag and drop, builders, play individual, play in bulk, etc.
* The naming and aliases are huge – be able to map and point as needed
* People like to see what is going on and happening – once they can see it, they could possibly understand it better.
* We need to somewhat tie into the Adials GPS Core Interface (show all of the options that are available)
	+ Along with this, we don’t want to pre-determine paths and procedures – allow for flexibility and flow. Have everything available (the full tool shed) and then pick and choose as needed.
* Prioritize the most used sections first – cart, items, subs, PO’s, invoices, and then the other key players
* This goes deeper than just carts – it deals with inventory control, marketing, flow, business processes, etc.
* The main four square is: PO, Invoice, Deposits, Expense/Receipts – all the rest are somewhat subsets of the main four.
* Jumping into some cart functionality issues and/or ideas…
	+ Pricing is a huge piece
	+ We are looking more into time, dates, date/times, and reoccurring elements to help with the pricing logic.
	+ Promotions and coupons sometimes have logic
* Walk through scenario:
	+ Kelly would love drop-downs, filters, choices, checkboxes, rules, and assignments
	+ Be able to move things, name things, and save things.
	+ We want to print and/or digitally display something…
		- Use a wizard type interface to help walk them through things
* We already have huge requests for custom carts and custom labels… what if we could marry the two biggest needs together. There is demand for this… which means there is money and funding for it. People want this…
* These ideas and features – will help us be unique – and add value
* As a side note… there are other technologies such as barcodes, QR codes, RFID tags, GPS, symbols, colors, etc.
* On barcodes, we need to have options on showing what the barcode contains or hide it (only show the barcode not the value or text) or show alternate text and/or values.
* Things change… think about that and allow for that to happen. Empower the users.