ADILAS TRAINING COURSES – EXPLORING BUSINESS FUNCTIONS

CLASS 1 – ADILAS FOUNDATIONS

WELCOME:

INTROS:

* How you’re connected with adilas/what you plan to do with adilas?
* Hope to get from the class?

GENERAL CLASS FORMAT:

* Review (15-30 mins)
* Instruct (60 mins)
* Practice (30 mins)
* Help adjust speed & direction as needed
* Ask questions
* ATTITUDE & APPROACH:
  + You won’t break it!
  + Don’t be afraid to get in & touch things!
    - Click on links, click on buttons
    - Make connections
    - The more you touch – the more you will learn!
  + You can always fix things! – EDIT
* CONCEPTS & IDEAS TO COVER:
  + Systems Thinking ---- Relationships
  + Cause & Effect – Natural Relationships
  + Data Assembly Line
    - Objects & Data Over Time
  + Dynamic & Flexible
  + Customization – out of the box
    - Settings & Permissions
    - What features do you need??? (Legos & Lincoln Logs)
  + Custom work – If you don’t see what you need, you can get it!
    - You dream it up, we’ll wire it up!
* FUNCTION: GENERAL PRINCIPLES & NAVIGATION POINTS
  + FLOW – Map
  + Home Links
  + The Chooser
    - Finding an interface fit for you
  + Browser Features
  + General Page Navigation:
    - Look at your buttons & links
    - MORE OPTIONS buttons….
  + Quick Search
    - Our new best friend
    - Key Terms: home, new, adv, last, alpha/numeric searches
  + Help File Pages
  + SEARCH – then ADD or EDIT
    - Once something is in the system – think edit, edit, edit to change it or continue working with it
    - When you need something new – ADD
  + Form Entry:
    - Start at the top & work your way down
    - Asterisk’s required
  + Think about where that information is stored/captured!
    - This will help you immensely in your reporting & searching!!!
  + Plan it out! Then go to the system!
    - Draw it, map it, talk about it, write it out – then go to the system!
  + Adilas should be an replication/extension of what you do physically!
    - Do it with your hands – go do it in adilas!
* TODAY’S ASSIGNMENTS:
  + Select & set a new interface as your default & navigate to each of these
  + Navigate to from a new page:
    - Shopping Cart or View Cart page
    - Add/Edit Items Help File
    - The Balance Sheet Homepage
  + Then navigate to each of those from using the quick search
  + Find the Quick Search Help File Page
  + Add yourself as a customer in a site
  + Find a part/item/product in their system & put it in a shopping cart
  + Edit your customer record – add a new phone number or email