

# Heartland Shuttle FAQ & Best Practices

**Mission:** The Shuttle program for Retail Orbit integrates multiple POS systems with Retail Orbit so that data can be collected without having to several reports from the POS and manually upload the information. Each POS system is different, however, and that means that shuttle has to adjust (as best it can) to be able to obtain the data successfully from the POS. The purpose of this document is to outline some common questions that come up during the integration process so that you can better understand how it works, what to expect, and what practices you need to put in place in order for Shuttle to receive the best data possible.

## **Which version of Shuttle should be installed for this POS?**

N/A

## **Does this POS use a relational database? How does this affect Shuttle?**

Yes. This means that when you make a change to an item (i.e., the department on the item), it automatically updates history in the POS with the changes you made. Therefore, if we repull the historical data, the changes will be reflected in Retail Orbit as well.

## **How does the department mapping work for this POS?**

Department mapping is set at the item level for this POS. This means that each item in Heartland MUST be assigned an M1 Class or Chid Class (custom field) in order for us to collect the data.

## **Are there any character limitations that we need to be concerned with for Shuttle to work?**

We highly recommend that Class Codes should be limited to Letters and Numbers with a length not exceeding 10 characters. Shuttle currently has the following limitations:

- Maximum Number of Characters: 20 (Please note that reporting can be thrown off if the combination of class code, class name, location name and category are too long).
- Characters Accepted: A-Z, 0-9, &, /, \$, +, -, #, <, > , ?
- Characters NOT Accepted: |, %, ' , ` , (comma)

## **Is Shuttle able to collect 24months of historical data, and if so, how is the historical inventory populated?**

Yes, history can be obtained for 24months and the inventory will come from the Shuttle during the history load.

## **What options are available for collection of Markdown data?**

By default, POS markdowns are the only data collected, however, there is a switch in Settings that will allow it to capture permanent markdowns as well (only affects the data moving forward, and not any permanent markdowns that were made before the switch was set).

## **What dates are used when determining where to collect the Purchase Order data?**

The End Ship date is used to determine which month the On Order goes into.

**How far back do we collect data on Open Purchase Orders?**

The Heartland Shuttle looks at all Open Purchase orders from the past. The POS should be maintained so that any Orders that will not come in (or will not be accepted if they do come in), should be cleared out of Heartland so that they don't affect the Open to Buy.

**What stops shuttle from working properly with this POS?**

This shuttle runs automatically every night, and should work without issue, unless the user is removed, the API token revoked, or the permissions for the user are changed.

**Are there any other nuances with Shuttle that I need to be aware of for this POS?**

When pulling history, it should be noted that the current price of items is what will be used for the inventory value in the past. All items MUST have an M1 class assigned to them, as we cannot gather information based on the department assigned to the item (also a custom field in Heartland). Heartland does provide access to export the data whenever the user would like to generate a report. Therefore, they can upload mid day if they need to affect reporting.

**If there is an issue, where do I get support?**

The best place to start with support regarding the collection of data is to contact Retail Orbit support by email at [support@retailorbit.com](mailto:support@retailorbit.com), by phone at 520-612-2001 or by appointment at [retailorbit.setmore.com](http://retailorbit.setmore.com).

Heartland support can be contacted through the chat feature in Heartland, and may be required if any changes to the data need to be made (they have an export tool that they can use to send you an excel form of the entire inventory so that classes/etc. can be modified and reloaded into Heartland).