PRESENTATION GALLERY PLANNING - Notes and Needs

We are not on the fast track or the fast train in any way. We are going to just start and keep chipping away at the pieces a bit at a time.

Goals:

* Make this a sales tool
  + Not trying to do education here (or especially not heavy education, obviously they will get some), we are trying to show and tell here - we can skip some of the navigation and hit points here - don’t have to detail out all of the in-between pieces

History:

Needs and Notes:

General Notes:

* Make the graphics a tiny bit smaller so that you don’t have to scroll - suck it up a little bit so that it can fit nicer on one page
  + Make the Adi pictures smaller on all the pages so you don’t have to scroll
  + We want people to get in and be in - see the whole page
* Any pictures we need to change? Or really don’t like in the particular themes??
* Put the most important pieces where you see them first
* Can you click on the dog? Do we want Adi to be able to do anything when clicked on?? Different on the different pages??
* It could be fun to include some examples or screenshots of clients that are actually using the system - where it looks nice, it shows how real business are using this…. That could even fit into the future plans for value add-on core, or something related to helping clients and investors to see what some possibilities are and how people are actually using the system and site
* We’ll try to get all the pieces already there in better shape and start making it live - then after that we can transition to building the new part of Future Plans and Investors
* Nav menus

Videos:

* Discussing that we may want to have a video link on every page - just small with an icon or something - same place on every page. That when clicked will pop open it’s own box and could even have a side menu that matches the sub categories on the page, along with an overview option, next to a video player window. Anyhow, just thinking of options and how we might be able to make that work. Lots of potential ideas to consider but we thought this was a great idea Brandon had.
* Currently we want quick place holders that get the job done. We may want to refine and make them much nicer later.
* Almost like a mini player where you can navigate the videos you want
* We could even make some of the videos screenshot videos with a little bit of verbiage on the bottom
* Work to KEEP IT SIMPLE
* Could make this into a gallery in and of itself - could have a video and some images
  + Possibly with some Lite (Light) Boxes
  + Could get a lot of traction without having to make tons of videos - show pics of what’s being discussed

**HOME - Main Landing Page**

Main landing page - <https://news.adilas.biz/sales-gallery/adilas-advert-index.html>

* Want a small intro such as: Introducing Adilas - where All Data Is Live And Searchable.
  + Put the rest of the info into a modal
* Put Adi’s comments below/down by the dog
* Make the 4 main topics more like a button??
* Business Functions
  + ERP??? That claim makes Brandon a little nervous but we really do have those pieces… Maybe we should keep this there - call ourselves what we really are
* Switch the order of main topics/categories - this may be needed on lots of pages
  + Put the most important pieces where you see them first
  + Change the main features order in all the navigation to this order
    - 1 - Business Functions
    - 2 - Application Players
    - 3 - Attributes
    - 4 - Core Concepts
    - Add 5 - Future Plans
      * Part of Future Plans are investment options or opportunities for investors???
      * Tied in and integrated with all the other pieces of the puzzle and navigation pieces
  + Cascade this change through all of the different menu systems
    - Sub menus, side menus, navigation menus, etc.
* Intro video to Adilas - who/what we are
* Video for how to navigate and use this site - invite them to explore and experiment
  + Thanks for coming to see - here is how you use the site (kind of flavor)
* We are thinking that we possibly want to kill the subtext on this main page as well - we are making this an interactive table of contents - not setting up pre-conceived notions on any of the pieces for good or bad
* When sub-text gone we may need to make the heading words bigger
* Most changes made - next level pieces when ready - like video player, etc.

**BUSINESS FUNCTIONS**

Business functions home - <https://news.adilas.biz/sales-gallery/bf-index.html>

* Bring the content up just a titch
  + Make it good and easier to see
* Fix the sort order and cascade that into the other menus throughout the entire site - our proposed order:
  + 1. Sales/Inventory Tracking - POS Point of Sales
  + 2. CRM - Customer Relationship Management
  + 3. Calendaring & Scheduling
  + 4. eCommerce
  + 5. Accounting and Backend Office
  + 6. Online Expense Tracking
  + 7. Payroll and Timecards
  + 8. Reports and Histories
  + 9. BI - Business Intelligence
  + 10. Data Relationships
  + 11. CMS - Content Management System
  + 12. Big Data
  + Both Brandon and I tend to read down the lists - so we may want to order them that way
    - Except that I do tend to see the top two across first before reading down - so maybe we want 2 more important ones at the top
  + The navigation menus to match
  + Also the “next” buttons to match the new/correct order, bottom navigation
* Accounting, BI, and Big Data might need some different verbiage such as
  + Accounting - Financials and backend office
  + BI - Analyzing, interpreting, and understanding your data
  + Big Data - Interconnected systems and databases
  + Maybe we want to come up with different verbiage - but we think we want them to say something different than they currently say
* Glossary note\* - May also need to add some definitions for a few of these pieces into our glossary as well - a lot of these terms weren’t there
* Kill the sub text - we want to keep it simple on these top level navigation pages - may end up keeping them on this page???? Not sure, may want to kill it like the other pages - we might have changed our minds here - we just didn’t like the verbiage on the players so we want that subtext to go - we may want to keep this one???
  + I think kill the subtext - most people have a pretty good idea of what these business functions are and what they need - they don’t need a little descriptor phrase. That will also help us shrink our page and make it more visible on one page.
* Made most changes here

Business functions - sales home - https://news.adilas.biz/sales-gallery/bf-sales.html

* Kill the sentences under the title
* Check folding - when we tried to expand accounting solutions and had other pieces expanded it wouldn’t work
* Put powerful statements in here for the different pieces - don’t like a lot of the current verbiage - THEN take it to the next level - SHOW something
  + What is really important for the next level??
  + What pieces do we want to show??
* SEE the pieces for the next step
* Do we want an overview???? Then go into the underlying pieces???
* May want a little more space at the bottom, it is kind of encroaching into bottom bar space
* Swith POS and Inventory tracking places - put POS first
* POS - Point of Sales - WORKING - Not finished
  + Current content - Full point of sale system built-in with barcode scanning, label building, discount engine, and default shopping cart settings.
  + Possible new content - Full point of sale system. Select a shopping cart and POS that fits your business flow and automatically integrates with inventory, customers, and other pieces. ????(Use barcode scanning, touch screen buttons, label building, discounts engines, loyalty points, or so many other features.)

**APPLICATION PLAYERS**

Application players home - sales-gallery/ap-index.html

* Switch the layout and make it more like the BF layout
  + Two lists/columns of 6 a piece, dog on the left hand side
* Propose to order the list like this:
  + 1. Customers
  + 2. Invoices
  + 3. Quotes
  + 4. Vendors
  + 5. PO’s - Purchase Orders
  + 6. Items - General Inventory Items/Parts
  + 7. Stock/Units - Serialized Inventory
  + 8. Deposits
  + 9. Expense/Receipts
  + 10. Employee/Users
  + 11. User-Maintained Balance Sheet Items
  + 12. Time - Calendaring and Scheduling
* May want to kill the underlying text on each of these pieces and let them go deeper if they want to explore
  + Treat it like fishing Brandon said
  + Keeping it simple and able to use fast, quickly, efficiently
* Made most of the changes here

**ATTRIBUTES**

Attribute Homepage - <https://news.adilas.biz/sales-gallery/attrib-index.html>

* Look at punctuation - some of them have periods, some of them have commas, make it consistent
* We may want to look at this other page to see if we have hit all of the big points we want cover in this section
  + Older file with some attributes - <https://data0.adilas.biz/what_is_adilas.pdf>
  + We haven’t checked underneath or the next level deep on these so they may have covered it better
  + We liked the subtexts better here - want to keep these
* Made changes here
* One additional note - we want to tighten up the top - just pull it up a little bit from the top

Attributes - One system home - <https://news.adilas.biz/sales-gallery/attrib-one-system.html>

* We like the crumb trails!! Good stuff!
* Reorder some of the pieces this page
* Focus it heavier on functions
  + POS
  + CRM
  + Higher level pieces

Attributes - Cloud based home - <https://news.adilas.biz/sales-gallery/attrib-cloud.html>

* Scratch the middle secure storage verbiage
* Over 99% uptime

**CORE CONCEPTS**

Core concepts home - sales-gallery/cc-index.html

* Maybe add a Cause and Effects point
  + Combining decisions and choices as well as consequences together
* Make Data into:
  + Objects and Data Over Time
* Keep looking here - what content did we create here??? Is there something we want to further explore here???
* Here is really where we want to say: This is who we are and this is what we do.
* We are thinking that we may want to orient this page back to the two column list, like the other sub-homepages and keep it at 12 like the others or get it down to 10
* We don’t want to make this a time sink - we can make the sub-caption fit relatively well to describe a small amount of what these mean
  + Of course we can nest further information and options underneath it
* Would it be helpful to have Shannon go look at the pages and record what I do like, don’t like and then can make suggestions….

\*\*\* Look at the document we created for making content for Chuck and Marissa on this. Maybe that will have something we want to look at. \*\*\*

Copied all of these documents we wanted to check out and notes we took after reading them into: PG\_DocumentReview

**CORE CONCEPTS** - Shannon’s Notes working through this part of the Presentation Gallery - Notes/comments to report back

Core concepts home - sales-gallery/cc-index.html

Going to start by lining them up together:

Original 12 Core Concepts Listed - - - What Chuck listed in the Presentation Gallery page

Below - what we may want the sub-text to read?? - This is probably something Brandon will really want to have some input on - I will just try to capture a flavor that I think is more in line with content Brandon and I have discussed and created.

* 1. Capture & Record the Story - - - The Story
  + Everything that happens in your business. Capture and record all the pieces.
* 2. Groups, Players, Individuals, & Characters - - - Characters
  + Who is participating in your business? Customers, employees, etc.
  + Chuck’s might work here as well: Groups & players, how they contribute
* 3. Relationships - - - Relationships
  + What is connected to other pieces?
* 4. Trouble, Problems, Needs, & Goals - - - Problems - - - Goals (separate points)
  + Problems: Understanding problems and needs directs solutions.
  + Goals: The tools to accomplish your dreams.
* 5. Decisions & Choices - - -
* 6. Consequences (Cause & Effects) - - -
  + How systems interact.
  + We discussed making a Cause & Effects point which could include decisions, consequences, and choices
* 7. Accountability - - - Accountability
* 8. Permissions & Settings - - - Settings & Permissions
  + Set the environment, allow access as desired.
* 9. Systems - - - Systems
  + Everything interacting in one integrated system.
* 10. Vision & Future Developments - - - Vision
  + Where we are headed.
  + May make this it’s own section under the options for investors
  + Maybe we also want to keep it here as well - can access it from either point?
* 11. Tech, Tools, & Maintenance - - - Maintenance
  + Giving you the tools to run your business.
* 12. Objects & Data Over Time - - - Data
  + Every piece holds its own data so they can interact seemlessly.
* Some double icons - because we copied and made some new bullets - Cause and Effect and Vision and Future

Core Concept Notes continued from homepage:

* We may want to make it a two column list like the other homepages
* Get it back to 10 or 12 headings
  + Or get it down to 9 and leave the horizontal layout??
* Note by Adi might be better to read something different like: What makes us different. Or… Building your world. … Since these are concepts we are trying to share here it didn’t feel like a fit to me to say dream it up, we’ll wire it up.
* Some double icons - because we copied and made some new bullets - Cause and Effect and Vision and Future
* Made changes - we decided to kill the subtext here too and keep the simpler theme on these main landing pages
* Some double icons - because we copied and made some new bullets - Cause and Effect and Vision and Future

CC Characters home - <https://news.adilas.biz/sales-gallery/cc-characters.html>

* Kill “Building Characteristics” -
  + Change to Application Players if that is what we are wanting here - if we are wanting to keep the same lingo
  + Or are we wanting to go a different direction with the concept, something more general like Parts of Your Business
* Modal the sub text under the main title - sub text seemed pretty fine if we are wanting that direction with it
* Sub point fine if we are keeping it as the Application Players - the 12 Main Players - maybe we want to use that verbiage somewhere here to tie it back in to some of our other content???
* \*\*Revisiting this page - it also needs better spacing, more centralized, on the two columns - crowd the side nav less and be more centered
  + This is going to be a need on every sub page here - make it consistent - and many of them are running into/over the side nav

CC Story home - <https://news.adilas.biz/sales-gallery/cc-story.html>

* Modal the sub text explanation
  + I think this text probably needs some tweaking - I am just not entirely sure what direction Brandon wants to take a few of these things
  + Keep it brief and not complicated
* We can probably keep the sub headings if we want that flavor or maybe we want to pare it down - almost more the business function type flavor level like:
  + Customer management
  + Sales tracking
  + Financials
  + Project management
  + Or maybe we want to go with something like:
    - People, tools, groups, …. Idk - need to get a clearer direction from Brandon on his vision here
* Center columns or get more gutter space away from nav

CC Relationships home - <https://news.adilas.biz/sales-gallery/cc-relationships.html>

* Heading - maybe Tracking Relationships instead of Building Relationships???
* Modal the sub explanation and probably tweak some…
* I don’t really like the layout and look of this page and the sub headings seem confusing
  + Maybe we could make them something more like this with brief examples???
  + Types of Relationships:
    - Natural (Typical) relationships - I.e. customers to invoices
    - Unusual (Atypical) relationships - I.e. customer to purchase order)
    - One to one relationships - I.e. customer X to invoice 13
    - One to many relationships - I.e. customer X to all their invoice history
    - One to many to many relationships - I.e. customer X to all their invoices and all items purchased
  + Track and Manage Relationships:
    - Everything time, date and user stamped
    - System histories
    - User histories
    - Create your own unique relationship ties
    - View reports for all relationships
* Center columns or get more gutter space away from nav

CC Settings & Permissions home - <https://news.adilas.biz/sales-gallery/cc-permissions.html>

* Modal the sub explanation
* I’m not totally sure why I am not liking these pages quite as much as some of the previous section…. Maybe because it’s not quite capturing the right flavor here???
* For the sub headings - if we keep this set
  + Re-order - something more like
    - Admin permissions
    - Manager permissions
    - Unique permissions per user
    - Sales permissions
    - Speciality permissions
    - Corporate wide settings
  + Kill the word “System” on each of the other list
* Center columns or get more gutter space away from nav

CC - Maintenance - <https://news.adilas.biz/sales-gallery/cc-maintenance.html>

* Modal the sub explanation - I liked this text
* I liked the sub-headings here too on this page - just may want to reorder some
* This will probably happen naturally when we modal the top text but the sub-categories are running into the bottom navigation - need to clean that up - especially this page they are overlapping on the left side

CC - System - <https://news.adilas.biz/sales-gallery/cc-system.html>

* I did not mind this top text in the sense that what it said seems fine - BUT I don’t feel like it captures the essence of what we mean by System, or having everything in one system and the power that creates
  + I think we need to reframe and capture what we mean by System
  + So reading the sub-pieces/categories - they all seem to fit under the title they gave this page of “Dynamically Customizable” - they fit together well, but they don’t capture the value of what you gain by having everything under ONE system
  + Maybe we can take this more in the direction of Seemless Integration - and the benefits of having all of your data under ONE system. This makes all the difference for things like:
    - Reporting
    - Communication
    - History, tracking
    - Automated integration, financials, histories, and so much more!
    - Linking different pieces of your business automatically
    - Etc., etc., etc. So many virtues here! Might be the direction we are actually thinking of with “System”
* Same issue with the bottom navigation bars being mixed in with the text

CC - Problems - <https://news.adilas.biz/sales-gallery/cc-problems.html>

* This one overall seemed fine but I felt like it really lacked a punch - maybe needful, maybe not??
* But the text and categories seemed okay and to fit together and better fit the title/page we are working with
* Similar fixes to other pages
  + Modal the explanatory text
  + This one needs more gutter space (is that what Brandon called it?) between the first column and the left bottom navigation - too close, clean up that look - maybe those two columns just need to be centered and that would fix it

CC - Accountability - <https://news.adilas.biz/sales-gallery/cc-accountability.html>

* Top text seemed fine
  + Some of the sub-categories/points didn’t really seem to fit here - we may want to add some other ones, also I think reordering some of these would be helpful
* Similar fixes
  + Modal the explanatory text
  + Center the two lists or provide more gutter space between the left side and the navigation link

CC - Data - <https://news.adilas.biz/sales-gallery/cc-data.html>

* Text seemed generally okay here. Similar to last one, may want to capture some different sub-points and reorder overall but seemed like a pretty good flavor overall
* Similar fixes
  + Modal explanatory text
  + Center columns or get more gutter space away from nav

CC - Goals - <https://news.adilas.biz/sales-gallery/cc-goals.html>

* Don’t like the title - “Visionary Realizations” - sounds to mystic, zen, hokey - let’s get a better business oriented phrase there - even something simple like Dreams and Plans seems like it could be a better fit - but we can come up with something for that - or I realized this was tied to Needs in the original doc so maybe something like Exceeding Needs or Meeting and Exceeding Needs
* The sub-categories are probably fine…. Depends on what we want goals to convey - might be fine to just leave for now
* Similar fixes
  + Modal explanatory text
  + The gutter space actually looks better on this page, probably because data is such a small word - may want to center more still and match other pages