

Adilas Conference
System Setup

6/8/21 (Continued)

- Marisa was the presenter

- we had major problems with the Internet & tech issues

- System setup

- Corp-wide settings - tons of them

- Users

* - We should not allow new default payments as "show" ... they should be hidden by defaults - more options under Corp admin

* - They wanted Venmo ^{spelling as a} payment type

- Marisa was doing a great job - very positive

- user profiles, settings, etc.

* - Remove the Flash option for my cart favorites - under personal profile

6/8/21 (Continued)

- setting up nav

- Being consistant to get things out of the system later on

- teaser in elements of time

- It would be really cool to make elements of time look more slick -

- * - adding in date picker to the add/edit pages in element of time
 - currently there is a conflict

- Being able to do advanced searches

Next session

Danny as the presenter

CRM - Customer Relationship Management

- knowing who your customers are

- then start marketing to them

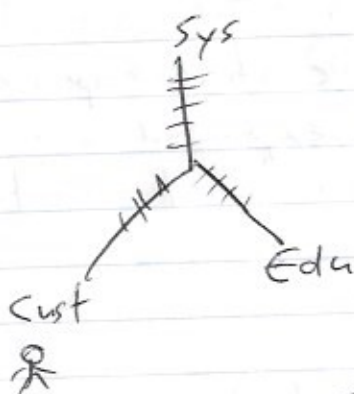
6/8/21 (Continued)

- Small side note - Kelly was doing slides on a power point, Marisa was driving (clicking through adidas), and Danny was presenting - fun comb -
- Prototyping & then expanding those things
- * - on the customer log notes... try to add in the date pickers ~~to~~ and the summer note (html editors)
- * - on the bulk customer updates... it needs to be expanded out to the whole core customer table
- fun usage cases
- Communication Challenges
- Not the issue, but how do you recover
- Steps & stages - tip of the iceberg
- for message marketing - bulk adds, bulk updates, & even time ~~to~~ frames

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6/8/21 (Continued)

- suggestions & feedback
- calls to action
- Using messages for users & vendors - UCC unified communication
or UC (not sure)
- two way communications
- fulfillment cycles - business processes



talking with
Kelly

Steve Berkenkoffter - new presenter

- Tip & tricks
- global parent core updates

6/8/21 (Continued)

- using data tables

- bulk updates

- Pros & cons for data tables

- * - on balance sheet - quick search by date

- ^{new or wanted options -} other quick search options like media/content, sub inventory, help files, RFID tags, etc.

- new icons, popups, & ways to get to your settings - education mode

- personal settings & icon menus

- putting quick navigation in the user's hand - direct link to what they want & need

- Being able to save your favorites & then refine your searches

- watching your id numbers

6/8/21 (Continued)

- Known issue report - helping to find things that are known problems
- clean-up routines
- internal payments

6/9/21

2nd day

Inventory Controls

* - on the add-edit-receipt-payee.cfm page

was missing some

images - it may have been an Internet problem

Kelly &
Steve
tag team

- Vendors \Rightarrow part categories \Rightarrow parts & items
- Down the chain based on categories
 - she showed multiple places where those categories play in
- Pros & Cons of parent/child inventory

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6/9/21 (Continued)

- Using outside exports & spreadsheets to get deeper insights
- inventory (parent/child) known issues
- Parent attribute compared with child or sub attributes
- Maybe show a slide or a plan with the flow
- * - on sub inventory templates... it needs to default to active. Currently it defaults to inactive
- Showing some down the road cause & effect relationships
- * - on the advanced part of parent attribute search - they may or may not want some of the inactive parent attributes on that report... in farm & ranch demo site, there were tons of inactive parent attributes that were showing
- Use of the word core - parent cores, child cores

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6/9/21 (Continued)

* - check the sub specific export by date from the advanced part search - ask Kelly for more info

- Purchase orders - ins & outs

Point of Sale features

by Sean Carliton

- Going through corp-wide settings for invoices, ~~so~~ taxes, & carts

- Getting into discounting

- eventually some loving is needed on the discount engine

- Going over my cart favorite buttons

* - On smart group buttons... the description modifier does not currently change the sub description. It should!

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8/9/21 (Continued)

- bulk tools for my cart favorites

- Custom labels

- multiple cart types - classic, kush, etc.

Next Section

Point of Sale Features - Part 2
Sales & Reporting

- swiping driver's licenses - quick add

- Customer Queues

- Cart overview

- delivery options

- future communication options

- education mode

- backorders overview

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6/19/21 (Continued)

- histories
- on advanced invoice search results (grouped) maybe add an average invoice amount - simple math
- on searches ... if you know what you want, that helps tons
- the power of being able to save your own reports
- Custom icon reports - daily sales reports

Next Section

Marisa was
the presenter

Exploring e-Commerce

- save time & money, adilas has a solution built-in
- settings - special e-commerce settings
- line by line walk through

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6/9/21 (Continued)

- they (the girls) did so much prep work - awesome!

* - on eCommerce - change some verbiage on the photo image sizes - make them square, if possible 750 x 750 vs 750 x 553 - Square works better on port cats as well

- on eCommerce stuff - maybe some suggested tie-ins (related items) - almost an automated top ten of related items

* - on e-commerce, the parent attribute on e-comm show all items with certain tags. We need those counters to filter what was/is really available - For example: drink(2) - but when clicked, only 1 (one) showed up. It would be better to show drink(1) + then show just that one

* - on login into eCommerce, it would be so awesome to have a new setting to say - where can we take you? my details, shop home, make a payment, etc. That would be so cool!

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6/9/21 (Continued)

New section - Q + A

- Message marketing overview
- add the bulk messaging page to the more options under the customer homepage
- Client feedback - she (Dawn) really liked the live training event
- focusing more on marketing - our clients want this - it needs some more love
- Communications on both internal + external - things

Idea

- * - build a customer marketing link builder page ... a page similar to the add/edit my cart favorite buttons (limited), but the main feature would build a ~~link~~ link.
 - add to cart, set a discount, track a campaign, add a coupon, auto login, etc ...

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Q&A Session 9-10:15 AM

6/10 - check pdf glossary = error 404

* Add terms to glossary:

- Modal

- A.D.I.

^ link to
the PDF
was
broken

* make "All Help files" more flexible
- be able to search the descriptions

- Marisa will get with Cory to
add Venmo to e-comm merchant
list

6/10/21

Backend Financials

- Reports & Overview

Steve & Kelly

- Balance Sheet Basics

- Daily history

- I can't wait until we can show
the daily balance sheet over time -
multiple day report running over
or off of aggregated totals

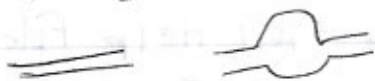
- we would like work on formats
and exports - maybe round two for
balance sheet

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6/10/21 (Continued)

- Go ahead & make mistakes

- we on purpose go out of balance



- System generated inventory asset controls -

- Digital office

- Going into banks & options

- Accounts receivables (A/R's)

- Accounts payable

- Net Profit

- P&L (Income Statement)

- Reports & budgeting

- Business Intelligence

- Looking for ~~the~~ trends & comparing things

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6/10/21 (Continued)

- Planning - huge key

* - on new B.S.I. items (balance sheet items) - we may need some more flexibility on the account & item groupings

* - on new balance sheet items, Kelly thought it would be really cool if we could ~~easy~~ easily setup both expense types & ~~expense~~ deposit types

- The value of education & being able to help set people & users up for success

Next Section

Backend Financials
Part 2

- Deposits & Expenses

- Main, line items, & payments

Steve & Kelly

- Kelly & Steve's 4-Square



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6/10/21 (Continued)

- PO's & using builds
- on PO's & invoices ... what do positive quantities do? what do negative quantities do?
 - see Kelly's diagram
- understanding logic & cause & effect
- Controlling vendors, categories, & chart of accounts (expense types & deposit types) -
- Using your mobile device
- idea ... it ~~is~~ sure would be cool if due dates could show up on a calendar type view - think of showing all kinds of stuff on a calendar type approach
- * - New settings - expense/receipts & locations on line items - also B.S.I. bump up & down
- take time & read the page errors & info stuff

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6/10/21 (Continued)

- the cost of having a huge accounting department
- Adding JavaScript to help control flow on the expense/receipts - there could be some tweaks that could help
- Duplicating Expense/Receipts + scheduling expenses
- there is a need for some cash flow + budgeting tools - this would be awesome - Round 2 on the financials
- Communication
 - voiding + retraining, if needed
 - verified dates + posting dates
 - bulk verifying
 - taking bite sized pieces
- * - ice-down dates + being able to post on invoices + PO's - they only ~~exist~~ exist on deposits + expense/receipts

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6/10/21 (Continued)

- data visualization + customized dash boards
 - * - on the media/content homepage + media/content advanced searches - it would be nice put the output (reports) into data tables for snow owl
 - on payroll ~~at home~~, there are some cool pieces that exist
-
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6/11/21

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Alan working with us as developers

- Presentation layer
- Business layer
- Data access layer
- Database access layer
- layering our code + trying to code things in that manner
- Modularization - something that is big gets broken into smaller pieces

6/11/21 (Continued)

- Benefits - easier to understand, easier to use, easier to maintain

- Being able to onboard new developers if it is more modularized

- Cohesion - from low (not desired) to high cohesion (we want this)

- Coupling - level of dependents & being as independent as possible

- breaking down our code - aka fracture, into smaller & smaller independent pieces

- Encapsulation -

- layering our code

- small & independent

- Getters & Setters

- He showed some examples

- Following your interests & be yourself