Denver - October Training – October 22-24th

**Day 1: Oct. 22**

\*\*\***Fix It:** or an item found in training that you may want to check: when we switched elements of time to the weekly view, it still had only the (next month), (last month), etc. buttons... if they switch to weekly etc., do you want the buttons to switch to (next week, last week, etc.) May also be nice to keep the month buttons as well???

-Transitional invoice - between a quote and an invoice.... you need to track things but it is not ready to be counted as revenue yet...

\*\*\*\*A consultant is SO powerful.... because you can get in and are able to see what people need and help them solve their pains.... you can show them an incredible product... but when you help them solve their pains or help them accomplish the purposes they have... that is what will matter to them... in so many ways it doesn't even matter if this is the coolest application in the world, it has to sink in and be relevant for them... at some point they have to catch that vision... Adilas is an incredible application - consultants (and maybe some training features) could be super powerful for understanding needs and layouts and how it could be most helpful to achieve our purpose...

\*\*\*Idea/Already added to the tick list: A way to remind you when your usage gets to a certain point and you want to be notified... etc.

-Ma's business: a lot of Internal Build PO's.... and when pulling inventory, from your inventory... it needs to be a negative quantity so that it can track it from your inventory... the sum of what you robbed from your inventory add up to your final product... the outcome on the PO that all of these items together created should equal $0.00. No physical monies changed hands, this is just an inventory tracking tool.... (can be very powerfully combined with the build and hold recipes if you are doing the same thing over and over and over)

-Multiple ways to track things in adilas... that is why it is so important to plan it out... see what is needed, or would be most beneficial for your industry...

-I love how it tracks usage as well... how you can see where everything came in on... where everything went out on... great stuff!

-Refund: create a new invoice and return that item... put in a negative quantity...

\*Adilas is SO incredibly customizable, which is an incredible asset... but that is almost like a 2-edged sword, because a lot of people don't know where to jump, or how to accomplish their goals and purposes... training & a knowledgeable client base - SO important.

\*Work through customer's pains... as they are prioritized... start with the worst pain - help solve that and then move to the next pain...

**Day 2: Oct. 23**

\*\*\*IDEA: from Roxanne - when you are in a deposit and you attach your invoices to the deposit... sometimes when going through you forget that you are only looking through the cash, so now you have tons on your deposit but you didn't want all of those other invoices, just cash (say), so now it makes it a pain to take them off... because when you have to remove any... you have to remove each one individually... can there be a link to empty out everything from the entire deposit..... that way you don't have to void... there would be a link within the deposit itself to clear the deposit so you can add back what you need... it is a pain to take them off one at a time... because each time it requires you to verify that you want to remove "this invoice" from the deposit... so basically, a link on the physical deposit to clear the entire deposit... or to be able to remove multiple or in bulk....

-Job Costing????

-One neat feature of adilas - enter once and it is there... no multiple entries into multiple systems... I have known this the whole time but David made a great comment about this that was great.

-Right now, out of the box, adilas can solve probably 80+% of any business’s needs.... pretty amazing!

-Systems thinking: We all work within systems... we are all familiar with systems that we work with or work within....

????-If you have a lot of these companies in Colorado that are trying to make this pretty dramatic change in January.... will you need to speed up the API option for industries... where does it fall on the tick list????

\*I love seeing people come alive and get excited about their life and good things they have going or things special to them that they like to share with others.

\*\*\*Again with Master Time Templates... putting in a color legend... currently planned to go on the add/edit template page... or also on the top of the calendar was suggested... then you can see it right there every time... with people's own custom legend, colors, titles, templates....

-Round 2 Elements of Time - to the dispatch level, following multiple crews on multiple jobs with varying times... all within a day... or whatever... dispatching level to time

\*The content server is going to be super fantastic!!!! So much incredible functionality! Whoa! Good stuff! --- Cool - 3 different levels, on their local drive, adilas holds it, and linking to an outside source (YouTube, cloud interfaces, etc., etc., etc.)

**Day 3: Oct. 24**

-Think of adilas like a game... cause & effect, cause & effect...

-P&L - runs over time; B.S. - snapshot in time; main players on the P&L - Revenue, COGS, Expenses

-Revenue: more so what you are going to be taxed on... from Mick - the transfer of goods or services at a price.... so invoices (an investment would go on the balance sheet but it would not be inputted on the P&L

-Henry Ford and the assembly line --- adilas ---- Adilas - a new tradition.

-Adilas - so user friendly, so accessible --- and the connectivity is INVALUABLE!

-Peachtree, QuickBooks. (Traditional accounting systems) are numeric or alpha-numeric systems.... whereas adilas is more an alpha system... much easier for the user. Also a traditional accounting system is a T-account or flat... whereas adilas is a multi-dimensional, mobile system... also units of measurement already built in to the system... incredibly enjoyable

-Paul said this a cool way... with all of these worlds are stories so often they invite us into their world or for the story we experience things in "their" world, come into my world. But with adilas, it is... "What is YOUR world?"... Because we are here to help you create your world. How do you want to play? How can we help to build your world and help it to function?

-System Assets: think monies you are bringing in, monies in; System Liabilities: monies, monies going out

-Reiterate some of the small things when setting up... because often people get overwhelmed just b/c it's all new and you forget how and where or for instance things coming in... all need to come in on a PO for example...

-Funny, but true, Roxanne says anyone that has done shopping online can do sales in adilas.... they might need some training and guidance for other functionality like adding in inventory, or doing accounting... but for sales, it is very logical and user friendly

\*The edit ability of adilas is a huge asset or benefit of using the system!

\*\*\*Whatever you do outside of the system... do inside the system!

-With verifying deposits and expenses... if they have been verified but they are wrong, you can back it up and actually un-verify it, then you can add/remove items... then you can go back and get things correct and you can verify it... a good way to back up if you made that mistake....

-Check your homepages so that you can see what you've been doing... sometimes people add so fast or use the back button and end up adding a whole bunch... so it is good to monitor and care for things.... Best practice: add things only once... then edit, edit, edit, whatever you need.... if you tried to add it, you might just need to search for it or figure out where to find it.

-Verifying things... is such a great way to basically check done... to say yes, this is correct; I authorize that to move forward...... (On a PO, the specific verify date is not as important as the Expenses and Deposit verify dates... that is very important on those last ones)

\*\*\*Idea/want to have: the ability to divide payments on expenses... or on paying off PO's with partial payments (divide payments like applying payments for our customers)

-Creating actual objects allows for multi-dimensional relationships... it simulates and/or tracks what really happens in the world... with time, relationships, story, etc.

\*Don't be afraid to start playing... even just start with what you can start with... you can circle back around and edit if needs be, or teach the next step at the next time, etc.

\*\*\*IDEA: from Uri, asking if we had thought about QR codes/swift codes for sending direct transfers, especially for those that are sending huge amounts of money to people

\*\*\*IDEA: Quick exports to Excel... any page, any data... again from Uri

-You are able to pull all sorts of data and reports from adilas... but you do have to know where to find it....

-adilas and others will sometimes trick out the system just a bit & put in a $0 expense to track their monthly bank statements.... so that they can have a holding place, attached to their vendor and then upload all the photos for their bank statement... so that they can document that along the way as well

\*\*\*\*IDEA: a box on expenses that you can say how much you would like to pay, as noted earlier... that way it can help you calculate and do the math...

-Splits allow for partial payments... but reimbursements do not allow for partials... so if you have a unique situation, you may need to play accordingly

-I personally need to have a better understanding of items like equity, capital, user-maintained balance sheet items (the running, assigned, etc. what are the differences in those options, what does it mean?), (Learn what feeds automatically and what needs to be manually entered... and what situations), P&L statements, payroll, payroll taxes --- really just how a lot of the accounting works.... liabilities - loans, company distributions, assets... (So many places to get to this information... many great resources for understanding these processes... Shari had specifically been talking about payroll)

-Other content bucket: local - is it on my C drive, F, my docs, etc., etc., etc. Remote - your YouTube account, google drive, sky drive, etc., etc. for both of these no costs just referencing to these files. Physical: pushed up to adilas servers and retrievable from adilas servers... that one they will have to charge for because of the space and potential file size.... but this is going to be SO neat! Really, the possibilities are SO immense. What kind of content do you use, what do you want?!

-When we get back from lunch -- Roxanne recommended that we show a trade - which we didn't quite get to