PRESENTATION GALLERY OUTLINE

Chuck added some questions that he sent to Brandon via email 11/29/19. We uploaded that on to our EOT meeting today (12/3/19) in the shop as well.

* Attributes
  + One System
    - What does that mean?
    - What would it cost?
    - Do I have to pay for different pieces?
    - Modular or all in one?
    - Does it really cover all of my business needs?
    - Is it expandable?
    - How deep does it go?
  + Customizable
    - Branding
    - Look and feel
    - Settings
    - Permissions
    - Page flow and processes
    - Add or subtract fields and values
    - White label
    - Custom dashboards
    - Custom reports
    - Custom code
    - Custom design
    - Custom database
  + Powerful
    - Business Functions
    - Tools
    - Features
    - Processes
    - Automation
    - Exports of data
    - Custom reports
    - Mobile
    - Web based
    - Adaptability
  + Dynamic
    - Relational model - one to many\*
    - Scaleable
    - Flexible
    - Custom naming conventions
    - Custom field options
    - Show/Hide settings
    - Settings
    - Configuration options
    - Navigation
    - Everything
  + Cloud Based
    - Any browser
    - Access
    - Storage
    - Up time
    - Auto upgrades
    - Anywhere
    - Any time
    - Any device
    - Convenience
    - Centralized data
    - Collaboration
    - Minimal IT requirements
    - Paperless office
  + Unlimited
    - Users
    - Usage
    - Locations
    - Invoices
    - Customers
    - Inventory
    - Storage
    - Processing
    - Corporations
    - Advantages
    - Access
    - Potential
  + Results
    - Analytics/stats
    - Reports
    - Data
    - Business Intelligence
    - Exports
    - Monitor business health
    - All Data Is Live And Searchable
  + No Contracts
    - Month to month
    - Client satisfaction
    - No licenses
    - Yearly review
    - Self serve model
    - Full access to your data
    - No limits - devices & users\*
* Business Functions
  + Sales
    - Inventory tracking
      * Start to finish inventory tracking
      * Item usage histories
      * Unlimited
      * Reports & exports\*
      * Images, scans, multimedia
      * Units of measure
      * General items
      * Serialized items - stock/units\*
      * Time, labor, or services - unlimited\*
      * Fulfillment
      * Sub inventory - parent/child\*
      * Transfers
      * Internal builds - manufacturing\*
      * Ecommerce settings
      * Updating inventory counts
    - POS - Point of Sale\*
      * Invoicing
      * Quoting/Ordering
      * Secure shopping cart
      * Barcoding
      * Custom buttons
      * Discounts & campaigns
      * General items
      * Serialized items - stock/units\*
      * Time, labor, or services - unlimited\*
      * Locations & tax settings
      * Hardware options
      * Custom designs & layouts
      * Ecommerce tied to POS
    - Customer options
      * Loyalty points
      * Preset discounts
      * Purchase history\*
      * Payment history
      * Accounts receivable
      * Customer billing
      * Online bill pay
      * Images, scans, multimedia
      * Customer accounts
      * Reports & exports\*
    - Reporting
      * Sales reports
      * Profit reports
      * Daily/weekly/monthly reporting
      * Per locations, per salesperson
      * Deposits
      * Purchase histories
      * Trending items
      * Automated P&L
      * Exports
      * Advanced filtering
      * Save your own reports
    - Payment solutions
      * Normal POS options - cash, check, etc.\*
      * Merchant processing - credit cards\*
      * Online bill pay
      * 3rd party payment solutions
      * On account - customer credit\*
      * Custom configurations
      * Gift cards\*
    - Ecommerce
      * Real-time (live) inventory counts & tracking
      * Fully integrated systems
      * Online product purchase
      * Customer login portal
      * Online bill pay
      * View histories, statements, orders
      * Fulfillment
      * Fully configurable - settings\*
    - Other special functions
      * Work orders
      * Layaway
      * Recipe/builds
      * Hidden line items
      * Reoccurring
      * Barcode/QR code generators
      * Emailing capabilities
      * Discounting engines
      * Quantity tracking & thresholds
      * Loyalty points
      * Gift cards
  + CRM - Customer Relationship Management\*
    - Sales & purchase tracking
      * Payment tracking
      * Monies owed
      * Accounts receivable
      * Purchase histories
      * Invoices/quotes
      * Customer queue & sub-queues\*
    - Customer profiles
      * Holds additional information & subs
      * Log notes
      * Additional contacts
      * Reoccurring billing
      * Purchase & payment history
      * Groups & types
      * Preset options - discount & tax category\*
      * Photos, scans, files, media
      * Expandable custom fields
      * Manage relationships
      * Unlimited customers
    - Customer tracking & follow-ups
      * Unlimited notes & logging
      * Show/hide notes on calendar
      * Show/hide notes in customer portal
      * Purchase histories - What did they buy?\*
      * Accounts receivable - What do they owe you?\*
    - Calendaring & scheduling
      * Elements of Time
      * Reporting
      * Billing
  + CMS - Content Management Systems\*
    - Upload content
      * Permissioned
      * Image galleries
      * Files/Media/Content
      * Pre-filled custom documents
      * Digital story telling
      * Manage content relationships
      * Multi-file upload
      * Paperless office\*
    - Web presence & ecommerce
      * Custom controls
      * Categorize
      * Turn things on/off
      * Change web pricing
      * Show/hide things on web
      * Provide long descriptions, specs, reviews\*
      * Full ecommerce experience
      * Shipping options
      * Customer portal
      * Online bill pay
    - Data controlled content
      * Point & click interfaces
      * Template based & custom options
      * Permission based
      * Create unlimited content
      * Edit content & record histories
      * Advance content - virtual data assembly line\*
      * Business world building
      * Store, view, interact as desired
      * Backend logic based on content - cause & effect\*
    - Whole system
      * The whole system is technically a CMS
      * System look & feel
      * Backend layout & design - What’s under the hood\*
      * Built-in core flexibility
      * Custom anything - Dream it up! We’ll wire it up!\*
      * Data & content storage
      * Tracking all data interactions
      * Access points - who, what, where, when\*
      * Solid foundation of permissions & settings\*
      * Dynamic possibilities - Let’s grow together!\*
    - Hosted solutions
      * Cloud based
      * Ease of use - mobile, home, work, travel
      * Automatic updates
      * No hardware & minimal IT requirements
      * Built on multi-server environment - getting more than most businesses could afford on their own\*
      * Backups & disaster recovery
      * Data & system security
      * Managed services
      * Not charged per devices or per users\*
      * All system pieces in one spot
      * Interconnected & accessible
      * Access to support & training\*
  + Expense Tracking
    - Monitor costs for goods & services
      * Reoccurring & duplicating
      * View recent activity
      * Pay for inventory
      * Automatic flow through accounts payable
      * Normal bills & utilities
      * Employee expense accounts
      * Real-time P&L (Profit & Loss Statement)
    - Manage people & wages
      * Digital employee time clocks
      * Admin/manager time clock management
      * Salaries
      * Commissions
      * Payroll
      * Reimbursements
      * Reporting & exports
      * Remote check printing
      * Credit card expense accounts
      * Year end reporting
    - Full operational tracking
      * Multiple locations
      * Split payments
      * Aging & due dates
      * Multi-vendors assigned to expenses
      * All inbound inventory pieces automatically tracks into payables
      * Floorplans & stock/units - serialized inventory
      * Manage vendor discounts & credits
      * Custom grouping levels
      * Job/project costing
    - Track financials
      * P&L - Profit & Loss, Income Statement
      * Balance sheet
      * Expense types
      * Cost of goods sold - COGS
      * Payments on account - splits
      * Accounts payable
      * Per location, per type - chart of accounts
      * Reimbursements
      * Interest & loans
    - Documentation options
      * Scans, images, photos
      * Upload PDF & other documents
      * Attach receipts
      * Histories & audit trail
      * Digital storytelling
    - Banks & check writing
      * Unlimited banks
      * Account balances & registers
      * Custom check printing
      * Bank reconciliation
      * Point & click payments
      * Monitor outstanding checks
  + Payroll
    - Employee options
      * Multiple departments
      * User profiles
      * Photo galleries
      * Files & media content
      * History tracking (logins, actions, audit trail)
      * W-2’s or 1099’s
      * Hourly, salary, commissioned, or mixed
      * Commissions & split commissions/sales
      * Digital paystub access
      * Individual time clock reports
    - Vendor options
      * Photo galleries
      * Files & media content
      * History tracking (usage, assignments, recent activity)
      * 1099’s
      * Full expense tracking
    - Time clocks
      * Employee time clocks
      * Manager time clocks
      * Admin time clocks
      * Multiple departments
      * Overtime
      * Bulk time cards
      * Project time tracking
      * Customer time tracking
    - HR options
      * Multiple departments
      * User profiles
      * Upload photos, files, content
      * Custom paperwork (contracts, forms, etc.)
      * Tax withholding settings
      * Bonuses, games, draws, IRA’s, meal plans, etc.
      * Permissions for employees, managers, and admin
      * Check writing
    - Reporting & forms
      * Full expense tracking
      * 1099’s
      * W-2’s
      * Other year end reporting
      * Commission reports
      * Sales reports
      * Payroll stubs & reporting
      * Export data
      * Custom paperwork
      * Printing options
    - Maintenance & updates
      * Automatic updates on tax withholding tables
      * Federal updates
      * State updates
      * Automatically flow into financials
      * Sub payroll & time tracking options
      * Forms updated annually
      * Custom paperwork & documents available
  + Calendar
    - Permissions & settings
      * Time templates overview
      * Time template settings (setup & editing)
      * View only
      * Basic add/edit/view
      * Full admin access
      * You name it, you set it up, you use it!
      * Configurable ANY scheduler
    - Reports & views
      * Calendar view
      * Time slot view
      * Details view
      * Grouped reports
      * Advanced searches
      * Build your own report
      * Customize time homepage
      * Show/hide daily stats & log notes
    - Subs & functions of time
      * Project/job time tracking
      * Action status logs & changes
      * Date/times
      * Flags, tags, categories, types, locations, phases
      * Comments/notes
      * Sign-off's
      * GPS or RFID tag tracking
      * Payroll/time sheets
      * Notification/reminders
      * Tie-in's/assignments/pools ("any" person, place, or thing)
      * Like Legos - stack, layer, combine
    - Business connections & relationships
      * Tons of invoicing options
      * Quotes, vendors, users, customers, etc.
      * Dynamic toolset
      * Privacy & admin only settings
      * Flex grid tie-ins & custom fields
      * Photos galleries
      * Media/content or other digital files
      * Custom paperwork & documents
      * Sub-phases & checkpoints (data assembly line)
    - Other practical usages
      * Project/job tracking
      * Scheduling & appointments
      * Calendar events
      * Customer time clocks & billing
      * Sub locations, groupings, types, phases
      * Internal or external interactive blog or forum
    - Custom usages
      * Dispatching
      * Packaging & production runs
      * Internal communications
      * Rentals, reservations, advanced scheduling
      * Job costing
    - Custom wire jobs
      * Rosters
      * Ski schools
      * Race events
      * Event fundraising
      * Social media
      * Aid stations
      * Curriculum tracking
      * Behavior tracking
      * Community funded projects
      * You name it!
  + Data Connection
    - Data
      * What is data worth?
      * Cloud based data vault
      * Business connections
      * People connections
      * Financial connections
      * Time connections
      * Little pieces - layering, stats, details
      * Databases - tables, rows, columns
      * One to many relationships
      * One to one relationships
      * Optional relationships
      * What is data to you?
        + Examples: names, numbers, addresses, people, product, accounting, flow charts, diagrams, natural progressions, data flow, mapping, drawing, connecting
      * You tell us
    - Natural connections
      * Employee/users to actions/usage
      * Corporation to locations
      * Customers to invoices & quotes
      * Inbound inventory - vendors to PO’s to items
      * Outbound inventory - customer to invoices to items
      * Inventory to financials
      * Invoice payments to deposits
      * Banks to deposits & expenses
      * Monies going out
      * Monies coming in
      * Time to everything
    - Flex Grid
      * Making custom software easy
    - Cause & effect relationships
      * Receivables tie to invoicing
      * Payables tie to inventory
      * Payables tie to expenses
      * Payables tie to items on account
      * Customers to purchase histories
      * Changes over time
      * Adaptive solutions
    - History & stats
      * Relational database model
      * Hundreds of tables with thousands of columns
      * Unlimited number of records & relationships
      * Building & progressing
      * Unlimited storage potential
    - Chaining & mapping
      * Chaining, blending, mixing
      * Transfers
      * Multi-location & usage
      * Stacking, depth, layers
      * Photos galleries
      * Media/content
      * Custom documents
      * Automation & creation
    - Systems
      * Interconnected system thinking
      * Everything under one roof
      * Bridging gaps, creating fluidity
      * Physical versus virtual
      * Processes/data assembly line
      * POS (Point of sale)
      * Inventory tracking
      * CRM (Customer Relationship Managment)
      * Expense tracking
      * Backend office & accounting
      * Payroll & timecards
    - Reports & exports
      * Anything you want
      * Web, pdf, Excel, csv
      * Preset standard reports
      * Build your own reports
      * Custom reports
      * Location specific
      * Scaleable multi-location
      * Files, images, scans
      * Digital storytelling
      * Data assembly line
    - Flex grid - maybe we need to detail flex grid out here & make it it’s own point
  + Accounting
  + Reports
  + Business Intel
  + ECommerce
  + Big Data
* Application Players
  + Customers
  + Invoices
  + Quotes
  + Vendors
  + PO
  + Parts/Items
  + Stock/Units
  + Deposits
  + Expenses
  + Users
  + Balance Sheet
  + Time
* Core Concepts
  + Your Story
  + Characters
  + Relationships
  + Problems
  + Goals
  + Accountability
  + Permissions
  + System
    - Brainstorming: Concept of connecting things - systems, system relationships - like the human body - nervous system, digestive systems, endocrine system - what system does Adilas have? See systems above in data connections
  + Maintenance
  + Data

This was where we were working originally as a general why would you come to Adilas. Or looking at ideas for the presentation gallery. Determined to follow the direction in the outline above for now.

* Work
  + Login
  + Choose a corporation
  + Request access
  + My stats
* Train/Play
  + Demo sites
  + Scenarios
  + How to’s
  + Training per area
    - 12 main players (tools)
    - Business functions
    - Specialized tasks
      * Settings
      * Permissions
      * Look & feel
* Learn
* Participate/Community
* Buy/Sell
  + Sell your services
    - New
    - Login to existing account
    - Marketplace
    - Advertise
    - Contact us
  + Buy someone else’s services
    - Marketplace
    - Contact us
  + 3rd Party Solutions
    - Marketing
    - Communications - text/email
    - Payment solutions
    - Compliance & oversight
    - Ecommerce - reordering, inventory,
    - Contact us to offer your own
  + Buy an Adilas System
    - Adilas Ecommerce site
    - Feature list
    - Fliers & documents (marketing)
    - Contact us
  + Buying and selling training
    - Purchasing product
      * Vendor specific
      * Generic
      * Setup products
      * Setup categories
      * Sub inventory (parent/child)
    - Making a sale
      * Selling items (general inventory)
      * Selling services
      * Selling stock/units (serialized units)
      * Cart basics
      * Tips & tricks
      * Discounts
      * Barcoding
      * POS buttons
* Research