Label Notes – 2/7/17

Steve, Kelly, Danny, and Brandon

* 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 even too generic
  + Think about moving into the future… speak the language of the person using the system.
  + Tags, coupons, sticker, label, quick access to sites, carrying info, sending info, displaying things, etc.
  + Some sort of visual tool to help get people going where they need to go – info, logic, mini database, mini vehicle of sorts, etc.
* 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.

2/9/17

* From Danny, words are just words… sometime you need to see it (think visual)
* Ecommerce – if a company has an outside source for their site, it is a royal pain in the rear to transfer data from the ecommerce site to another business system that tracks your stuff. People are looking for ways to work from home.
* Options to choose colors and keep the look and feel consistent. That is huge.
* If we try to please every… we end up hurting all parties. We need to setup some rules and then help all of us play by these rules.
* There is a conflict between chasing the dream and making do with what we have got.
* Round one – from Danny – drag and drop, pick and choose what kind of fields and where they go, and then make it work together.
* Round one – from Steve – a label homepage where they could store different settings and name a label. Then add the functionality to that label. We then know where it shows up. Maybe tied to the paperwork stuff.
* Default vs. custom – this is a constant battle. Where do we draw the line and how do we actually pull this project off.
* Brainstorming vs. trystorming – there is a difference. Trystorming almost implies multiple loops or iterations (experimenting and trying over and over again). At what point do we switch between the two. Do we need to start over and take a different path? Look and check out what is around you.
* Burning platforms – what are the current burning platforms? What is making us jump?
  + We get very distracted on little side fires meanwhile we are still trying to work toward a dream – those little side fires are major distractions
  + The ground keeps moving and didn’t choose a single model. It is very diverse.
  + The mix between demands, funding available, and talent that is available.
* Sometime rules and regulations create the burning platforms. These rules and regulations are either real and/or implied.
* Open marketplace stuff – we do want to open up the open competition. We need options and diversity. Who is doing what and how does that effect the whole.
* One big client or multiple smaller clients – Sometime the bigger the client, the more the distraction (in a way). Maybe focus on the smaller mile stones vs. the bigger golden nugget.
* How hard is it? If it is super hard… maybe look around and ask for help or ask if you are on the right path.
* Maybe the goal is communication and getting our work flow organized.
* Instead of going super deep into the big dark hole, maybe keep doing what we enjoy.
* If things get outdated, either update things and/or take it fully off. It is ok to remove things as needed.
* There was discussion dealing with hardware and recommendations. We would love to push people to the adilas world or adilas market.
* Departmentalize things and who is doing what? It might help if it were more defined. Maybe all of this is part of the adilas world and/or adilas market. Sadly, we need to be able to say – blame so and so.
* Adilas is the SaaS (software as a service – from Molly – software and service…) – all of the other pieces need to be done by other parties.
* We are seeing a switch in technology. Lots of things used to go with a magnetic stripe … we are seeing more and more things going to 2D barcodes and such.
* What about cross corp transfers? If it (a label and/or product) comes with enough info, could we virtually look-up things to make sure that other things happen? That would be pretty cool. We would need to make sure that standards are set and security is enforced.
* We are seeing an increased need for elements of time being able to be scanned and tracked as well. Think of all the system players. A label/tag/sticker is just a vehicle to help move info and flow around the system.
* From Molly – what would you like (her light vision of this feature)… labels and the shopping cart – two key pieces are labels and cart (current fires and tons of custom needs) – inventory labels, shopping cart labels, customer/patient labels – smart cart and rewards and discounts – label things at the time of packaging – the QR (label) needs to be connected to the pricing models and campaign stuff – one pager, build a label, these are the instruction and/or info that needs to be stored (we could store that and then link to it if needed) – there might be options and/or branching logic – where does it appear? Maybe multiple places for the same label. – intuitive positioning of the labels (where do they show up?) Is it on the item, on the category, on the PO, in the cart, from special reports, etc.
* We will make some plans and then show you the progress.
* Be able to sort the main labels once created.
* Get generic labels from Danny, Kelly, Molly, etc. This will be the starting place.
* Label layout is somewhat of a nightmare to get everything that they want/need in a small and/or limited space.
* We need to do some pricing matrixes for our own products. We have tons of options, that gets tough but we do need some of the basic starting points.
  + As part of this discussion. We pulled out an older adilas pricing matrix and I went over it with Danny and Steve. I told them that I would pass it on to them and let them hack on it and jump from there.
* Don’t give them every choice under the sun… keep it simple.
  + Maybe preselect the things we know that they may want. Give them a starting point.
  + It would be awesome to be able to copy and duplicate certain labels.
* From Russell on a later meeting – only change what you need to or want, leave all the rest as defaults. On his new color pickers, you can pick and choose any color you want. You don’t have to do all of them, just pick and choose what you want. Instead of chewing the whole thing… just take one small bite at a time. Great concept.
* From Russell on a later meeting - On figuring out your target – use the bell curve model. You have outsides, the 80% (still on the outsides but part of the main meat), and the main 60% (the middle of the curve). Defaults in the middle and custom on the outside.
* Talking about the screen shot for the initial flow…
  + Start at the homepage. It would have a button to create a new label. It would also show existing labels with links to edit the main and edit the label items.
  + When they get to the add new page, get the name, where, when, why, how, size, sort, status, description, etc. Think of all of the main options. This page will end up being both an add/edit page for the main details.