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
      * Virtual buddy system
      * Link, stack, connect data
      * User-maintained connections
      * Custom data fields
      * Create your own mini database
      * History & log notes
      * Fully searchable
      * Tie data pieces together
      * Reflexive tie-ins - full circle
      * Save your own reports & export
      * Digital storytelling
      * 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
  + Accounting
    - Brainstorming: We have balance sheets, P&Ls, user-maintained, system maintained, accounts receivable, accounts payable, things on account, aging, reimbursements, expenses, banks, inventory tracking, layaways, work in progress, loans, photos, media content, custom documents, natural flow, flex grid, payroll, people, deposits, invoices, customers, users, stock/units, floorplan, tons of reports & exports, bank reconciliation, operational led accounting, mapping, roll calling, translating, a different variation than tradition, loyalty points, taxes, sales tax, withholdings, PO’s, manufacturing, inventory manipulation, track things through life cycles, go backwards or forward, accumulative, many pieces are automated, +++++, non-traditional, traditional, system, digital storytelling, we do accounting because we have good data - accounting comes from data - based on what I have we can…, permissions, levels, who can advance the ball, who can verify, who can view, ledgers - bank & check ledger type things, glossary, terms, concepts - what is our goal for accounting - data assembly line, digital story telling, cause & effect, characters interact -they have trouble/problems - they work to solve, time - time is a huge piece in accounting, how do we zipper operations & accounting together to close the gap between the two, how does it handle roll call technology, how, what, why???, if someone can do accounting by their own design & take it to their accountant - then why can’t I create something that automates these processes. We play according to the standards & the rules but we create the processes to get to those points. Tradition - our biggest competition & nay sayer. This is daily, real-time, share, no batching/waiting, managers & admin can look at things real-time, cloud based, editable, full history, audit trail, cause & effect, cart & horse, data drill-down - proof behind your numbers. Multi-systems with static numbers have weaknesses for transfer & real-time & changing pieces. Why we chose to build in a non-traditional manner - because we see all the benefits & we want to keep going this direction. We are pioneering & we are on purpose creating tools that are proof of concept. Phantom costing, funny money, slush funds, sub-inventory & cost controls, perfect costing, costing models - allow for multiple, discounts, COGS, we help you track your revenue, your adjustments, your expense, your assets, liabilities, equities, future - we have a challenge & we build to solve the challenges that we see - this is part of our accounting model. Some people expect us to be completely done but we are not done - we are going to keep building. You really need human input at certain places - decision have to be made - you really can’t automate some pieces. Ongoing development - bring your ideas - stone soup “Bring what you’ve got, throw it in the pot. We are making stone soup.”, open to suggestions & new growth, pain, brick walls, burning platforms - all these pains bring the need for new solution. Static vs. dynamic. Allow for updating inventory counts, avoid the word adjustments, how do you deal with theft, shrinkage, inventory reconciliation & accounting, all kinds of stuff, people that have in store credit, accounts, how do you take off discounts for product purchased earlier, bonuses, discounts, vendor credit, assets, liabilities, we give you tools to play these games. Accounts, sub accounts, you can track these pieces, as many notes as you need to - you can track the story - the story is powerful & the telling the story is your audit protection. We deal with multi-location models, stacked model, multi-locations to one primary locations, or multi-worlds to roll up or down to cross corp stuff. Some of this is still in progress. We don’t require you to do this - this is optional. We can be a good companion with any other software package. Run any part of our application without using this piece. We can feed information to any other software package you want to use. Exports - numbers for your accounting software. If you already have something you like - we can fill whatever pieces you need. Adilas is a great companion software package for ANY business!
    - Conflict management - it is okay to stand your ground. Be confident in what you have built & the why you have built it that way. We are going in this direction! If you like what we are doing, great! If not, great, feel free to use some of our other products & pieces if you would like. We do not need to apologize for things that are in line with your values and helping to build & create your vision. Vision helps us all work & succeed.
  + 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