codeREADr

# Setting up codeREADr as both Trigger and Action

## 1. You first need to set up the Trigger App (in this case, codeREADr).

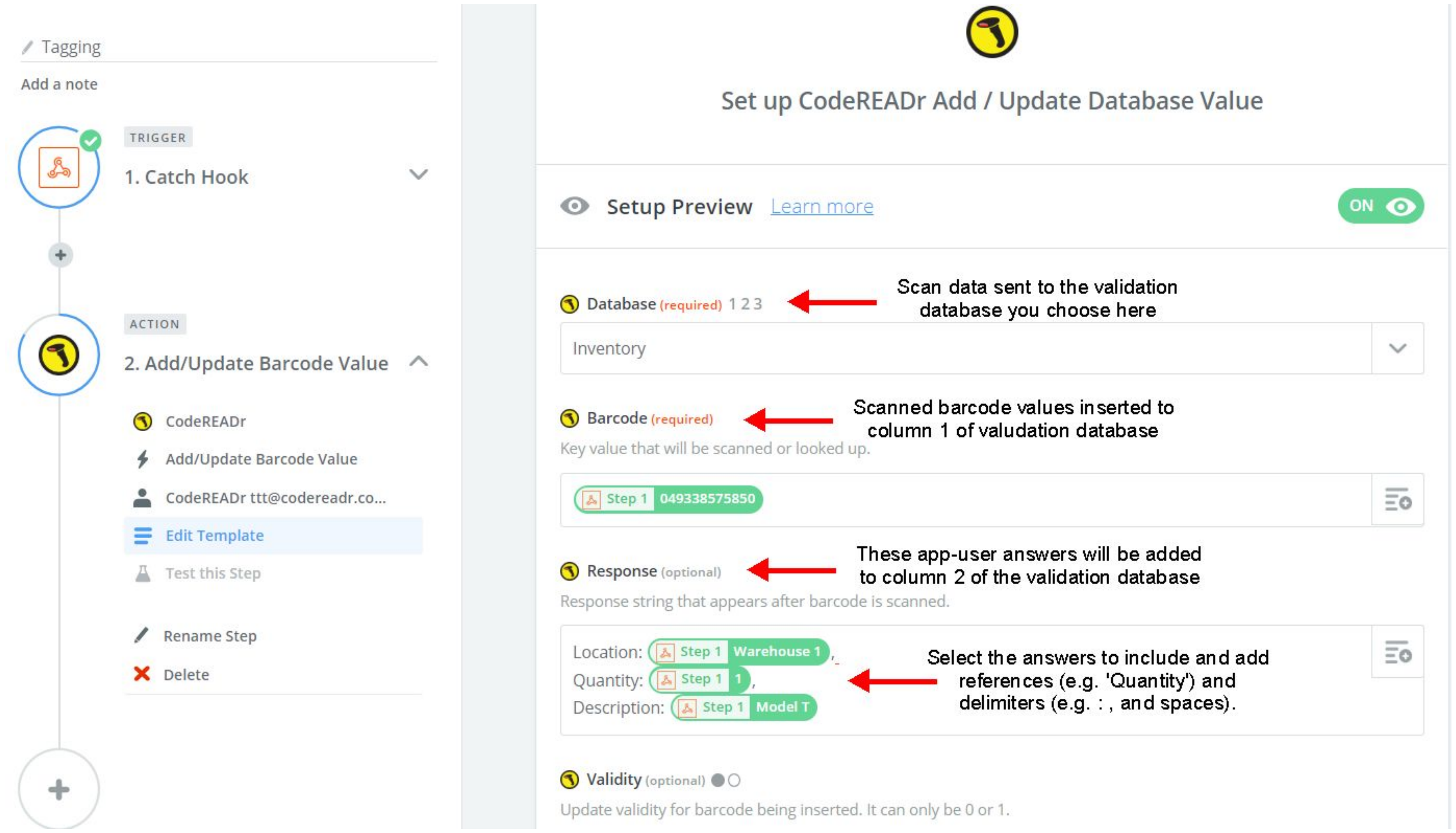
a) Create a service using your codeREADr.com account.
   i) A record-scans service type can be used online or offline to insert scanned data into a codeREADr validation database for use by a separate validation service.
   ii) A validate-scans service type can be used online or offline to insert scanned data into a codeREADr validation database for use by the same service or a separate validation service.

   For the example below, we created an online, record-scans service with a validation database and an Export Template - all called ‘Tagging’. For the service we created three questions (app-user prompts): a shared ‘session’ question (dropdown) for Location; a Quantity question (dropdown with ‘1’ as the default); and a Description question (short form). We could have added a fourth question for scanning the serial number of the asset (a short form barcode-scan option) if that needed to be separately captured. There is no limit to the number of prompts.

b) Once you have your service created, follow the instructions to Create the Trigger using a Zapier Webhook.

## 2. Now connect the Action App (also in this case, codeREADr).

Here you can find detailed instructions to Create an Action. A summary is shown in this screenshot.



Tagging

Add a note

TRIGGER

1. Catch Hook

ACTION

2. Add/Update Barcode Value

- CodeREADr
- Add/Update Barcode Value
- CodeREADr ttt@codereadr.co...
- Edit Template
- Test this Step
- Rename Step
- Delete

Set up CodeREADr Add / Update Database Value

Setup Preview Learn more ON

Database (required) 1 2 3

Inventory

Scan data sent to the validation database you choose here

Barcode (required)

Key value that will be scanned or looked up.

Step 1 049338575850

Scanned barcode values inserted to column 1 of valudation database

Response (optional)

Response string that appears after barcode is scanned.

Location: Step 1 Warehouse 1,
Quantity: Step 1 1,
Description: Step 1 Model T

These app-user answers will be added to column 2 of the validation database

Select the answers to include and add references (e.g. 'Quantity') and delimiters (e.g. : , and spaces).

Validity (optional)

Update validity for barcode being inserted. It can only be 0 or 1.

## 3. Helpful Hints

A. When configuring your Triggers and Actions after re-configuring your codeREADr Services, you may find it easier to create new Zaps and turn off the old ones rather than editing Zaps. This is **particularly important when testing the Catch Hook Trigger** after you have scanned a value. If that's test isn't using the new service configuration, you may be able to proceed but the integration will fail.

B. Most administrators will use one codeREADr service to insert data into a validation database. However, you can also have **multiple services inserting data into the same validation database**.

> 1. When creating your codeREADr services, each service must be associated to the same database in Step 1 ('Type") of the service creation wizard. Also, each service must have a unique Webhook created on Zapier and pasted into Postback URL form on the Advanced step, usually with a unique export template as well (see below).
>
> 2. Assuming each service will change the response data after entering their answers, then each service will have their own uniques prompts for the app user to answer. This means you need to create a unique export template for each service.
>
> An example using this type of workflow would be process, asset or shipment tracking where at each step the app-user need to see the status of the previous step before taking an action. The app user will only see the answers submitted by the immediately prior user. And when they answer their prompts, the next app user will only see those answers and not any of the other answers prior to that.
>
> 3. It's also possible to share prompts for multiple services but be aware that the prompts will need to be answered each time or they will be blank for the next scan.
>
> 4. When adding your prompts to a service on the Questions step, you generally should make one or all of them required (click the asterisk) so the app user must answer the question(s) before they can submit the record.

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