General Notes for Adilas Training in Denver

Day 1 - Tues. July 16th - Focus: sales and inventory

Steve - demo/overview:

-Mainly covering sales - shopping cart, interfaces,

-Cool demo and overview with serialized and stock units

-Think it up, and then let adilas try to follow your flow

\*IDEA: Steve mentioned that it would be neat to get someone on a demo... or maybe we could even film them and put it online.... but get a user that uses a touchscreen (like those that have a touch screen/computer flat together, it tilts) they can just go to town on their touch screen

\*IDEA: Maybe this is kind of like what Brandon & I talked about when we visited the Mixing Bowl... but that would be really neat to do some high quality filming on locations to see how various users use adilas... like mormon.org type thing... that would really be so neat and could be a great asset for marketing... just a quality little video demo with really users

-Recipes - Build & hold/Build & sell

\*Cannot overemphasize how important setup is! SETUP is critical - that makes users happy, satisfied and that can create more successful adilas users.

\*IDEA: Would it be worthwhile to have a special training for reps and consultants to specifically help them be effective with setups? Helping consultants so they can help their clients.

-Ability to archive - Standard Operating Procedures (SOP) right onto their site, so that the company can have its specific guidelines for use - that is really neat

\*Adilas - REAL TIME, anytime and can be SO incredibly effective and help your client to be successful when you give them the correct tools (setup), and help them to use it successfully - \*No lag time with understanding what is going on with your business, you can know everyday

\*Dream it up - and you can make it happen! It is what YOU WANT! That is one of the greatest features for users!

-Adilas Project - Steve called it - I'd never heard them mention that term but I liked it. Adilas is trying to help business owners accomplish their goals and be successful.

-Just getting clients/users going... you can start them with a little bit and add more pieces as they are ready for more, wanting to incorporate more. You can fill in the backend later. Just get them using the system on a daily basis and then you can incorporate other aspects as you go.

-The most important thing is to know what your client wants, needs, what are their goals? Then set them up in a way that they can accomplish that and understand how to be successful. Mirror the physical in the virtual. (What they do with their hands - do in adilas.)

Back with Brandon:

-Planning out what you want on paper - very useful tool

-Setting up a consulting business

-How many worlds = corporations (EINs, entities)? Locations - various locations under the same corporation or entity

-Print help file on the main page when you set someone up so that you can get them back in should they log themselves out...

-I think a great thing Brandon did is having them walk them through functions - when something was missed, or just general practice and repetition

-Rep: get all the info you can independently before you start - like tax settings, etc., etc. Then anything they need you can go through with them... but get what you can before the sit down setup.

\*IDEA: connect a video link to the permissions and settings area so that people could watch a brief blurb instead of reading the info to the side if desired - idea from Russell

Back from lunch:

-A brief history of adilas - started from a question of how long has adilas been sold

-It is so interesting how much your goal really does affect what we do in training or how we use or work with adilas tools -

-So many ways to play the game or get what you need/want - i.e. they were talking about duplicating the PO's for generic items to switch locations... so many great tools

-People LOVE the Quick Search when they see how it can be used

-When people see what adilas can do, they LOVE it! It's just getting them to be able to see, understand, and use adilas successfully.

-You can start from SO many different places. When you have parts you can start your cart from there, you can quick search start, you can start with customers, etc., etc.

-Remember to use your browser tools and assets

-Be consistent in adding your items with everything (customers, part numbers, just keep it the same - all lower case or first letter of word capped, etc.

-People love seeing the possibilities - they love seeing the speed, they love seeing things that make their work faster, easier, more efficient - all of the tracking, accountability barcodes, reporting - history, quick buttons, my cart favorites etc., etc., etc.

-My cart favorite buttons - pretty snazzy stuff

**DAY 2 - JULY 17th: Idea for focus - CRM, eCommerce, Flex-grid, Elements of time**

Review/demo with Steve

-Going over PO creation, getting inventory in

-Can use reference number to help select specific groups, for closeout items or etc.

-Verify & lock PO's - is really a communication tool between off site receiving & another site for accounting - allows to verify that things have been received....

-Much easier to just get the little swiper or key it into adilas so that all of your data is there & tracked. Much easier than having a separate card swiping system which you have to record approval numbers back from the batch, etc., etc. Much easier if it is all contained in adilas. Adilas also can connect all of the info from the swipe - the approval number has a drill down with all of the details and you can even void a transaction in adilas if it's within that business day and the batch hasn't been settled

-Covering credit card transactions - people really want to be able to use this function for demos

-"This is an eBusiness buffet, have fun!" - Brandon

Back training with Brandon

\*\*\*Training, education, education, training! Obviously that is why we are even in Denver but there is such a need for it! We have a lot of exciting things coming and it will be so exciting to get the user guide up and going with interactive videos and education from the conceptual level through tech level

\*IDEA: (apparently already recorded) but have a template for inputting new employees, to help save on time

-Customer Tax ID# - a great field to just modify to what you need (for Russ with family history, maybe this is their Reference tag)

-Customers: a fun little demonstration with Danny & Santiago

-Customers throughout the morning

-Training & questions on customers (CRM)

-Elements of time - often the question is presented - can you get it to prompt you? Push technology -Fits into round 2 of elements of time

-IDEA: It would be cool in the follow ups or whatever... is to have the dates on the mini calendar as a link that automatically populates field - way too much work for right now - automated will come in the future.

\*COOL - Something I did not know, but is a cool little thing. You can add links in the adilas logs... there is an automatic link if you fill in the web address for the customer... but also by html compatible log notes... which for Russ's question for family history essentially means every log note you make - say for referencing census reports, death records, etc., etc. - you can add html text to create a hyperlink in your log note, so you could reference right to that sight... that is pretty snazzy (with family history, I don't know how reliable the site sources are, or if you need a scan or pic from it???)

\*It is going to be so fantastic and incredibly powerful to have the "create your own buttons" for what you do or look at or need to get to fast, etc. or being able to write custom code for your specific purposes. Really neat stuff!

-When you know where things are stored and you know your methodology it is amazing how easy and the capacity you have to pull that information.

-Copy and paste emails to the log, then you have all of the information and the entire story that has occurred... as much as you put in, you can get back

-Additional contacts is a great place to add subs or things like "Ship To", "Shipping Address" or whatever you need

-I love that adilas is created to be not limiting - - so many applications don't let you do certain things or don't allow certain things because for various reasons they limit it to a specific scope or don't realize other capabilities

-Cool sounding function on elements of time where you could track sub dates and time under a project... then you could track your final amount of time or so forth and invoice for it or know how long a project took you

-Elements of time - you can add up your time and billing if you'd like - for it to auto-calculate and help you with some of those things enter them as mains. Sub dates and times can be good for tracking a project but it does not auto calculate your time but maybe if you don't have a specific hourly rate and just want to decide on a total when you're done or something, that might be a good way to go with subs. Depends on what you want - just like with all of adilas... what is your goal? Then let’s choose the best route to achieve that.

-Pre-set your calendar view in the settings area - you can put it in calendar view, time slot, showing what you want, etc., etc., etc. Of course from the home page, you can swap to differing views. Lots of cool stuff. I need to get more up to speed on elements of time and flex grid

\*REQUEST/IDEA: Clients have been asking for a connection between customer log notes and elements of time. Basically asking to put a follow-up on the calendar, etc., etc. Brandon mentioned that might fit well with a setting. Maybe an element of time....? Brought up in class by Steve.

-I think it is instructive how we work through step by step and problem solve many times. So working through turning on a permission and then adding the setting when it doesn't show up and just adjusting things so that users know that there are ways to fix things or get back to what we wanted or my goal was.

-eCommerce overview - super neat stuff coming with this...

-I think it is cool that people working on the eCommerce are already getting their own exposure to adilas... :) - also an unanticipated aspect I had not thought of is building customer profiles.

-Returns - 'think negative invoice' - but be careful with that, it is not a blanket statement... because what if you have something returned that you can't use again or etc., etc., etc.

-Sometimes it is so amazing to me, that you click a few settings or permission buttons and your entire look, feel, capability can change entirely... same product, which we know but sometimes I still find it astounding because it is SO different from any other product, amazing!

\*Whoa! So much cool future development! All sorts of fantastic stuff coming! - Marketing, business aspects, tools, promos, etc., etc., etc.

\*IDEA: Track who is logging in to eCommerce. Possibly somehow route it to the Queue??? Maybe flag it somewhere else??? (May possibly be in the code already???)

-Been down digging tons of tunnels and kind of wondering why no one else is down here but they are trying to spread the word and invite others down to dig down here. And there will be many more to come!

-Currently - adilas is a business tool. Future - adilas as a business and marketing tool.

-Brief overview of flex grid

-Flex grid: essentially creating and stacking your own customizable database on top of what adilas already has. (Create your own database)

-User maintained history aspect: essentially any note you want to create, or any info you want to log that isn't already tracked, user maintained notes, etc.

-Custom fields: so many possibilities here! What do you want to track, how many categories, sub categories, etc....?

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**DAY 3 - JULY 18th - Focus on deposits, banks, expenses, etc.**

-Started off with a question from online which led us back into flex grid

-Back into flex grid... (Transparent & non-transparent flex grid options)

-The only caution for flex grid is plan it out so you don't have to re-do all of your work and so that you can have the pieces you need where you want

^I need to learn more about flex grid and elements of time

-I love the problem solving aspect of setup and consulting.... understanding their issues, concerns, needs, goals and helping choose the best tools to fit that goal or an acceptable solution for their concerns

-It is so neat that the flex grid is its own customizable database on top of the application.

-You can even barcode flex grid if you would like - a company uses this because they have different pricing for many of their customers on the same parts

\*We need testimonials and experiences from customers - people see the value in that, it had been mentioned by multiple class members

-Stock units seem really neat - we saw a little bit with a company that had done a lot of internal invoicing with stock units - really amazing how much they tracked everything.... construction management and job costing to the n-th level

-Once you have all of this data, you can do SO many things. Plan ahead, know what you need for future projects, have everything tracked to the finest detail... huge potential, everywhere!

-Brandon did a little show & tell of how some different company's use adilas - people LOVE this! This seems to give people an understanding to the point where they finally grasp some of the possibilities of adilas. It is interesting to hear their reactions, because we have been working in adilas now for 2 days and they have been really excited but people love seeing how this is really used in business and they start seeing an even bigger picture. A good little wow show, they really capture just how much this tracks and how easy it makes people's lives in business and how great of a business tool adilas is. ....... Now we just need to get some "commercial", "testimonials" from so many of these customers that are using adilas.

-Adilas really increased the re-sale value when you have such a detailed customer base and detailed books and you really increase the value by showing what the company is that is being sold.

\*IDEA: A rep training - which was already mentioned above but what if it was largely rep led and instructed - specifically for reps and how to setup clients, but also all that adilas does

-Protection by sharing - and the users and those in the class were expressing their appreciation of that and also feedback on how smart or a good route that is

-Security question - password & profile help page. Talking about all the upfront adilas does to keep things safe

\*Users get super frustrated when they are set up and feel like they have been left alone. If you can make a good setup and initial training, that is critical, but there is a definite need for consultants and training - no question obviously, why we're here again and why adilas university is forth coming. You will definitely have some people that will get in and figure it out and make things work and you definitely have other people who will need more hand holding. Also known - just figuring out how to address that again and help users to be successful! That should be the focus of the rep/consultant - help your users/clients to be successful.

-Is accounting even needed if nothing is happening? Great way to ask that - let operations lead. Put the horse before the cart.

-Zipper analogy - a great starting point - because merging operations with accounting will change the ways businesses can function and can change the face of what will occur in business accounting and tracking.... Brandon wanted me to record that Joe was talking about this but more of a comment than an idea. Maybe an idea as an approach???

-Reps/consulting/instruction note: we really need to be able to help people understand principles, flow, some basics and where to go for help (help file, tech support, adilas university, etc.) about how adilas functions.... because when people understand flow and more principles, then hopefully they can be more prepared to go in and figure out how to make things work for them.

-Interactive map: operations on the bottom and as things flow through the bottom section, then thing begin to rise to the top (a little cream scenario), when you have good operations, things will be cascading to the top - your accounting aspects

-I'm really impressed with Brandon's teaching: sometimes it gets really challenging to cover basics, flow, and possibilities when you have such varying levels of users and also users or clients who really want their "problem" questions answered... anyhow, it definitely takes a balance and I am grateful for Brandon's patience and teaching and all such things.

-Accounting comes with the natural flow of accounting

-It is important to understand that there are many ways around the track. Different ways work for different people, industries and preferences - and help other to work in the way that they need...

Roxanne: demoing expense/receipt - Good to remind people when setting up and the interface looks intimidating. That assets are any monies coming in, liabilities are any monies going out. With that PO's are tied to inventory, what you are paying and bringing in for inventory. Expense/receipts are any other money out for whatever.......

-She also copies and pastes a lot of her little notes into all the different sections, b/c different ones show up in different reports

-P&L - Profit and Loss, I.S. - Income Statement, B.S. - Balance Sheet

-Roxanne was saying: Get in there and get working - if you make mistakes, not a problem, it can be cleaned up but be unafraid to get in there and just use it. There are ways to clean up, to move on, just get going and try to do the best we can.

-Reimbursements - when creating that expense receipts for a reimbursement, you are putting in what they paid - so "no bank assigned", then when you go to pay him that will essentially create a new expense/receipt to satisfy that one or many if there are many to reimburse

\*Always work out of your payables, you're always cleaning up your payables. For what you owe, look at your payables, work from there. Look at what to pay from there, and then you have it broken down to your PO's, your REI's, and your Splits.

-The "not yet" verified link on PO expenses you are paying on - if you click on that link it will take you right to the verify page and then right back to your payables homepage - instead of going back and doing the process over and over and over, you can do it all there nice and fast.

Wahoo! Thanks Roxanne, that was a great demo!

Back with Brandon leading - but a lot of group comments and input, wrapping up the training scenarios, etc.

-Great comment by Joe as we were talking about future clients - Every situation you walk into you need to assess the client, not only what they need, but what is their interest and desire - are they ready to soak up adilas like a sponge.... or are they no, no we have QuickBooks/PeachTree/whatever... then you just throw them a bone and then another bone, etc., etc. Then Brandon was discussing that you really can walk someone step by step. You can start with some aspect of the application and once they get that then you can introduce another aspect. What do you want???

\*The byproducts that adilas creates is worth way more than the monthly payment for the application

\*People believe in adilas and the way adilas functions. They love how adilas cares about their customers and reps, they appreciate how adilas is not stingy with all of their code or training, they love it for the incredible business tool it is - that it tracks everything and does almost anything they want and that you can tie everything together and tell the whole story, they love that adilas is offering training for free right now, that adilas actually takes their ideas for improvement and incorporates that. Those things make people believe in adilas and people are selling and promoting adilas because they love the product and they believe in adilas' philosophy.

-Things are automatically mapping just as you are operating.

-"People do things different ways, and so does adilas." -comment from Roxanne as we were discussing how important it is to set people up right from the beginning or in a way that works for them and their preference

-Also a note, a consultant was discussing that they doesn't know everything but you don't want a client to know that or feel like you don't know what you're doing. So they focus on another problem or area of training for that time, express that you can focus on the question next time or after getting these things settled, work with something that you know, - then they’ll figure out the answer for the next time. That was their trade style.

\*But of course another style - which others mentioned, is: I don't know the answer to that question but I know where I can get the answer and I will get it for you. That is how I like to play as well. Be completely up front and honest and transparent but I am willing to work for the answers and get them to you. You can still be confident about the system and your abilities without knowing the answer to everything. Just be up front and professional and get the answers you need or find creative solutions for their problems. The answers are there.

-Here is the system, there are some rules involved but you can play like crazy with whatever you want!

-History has such great power, records the rest of your story.

-Traditional accounting - I need to close up my month, what happened this month. Adilas - what happened today, at any time, and at any time throughout the day. All sorts of data - run all levels over time!

-You can use any aspect of adilas.... or all aspects of adilas. What do they want? Or if you hit the brick wall of tradition, offer something they don't have... then they can slowly work into things later if they want, or if not, no problem. You can sell adilas just for their pain!

-Because you are not forced to play in one specific way it opens things up exponentially. That is why adilas can service all sorts of clients, industries, etc., etc.

-People love that adilas supports the small business owners and truly works to support clients and does not kowtow to huge corporate companies.

-And still growing.... :)

-A great selling point for customers is also the idea sharing - if a client has a need, adilas often has a tool that can help, and if adilas doesn't have it you can submit your suggestions or they can build you the custom function or maybe there can be a piggyback development

-Put notes in everywhere in adilas - use the notes to the max, tell the story

Notes for graphic ideas:

-Adilas Engine with different bodies/skins - multiple ways to show how customizable, various ways to interface

-World building graphics -

-Items travelling through the pipes: PO's - transformation - invoice

-Steve's symbolism about an ant colony all participating to build adilas