Handhelds. . . . Miracle or Nightmare?

by Lorna Schauseil, President, GBC Systems, Inc.

If you are currently using handhelds, you already know whether they are a miracle or a nightmare for your company - or a little of both. It is important to point out, however, that unless your handhelds lose information on a regular basis, even handhelds that are not what they should be are still worth using because of the time saved, elimination of calculation and data entry errors, end of day processing, and signature capture.

If you are thinking about using handhelds for the first time, this article may help avoid a costly mistake. How can you tell if the particular handheld and program that works with your system is going to be a miracle or a nightmare? A little investigation may help answer all of your questions.

The Miracle:
The distribution industry is recognizing the value of handhelds for the amount of time they can save and additional information that is available from deliveries. Those companies who are not yet using handhelds for route deliveries are quickly realizing they are missing the boat. The biggest factor is the elimination of data entry errors. Errors entered by either the driver or the data entry people consume a great deal of time and present an unprofessional image to the customer. Another big benefit is the ability to send digital copies of invoices to the customer with a signature regardless of the age of the invoice.

Eliminating driver errors in pricing, taxes, or customer, and the time it may take the data entry person to figure it out (if at all possible) and more time to correct the invoice and notify the customer is well worth the investment in handhelds. Changing out equipment at a customer location is another miracle of handhelds. Without handhelds, the driver must write the serial numbers of both the one delivered and the one picked up. The obvious problems with this are the driver's handwriting, (or transposing serial numbers) and the equipment not being where it is supposed to be.

Instant data entry allows you to view the previous day's sales, cash, inventory and discrepancies minutes after the drivers return from their routes and sync their handhelds. The end of day reports allow the route manager to monitor and correct discrepancies before the driver leaves for the day.

The basic wonders of the handheld – eliminating data entry (and subsequent errors in the process), maintaining the equipment in the field and warehouse, and tracking inventory. The question you may ask is what could go wrong with tried and true handheld programs that have been in use for years?

The Nightmare:
The major issue with some handheld programs is handheld programs that have not kept up with technology. Progress in handheld programming, operating systems, and hardware are occurring on a weekly basis. If the producing company does not maintain its software, you may be stuck with handheld programs that do not operate on available handhelds or operating systems. The Palm operating system goes through updates that are not backward compatible so your program may not work on handhelds that you can readily purchase. Companies are forced to look for older , sometimes used, handhelds through discount warehouses and eBay for replacements.

Stagnant handheld programs also suffer with the syncing process and are normally confined to syncing with a cradle and a program such as Active Sync or Hot Sync, which is slow in the office and painfully slow from a remote location. Syncing is normally done from a single cradle one by one through the handheld syncing program. Many companies use multiple cradles but still sync one by one, taking quite a while to get through the entire syncing process. The marvels of technology have brought us to 30-second simultaneous syncs with the use of a wireless connection or Bluetooth, either locally or remotely (necessary access is required for remote syncing). The benefit of wireless is that all handhelds can sync simultaneously and do not have to wait for other drivers to finish.

If you are going to purchase handhelds for the first time, you should check the available hardware first. Make sure the handhelds that are offered are current and readily available for purchase. The three most popular handheld operating systems are the Palm, Pocket PC, and Blackberry.

Current versions of each operating system can be found on the manufacturer's website. The handhelds you purchase should be readily available, and current. Many older handheld software programs work on current models, but some do not. It could be a nightmare if you cannot purchase the necessary handhelds.

You should also consider how often the programs are being updated and whether or not there is a charge for the upgrades. Handheld hardware gets outdated and obsolete very quickly today. If the programs are not kept up, you will end up with the above scenario of not being able to find current handhelds for replacement. You may also end up with expensive upgrades each time the operating system is updated.

Handhelds take the effort out of calculating invoices, taxes, inventory, equipment maintained at a customer location, and end of day reconciliation for cash and checks. The data is moved into the main program in seconds and normally the customer information is updated the next morning so it remains current. Digital invoices can be produced with the customer signature and printed name from the main program and easily faxed to the customer within seconds.

The use of handhelds is highly recommended, even if the programs are not current because they do solve most of the data entry problems. Many older programs take an inordinate amount of time to sync the data from the handhelds, but that is still better than manually writing tickets and entering them manually into the system.

Before purchasing for the first time, it may be worth your time to call other users of the handhelds to see how happy they are with their current handhelds. Below are some questions you should ask:

How do they sync the handhelds and how long does it take for each one? If it takes a few minutes for each one and you only have two to five drivers it may not matter. However, if you have 30 drivers and it takes 4 minutes to sync each one that equates to a minimum of 2 hours after the drivers return.

What is the availability of handhelds when you need replacements? Are they readily available either through the manufacturer or a computer store?

Is the company responsive when you need something added to the handheld program? Many times State governments add new requirements such as a recall procedure, or an added tax with a different rate for food items vs. hard goods. How long will it take to get a revision to the program?

Is the company responsive when you have any type of difficulty with the handhelds? Is someone available to help get through the problem?

How often is the handheld program updated, and is there an additional charge for upgrades?

What type of interface is used between the main program and the handheld data? Does it integrate directly with the main program, or is there an additional program you need to first convert the data? This is normally the scenario when using a Unix or DOS based system and creates two sets of information. It requires users to first move information from the handheld to the interface program, and then again from the interface program to the main system. The same is true sending information from the main system to the interface program, and then again to the handheld program.

Can you view and print invoices with the signature from the main program, or do you have to go to the interface program to find and print those tickets?

How does the handheld create invoice numbers? Are they consecutive throughout the program, or do they leave large blocks of invoices that just disappear? This could be crucial during a State audit.

Can you tell how the invoice was generated after it is posted into the main system? You should be able to determine whether the invoice was generated by a handheld, or manually by office personnel.

If the handheld loses power during the day, will the existing information be lost? Most programs store the information on a data card so loss of power will not affect existing delivery information.

If the supplier of your software does not have a handheld program, you can try other sources to see if something is compatible with your system. Once you try handhelds, you will never want to go back to the errors of a manual system or the length of time it takes to get all data updated during the busy season. Consider the amount of time it takes to get the information from the day's deliveries posted into the main system and you will quickly realize the ROI is less than one year.