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
    - Your financial documents
      * Balance sheet
      * Assets, liabilities, equity
      * P&L - Income Statement
      * Revenue & COGS - cost of goods
      * Accounts receivable - A/R’s
      * Accounts payable - A/P’s
      * Bank registers
      * Inventory values & stats
      * Expenses & deposits
      * Invoices & PO’s
      * Real-time & living values
      * Full audit trail
    - Automation
      * Things on account
      * Aging
      * Loyalty points
      * Taxes & withholdings
      * Sales tax
      * Sub-inventory & perfect cost controls
      * Discounts
      * Financial flow
      * Full P&L
      * System-maintained balance sheet items
      * Accounts receivable - A/R’s
      * Accounts payable - A/P’s
      * You name it!
    - Natural flow & relationships
      * Relational database model
      * Operational led accounting
      * Inventory tracking
      * Banks
      * Expenses & reimbursements
      * Bill pay
      * Flex grid
      * Manufacturing & building
      * Daily, real-time, sharing
      * No batching/waiting
      * Cloud based watching
    - User-maintained
      * Allow for user interactions
      * Add/edit balance sheet items
      * Supporting transaction details
      * Layaway & work in progress
      * Equipment, vehicles, real estate, loans, etc.
      * Photos, media, content, custom documents
      * Stock/units & floorplan
      * Bank reconciliation
      * Bulk tools
      * Editable data with history
      * Phantom costing & slush funds
      * Shrinkage, theft, inventory adjustments
      * In-store credit
      * Sub accounts
    - Systems
      * 12 main players
        + Customers
        + Invoices
        + Quotes
        + General inventory items
        + Stock/units
        + Elements of time
        + Employee/users
        + Vendors
        + PO’s
        + Expense/receipts
        + Deposits
        + Balance sheet items
      * Cause & effects
      * Decisions & consequences
      * Characters & relationships
      * Working to solve problems
      * Solution thinking
      * Systematic design
      * Scaleable - mom & pop shop clear to enterprise
      * Multi-locations or multi-corp
    - Reporting & exports
      * Balance sheet
      * P&Ls - Income Statement
      * Accounts receivable - A/R’s
      * Accounts payable - A/P’s
      * Build your own
      * Save reports & favorites
      * All kinds of basic exports
      * All kinds of advanced exports
      * Payroll, time cards, & commissions
      * Drill-down to details
      * Okay feeding data to other systems
    - Future/non-traditional concepts
      * Objects & data over time
      * Digital storytelling
      * Data assembly line
      * Importance of dates & times
      * Modern glossary & terms
      * Business zipper - operations & accounting
      * Actively improving, designing, concepting, etc.
      * Momentum & vision
      * Pioneering & proof of concepts
      * World building
      * Community oriented - stone soup
      * 3D model - time, resources (money/people), space (depth/layering)
    - Purposeful design
      * Looking & taking the next steps
      * Operational led accounting
      * Mapping, translating & defining
      * Roll calling
      * Track life cycles
      * Flagging & tagging data - searchability
      * Permission levels
      * Closing the gap
      * Data supported numbers
      * Challenging tradition
      * What brings about change?
      * Optional usage
      * Great companion software package
      * Law of deference - defer to the thing that contains the most information
  + Reports
    - Brainstorming: before we even go super far - we start at collecting the data, we centralized the data, we categorize the data, we validate it, we can catch so many things including custom, all data is live and searchable, permission options, exports, can automatically transfer data to other systems. All based on time. Every single report has some kind of a life cycle, date/time stamp, build your own, save reports to get their quicker, build custom reports to meet your needs, every section has basic and advanced search options. Quick search - that in and of itself allows you to bounce and get anywhere so quickly. Bounce, grab it, pull it, etc. Part of our reporting is slowly letting the cream rise or going from transactional data to a aggregated sum or total. Like a library - tons of data that you can bring to the surface when you need. Multi-locations, all sorts of filters that you can add. We ride on top of a browser, multiple windows, tabs, etc. Technology, cloud, formatting, pdfs, microsoft, open office. Labeling, barcoding,
    - Brainstomring: Scheduling, automation, mobile ready reports where you don’t even have to log in. Half of the entire application are reports. Reports - show & view. (Navigate - go & do) Data points & structure of the database. API sockets & pulling raw data to build your own things. Reports also have drill-down. Proof within the pudding. The underlying data. Reports - what is important, how do we get them? How do we sort them? We can group them, we can…. It is your data - we are just giving you access to them. Your data, you cache & retrieve it, we secure it! Splintered reports, custom paperwork & filling out specific forms. We can fill out forms from data from any section. What about being able to attach photos, scans, media, files. History & audit reports - who touched what and when. What if we are doing a roll call - allowing them to pull naturally & show up in a roll call. We can flag & tag the data so that it will show up in certain ways, certain reports, etc. Different things that we show you. Reporting for inventory, expenses, COGS, financials, bank schedules, transactions, maintenance logs, favorites, enter once use many. Compliance, oversight,reports to CPAs, investors, view only function, warnings, thresholds, communications, notifications, hidden reports, track anything. Archiving, digital assembly line concept - you are advancing a piece of the puzzle or you can take snapshots in time. Banks, payroll, time card reporting, payroll, workman's comp, hourly reports, expense, revenue, inventory reporting, tax, sales tax, payroll tax reporting, quarterly, annual, to CPA, unknown..., HR stuff, we hold all of the data in one place, you may access that data at any time 24/7 even holidays, state, federal, viability of our business, business inteligence (spelling), what adjustments may be needed, person interactions, who is helping with what, scheduling. News & updates, calendaring.
  + 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