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Adilas.biz Developer's Notebook Report - to - (133)

Photos	Time Id	Color	Title/Caption	Start Date	Notes
	AU 365	■	Daily Ideas	1/11/2011	<p>-Turn the adilas interactive map into the main multimedia player. Allow the left and right hand sides to be controlled. Add a little bit on the bottom and slide the left hand side over a bit. Make it 750 x 450 with a frame set below the main player.</p> <p>-On the player – be able to choose options like video, slide show, h-scroll, v-scroll (maybe spell them out), audio, web link, animation, step-by-step. Each section or sub-section could have their own button options. You could also call for a button on the fly though a function.</p> <p>-On the top left have a home/reset button that allows the application to be reset. This can be controlled through the URL string and stored in a database. Basically, I want the player to be as generic and flexible as possible.</p> <p>-Make all of the buttons show/hide by calling functions. This will help the player be able to respond to any event or need. Make sure and publish the functions and even provide code for flash developers. Make it easy.</p> <p>What do people need?</p> <ul style="list-style-type: none"> - A way to organize their data - Be able to retrieve their data - Be able to store and archive data - Data could be anything: numbers, dates, text, time codes, serial numbers, inventory, recipes, events, photos, documents, pdf's, paperwork, movies, slides, video, animation, charts, lists, etc. - Be able to track things - Be able to sell things - Be able to show things - I need something custom that is easy and fits my needs - All in one place.... - ADILAS – All Data Is Live And Searchable <p>-I'm asked to do similar things over and over again. Can you build me an application that does this? <i>This? Or this?</i></p> <p>How much will it cost and how long will it do people need?</p>

AI Agent



AU
2185

Brainstorming - 2/16/2011
Ideas & Concepts
for the Multi-
media Training
Tool

- Ideas & concepts for the multi-media training tool
1. Make a template for learning and distributing knowledge.
 2. Knowledge = Information (correct & right information) x Experience or $K = I \times E$
 3. Add a crumb trail to help the users know where they are at...
 4. Secure multi-media player. Be multi-media I mean graphics, buttons, links, text, searchable, printable, audio(mp3), video, mapping, motion, PDF, web, controllable, code once – use many, dynamic templates, database fed, permissions, history, usage, forums, feedback, charts, pod casts, dynamic outlines, decision trees within presentation, still images, automated output, etc.
 5. Be able to mix and match what the player can do...
 6. The end goal is to automate as much as possible. We may have to take some steps to get to that stage.
 7. Usage permissions – General public (no login required), all users per corp (requires a valid login), only specific users may view (1-many from training to users).
 8. Usage histories – Every time a user views a clip – we record a history note behind the scenes. Random idea – maybe show the users which ones they have seen and when. Maybe even a started and completed flag.
 9. If a valid login is required, how can we help the users know if their time limit is up and/or getting close. Maybe run a check against the login table and then prompt them to keep the session alive by searching or refreshing their login history page.
 10. On usage histories – it may be cool if you could require certain training modules before allowing a user to use a specific part of the application. This could get out of control but may help educate people before you just turn them loose.
 11. The usage history would also need some special reports to help managers and trainers know what is being viewed and what might need a touch-up or revisit.
 12. As long as we are doing training... what about testing and evaluations? Why not include a testing module. Not required at all unless you want it. We provide the database, question templates, etc. We also provide the correcting reports to managers.
 13. What about a valid login plus an IP address – additional security? Just an idea. Maybe a white list of IP addresses. This may come later if needed. Another idea is require the IP addresses on the login not the media.
 14. Training could be as simple as a narrated slideshow or as complicated as a branching interactive video with different sub sections. Because it is a multi-media player – you could even mix and match presentation types in a single player.
 15. Ask the question – what would I do?
 16. Maybe allow for web services or domain name aliases...
 17. Allow outside users to login under a public username and password to submit content for review and formatting. This may require an approval process or an approval/sign off field(s). Only show items that have been approved.
 18. Be able to categorize training. This also includes sort options.
 19. Keep things fast and efficient – this may require a hybrid solution...
 20. We might need to use frames – standard adilas

header, player window, extra content to print or add/edit something, standard footer

a. This could help with branding, searchable and printable text, etc.

b. This might need to be three or four windows within a single master window – you might need to scroll the whole page as a unit. You may also need to scroll the extra content window. It is possible to also use an I-frame instead of a normal frame.

21. One of the goals is to lessen the number of clicks... leave menus open, show indicators, simulate a back-type button, etc. Make it a good experience. This also includes a play all of next clip.

22. Allow the user to determine what buttons to show... this would be done during the set-up phase of the media clip. Different buttons might be play, pause, stop, rewind, fast forward, full speed, $\frac{3}{4}$ speed, $\frac{1}{2}$ speed, $\frac{1}{4}$ speed, loop, back to start, step forward, step back, volume, mute, scroll up, scroll down, scroll right, scroll left, zoom in/out.

23. "Apply" what you learn! Do this along the way... don't wait to the end. The more you apply it, the more it becomes a part of you.

24. Be able to choose options like video, slide show, horizontal scroll (h-scroll), vertical scroll (v-scroll), audio, web link(s), animation, step-by-step, etc. Each section or sub section could have their own button options. You could also show/hide and call any button from a function call on the fly.

25. Make the player as generic as possible. It also needs to be as flexible as possible. It should be able to respond to any event or need. In order to do this, all functions will need to be available and published (written & documented). We may even need to provide flash code samples. Make it easy, I don't want to be the bottle neck... open it up for other developers.

26. If a change is made in the process, maybe have a piece at the end that shows additions or modifications. That way you don't have to totally redo the entire clip.

27. Another idea is to break the pieces into smaller pieces so that it would be easy to cut and paste or fill in changes or gaps. Think "bite size" pieces.

28. Allow backgrounds and text colors to be modified. Maybe even think about variable (dynamic) symbols and buttons (icons). Make everything transparent to help show custom background colors.

29. Another option is to allow dynamic player buttons, use .swf files, and allow the player to be fully customized. Even allow a custom loader to be used.

30. The smaller more modular pieces, the better. This will help with branching logic, videos within videos, smaller downloads, and snap-on components and functionality.

31. Remember the non-flash users. This could be html or .mov files.

32. Push vs. Pull technology. Allow the user options to show related clips or possible next steps.

33. Once we start in to flash... I can see navigation, sub modules, shopping carts, schedulers, training, etc. Starting to play in the same base player. It might be cool if there were optional choices or options for classic html or interactive Flash.

34. I want options for QuickTime, mp3 audio, html step-by-steps, & Flash. I want to service all of our clients and their learning styles.

35. Training may fit best as an element of time similar to a document, outline, or idea. The media assets and

contents could then be tied to subs. Think of an interactive outline that has subs and dynamic content. That outline becomes the training as it is organized and then sent to a player to allow the user to interact with it.

36. What about tests, quizzes, and evaluations being tied to education and training pieces? This is not required but might be a cool option.

37. Allow the doors to be opened to recruit or enlist help... This could be flow, concepts, media, content, suggestions, needs, etc. The goal would be to provide a clear and logical path with built-in checkpoints and checks. This is a way to duplicate yourself and share the load.

38. Dealing with content, media, and/or other assets... What about having a place for credits... This is the who behind the pieces... This could help to motivate people to play and even drive business to them as individuals.

39. Random idea – Inside of LTF we have a music selection (jukebox or iPod). It might be fun to allow others to be able to change music or have some fun and control of different tunes and/or moods. This doesn't have to be tied just to music. It could be for music, background sounds, different levels and takes, tracks, different teachers and/or instructors, additional commentary, etc. Sound and music are a big part of learning and defining who people are and what they enjoy and/or feel comfortable with.

40. Instruction could also be a form of meditation or visualizing certain steps and/or events. Think of some calm backgrounds with someone talking or taking you on a mental journey.

41. What about custom help files or standard operating procedures? Because each page has a help file id, we could technically allow a user to tie in their own procedures dynamically so that their users would see or have access to the correct help files or custom help files. This could be HTML, pdf, audio, video, graphics, or other.... (added 12/14/12)



AU
1863



Daily Tasks

11/19/2013

- Emails, backing up files, and prep work.
- Working on eCommerce code. Added code to the web quotes and orders page to help with virtual logging in from a hyper-link or web link. Worked on the web invoice file to help with eCommerce and emailing links to customer invoices.
- An intern came over and we worked on the invoice page together. Good stuff and great session.
- Went in to Bridgerland to work with the interns. WE started out on the media homepage and shared code between what two of the interns had on their own code files. God back and forth action. My sister then did an hour long training session on using elements of time to track time on different projects. It was a good session and we covered some good ground. The interns and I then worked on the advanced search page for media content. We got a couple of concepts in and then an intern had to leave. The remaining intern and I worked on the rest of the form and all of the prep work to make sure we got everything. Lots of details. 30 miles.



-If we watch people use the system without any other information it may help us find the holes and pitfalls. That takes quite a bit of time, but if you don't have to explain everything, it actually saves you time in the long run.

-Maybe soften some of the error messages. Help to guide and virtually hold the users hand a bit more. Show them the goal and then how to do that.

Notes About Teachers & Educators - & How They Could Use Adilas:

-This morning I have been thinking about teachers and educators. I really think adilas could be beneficial to teachers at all levels.

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-I was thinking about a guy who has been helping with adilas and having him spearhead this little project. I really want to get this product out to educators and people who are teaching the next generation. It could really help them out.

-We could sell a single teacher license for \$10 a month. What a benefit to the teachers at that price! We could do a whole school from \$17 to \$187 (whatever) based on number of teachers and students. We could do districts at a different level and even dedicated servers at another level. Tons of options.

-We could do public schools, K-12, preschools, private schools, charter schools, alternative schools, technical colleges & schools, colleges, universities, etc. No limits! Hey, even Sunday Schools... :)

-We could make a number of other interfaces that fit styles and different age groups.

-We could set a flat rate of \$50/hour for custom work. That is much easier to swallow than \$100/hour or higher.

-We could offer custom interfaces, custom documents, custom reports, and custom training. These are all part of the system and great potential revenue streams and profit centers.

-A CRM (Customer Relationship Management) system for teachers and students.

-Teachers could use – CRM, scheduling, photo management, documentation management per calendar event or per student, custom fields for tracking data, backend login (eCommerce) for parents, personal expense tracking, etc. Tons of options!

-We could approach schools at the state and district levels. We could approach teachers at a private or personal level. It is just a tool! They could use it at school, at home, over the summer, even while on field trips and bus rides. All they need is a hotspot or Internet connection.

-The application can be used on ipads, tablets, PC's, Mac's, phones, laptops, desktops, etc. Piece of cake and super small bandwidth and footprint.

-No contract. Month to month or annual plans. Free updates. Freedom and organization of their data.

-Cloud based, hosted solution.

-Privacy of data in multi-teacher environments.

-The power of a full business software system – catered to help teachers, educators, and students! A teacher's business is their classroom and their students. We can help with that!

Random note: I saw an interesting phrase in an email

this morning... It said "disposing of digital debris". I find that interesting as one of our current thought patterns deals with waste and being able to remove sludge and unneeded digital debris. All of nature has a way of getting rid of waste. We need to build those features in our data projects.

More notes on adilas for teachers & educators:

-School lunch program. They could pay and load cards from backend eCommerce. This is kind of like a gift card type interface or options. We could have an easy my cart favorites menu to bill out lunches and charge the cards accordingly. It could be super simple.

-Schools may need small online stores for yearbooks, t-shirts, game tickets, plays, donations, etc. This could be more eCommerce school funds cards. Pretty cool.

-Schools need email and text messaging between teachers and students and teachers and parents. We could use Full Circle IM as a 3rd party vendor for that. Piece of cake.

-Simple pricing structure of \$10 per month per teacher. Any of the reps could get 20% of that as the rep and/or consultant. This same commission structure exists for all reps. This deals with accounts, not teachers (unless they are their own mini account).

Level 1 – 0 to 25 clients (accounts) – 20%

Level 2 – 26-50 clients (accounts) – 25%

Level 3 – 51-75 clients (accounts) – 30%

Level 4 – 76-100 clients (accounts) – 35%

Level 5 – Over 100 clients (accounts) – 40%

-Boy, it would be awesome to have a specific website that had teacher specific stuff on it. Ideas, tutorials, consultants, developers, manuals, and other resources. This could be really cool if they could even purchase or setup an account right from there. We could figure out referrals, promotion codes, etc. Just an idea! :)

-On schools and reports, dates are very important. We just barely added some custom date ranges to the school specific settings. This is an admin feature, but the dates could be set by school year, semesters, quarters, trimesters, year-round, etc. You get to set the active date range. All of the older data still exists, but the active date range helps to keep things current and fresh. In a way, it is like getting rid of waste and rubbish without actually towing it away.

-Objects and data wrapped in time... Think of what happens in a school year, a quarter, a semester, a trimester. What if all of that could be wrapped up together. Relationships, characters, players, problems, trouble, decisions, and consequences. Each chapter in the book (school year or timeframe) needs to play out as it happens. Catch the story at the source (teacher/student) and then go from there.

-Mini world building – a teacher, his/her students, their school, their community, their district, their region, their state, their world.

-More ideas and possible needs for an eCommerce and/or point of sale piece of software or solution... Event registration, community events and calendars, book stores, class fees, dances, housing, parking, food, labs, supplies, tuition, clubs, fund raisers, donations, extra curricular activities, field trips, exchanges, trips, etc. Tons

of things, at a school, deal with money.

-This might be further down the line, but what about teaching adilas classes to students. Teach them how to run a business, sell things, track things, do accounting, even how to dream! Teach them... You dream it up, we'll help you wire it up!

-What about different accounts per students. Say they put some money on a card or an account, wouldn't it be cool if you could sub divide the money into different areas... For example: food, recreation, fees, book store, clubs, activities, etc.

-What if someone wanted to design a whole new interface that talks with an adilas backend? They could use any programming language and an adilas backend engine or API connection socket. The interface could be 100% specific to teachers and educators.

-I need to get back to my other projects... I'm having a hard time turning off the ideas... :) Good stuff and it could help great people! That's exciting!

Other notes:

-On customer logs (meaning the main customer information page), it might be nice to add all subs of time. Maybe also the invoice number of the main element of time to show what has and has not been invoiced. Then again, maybe just a link instead of showing all of the data. Or maybe wait until we do the roll call page and then link from there.

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As a side note, we added a Word Document on 10/30/2019. Original date of the entry above is 9/10/2014. The new Word Document came from Chuck Swann, an adilas designer/developer. It was listing out some additional needs for schools. See this link for more info on that doc.

Web link - Word doc file



AU
2868

Daily Ideas

10/9/2014

Just for fun.... Think about sub locations per system player groups.... Just showing 4 of the 12 main system player groups:

Invoices:

1. Pending
2. Work in progress
3. Layaway
4. Shipping
5. Archived
6. Etc.

Items:

1. Bin #
2. Pallet #
3. Bay #
4. Floor #
5. Area
6. Section
7. Room
8. Etc.

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Stock/Units:

1. Lot
2. Show room
3. Front line
4. Repair
5. Rental fleet
6. Etc.

Employee/Users:

1. Department
2. Office #
3. Area
4. Team
5. Committee
6. Task Force
7. Probation
8. Etc.

-Thoughts on sub locations.... What if we made a section under elements of time for sub locations. (Think of sub locations per main player group) We could allow each main system player group to have virtual sub locations. This is kind of new... Instead of a single set of sub locations, what if we could specify subs per group... For example, say subs for a stock/unit could be Montrose Colorado (main location), North Lot (sub location). The item still exists in Montrose but we also know a sub of the main. Where the new piece comes in is by main player group. Let's say we are doing some parts (general inventory) movement, we may not want North Lot as a sub location. What if we only wanted Basement or Storage? Basically allow sub locations per main system player group. A PO might want sub locations of pending, filed, to be paid, shredded, etc. (Different subs for invoice, PO's, products, employees, etc.)

-I'm seeing an increased need to cross tie a single data object (invoice #777, PO #251, E/R #555, stock/unit #101) to subs of the elements of time features. This could allow for sub phases, movement, sub tracking, sub locations, sub assignments, etc. We could add time elements to each of the main system player groups. The other part of this new need is where the action takes

place. Traditionally, all subs of elements of time happen from the main element of time. What if we stored the data under the main element of time but showed or allowed access to the subs from the host or parent data object. For example: Let's say that invoice #37 (host or parent data object) wanted to track how long it took to build something... We could use sub dates and times (sub of time) but have it show up and be editable from invoice #37. The person could be interacting with time without ever leaving the invoice environment. That could be really cool and has a lot of potential. Here is what it might look like: (Sketch – please see scan in photo gallery – Main system player groups who need to access subs of time... There are actually 12 main player groups – just added a few of them for this drawing: Customers, invoices, quotes, parts, stock/units, vendor, PO's, expenses... Elements of time as a wrapper or pass through to the subs or functions of time – some of the subs or functions of time: sub dates & times, sub locations, sub comments, sub sign-offs, sub payroll, sub reminders, sub GPS & RFID tracking, sub assignments... Basically, use the main elements of time as a wrapper or pass through to access any of the subs or functions of time. Gain access to anything using time as a wrapper.

-Wow, I didn't know time and time functionality (subs of time) were so important. Basically, if we used time as the wrapper or pass through media, medium, vehicle, or channel... We could add additional functionality to all existing player groups and individual players. That could be so powerful! I'm excited!

-Instead of making time a key player, in this instance or event, it will be almost transparent but will allow main data objects and groups to access additional functionality.

-What if... we could create templates for each main player group (all 12). We could then allow access to subs of time based on settings per template. It gets back to "Types" and "Functions". Both types and functions of time were major topics while we were developing the system section called elements of time. I'm seeing a potential to take those same concepts to all main player groups and even let main player groups connect to sub functions of functionality of time or other player groups. This could get deep, but basically defining different types and functions for the different players and player groups.

-Once we define the subs or functions, we could allow cross tying or cross usage as needed. Basically, make everything part of a bigger interactive system or data sphere. Bring it all together into one bigger system.

-Things would still have a home or default usage, but we could open up cross overs and functionality to meet the demands of a flexible and complete world. True world building. Taking custom to a new level.

-A couple days back I was writing about real in-line extensions. Well today I was explaining the concepts to the adilas interns. I used a couple of small drawings to show them what we were trying to do and come up with. Here are some rough sketches of how I was trying to explain things... (Please see sketches on scans in photo galleries): new in-line extensions, pretend an existing database table, core system with possible extensions, flow chart or relationship model with some extensions, throw things in the bucket, predefined levels, bucket or

main data object with subs...

-Imagine a one-to-many relationship (main boxes and lines)

-Then imagine the flexibility if you could virtually extend and control other needs and wants on almost any table or relationship. Look at the dotted lines. Think options and custom business or data solution.

-Imagine a bucket with certain predefined sections or sub containers (how the bucket is organized). Then imagine extending or adding custom containers as needed.

-Small fix is needed on creating an internal-repair ticket from a URL web link. If no prior location is selected, it drops the URL stock value and the user has to re-enter it. Help them out by keeping the known stock/unit value going forward.

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AU
2961



Daily Tasks

12/4/2014

- Working with an intern on logic for his first customer upload. Over its course, we spent about 10 hours on what needs to happen and why. Also had some light tech support calls.
- On the phone with both Steve and an intern going over the entire process of doing a customer data upload. We did a GoToMeeting session. We drew out the process. That included a funnel process from MS Excel, temp database, new table, ColdFusion page, queries, loops, variables, conditional logic and other tweaks to the variables. Then we check the live database and then point the new and clean variables back into tables, rows, and relationships in the live database. We even FTPed (file transfer protocol) the tables up, logged into the remote server, and ran the live update. Great session. After that Steve and I talked about new shopping cart access points and black boxes for custom code. We also talked about integrating with different pieces of software on a user's machine and then allowing full API connections from the software applications installed on user machines.
- Uploaded the new graphic for the shopping cart black box diagram. I also tweaked an adilas associates' adilas university logo and put it up online. That was fun to get that graphic up and online.
- Working with my brother on arrays and structures.
- Working on a meeting agenda and printouts for the developer's meeting.
- Went into Bridgerland to meet with adilas developers and adilas interns. This was our first meeting of this level and scope. We ended up with 15 people at the meeting. There were only two that I haven't met before. They were friends of one of the current interns. We had a great group of people at the meeting. We did a two hour session and covered lots of ground. Super awesome meeting and I was humbled by the participation and comments from the group. It was awesome and humbling at the same time. See elements of time #2930 in adilas university for the video web link. We gave out flyers, paperwork, and handed out all of the new jump drives that I had. Great session and good energy. See this URL for the GoToMeeting screen capture: [videos/adilas_developers_meeting_12_4_14.wmv](#). 30 miles.



Shop 3018

New web links for customers

5/11/2017

We need to add in new HTML links to help customers get to the online bill pay stuff. This could be from the customer log page or on the emails that get sent out to the client. Currently we email invoices, quotes, and statements. It might be nice to have the online bill pay links be on all of those emails. It might be nice to have those same URL's available from the customer log page where they could be copied and pasted into a handwritten email message as well. Just some ideas.



Shop 2795

Working on the 3rd party solution page

6/13/2017

Adding a new graphic to the adilas 3rd party solutions page for a company called Green Stock. I changed up some verbage, web links, and sent them a screen shot of the page. The were originally called AFB Branding or Adilas Branding, but we wanted to create a little bit more distance between the brands and who was part of what party. Other small tweaks and changes.



Shop 2816

Meeting to work on Campaign Rise

6/23/2017

On a GoToMeeting session with Bryan and Alan and Dave. Alan and Dave were at my house and Bryan was connected remotely. Once we got started, Alan went over a good sized email to talk about the different pieces that are needed, planned, and finished. He had gone into pretty good depth on the email notes. See attached for a copy of what it looked like.

- They are still planning to connect with Facebook and Twitter for social media stuff.

- They are going to be keeping the campaigns and the following of friends on different tabs.

- They were talking about videos and getting the video streaming to be smoother. Lots of media/content type options and questions.

- We talked about the different options on the media/content server. There are three ways that media/content may be connected. They are local (on their computer), remote reference (web link or URL based), and physical upload (actual file uploaded to our servers). We are thinking that the video options might work best if we use the remote reference option.

- On the paid events - Alan will not worry about pictures per items but will worry about the donation amount.

We finished up the meeting and got some of the guys paid. I'm really happy for what they are doing. This will be a big learning project for all of those who are involved. Kinda like their first major wire job using customers, vendors, parts, elements of time, PO's, invoices, and flex grid tie-ins. Pretty cool.



Shop
3108

Adilas Time

10/25/2017

On the morning GoToMeeting session with Steve. We started out and I asked Steve for some advice on what he would do for a wholesale manufacturing facility. I have a big custom project that I am trying to plan out and design some flow and processes. He had tons of great ideas dealing with flow processes and I was scratching them down on paper as fast as I could. Some of these are random notes, but it should get the idea across.

- Create a recipe with all of the top selling items. Have each item listed at a zero quantity. You could also do the same thing on the advanced grid for my cart favorites. You get a similar outcome. Then use either the recipe/build or the smart group buttons to get a quick entry form for your top selling items.

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- You could also create a quote with a quantity of 1 for all items. You could then restore the quote and change quantities as needed. As a side note, quotes with a quantity of 0 will not work due to the cart code. The recipe/build and/or the advanced grid on the my cart favorite buttons do allows zeros.

- Once you start getting a client's history, they will most likely buy the same or similar things over and over again. It saves tons of time if you take an old quote or old invoice and restore it to the cart. You tweak and change quantities and add or subtract as needed. It helps you know their patterns and saves tons of time. This is a great level to start helping your clients.

- Once you get approval on the quote, flip it to a transitional or work in progress (WIP) invoice. This becomes your virtual work orders or what is needed. If needed, we could improve some of the search options and even add some flags to help with flow and what not.

- Steve was saying that when they do some of their ordering... the companies use generic items and put out the request to multiple companies. Then, later on, they make normal PO's to bring things in.

- When the invoices are shipped and filled, they flip it out of the transitional state (WIP state) into a normal customer invoice. This process already exists and maybe we could enhance it and make it smoother as well.

- Steve started talking about how each customer ends up making a three point triangle of sorts. This was the theory. Each triangle was different just as each customer/client is different. The three different legs of the triangle were: 1. Getting and setting up the client. This is usually the longest leg. This is onboarding the client and getting them to make the first order. 2. The second leg was getting them the actual products and services. Depending, this could be shorter or longer based on needs and availability. 3. The third leg was maintenance and retention of that customer. This includes communicating, offering additional pieces, and building customer loyalty. Basically, keeping the customer a customer and making them happy. Every business needs to apply some of these same things to keep a healthy customer base. The goal is to keep shrinking the triangle as you work with your customers

and clients. Good stuff.

- One of the things that helps the most is a good ordering process. This could be ecommerce, internal shopping carts, custom carts, custom interfaces, recipe/builds, groupings, kitting, buttons, etc.

- We talked about new technologies like predictive text for searching, tabs, cards, drop-downs, graphs and charts, and easy to use navigation and buttons.

- We then talked about back orders and how Steve wants to totally re-write the back order process. Currently, most companies make one giant invoice or order and then try to fill it as they can. This creates a nightmare for inventory, receivables, payables, and other accounting problems. Steve would like us to go in the direction that we sell what we have, we bill for what we sell, and we make a second order with the other pieces. That order gets put in the transitional invoices or work in progress invoices and we chip away at it. If needed, we split that order up and bill for what is delivered. It helps us track our inventory better, we collect on what was really shipped, and it helps the person receiving it to keep their inventories better. Along with this, we may need some tools to help split things, monitor progress, do some sub locations, sub phases, and track virtual checkpoints and pods. Keep it real vs trying to put everything in one spot and then have it break from there. Steve would rather link, join, and tie-in multiple pieces to make a whole vs forcing everything under one roof. It is still all there, it just allows for more flexibility and monies are able to cross lines faster. Some great ideas. We could even detail this out more as we go.

- We talked about chaining and moving inventory forward. This helps to track normal flow plus solves the back order issue. Basically, I've got this, I'll send you this, you still need this. Keep pushing the other items to the next invoice (splitting up the invoices) and still maintain a chain and/or connection.

- If we do a back order, we back order a parent item. We then flip that to a child item or mini conversion as they come in and go out. The main back order only holds the parent item or a reference to the main item that is needed.

- Steve showed me a page that he and Russell are working on. It is his campground reservation homepage. He is using the new snow owl theme to show tabs, cards, and show/hiding pieces to create a one-page interface. The web link is:
top_secret/secure/campground_reservations_home.cfm. You do have to have the snow owl theme to use that page.

- We talked about what options Russell could bring to our meeting. Russell brings easy and pretty. He is good at researching ideas and templates to show the ideas and concepts. He has hours and hours of looking at templates and thinking about how we could use similar type features. He then uses those ideas instead of trying to build them on his own. A great resource.

- We then talked about maybe having them start with ecommerce and let that be the ordering process. We also talked about how sometimes it is harder to do 1 or 2 steps up as compared to going 4 to 6 steps up and getting the flow correct. It kinda depends on the goals.

- We then talked more about how the online ordering and ecommerce solutions are changing the face of the land on which we live. The shopping cart is one your primary tools. That is huge. We also talked more about mobile and helping users and customers gain access through faster logins and such.

- We talked about emails and communications, no more batches, doing real-time data and transactions as they happen, cash flow and how even daily cash flow could really help speed things up. We talked about using technology to your advantage and how automation of certain tasks can really help. Lot of talk about just in time and how that effects things.

- The last concept we ended up talking about was ways of paying commissions and just in time deposits using ACH transactions for our reps and developers. The quicker we could get that money flowing out and into the right spots, it is like a watering system vs. flash flooding. It just helps things to keep going better. Lubing the system.

After we were done talking, we worked with Alan and Calvin on some of their projects. I then spent some time backing up files and trying to make the bitbucket repository (code bank) smaller.



Shop
3737



Adilas Time

5/9/2018

Working on the easy system setup for a new adilas system. This is for the one-time setup fee, the 1st month system fee, up to 5 hours of training and/or setup, and up to 3 hours of custom code or simple data migration. Working on the links and verbage for the adilas ecommerce site.

I had a meeting with Andy from the Peak Deli at 3:30 pm. We went in and worked on his my cart favorite buttons. We ended up stacking things and making button groups for his different sections of buttons. These were things like breakfast, lunch, drinks, sweets, choose a side, etc. I think it will really help him speed things up and make it go faster. Anyways, it was fun to see all of his buttons and help him get everything all organized and what not. Good stuff.

Finished up the day by working on the adilas ecommerce page. Spent quite a bit of time pulling together assets and links for the easy system setup item. That was fun to pull all of those things together in one place. Here is the link for the new setup item:

Web link - Item detail page



Shop
4033

Adilas Time

10/2/2018

Steve and I met this morning and had a good meeting. It was just the two of us. So, we ended up talking shop and strategy. We talked about some of our internal pain points and how we could get someone to help us out with those things. One of the pain points was with merchant processing solutions. We have coded to a number of Internet gateways, and that is working fine.

We have two major needs on the merchant processing level...

1. Is on the chip reader side. We have two gateways that we have coded to, but it takes a person to get people setup and going on that (light babysitting). Those solutions require both web API socket stuff and software installed on a computer. If the company updates their software, we have to recertify and no one wants to pay for that. So far, those solutions have been somewhat of a headache.

2. We need a simple Internet solution where a new merchant could be approved very easily and then they are off to the races. Currently, the Authorize.net's and USAePay (our top two gateways) have pretty deep prerequisites that the merchants have to go through in order to be setup and qualify. As they grow and mature, they may need to go to a bigger processor, but we need a really simple solution to get people started fairly quickly. We are thinking that Stripe might be the best option and/or looking deeper into PayPal or something like that. I personally am leaning more towards Stripe.

We also talked about some other internal needs and who we could put on what projects. Some of the other needs are things like:

- User guides
- How to's
- News and updates (this is biggie for us)
- Billboard sites (world building, roll call accounting, data assembly line, and others)
- Tons of other mini projects that come up
- Build out the full Adilas API sockets and the underlying documentation to make that happen. That is a huge piece of the puzzle.

We would really like to have some focused project management on both internal projects and client projects.

11:00 to 12:00 pm - Meeting with Global Design and Assembly - orders and backorders

- Not duplicating orders when something gets back ordered. They would love to enter things once and have it flow through.

- They would like a definitive answer of prices and timelines to make that happen.

- They import products and resell those items. Lots of shipping and fulfilling of orders.

- They would like to go more paperless in the backend office (what is needed, what is ready, what has been shipped, etc.) - Currently, they are doing a lot of paper back and forth. They would like to eliminate the paper model.

- Steve, talking about a transitional PO (similar to a transitional invoice - between a quote and an invoice). This would be used for the on order/not quite inventory yet but maybe we are already making payments, etc. Steve was saying that Will Hudson (adilas developer) was going to be working on the transitional PO project. Basically, a work in progress type PO... it isn't fully valid inventory yet, but it is becoming more and more solid values. ?

- Jason, I think you guys would have a lot of clients who would like for a more automated backorder process.

- Steve, was talking about the existing manual process of duplicating the original PO and only pushing the backordered items forward. You don't have to build it from scratch, but you duplicate and keep pushing the ball forward. The other side to this, is you only pay for what you really get and have.

- Jason, would really like that process to happen (like magic) so that the whole story is still there but it flows through the whole system.

- Example: Say we ordered 500, you only got 300. What comes next? Do you have a small box that says, move 200 to backorder (aka a new PO) or what other options might be there.

- Small talks about ice-down dates

- On a technical side... how do you keep cost of goods, inventory, accounts payable, and what is received and what is not received? Some of the questions go clear out to the balance sheet and how to track things.

- Just in time ordering and smaller draws... Say they need 500 total, but only want 100 now and another 100 by next week and then rest when possible. Just in time issues and some tracking nightmares.

- Technically, we may need another couple fields where we could put desired amount, shipped amounts, and backordered amounts.

- There is more of a need for time based ordering - just as, I need this on this date, and that on this other date... Basically, tying things into more of a time or schedule based environment.

- On the just in time... If someone wants 500 and you only have 200, how do you put it on the order? Do you put the whole 500 on there (this would drop your inventory

by -200) or do you just do the 200, out the door, and then put the other 300 on another PO/invoice. Basically items still needed to be bought, purchased, and/or shipped.

- Warehousing and stocking shelves - excess inventory and back stock

- ecommerce type scenarios where orders are processed and managed as part of a supply chain scenario.

- Steve, was talking about companies that are proactively pulling sales from the other companies and then keeping a supply chain up and ready based on max/min re-ordering options. Once they (the other company) gets to certain level, a new order is always processed.

?

- here is a link for some of the older back order or backorder brainstorming from the developer's notebook.

Web link - [developers_notebook_home.cfm?q=back%20order%2Bbackorder](#)

- Steve, was talking about the new plant move and harvesting options that they are building out. It used to be one manual process at a time. Now, they can click a button and move, kill, phase, or group hundreds and hundreds of plants at a time. The whole thing was custom built and automated through elements of time, PO's, and parent/child inventory. Totally a new automated process.

- Jason, we only want what really happens to be recorded, but we don't want to lose the other details of the story.

- Brandi, we already have some custom code that helps us see what we have on hand, what has been placed on new orders, and what is still needed (don't have that yet)

- Brandi, we currently have to make a sales order, fulfill it to the level that is true, and then duplicate it and redo what is still needed. This is the current manual process. She would really love to automate that manual process and take out the possible human error (either multiple clicks and/or info that was forgotten).

- Backorders play on both sides of the fence... inbound items and outbound items... Both sides need a standard and automated flow process.

- Steve, was recommending that we see their existing processes and then make a plan.

- Brandon, we somewhat proposed a system that uses a request quantity (what is wanted), actual quantity (real values), and still needed values (backorders and/or wish list). We talked about having and showing all the fields and allowing JavaScript to help do the math, show/hide checkboxes to help automate the duplication process and pushing the virtual backorder and/or wish list forward. We would then keep chaining and flex gridding those pieces together. Basically, the same things that they are doing manually right now, but we speed it up and help to automate it.

- Steve, he loves clients who ask - Can we move this tree? I keep having to walk around it. While other clients just quietly walk around the tree every day. Sometimes those clients who ask the questions really help us move the ball forward.

- Steve, software and application are constantly changing.

- Jason, really likes to look at "scale". Can I do this? Can I do this for x number? Can I double or triple that and still be ok? Can I multiple by n (unknown number)? It all comes to scale.

- Jason, they have really used tons and tons of flex grid...? It is now getting to the level where it is getting to be somewhat of a nightmare, due to the number of custom fields and where it is stored.

- Jason, process sequencing - what data (total) do we need to catch and then push to where it goes. First catch the data. Then we can display it, however we want to.

- Jason, he likes farming (talking about idea farming). But, he really like to harvest (seeing it through).

- Jason, will send up some docs on what they want done. We (adilas) will then help plan it out and get them some quotes and what not.

- Dream it up, and we'll help you wire it up.



Shannon and I started re-watching the video of Kelly Whyman doing a presentation from the Denver training event. See this element of time and look for the afternoon video on day 3 - the actual start time of the Kelly portion of the video is at 2:33:19 (ish) - Web link - time_web_gallery.cfm?corp=748&id=3957

- One of the first things that she does is get the physical process that really happen and then she breaks those values into a work flow and defines who is going to do what?

- Setting and maintaining the expectations. Owners and operators are different. If things are too complicated, they, the users, stop putting things in.

- There are those who are good at frontend, backend, and maintenance. Different skills, talents, and interest levels.

- Shannon and I talked about "getting an investment approach" where the clients see what other successful people do. This was talking about other skills such as training, setup, maintenance, consulting, overseeing, etc. Ongoing help and other services.

- The setup and initial portion of the client's implementation is very important. They may need some ongoing oversight and/or help. How am I going to support you to get to your goals. Ongoing relationships.

- Try to operate out of the box first and then customize from there. Sometimes they jump too early on the custom bandwagon. Everybody loves the idea of custom but it can be a two edge sword. There might be a difference between small customization vs full or huge customization.

- Are you really ready to take on adilas? Is this the right system for you? You have to really want this (data feeding game). We talked about can's and should's... cost/time analysis.

- Maybe a way we can differentiate ourselves is based on concepts. We love talking about 3D world building, systems, interconnected data relationships, digital story telling, permissions & settings, and objects and data over time. There is an older PDF flyer that has a fun math equation of :: "Results = Mix(Functions, Players, Concepts)". See this older flyer for more info: Web link - [adilas_formula.pdf](#) - Good stuff.

- Sell the sizzle

Anyways, Shannon and I only made it part way through the video from Kelly. We had some good talks and we have some homework to keep watching and taking notes. We will touch base again next week on Tuesday.



Shop
4427

Brainstorming

2/25/2019

At some point, we want to circle back around and rebuild a bunch of the pieces and how they act and interact. We would like to call this new rebuild "fracture" or something to that effect. Anyways, here are some brainstorming ideas on the fracture pieces that we would like to sew together. No specific order:

- object oriented approach (objects and data over time)
- use teams and different talent pools
- ice berg vs mountain type analogy (what is being exposed and what are the perceptions - visual exposure)
- settings and different setting levels (corp, group, page, user) ?
- subs... of sub (everything is fracturing into smaller and smaller pieces) - plan for it and embrace it
- API socket connections and external work flow options
- database scaling (corp-specific databases or corp-specific database tables)
- real in-line database extensions (add/edit/remove database fields and help them flow through the whole system)
- 3D world building - keep going and building out these ideas and concepts - one step at a time
- data assembly line(s) - concepts of tracking phases, grouping, sub locations, allowing flex and checkpoints, permissions, mapping to financials, etc.
- using time or elements of time as a base level and then mix, blend, and share sub functionality and tracking options (more objects and data over time stuff)
- funding and making sure we can fund the planning, design, and development of our game plan
- help files, videos, and SOP (standard operating procedures) - standard and custom
- black box and ways to customize the pages, verbage, logic, and process flow
- summarized data (aggregated data) vs transactional data (all the steps and transactions) - we need both - watchers, feeders, and triggers
- following and dreaming the dream - it may sound way out there... but following that dream is huge
- make a visual plan
- include general testing, unit testing, validation (local and serer-side), and standardizing requirements
- version control and deployment

- going back and doing research and review of older notes - tons of mini gold nuggets to harvest from doing this over the years (make sure and harvest some of our own ideas)

- use of sub homepages and graphical hubs of sort - also use graphics, charts, graphs, and other elements

- summed up data with drill-downs or searches available (basic or advanced) - approach all most everything from a summed up version into a more expansive (expanded) view and/or format

- be able to export any data to CSV, Excel, PDF, and general web format

?

- smaller mini functions - getters and setters - for miniature database access and updates

- use sub flags, tags, and other similar features - lots of ideas about sub phases, sub groups, sub locations, sub flags, sub tags, sub progress, etc. Lots of prior documentation on elements of time and subs of time, including how to virtually adopt functionality between main player groups (invoices, deposits, expense/receipts, PO's, customers, parts/items, stock/units, vendors, employee/users, quotes, elements of time, balance sheet items, etc.)

- custom look and feel - able to match moving trends

- responsive (able to change size and layout based on device or screen size) - mobile development

- sales - how are we going to market and/or sell our products and services - how are we going to set things up for correct billing and tracking (usage, storage, bandwidth, queries, connections, data, files, images, etc.)

- communications, push/pull notifications, automated things, queues and scheduling tasks, bulk and individual communications

- good project management

- sub permissions - almost down to the function type level (as needed)

- dynamic verbiage, custom layout(s), dynamic link builder (favorites), and simple look and feel

If you are looking for other ideas for the fracture account stuff. See this URL or web address: [Web link - developers_notebook_home.cfm?q=fracture](http://Web-link-developers_notebook_home.cfm?q=fracture)



- Is it easier to say what we can't do, b/c we can do so much
- A whole package
- Interconnected,
- Buffet - pick & choose, can play at any level you want - imagine a buffet with 100 items, say you want 2, 3 or 50, you get to pick and choose what you want, it's great!
- Customizable
- All data is live & searchable, serviceable, sustainable, etc. Joe's thing
- Tanya's graphic: choose your flavor, pick your tools, skin your engine,world



4.1 - General Overview

Understanding the Basics:

Welcome to adilas! Adilas is a buffet of user-oriented options, and you can play in a style that suits your needs and wants. It's a whole, interconnected package that allows you to streamline your business functions through one customizable program. From vendors and customers to expense/receipts and payroll, adilas will track your data in a way that allows you to follow the entire process without having to change from program to program.

At adilas, you choose your flavor, pick your tools, skin your engine, and build your world. Adilas is a powerful data engine and a dynamic and adaptable business model. In the following sections you will learn more about the pieces and how they interact with one another.

Getting Started:

This User Guide is a great resource as you start using adilas. Every subsection here in "Meet The Players" begins with "Understanding the Basics" and "Getting Started". Each subject also includes suggestions for some basic and admin permissions or settings for that section of adilas. There are also multiple links to help files for pages associated with each subject.

Make sure to get in and start using the adilas system.

This is really how you will gain the confidence and experience you want. Use the play sites, utilize this user guide, check out help files, click on links, explore, see how it all fits together and you will begin navigating the adilas system far more quickly. We hope this User Guide will be a helpful tool as you start to use adilas.biz!

Suggested Permissions and Settings:

Settings and permissions are foundational pieces of adilas. Settings help create the specialized work flow and the look and feel of your adilas. Permissions dictate who is allowed to view, or work, in every area of the system.

This section of the user guide will give you a basic idea of some of the associated permissions or potential settings that could be used. The general format for the permissions section is to give the section name where

the permission is found, the permission name, and a brief description. If applicable, the settings section gives you the setting's name and a brief description. This is not all inclusive, but meant to help you get started understanding and using permissions and settings in adilas.

Related Pages & Help File Links:

This section will contain brief descriptions of related pages in adilas and links to the help file associated with that page.

Understanding the Basics: This help file explains some of the basic theories and concepts that adilas uses.



Web link - top_secret/steps_basics.cfm

Adilas.biz System Overview: With adilas – you get it all! This map shows aspects of adilas grouped together to show business functions. These subgroupings are representative of things you may find in varied business system packages. But the most powerful part of adilas is, that here, you get it all together in one interworking system!

Web link - adilas_system_overview_map.pdf

Additional Content:

-Have some of the adilas graphics – like the GPS World Building Graphic

Web link - images/help/adilas_gps_layout_big.jpg

-And the Adilas.biz System Overview: Map – With adilas, you get it all! (This link is listed above, but we could potentially even show the graphic here.)

Web link - adilas_system_overview_map.pdf



- Dealing with some of your high end user features, accounting, histories, HR stuff
- Permissionable to whatever level you would like - user with extra permissions (additional responsibilities)

4.2 - Admin

Understanding the Basics:

Admin refers to the management or administration of your business or organization. Adilas is built on a foundation of permissions and settings. Settings help create the specialized work flow of your adilas, as well as the look and feel. Permissions allow administrators the ability to grant or limit access for other users throughout the company's adilas application. In other words administrators assign, by permissions, how other users view and use the system. ?

Admin is used throughout the system to denote the higher-end user features which are accessible to those with the higher administrative permissions. These are features that allow more power and accessibility to work in the system and with the data. The flexibility of adilas is that you can give each individual the permissions they need to access the relevant pages and information necessary to do their job.

Getting Started:

Admin functionality is based on assigned permissions. To setup new users in the system or to edit information/permissions for any user, go to the Payee Permission Home page. Either search and add for a new user, or click on the name of an existing user to edit info or permissions. This takes you to the Add/Edit Employee/User Permissions page, which is an incredibly powerful page. This is where you setup how that user is able to work in the adilas system. For more information on permissions and settings please check out these sections of the user guide.

Reach the Payee Permission Homepage from the Classic Homepage under System Management – Add/Edit Payees and Permissions; My Favorites Homepage under Other Homepages – Payees & Permissions; or on the Interactive Map under the users button.

Suggested Permissions and Settings:

Admin: The ultimate administrator in a corporation has 2 key permissions that allow them to work with all other user's permissions and the corporation-wide settings. These are ultra-admin permissions and should not be given out to anyone but the highest administrators. These permissions are found under the System Management section and are called "Add/Edit Payees & Permissions" and "Manage Corp Info & Permissions". These two permissions allow you to add users to the system, assign permissions for any user, and manage all of the corp-wide settings.

We recommend that administrators check out both the settings and permissions pages within adilas. Both are important to the management of your adilas. There is an incredible amount of customization available right from the start. If you have any questions about permissions or settings, check out that section of the user guide, search through the permissions or settings - they all have associated descriptions, or contact your rep or adilas support to find your answers.

Related Pages & Help File Links:

Add/Edit Employee/User Permissions: This is the critical page for setting up users in adilas. Come here to assign or edit permissions for users and to read descriptions for the permissions. Web link - help.cfm?id=106&pwd=permissions

Manage Corporation Info and Permissions: This page in adilas is your hub for accessing your corporation management links. Web link - help.cfm?id=216&pwd=corp_admin

Corporation Wide Settings and Defaults: This is the page in adilas where you adjust all of your corp-wide settings. The help file, whose link is provided below, contains additional details for all the descriptions associated with each setting. Web link - help.cfm?id=336&pwd=settings

Login, Passwords, & Permissions: This is the section of the User Guide that covers logins, passwords, and permissions. There is some great information here especially regarding the concepts and theory behind these adilas functions. Web link - steps_logins.cfm

Additional Content:

-It would be great to come up with a useful graphical illustration to really illustrate permissions and settings... which should obviously go with permissions and settings but is also applicable here.



AU
3946

4.4 - A/P -
Accounts
Payable (vendor
waiting room)

4/16/2019

4.4 - A/P - Accounts Payable (vendor waiting room)

- Time element (all time is stamped & tracked) - aging
- Fed by PO actions, etc. or inputs (partial paid or still due)
- Catch all for monies still owed

4.4 - Accounts Payable (Vendor waiting room)

Understanding the Basics:

Accounts payable are monies owed by your company for products or services you have received or will receive.

This page is a virtual vendor waiting room called the Payables Homepage and is a great place to start for seeing money still owed by your company. It shows you amounts paid and/or owed to specific vendors and payees.

The Payables Homepage is fed by PO's (Purchase Orders), unpaid or partially paid expense/receipts called splits (payments on account), reimbursements (REI's) – expenses checked for a reimbursement, and serialized stock/units. This page is full of active links so that you can directly access those objects to manage payment efficiently.

Getting Started:

We recommend starting at the Payables Homepage for managing the process of paying off any PO's, splits, REI's or serialized inventories. Use the active links in their respective columns to begin the expense/receipt process for these items. This will eventually create a new expense/receipt where you will pay off, or partially pay for, the associated items you linked from. To filter the data for this page, click the show/hide search criteria button and adjust your settings to the report type and parameters you want.

Get to the Payables Homepage from the Classic Homepage under System Liabilities – Payables Homepage; My Favorites Homepage under Expense/Receipts – Payables Homepage; or the Interactive Map Homepage under the a/p – vendor waiting room button.

Suggested Permissions and Settings:

Permissions:

Basic Use:

System Liabilities Section: "Basic Expenses/Receipts" – this allows a user to add/edit, view, search, and print basic expense/receipts. Maintains a limited view of any private expense/receipts.

System Liabilities Section: "Basic Payables" – this allows the user to view but not edit data on the Payables Homepage.

These 2 permissions work well together for users who are creating expense/receipts for limited items such as PO's.

Admin Use:

System Liabilities Section: "Admin Payables" – as the admin level for payables this allows the user to create split payment receipts, reimbursements, and contains admin feature options for PO's and stock/units. This permission should be given to the person in charge of making payments for your corporation or your accounts payable person.

Related Pages & Help File Links:

Payables Homepage: Come here to see the vendors/payees your company owes money to and manage payment for these expenses. Web link - <help.cfm?id=239&pwd=payables>



Start PO Payment Receipt: This is the page that starts to build a new expense/receipt for PO's by linking from the Payables Homepage. This is the most efficient route for paying off PO's because it automatically connects your expense/receipt information with the specific vendor and the PO's that are being paid for. Web link - <help.cfm?id=247&pwd=payment>

Start Split Receipt (payments on account): This starts the expense/receipt building process for payments on account. This occurs by linking from a split payment from the Payables Homepage. Web link - <help.cfm?id=241&pwd=split>

Start Reimbursement Receipt: This starts building an expense/receipt for reimbursements owed. Web link - <help.cfm?id=114&pwd=start>

Additional Content:

-Views or screen shots of the Payables Homepage



AU
3947

4.5 - A/R -
Accounts
Receivable
(customer
waiting room)

4/16/2019

4.5 - A/R - Accounts Receivable (customer waiting room)

-Tied to A/P - one's outgoing, one's incoming - so very much like A/P but what people owe you
-Comes in through invoices & sometimes also through time.... charging people for time
-Monies received during the day but not deposited yet.... staging area, like your cash register, vault, bank bag, etc.

4.5 - Accounts Receivable (customer waiting room)

Understanding the Basics:

Accounts receivable are monies that people owe you. This page is a virtual customer waiting room or cash register, called the Receivables Homepage, and is where you can go to see who still owes you money and invoices that have not been deposited yet. ?

The Receivables Homepage is fed from invoices. This page contains multiple links for efficiently managing and navigating your receivables. These links allow you to view/search all your receivables, manage customer receivables, apply payments to customer accounts, view customer logs, histories, create statements, and more.

Getting Started:

From the Receivables Homepage the initial information displayed depends on the "Report Type" that has been selected. Click the show/hide search criteria button to change your report type or filter data and set parameters you are interested in viewing. Explore other active links to search customer accounts, apply payments or create a statement.

Get to the Receivables Homepage from the Classic Homepage under System Assets – Receivables Homepage; My Favorites Homepage under Deposits – Receivables Homepage; or the Interactive Map Homepage under the a/r – customer waiting room button.

Suggested Permissions and Settings:

Permissions:

Basic Use:

System Assets Section: "Basic Receivables" – this allows a user to look up accounts receivable, this is a view only permission and does not allow any editing of data.

Admin Use:

System Assets Section: "Admin Receivables" – this allows a user to modify the deposit status on receivables.

For admin users, and even for a basic user, to effectively use the Receivables section, other permissions would be helpful such as basic customer permissions, statement permissions, and other related actions.

Related Pages & Help File Links:

Receivables Homepage: Your hub for managing accounts receivable information. Web link - [receivable_home.cfm](#)

Customer Invoice Report: This is a special invoice/payment search page for individual customers and is a pre-filtered search when you link from their totals or what they owe on the receivables homepage. Web link - [help.cfm?id=263&pwd=invoice](#)

Apply Payments to Invoices: This page helps you apply payments to multiple invoices for a customer from a single page. Web link - [help.cfm?id=262&pwd=payments?](#)

Invoice Homepage: This is where all of your invoice sales show up whether they are paid, unpaid or partially paid. Web link - [invoice_home.cfm](#)

Additional Content:

-Screen shot of the Receivables Homepage, possibly even some of its differing views.



- At the world level, what is your world, what is your business... individual business entities - the giant umbrella that all of the groups fit under
- What are your flavors, what do you do, what do you need?
- You can technically have multiple corporations and switch between them... so a user can be bigger than individual worlds
- Can custom name your corporation, LLC., INC., entity,.... name your world

4.14 - Corporations



Understanding the Basics:

Your Corporation is essentially your world. What you do in your industry, your look and feel, your terminology and what tools you use to accomplish your work. All of these are specific to your organization and many are customizable in adilas to reflect your organization in the creation of your adilas world.

You can have multiple locations and for some, potentially multiple corporations. A user is technically bigger than a corporation, because one user can have access to multiple corporations. Since users are assigned permissions per corporation they can flip between corporations and do the work they have been permitted to do in that corporation. Everything you do in adilas is tracked and takes place under the umbrella of your corporation or within that world.

Getting Started:

Setting up a corporation is one of the highest administrative functions. This is the person who has the power to change corporation-wide settings and defaults that will cascade throughout your entire adilas world.

The Manage Corporation Info and Permissions page is where you can access all necessary links for managing corporation settings. One especially important link on this page is the “[edit corp-wide settings and defaults]”.

This link takes you to the Corporation-Wide Settings and Defaults page with over 70 different settings to help customize your adilas world.

Get to the Manage Corporation Info and Permission page from the Classic Homepage under System Management – Manage Corp Info & Permissions; My Favorites Homepage under Other Homepages – Corp Home; or the Interactive Map Homepage under the settings button.

Suggested Permission and Settings:

Permissions:

Setting up corporations is considered an administrative function and requires high admin permissions.

Admin Use:

System Management Section: “Manage Corp Info & Permissions” – this is one of the highest admin permissions and should only be given to your ultimate administrators. This permission allows the user to adjust any corporation-wide settings.

System Management Section: “Add Edit Payees & Permissions” – this is another one of the highest admin permissions. This permission allows you to add/edit and assign permissions to yourself and any other user.

Settings:

As mentioned previously, setting your corporation defaults and flow is where you use the settings section of adilas more than anywhere else. There are over 70 different settings. Have fun checking out the different options to see what you can do with your adilas world!

Related Pages & Help File Links:

Manage Corporation Info and Permissions: This page is your hub for accessing your corporation management links.

Web link - help.cfm?id=216&pwd=corp_admin

Corporation-Wide Settings and Defaults: This is where you setup or adjust your corporation-wide settings or your adilas world. Come here to setup terminology, work flow and special options to best reflect your corporation.

Web link - help.cfm?id=336&pwd=settings

Add/Edit Corporation: This is the page where your corporation information will originally be added. This page also holds look and feel information such as your corporation logo and the color schemes for your adilas. This information can be updated or edited by going to this page in adilas. The link for this page is called “edit main corp info – look and feel”.

Web link - help.cfm?id=16&pwd=corps

Additional Content:

-It might be fun here to show some world building graphics here.

-I think it would also be fun to have some graphics of some different corporations or “worlds”.... Give a little idea of the flavors already out there – there are so many and it is so exciting!



Shop
4574



Business plan -
whiteboarding
with Kelly,
Brandon, and
Steve

4/23/2019

We were going to have a meeting with Kelly and do some online whiteboarding and business planning, but that didn't happen. Instead, Steve and Brandon had a couple hour brainstorming session about their own ideas on a business model and business plan. Super fun brainstorming meeting.

- Steve and Brandon were talking about the role of the adilas market, adilas university, and the adilas café.

- Steve was talking about ideas... are you buying or selling? What section of the market and/or café do you play in?

- Just jump in... see a need, fill a need - we love it



- Another piece that we may be missing is marketing and sales type literature and media pieces

- We would love to recruit some others to help with the heavy lifting - There are tons of great adilas users out there who have some great skills

- It takes time and energy to get things going - the goal is, once it gets going, hopefully it will keep feeding itself.

- Steve is having fun tackling the business model - analogy - like a friendly pirate ship. It could be a boat, a ship, a car, a plane, or anything that moves over time. The fun come in as you start asking questions. Are we friendly? Are we mean? How many sails do we put out? What direction are we going (what is our heading)? What kind of crew do you want? How big and how small do you want to be? Etc. Fun stuff.

- Sometimes as we write and record these log notes, it may expose some of our underbellies, but we really gain from it in multiple ways.

- Steve and I would like to be open to discussions from any parties. We also acknowledge that there is a cost to being open and listening to those ideas.

- There seems to be many cycles that interconnect and play as the ball gets kicked down the road.

- Zipper analogy of bringing operations and accounting together. We started this a long time ago, we want to keep going but some of the steps are bigger and harder than others to conquer. Problems exists and that helps keep things going. Problems force decisions and hopefully a solution.

- Working in teams and pulling through things together - it helps get the ball across the finish line and you build relationships along the way.

- A constant mode of refinement - dive and resurface, dive and resurface - build and break, build and break - the concept of maintenance.

- Building blocks of teams - forming, storming, norming, performing - where are we at in our team development process?

- As we keep coming together as a team, there will be some normalizing and efficiency as we keep going. Good stuff.

- Steve is always on the hunt for the better and better ideas. He loves the hunt, in theory and in practice.

- Different angles, different views - false summits, operations, accounting, task oriented, dreamers, managers, etc. Like a pie analogy, we need the whole (in the end), and certain people are doing certain pieces (delegating tasks and processes), but hopefully as you bring it all together and it becomes the whole.

- The proof is in the pudding - if you have a great idea... let's put it to the test... we don't have a monopoly on all of the good ideas. We want to be open to those around us. Ideas by themselves don't really stand too long... those ideas have to be put into action and start applying those concepts. ?

- You can fund a company through investment, equity, sales, or leveraging debt. We are leaning towards sales and equity.

- Talking about models, we are even seeing some morphing models (mixing and blending), client/services, budgets, and strategic customer care projects. Customer tune ups, targeted tech support, and other customer care and retention efforts.

- Hoist anchor! Starting to get the ship out of the harbor.

- Models - rep model, hub/shop model, 3rd party solutions and white label model - We are seeing a small mix between the basic rep model and the basic hub/shop model. - Russell's word "Dependable" model. A loosely bonded hub/shop type model where the bond is the dependable type and/or dependable people who service other parts of the service model. Basically, they stick around to help pick-up and service the by-products that are created (training, consulting, setup, design work, custom code, tech support, project management, training, and other by-product services).

- Being able to clone some of the main core players - Steve, Brandon, Shari O., etc. Small teams forming under some of these key players and creating loose bonds (dependable type bonds). Very interesting.

- Talking about sales and white label options, we have no boundaries and no zones - people could consume our product wherever they are - we don't plan on adding any boundaries and/or zones.

- Anybody could identify a problem and/or issue - what we really want and need is those who help come up with and are willing to work on solutions.

- Steve was saying that the employer/employee relationship is a kin to slavery - it can work, but over time, it has other costs and drains. Steve really wants to keep moving towards the dependable type model - It is very loose but it can and does work - We want to keep helping those around us - if you look at it... we have so many by-

products, the by-products completely outweigh our normal products. Very interesting. One of the key pieces is, you have to want to play the game. If you are just coasting, it doesn't work very well.

- Finding that balance point - We were talking about the difference between a normal company that has an employer/employee model vs this loose community of dependable - We also talked about how some companies are replacing the traditional model with robots, AI (artificial intelligence), or automated services. Where are those balance points and what makes things tip to one side or the other? One of the core concepts that we have is, our main product creates tons of subs or by-products. We can allow others to pick-up any of those by-products? by offering their services (basically an open market type option).

- Some of this is just happening and we are figuring it out as we go... We have plans, we try things, we fail sometimes, we go backwards and forwards, we try to listen, we harvest other's ideas, we experiment, we tweak, we refine, we circle back around. That seems to work for us. It is more of the try storming type mentality vs just a plan it and build it type model.

- Randomly enough, we keep getting people circling back around after years of talking with them initially (old sales leads). We also have other people who are looking for and needing some of the functionality that we are working on and/or already have. The general public needs keep advancing right along with us. Step by step building process. Keep building towards the full system (fully interconnected pieces) and even full world building levels.

- Talking about commissions and outbound monies and such - Steve used the word semi-dependable (not a full dependable, but still part of the whole team).

- Finding the glide plane - like an airplane coming in for a landing.

- Tag teaming based on abilities - Coach, put me in... I want to play or give me a shot.

- People putting in time to help move the ball forward - Steve would like to move the company into a trust at some point.

- We are excited that we are moving some things over to deeper and more expanded technologies - tech stuff and server models.

- Keep working to get out of the way

- There is some magic in having a business plan but it can have limits - we do need some direction but it also helps to have your head up and be looking around. Our current business plan is "we are heading North" or something like "we are heading to the top of the mountain" - we have a direction and a way to go about it, that's about it. Fill in the gaps and cross the bridges as they come up (we know they are out there, but we don't have a full plan in place for every little thing).

- What about enjoying the journey? There is some fun in planning out the journey and then responding to cause and effect relationships that happen based on those decisions. That sounds like world building, in a way. The five core concepts of world building are: Characters, relationships, trouble/problems, decisions, and consequences - see this element of time for more information... Web link - time_web_gallery.cfm?corp=371&id=3634

- Some people will like what we do and sadly, we may make some enemies - we want to keep it as an open model - there are tons of options out there. We welcome those who want to play and we'll keep refining and building as we go. We want people who are looking for a solution and are willing to help and invest in their solution. We want to make adilas consumable... what do you want and how can you make it work for you?

- Model of being able to charge for different components - it all needs to exist - what if we showed all of the 12 main players and what part of their bill gets charged out and/or applied to what part of the 12 main players? That could be pretty cool.

- We may want to open up the adilas ecommerce piece to all of our clients. Currently, they have to pay for the extended ecommerce functionality.

- Data - the new currency... people are offering features and functions for free, just so that they can collect data. Very interesting.

- Steve would like to help push forward the ideas of the adilas café - a virtual community of users and/or other companies that offer their services - that will be really cool - helping to push the ball along the path using the skills and talents of others (a community of adilas power users and/or outside services). Once again, the by-products are a huge part of the model.

- We do need some standardization pieces, but some of our model is the flexible ways you can do it... We need both side of the fence.

- We ended by doing a brief look at where we have been and where we are going (historical summary of invoices and client based financials). Good stuff.



Shop
4657

Working with
Wayne on the
database

5/28/2019

We are seeing a need to add an adilas URL (web address) on a per corp level vs on a per server level. Currently, most of our redirect options are all based on a per server basis. Also, we may need to go back in and change some of the existing links and hardcoded web links.

- We need some options for manual load balancing.
- Wayne was showing us his custom functions and how he is combining code into custom tags.
- We also talked about some of the aliases and how certain field names show up. As a side note, we will have to update our API socket documentation to note some of those changes.
- Wayne has been doing some mappings to certain relative and fully expanded paths.
- Lots of simplifying code and things. There is still tons to do, but we are starting to make progress.
- Having a centralized spot to help Wayne know about errors and/or issues with the transition to AWS.
- We need a community based process that allows us to publish wiki type information, definitions, best practices, etc. We may even want some of this wiki info to be automatically generated. We need to keep things up to date to make it relative and productive. As a side note, Wayne has setup and contributed to wiki type things and has some know how there. He will be a great resource on that stuff.
- Ways of harnessing the skills and knowledge to help others. Letting people be part of a cause and participating to the overall adilas community.
- Steve would really like the adilas users to have options to play, work, participate in the adilas community, learn, train, sales, place for their stuff, participate in the marketplace, sell their skills, contribute, etc. This could be part of the adilas marketplace, adilas world, the adilas café, etc. Lots of options.
- Being able to share our knowledge with others. Helping to speed up the process.
- Steve popped in and was saying that maybe we could use our WordPress and/or our news and updates section. We also have help files, web/API socket documentation, developer's notebook, user guides, elements of time, etc. We have also made and created a number of self contained PDF files with specific topics. We would like to make sections for developers (super techy), users (definitions, help files, tutorials, etc.), reps/consultants, community, and other sub sets.
- Currently, there is a deficit on the training and education side of things. We may end up going in and checking stats on some of the older inactive adilas users and see who did what. We also need to open up the adilas market and adilas café to all of the users who have some great

and awesome skills and skill sets. That is a great way to even out our tri-facto model of clients/users, system, and education stuff.

- Steve was seeing and talking about co-founders of adilas. It doesn't come from just one person. It comes from a community effort.

Towards the end of the meeting, Brandon went back to doing some prep work on the adilas user guide. As part of that process, he spent some time reading an old history bio from the adilas team. See attached for a copy of the bio. It has a publish date of 2011. Lots of fun info.



Shop
4708



Adilas Time

6/20/2019

Paying bills, recording notes, and doing email.



Working on documentation for the getWebGeneralInventory API socket. Not that it is that fun to read, but here is the link to the documentation. Web link - [printable_web_api_documentation.cfm?id=234](#)

Bryan Dayton called me and we jumped on a GoToMeeting. We looked into an error that was coming up with sub inventory buffers out in ecommerce. We found that a query was being called and then a sub query was renaming the main query and thus losing some of the original data. The data was still in the actual database, the memory variables were just being overwritten. We made some changes and pushed up some new code. We also did some debugging on a custom label job that Bryan was working on. The issue there was pretty simple and we had to switch from one id to another id and then the custom label was able to run. Small switch between parent and child id numbers.



Shop
4761



Work with
Shannon

7/31/2019

Shannon and I were working on some new verbiage and documentation for tools that we use. We spent some time on the web/API socket section, custom web platforms, and full on world building (hybrid or super customer with everything included). I'm enjoying getting in there and adding some new content and trying to help people and users follow along with where we are going and what we have learned along this journey. Good stuff.

See this entry for some of our notes...
Web link - [time_web_gallery.cfm?corp=371&id=4029](#)



Shop
4763



Work with
Shannon

8/1/2019

Shannon and I had a work session working on the brainstorming document called tools that we use. We spent most of our session working on the sub comments dealing with world building and taking things to an advanced level. See this element of time for more details and then scroll down toward the bottom to see the entry on world building. Web link - [time_web_gallery.cfm?corp=371&id=4029](#)



Shop
4814



Work with
Shannon

8/6/2019

Shannon and I met over a Zoom session. Steve and Josh were on the GoToMeeting channel. We did some review and worked on more content for the adilas user guide. We are currently still working on the limitations of world building, under a sub document called tools that we use. We also spent some time talking about our flex bubble type model and how that analogy and/or system plays into real life and plans that we make.

See element of time # 4791 in the shop for more details.
Web link - time_web_gallery.cfm?corp=748&id=4791



Shop
4818



Work with
Shannon

8/7/2019

Met up with Shannon for another session on the tools that we use document. It still needs some editing, but it has most of the content now. We spent most of our time today working on limitations and other future topics that need to be considered if doing world building (bottom of the page in the sub comments). See this link for the full document. We have added to this doc for a couple of weeks, here and there. The original was started way back in 2013 and 2014. Long time coming.

Web link - time_web_gallery.cfm?corp=371&id=4029



Shop
4816



Work with
Shannon

8/13/2019

Shannon and Cory and I spent an hour or so working on some glossary definitions. At first, we were just randomly recording words and phrases that we use in the adilas world. Our eventual goal is to make it more polished and allow people to use it as a normal glossary of terms.

Here is the link to what we have now:
Web link - time_web_gallery.cfm?corp=371&id=4030



Adi
1485

Adding more
functionality to
delayed inventory
count-scan

8/13/2019

As of 3/23/2020: You can scan a sub barcode and automatically count it as one, then keep scanning. Then it will tell you how many you have at the end. Or you can scan the sub barcode and tell it you have x quantity.

**What doesn't work is the "update using selected quantity totals"- this creates the update PO- but it doesn't work for subs yet. We need to have a setting to disable the button if the corp is using subs so they don't create a mess. Not sure if we will fix this button or not- it automatically makes the PO, but would like a review first. (see below)

Molly thinks her client would pay for the next step, which is having a combo of the review page with the update inventory counts page- so you can see how much inventory you actually have, before you submit "update quantity." Essentially a web version of the excel report. Would be great to have it sorted by scanned or not scanned- if in snow owl could sort. You wouldn't have to go through and do the update, but you could make changes if needed.

Want to have a note field per line item after description (instead of just notes at the top of the PO)

As of 3/3/20: Still working on this project- things keep breaking...

9/9/19: Molly working with client on their specific needs. Attached some drawings today.

Need to start phase two. Brandon built a custom upload piece for a client that takes a csv file with a scan and a quantity with spreadsheet. Two columns: barcode and quantity.

8/13/19: Spoke with Molly at length. Need ability to scan sub barcodes/ids as well. Currently can't submit 0 as a quantity. Also can't add quantity if existing quantity is 0.

Ability to have multiple stations performing delayed scan count at the same time to facilitate end of day inventory. Already track payee, which is great.

One idea for organizing data on the screen: On delayed inventory counter review & commit page (Web link - [inventory_counter_review.cfm](#))

Have one line item similar to a parent- total quantity scanned, then under it, each line item or sub scan which would refer to each station/payee who was scanning inventory.

Then total quantity on hand and total quantity scanned/counted, so that you could compare/review before committing to the numbers. There would be an open field next to the total quantity scanned so you could add another in, and then you could update using selected quantity scanned totals.

8/12/19: Clients would like to scan every package (with same barcode) and have adilas keep a tally of how many and report that at the end for the final submission. So there would still be the review and commit page, where,

after scanning barcode ~1234 50 times you could see that, and then click update using selected quantity totals. This would help cut down on human error.



Shop
4820



Work with
Shannon

8/15/2019

Shannon and I were recapping and working on organizing the online glossary. Shannon was doing most the work. I was just there as support.

Web link - time_web_gallery.cfm?corp=371&id=4030

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Shop
4850



Meeting with
Cory

8/20/2019

Talking about delayed counters and working on phase 2 of that project. Molly, Cory, and Brandon were on the call.

Known needs:

- we need to be able to include subs
- we need to be able to scan subs - currently only scans parent subs
- we also need to be able scan and hold (scan every unit in a bin) and then have that count for you
- multiple locations and being able to scan and hold - not really real adilas locations - kinda like sub locations within the same location
- be able to ultimate review before submitting for processing
- on the review, you could see who scanned what

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// ideas

- Maybe a new button that allows for multiple scans (scan to count) - Once it comes up, maybe a spreadsheet like column with multiple lines
- On the review and commit page, be able to search and filter by item and by person and by notes.
- You also need a way to remove and/or combine certain pieces. Kind of a fully functional master overview.
- They would like to see some new quantities such as total amount scanned, system count (on hand), and an open field for the real quantity. Maybe even show them the math before we actually do it, meaning another quantity called math adjustment quantity (non adjustable >> just a math calc).
- On the review page, they wanted a little bit more info without over doing it.
- We may need to change the database model and move from JSON text to real database entries. This would help with searches, show/hide stuff, and better ways to clear and/or delete things out of the process.
- Molly was talking about the importance of date filters and date/time stamps
- They don't want to see all of the sub information (too much). They would like to rework the normal update PO process. (update_inventory_count.cfm page). They would like to have all of the subs open by default, take off all of the extra sub info and sub inventory attributes. Keep it simple and easy. They like how simple the delayed inventory counter looks but even that one needs some new fields.
- Some of the people use this process every day. Many of them use it at least monthly. They really want it work on a Warehouse type model. Lots of scans and less clicks. They want more of a barcode based model.
- There was some discussion on how to display the review and submit page. Some of the comments were grouped by parent item and then broken down by person who did the scans. They were talking about having a

total summary line per item and then some sub details that could be showed if needed (collapsible like the show subs option for sub inventory).

- There was some talk about storing multiple steps in the session scope. Basically another way of delaying the inventory counting. Currently we submit each page... the question was raised about submitting multiple pages and then having a final review to do the real submit process.

- As a side note, the action page for the delayed count process aborts and shows a dump. We need to help and clean that up.

Web link - time_web_gallery.cfm?corp=22&id=1485 - community funded project for this piece.



See attached for a link to the video recording of the GoToMeeting session.



Shop
4819



Work with
Shannon

8/21/2019

Shannon and I did some more work on the adilas glossary. See this link for more info:

Web link - time_web_gallery.cfm?corp=371&id=4030



Adi
1497



Limiting or
Hiding Units of
Measurement

8/21/2019

4/29: This is a little more info: confirmed just like money type settings page. Only it would be simpler.

1)Review project, web page id, cascade to every other server. create a new page, everywhere there is a drop down for unit of measurement shown, need to fix. Code sign off.

Currently a user can add units of measurement and edit the ones they add. There have been a few requests to hide the units of measurement that aren't being used. I imagine this as similar to select money types, and perhaps it is housed on that page as well? Then users could keep just the uofm's that are relevant to their industry. There would be a page with boxes that could be checked or unchecked.

Or, another option could be more similar to categories, since the add/edit unit of measurement page resembles that one: Web link - add_edit_unit_of_measurement.cfm?mode=add&id=new

You could actually click next to the uofm and make inactive and then it wouldn't show up on the drop down list when creating a new item/editing an existing item.



Shop
4817



Work with
Shannon

8/22/2019

Shannon and I did a session on the adilas glossary verbiage. We were working on rough descriptions and terms for A through D. See this link for the full glossary.

Web link - time_web_gallery.cfm?corp=371&id=4030



Shop
4860



Meeting with
Jonathan

8/22/2019

Had a great meeting with Jonathan. He reported on some of his findings. He met with Shannon and got a light tour and then did some additional research. We talked about some of his initial thoughts and feelings. He said that it was kinda overwhelming. Pretty normal. Once he got into it and kinda started to understand that you could virtually move around and look at things from different angles, it started to make more sense. We spent an hour and talked about three main concepts. We talked about the adilas café (new entry point for adilas users), the ice berg analogy (reskinning based on industry-specific needs and wants), and other adilas concepts (photo gallery of ideas). Good conversation and good ideas already starting to flow. I loved it. My goal was to transfer some vision and let him start exploring and playing around.

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These are some outside links and pages that we went to for background.

A link to some of our plans for the adilas café - Web link - developers notebook - q=adilas%20caf

I'd like to get Jonathan started on working on the mock-ups for the adilas café and/or the adilas world and/or the adilas marketplace. They are all somewhat tied together. Future home and hub for the adilas community. We want people to come here to work, play, shop, sell their skills and their goods, and participate in different ways.

Web link - developers notebook - q=ice%20berg - notes and research on the ice berg analogy of reskinning the adilas engine

Web link - photo_gallery_full.cfm - small concept photo gallery of core adilas concepts and direction



-Before we go into this next section it is worth expressing that there are multiple different views on this accounting piece. As different as religion and politics are, some people have similar opinions and beliefs on how accounting should be done. We are not trying to start a fight or offend anyone and we value all of the different avenues.

-Basically we feel like accounting is the end result of cause and effect relationships and how they show up. So our goal is to gather information and data as it starts and let it flow if the data is okay. If a change is needed, we make the change, record a checkpoint or make the correction, and then let that data flow. So accounting really does become a sum of the details. In life, most things do not just appear. There is a story or a reason. ?

-When we first started building Adilas we saw that there was a known gap between what is called "Operations" (day to day activities) and "Accounting" (the financials and final numbers). One of the analogies that Steve Berkenkotter came up with was a zipper where you have operations on one side and accounting on the other side. "Our goal was to bring operations and accounting together one cog at a time, like a zipper being pulled upwards until it comes together."

-As we got into it and had been exploring we found that you often need to let operations lead, that is a huge key. Already some people might be saying no, stop this is the wrong direction for accounting but this is a critical key in how we approach the topic. Using another analogy, imagine a horse and a cart. Which one needs to come first? The horse, to pull the cart. Your horse is operations and your accounting is the cart. Natural consequences of a users action present the next logical step. This is known as accounting or accountability. Let operations lead and the accounting will automatically follow.

-For those who are really worried that is a bad idea, accounting can still have the reigns and reign things in the horse/cart analogy. But in the end the cart has to go where the horse goes if they are connected to it and really want true accounting.

-Without going into details it may be important to say that accounting would not have anything to account for if there were not daily operations occurring in one way or another. Once again we feel that accounting is the sum of the details.

-Another analogy on how we track things is similar to a process of water turning into ice. The water droplets are very loose at first (like operations), and slowly become crystals, then slush, and finally becoming completely frozen or ice (final numbers or accounting). Throughout the process we flag and date key check points of the life-cycle or steps in the process. This becomes a built-in history of what was going on at any given point in time.

-Imagine the concept of a data assembly line. You basically run all actions and activities through both space and time while monitoring resources to get a 3D

model of where things are really at. Digital story telling.

Web link - help.cfm?id=496&pwd=assembly

-The 3D model contains 3 dimensions, the x axis is time (horizontal), the y axis is monies & resources (vertical), and the z axis is space or depth (how deep are you going within that). Web link - help.cfm?id=483&pwd=building

?



AU
4038

11.7 - Old School Accounting vs.
New School Accounting 8/27/2019

11.7 - Old School Accounting vs. New School Accounting

-Similar to a movie that says the views and opinions expressed here are those of the authors and creators and do not necessarily reflect traditional views on accounting. We acknowledge that this could be a very controversial topic and do not mean to make any sort of inference or offense. Having said that we are trying to stir the pot a little and challenge tradition.

OLD SCHOOL ACCOUNTING

-Old school accounting, or traditional accounting, or double entry accounting, are some terms that are used to talk about classic ways of keeping books. Books meaning a company's financials. Interestingly enough, originally things really were kept in books or notebooks. These are often referred to as journals and ledgers.

-By way of a little history a couple of very important events happened. The father of accounting is a guy by the name of Luca Pacioli. He was an Italian monk that lived at the same period of time as Leonardo DaVinci. He is credited as the father of accounting due to a textbook he published called, "Summa de Arithmetica" (the summation of arithmetic). Here is the kicker, this book was published in 1494. To put this date in perspective, Columbus sailed the ocean blue in 1492. Many of the modern day accounting systems have just digitized and sped up these 500+ year old concepts. This is potentially why we would call it old school accounting.

-Going way back, before computers, company's would keep track of their records on paper. The word "paper trail" goes back to this method of accounting. In order to keep things separated and organized they put things into accounts or T-accounts. A T-account was almost like a miniature bank balance which you could add to it or take away from it so that you could know the balance in that account. These pluses and minuses are called credits and debits. Normally a credit is a plus and a debit is a minus, there are some exceptions.

-These processes may be different per company but this is a general overview. A company would have something that they wanted to track. Often this was something that was either important to the company or something the government said they had to track due to taxes. Where they would start is to create a list of categories that they called a chart of accounts. Each category or piece that they were going to track got a number. These numbers have all sorts of levels and specific categories that have been defined over time. There are certain numbers for cash, accounts receivable, accounts payable, long-term loans, etc.

-A journal entry was a debit or credit to one of these chart of accounts. This is where your T-account comes in, meaning credits on one side of the T and debits on the other. These journal entries are the small transactions or day by day activity. The sum of these journal entries would then be passed on to a more stable spot called a ledger. Back in the day, depending on the time period between things, the journal entries would be kept daily or as often as they could. When the time

period came that they wanted to get the totals, they then summed up those totals and put them into the ledgers. This helped them save space and kept the ledgers clean so that they weren't showing all the daily ups and downs and fluidity of business. Often these final posts to the ledger were done weekly, monthly, quarterly, annually, or some other period of time. This is where the word post comes into accounting - moving from a general journal to a ledger - aka summing things up and stamping it into the more final record.

-As part of the journal entry system businesses would do what is called double entry, meaning if something happened it may have effected more than one account. Technically this is how they were tracking cause and effects. For example if I got some new monies from a sale I would have to record those monies coming in and the other side of that would be that I got to deposit that money and my bank account increased. Some of these double entries can get very deep.

-To help businesses keep track of their financials there have been some helpful documents or reports created that we still use today. These reports helped them to know the vitality of the business. These are things like cash flow statement, income statement (P&L or Profit & Loss), balance sheet, etc. These documents are wonderful tools that were created. Most business owners will recognize these names as standard financial documents. Business owners use these documents to get business loans, submit taxes, track business operations, buy and sell businesses, make business decisions, receive other financial reports/requests, etc.

-There are a number of other things that are associated with old school accounting or traditional double entry accounting. There are chapters upon chapters and textbooks upon textbooks that go over all of the ins and outs of double entry accounting. In general, most of the existing accounting software packages literally emulate the same 500+ year old accounting concepts and flow. They use the same names, the same flow, same mentality, it is just digitized and has some technology enhancements that help it to go faster but it is based on the traditional accounting practices. We may address some of these traditional accounting aspects further as we discuss new school accounting.

NEW SCHOOL ACCOUNTING

-New school accounting, roll call accounting, time stamp accounting, tracking objects and data over time, data assembly line, world building, these are all some terms that could be used for modern and/or progressive ways of tracking your data and doing your books. As a note, some of the terms and concepts that exist in old school accounting will be mimicked or copied in new school accounting but some of the names have been changed. This is really important because if you keep some of the traditional names, people expect it to follow the same process as the traditional method does.

-In old school accounting we added a history section that showed sort of where things came from. Before we jump into new school accounting we feel like it is important

that you have an idea where some of these things came from before we start right into ideas and concepts. Right up front we didn't set out to make a new accounting system. Our business problems were all on the operations, day to day tracking, side of the equation. If you would like a story type format here is a great document below that tells the unfolding of what happened with Adilas.

Web link - [adilas_history_bio.pdf](#) - (Tons of fun concepts as they developed. This document shows lots of the problems we encountered as a business and how our solutions evolved into the Adilas system.)

-As humans we love to use tools because they help us accomplish our tasks more efficiently. In old school accounting some of the tools used at its roots go clear back to paper and pencil, which are some great tools. Each tool has pros and cons and at some point, if the task keeps evolving it can break the efficiency of the tool being used. (If you are interested in seeing a fun document exploring tools and where they excel and break click here - time id # 4029 in adilas university.)

-All data actually has a life cycle, meaning it gets started or created and ends and/or finishes. Usually that means that there is some sort of time frame between these different phases or stages in how data fulfills its life-cycle. In our quest for tracking things we started on the operations side. We really wanted to see where every penny went from beginning to end. The missing pieces for our business were on the operations side of tracking inventories, selling inventories, counting inventories, building new things, etc., etc. Basically we needed to get more details on what was happening in the day to day transactions and activities. Step 1 is catch the data at the source.

-As you try to catch data at, or from, the source you have to have tools in the hands of those who are doing it to allow them to capture the data. This can be a problem due to technologies, permissions, or trust issues between departments and employees. As part of this discussion we need to acknowledge that there is a known gap between operations and accounting. Operations, or sometimes the sales department, tries to make things happen to make the deals go. Sometimes accounting doesn't like all of the decisions made by the operations department and/or doesn't want to give all of the control for decisions to the operations department. This is where permissions come in. A permission is basically a thumbs up or a thumbs down on being able to add, edit, delete, modify, and so on to all kinds of elements.

-At this point we want to introduce a few analogies. One of them deals with this life cycle of data. What we want to introduce is the idea of water becoming more solid or the process of water freezing into ice. At first when the water is very flexible this is like the sales - things are still happening and moving, deals might still be in process and negotiation, promises may be being made potentially on both sides of the equation. As the deals solidifies it is almost like that liquid water starts becoming snow or slush. At this point we now have fixed

numbers, maybe we have monies, a transaction could have been completed, or we need to further build or fulfill something. As the time goes on those values, numbers, monies, product transactions, and data become more firm and stable like ice. They become fixed and a piece of the history. We call this analogy the water, snow, to ice analogy.

-The next analogy we want to introduce is a cart and a horse analogy. We propose that the horse is the thing that is moving things along, which is your operation or sales side of the equation. If you don't sell anything, you don't have anything to account for anything. If you separate the horse and the cart, the horse can stop, eat, or run wild. If the horse is not attached to the cart (your accounting), your accounting just sits there. There is no knowledge that gets passed from the actions of the horse to the cart. It literally just sits there and/or rolls down the hill (just being silly). This is the gap between operations and accounting. Long story made short, you have to connect them, let the horse lead (operations and sales), and then account for and/or tell the story of where you went and what was done. That's the accounting side of the puzzle. Up higher, in another section, we mentioned that accounting can still control the horse using reigns, bits, halters, bridles, yokes, etc. Sales doesn't run totally wild, but you do have to follow them, and/or account for what they are doing. Once again, just being silly, but if you put the horse behind the cart or make the horse push the cart, good luck. We haven't found that to be very successful.

WORKING BELOW HERE....

-how to wrap this up... world building and the assembly line for data (keep passing the good data on and sum of the details). use technology... small little analogy of the shoebox... if that works, then what we are building can totally work even better.

-Comparison between operations and accounting with static, parallel, perfect lines - everything is perfectly static.

-How we actually need flex bubbles and periods of time/waiting, etc.

-Difference between operations and accounting and the gap between those. Batches, things get batched, missing time, lack of communication, non-centralized data,

-3D data assembly line and 3D world building models

4:17 PM

Brandon Moore

/// notes from the adilas history bio

- corps, locations, users, permissions

- web-based

- tools >> head, paper/pencil, computer tools, software, database, web solutions

- Internet came into play mid 90's

- gathering information into a central location

- limiting duplicate work - collecting data and allowing it to flow (start a process)

- start with your pain points

- enter once, use many, and empower the users at the point of action

- letting operations lead

?

- with the right tools, productivity increased and sales increased, and that drove the need for better accounting

- pain - load and stress

- zipper analogy and using the system as the common element (even the bad guy - saying no)

- permissions and opening and closing virtual windows

- solving problems and then going to the next logical step - keep solving bigger and bigger problems (cogs of the zipper)

- one-to-many relationship model

- dreaming up a super system (what if we could do this... or that... or maybe both...)

4:17 PM

Brandon Moore

- maybe grab the paragraph about no road maps and we were just going off of ideas, concepts, and needs... shannon liked that section.

- we are still doing the same things today as we were back then. where is the pain and how can we possibly fix that (more zipper cogs coming together).

- From here maybe start looking at the post-it note list and see if we can transition into some of those other pieces. We'd like to describe that there is gap, horse/cart, time, batching - and just how this gap keeps getting wider and wider with the real time effects of these things, using computers and technology to create logic that can perform these accounting operations (conversation with Brandon & Steve -- WORKING....

- IDEAS: We are going to start defining terms, concepts, start typing up pieces and ideas and we will probably need to come back and sew it all together, smooth things out, and make transitions.

- Another Note: On 6/25/19 as Brandon and Steve were talking Steve was saying how old school accounting used to have post after post and entries and different

journal entries - lots of time and inputs, whereas roll call accounting can use technology to create logic and teach the computer to look for certain patterns and use logic to map to what is actually happening. Because it uses the logic and mapping, it can do that process over and over again and allows the data to flow more on its own, it just tracks where everything is at and puts numbers where they need to go. Computers are really good at doing repetitive tasks.

-Ideas/Concepts from History Bio Article:

These concepts are enter once, use many, and empower the users at the point of action.

The entire development process was as follows: 1. Find a specific need 2. Figure out what pieces came from where 3. Take a step in that direction by releasing a new tool, feature, or report. The natural consequence of the user actions would then present the next logical step and management would be able to see where they wanted to go. In a way, the horse began leading the cart instead of the other way around.

-If you would like some additional research from the developer's notebook on new school accounting look here.

Web link - developers notebook - q=new%20school

-Some entries from the developer's notebook on Christopher Columbus and Lucas Pacioli. Christopher Columbus - 1492 sailed the ocean blue. Luca Pacioli - the father of accounting - in 1494 published a work on the double-entry system of book-keeping and accounting called "Summa de Arithmetica".

Web link - developers notebook - q=columbus%2Bpacioli

-This is a 6 page document that has a publish date of 2011 and deals with the start of the Adilas system. It discusses where Adilas came from and how we even started on this journey. Lots of fun concepts of roll call accounting and tracking objects and data over time.

Web link - adilas_history_bio.pdf

-The link below is a photo gallery but has some interesting accounting concepts to check out especially in the second picture.

Web link - photo_gallery_full.cfm



Shop
4933



Work with
Shannon

9/17/2019

Shannon came on at 11 am, but I was still working on the code merge for Steve. We got started about 11:30 am. The whole session ended up being somewhat of a training exercise about mapping out the system and what progress we have made over the years. My goal was to help Shannon as she was going to be meeting with Jonathan and doing some training for him. After Steve and I's meeting the other day, we would like Jonathan to keep going along the lines that he is working and work on mapping out the pieces.

Going back a long ways, we started out in 2010 (October 2010 ish) doing a mapping project that lead to some major discoveries. We came up with the interactive map and tons of other good needs and ideas for the future. That was literally a springboard into some of our current projects and direction. Here is a link to the interactive map graphic.

Web link - images/help - big_map_layout.gif - interactive map graphic (2010)

Next we got into what we ended up calling the core layout or GPS core. This is a spiral navigation wheel or a core shot of a world. This graphic started to bring in concepts of world building and almost a space type theme. Here are a couple of links for these graphics.

Web link - images/help - adilas_gps_layout_big.jpg - GPS core layout map (2013/2014)

Web link - images/help - adilas_gps_layout_plain.jpg - core only

Web link - images/help - adilas_gps_layout_world_building.jpg - world building levels only

The next level was dealing with the core interface, deeper world building concepts, with different modes or levels (data mode, work mode, usage/stats, settings, permissions, learning, concepts/theory levels). This one only got to the graphic stage, we really wanted to build it out into an interactive navigation model, but only prototype graphics were created. Here is a link for some of these graphics:

Web link - images - adilas_gps_core_layout.jpg - GPS core layout with different modes (2015)

Web link - images - adilas_gps_core_layout_white_label.jpg - GPS core layout - white label (2019)

The other thing that we have always wanted to do was use and show some graphical homepages. Basically, have some kind of primary navigation that is really easy to use. As the users leave the primary dashboard and/or navigation, have them land on a graphical homepage of sorts. Each of these sub homepages would be a landing spot for the subject and/or topic at hand. For example: invoice homepage, deposit homepage, expense/receipt homepage, inventory homepage, customer homepage, etc. There are even smaller and more specific homepages that are sub to some of these bigger homepages. They could use some fun graphical

interfaces as well. We still want to do this, we just haven't had the time. Here is a link on some of the research and ideas on the graphical homepages.

Web link - developers notebook - q=graphical%20home - research on graphical homepages out in the developer's notebook

The next level is trying to get the whole system or platform into a deeper 3D world building level and using the concepts of the data assembly lines. That would be really cool. Here are a couple of other links that play along those lines:

Web link - developers notebook - q=3d%20world%20building - research on 3D world building



Web link - developers notebook - q=data%20assembly%20line - research on the concept of a data assembly line

Here are some other fun graphics - just concepts:

Web link - images/help - tools_magic_square.jpg - magic square - invoices, PO's, deposits, and expenses

Web link - images/help - adilas_3d_world_building.gif - concepts of 3D world building

Web link - images/help - adilas_dream_it_up.jpg - 4 step - dream it up process

Web link - images/help - adilas_dream_it_up_white_label.gif - 4 step - dream it up process - white label

Web link - images/help - location_model_landscape.gif - What you get with adilas - map overview

Web link - images/help - adilas_map_layout_all_business_functions.jpg - business functions overview using the map layout

Web link - images/help - adilas_gps_layout_all_business_functions.jpg - business functions overview using the core layout

Web link - images/help - adilas_core_map_combos_all_business_functions.jpg - business functions overview using both corp and map layouts

All Business functions: - all business functions - shown in the core - show on the map - show using both core and map

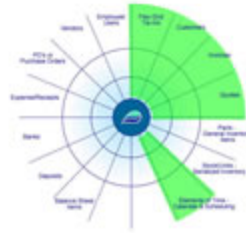
1. Sales, Inventory Tracking, & POS (Point of Sale) - core - map - combo

Sales, Inventory Tracking, & POS (Point Of Sale) Functions



2. CRM (Customer Relationship Management) - core - map - combo

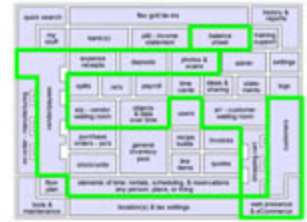
CRM (Customer Relationship Management) Functions



3. CMS (Content Management System) - core - photo galleries - map - combo

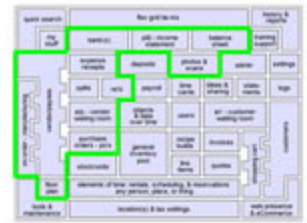


CMS (Content Management System) Functions



4. Online Expense Tracking - core - map - combo

Online Expense Tracking Functions



5. Payroll & Timecards - core - map - combo

Payroll & Timecard Functions



6. Calendar & Scheduling - core - map - combo

Calendar & Scheduling Functions



7. Create Data Relationships Between System Players - core - map - combo

Create Data Relationships Between System Players



?

8. Backend Office & Accounting Functions - core - map - combo

Backend Office & Accounting Functions



9. Histories & Reports - core - map - combo

Histories & Reporting Functions



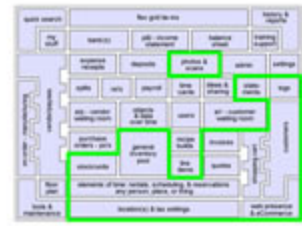
10. BI (Business Intelligence) - core - map - combo

BI (Business Intelligence) Functions



11. Web Presence & eCommerce - core - map - combo

Web Presence & eCommerce Functions



12. Virtual Data Portal (Big Data) - core - map - combo

Virtual Data Portal (Big Data) Functions



Shop 4976

Working with Eric 9/24/2019

Eric popped in and asked some questions about transitional invoices and how all of that works. We ended up talking about putting those requests into our community funded project list. Steve and I want to help to funnel the users and their requests into our project management options. Steve and I are going to be trying to focus on core vs custom and trying to figure out how maybe the custom could be core with settings (how to make it happen and/or play through).

3D calendar and time management. We are seeing people wanting to get into smaller and smaller time periods just as hours, minutes, seconds. Most of our stuff is currently on the day or single day type environment. 3D calendars deal with years, quarters, months, weeks, days, hours, minutes, and seconds. Our users may even want to determine what their unit of measure (date specific) is... that way they could choose what level they want to play on (days, hours, minutes, etc.).

Web link - help.cfm?id=479&pwd=core - help file for world building and showing the layering options

Web link - jpeg image - small drawing on how the upper levels of world building may be configured and such.

Steve and I are seeing our way through the multiple databases per server type option. Those are technically the cluster and solar system levels in the world building pieces.

After Steve and I got done speaking, I jumped back on the special accounts project (rewards, customer loyalty points, gift cards, etc.).



Shop
4988



Server talks with
Wayne 10/8/2019

As we were getting into the meeting, we were just talking about management styles and what not. I pushed over a link to a small article from the Harvard Business Review from back in May 2010. The article is called "Bringing Out the Best in Your People". Here is the link: [Web link - managing yourself](#)

With AWS, Wayne is having the biggest struggle accessing images and copying session variables into local variables. Tons of different includes, paths, crazy look and feel values, etc. Any time we link to the images differently, it becomes a problem. We are still having problems with logos, alternate logos, watermarks, etc. Wayne is looking at creating a corporation object and then trying to map to that vs all of the normal session stuff. ?

Small talk about the progression of the system from early 2000's to 2013, 2015 (big influx of new developers), 2016-2017 snow owl theme settings, and so on. We also talked about our custom code options and how the black boxes played into the mix.

Wayne is leaning towards a single corp object. Alan is thinking along those same lines. They were talking about removing the page logic and making it exist much higher on the page. In a way, we have a ton of code that exists and then it gets used differently on the pages. We are needing a way to standardizing that flow and process. As these guys are searching and replacing certain variables... it isn't uncommon to get 1,600 different pages that need to be changed and what not.

Question from Steve - If we stay with Newtek, do we need these same changes or are these new changes just for moving things out to AWS? Lots of talk about localizing the variables and helping to standardize things. Being consistent and making sure that those pieces exists, no mater what.

One of the problems is switching between reports that are based on the secure login and other reports that don't need to be secured, but we still want the whole look and feel to play across. That gets challenging.

Talking about built-in clustering for ColdFusion and what offerings can we still do and achieve at Newtek? Steve had some questions there. We have three different environments... we have older physical dedicated boxes, we have new VPS (virtual private servers), and AWS clustering. We are thinking that we need focus more on the new possibilities with the VPS servers and possible clustering at Newtek. We put some rough percentages out there... this just a starting place. We are thinking 75% of our server efforts on the new VPS and ColdFusion Enterprise clustering. We are then thinking about a 20% effort out in the AWS land (that has been pretty challenging), and then maybe doing 5% efforts on the older physical dedicated servers.

Steve is seeing a new need for dedicated aggregated servers and aggregated systems. That will change our model and may alter some of our focus. Wayne was talking about some load balancing and even doing load

testing. Using a scripting program and software to add some load and pound on our servers a little bit more. He provided a link to the Locust software package.

<https://locust.io/> - program to automate some server beat-up drills (simulate loads)

Wayne wanted to know, what is our kryptonite (what makes us go slow) - We said, looking up items, tons and tons of invoices, pulling big reports like the P&L, balance sheet, sub inventory, history reports, and tons and tons of transactional data reporting. Steve was saying that we could copy over some data from some of our bigger clients and then use that background data to virtually beat-up the system using real data. Steve is going to check with a couple of clients to get permission to use their data to do the server beat-ups. The real data won't ever be exposed, just used to simulate server loads.

Alan and Wayne were talking about using the load testing options and then looking at other factors such as splitting up the databases, moving the actual databases to their own servers, keeping them on the same servers on different drives, etc. Lots of testing and putting equal automated loads to see what the best configuration might be. Good discussion.



Shop 4938



Work with Shannon

10/8/2019

Working with Shannon on some glossary terms. Part way through the meeting, Steve came on and wanted me to look at a small shopping cart bug. It ended up being in some custom black box code. We fixed it and then went on with more glossary stuff. We were working on the S's today.

Web link - time_web_gallery.cfm?corp=371&id=4030 - online glossary



Shop 5005



Adilas Time

10/9/2019

Just Dustin and I were on the morning meeting. We touched base and then he bailed out to work on his project. I spent some time doing emails, reviewing code for Wayne from a small flex grid export to CSV file, and recording notes. I uploaded a bunch of concept art to an element of time from last week. This was from a meeting with Jonathan Wells. See this entry for some of the concept art.

Web link - time_web_gallery.cfm?corp=748&id=5003 - concept art and mapping out the system

I merged in some code for Eric and did some light research on ColdFusion using underlying Java objects and being able to manipulate those pieces. I got two emails from reps that needed a little bit of debugging on some reports and exports. Working on those pieces.



Shop 4935



Work with Shannon

10/10/2019

Shannon and I met up and worked on some more glossary terms. We also talked about getting back to the main adilas user guide.

Web link - time_web_gallery.cfm?corp=371&id=4030 - online glossary



Shop
5012



Meeting with
Chuck - camp-
adilas

10/10/2019

We had a meeting with Chuck and he was showing some new progress with the campground stuff. We are code naming it camp-adilas just for fun. That was Marisa's idea. We had Danny Shuford, Marisa Shaw, Chuck, Steve, Alan, and myself on the meeting. Steve and I were lightly distracted, due to a server issue. We had two servers down and we were part in the meeting and part trying to make sure that things were being taken care of. Interesting.

Anyways, here are some notes from our meeting.

- Visual services and access to add-on services when selling and booking a campground site
- Color coded helpers to help with states, statuses, and color coding helpers
- Be able to show available, occupied, and services available to each site
- Marisa was talking about a synced reservation and a non-synced reservation. This deals with who is booking the site. Is it grandma and grandpa who put their card down to reserve 4 different sites for their family (synced or all together) or is it just a single family booking a site (non-synced or self pay). She was saying that we need to be able to do both and allow those groups to expand, contract, and break apart if needed. All of this deals with billing and reservations.
- It is really important to be able to show just the open sites for a specific date range.
- The sites themselves need different status levels. For example: pending, confirmed, checked in, checked out, reserved, etc.
- They talked about a "do not move" lock on certain site. This deals with a state or status that keeps the person locked in for some reason. It could be VIP treatment, special needs, special group considerations, or some other circumstance.
- We need to be able to add notes to any site and/or reservation.
- Block a site through a date range. Also being able to block the same site with a possible extension date range (not for sure, but a maybe or possible extended stay).
- Lots of needs for discounts and campaign tracking. This is already built in, but we wanted to note it anyways.
- Waiting lists would be nice. Able to sort and move people around on the waiting list as needed. They even talked about different queue type options.
- Lots of color coding and legends
- Being able to move reservations from the waiting list to some other available site

?

- Lots of talk about treating the waiting list like a queue of sort sort. The queue would be, by default, first come first server, but it would also have ways of tweaking it based off of needs, special circumstances, and/or add-on services (being able to manually move things around if needed).

- Currently, the campgrounds are doing tons of little hand-written notes and post-it notes to keep track of things. That gets crazy as things get busier.

- Danny was talking about using the priority fields on the elements of time to help sort certain reservations and/or waiting list persons. Just an idea.

- My biggest take away from the meeting was Marisa's comment - "I can sell this!" - Chuck is making the system sellable due to the ideas of the intuitive graphical user interface and what the possibilities could be. That was my favorite comment. Good stuff. We need to make this thing sellable.

- Sent an email to both Chuck and Russell to have them look into some of the stuff that we have been doing with Jonathan Wells, the designer from Rexburg, ID area. Here is the link: [Web link - developers notebook - q=meeting%20with%20jonathan](#)



Shop 5006



Adilas Time

10/15/2019

On the morning meeting with Steve and Dustin. We mostly just did our own thing today. Steve and I chatted about a few things but mostly I was working through small to do list stuff, emails, recording notes, paying bills, and what not. Steve was doing the same thing.

I did put up some notes from a meeting with Chuck the other day. He is working on some mock-ups for the campground industry. Here is the link to our notes from that meeting.

[Web link - time_web_gallery.cfm?corp=748&id=5012](#)



Shop 4939



Work with Shannon

10/15/2019

Shannon and I touched base and I showed her some of the new graphics and stuff that both Chuck and Jonathan have been working on. That was fun and she enjoyed it. I enjoy sharing and showing progress and vision. After that we worked on the online glossary. We were on J's, K's, and S's. See the link below.

[Web link - time_web_gallery.cfm?corp=371&id=4030 - online glossary of terms](#)



Shop 5067



Uploading photos and screenshots

10/15/2019

Uploading screenshots and photos from earlier meetings today.

[Web link - time_web_gallery.cfm?corp=748&id=5046 - meeting with Jonathan Wells](#)



Shop
5062



Work with
Shannon

10/24/2019

Shannon and I did a session on the online glossary. We were working on T's, U's, V's, and W's. See the link below for the glossary.

Web link - time_web_gallery.cfm?corp=371&id=4030 - online glossary



Shop
5064



Work with
Shannon

10/29/2019

Shannon and I finished up the first round of the online glossary values. Some of them still need some refining and tweaking, but each letter has a number of terms and what not. Good stuff.

Web link - time_web_gallery.cfm?corp=371&id=4030 - online glossary

?



Shop
5082



Meeting with
Chuck

10/29/2019

Meeting with Chuck to get an update on Camp Adilas. We started out reviewing some other new graphics that are being presented and worked on. We then jumped into schools and how adilas could help out schools. Kind of a fun start to the meeting.

- Schools and options of supporting schools and education needs. Say like Bridgerland Tech College - They have 25 different departments, they sell all kinds of things, they have a book store, class fees, special events, tracking profit per department, café - lunchroom, catering, etc.

- Being able to configure the tools and features to fill the needs of the different companies and/or departments within a bigger organization. ?

- Here is a link that deals with options for schools, some older brainstorming - Web link - time_web_gallery.cfm?corp=371&id=2844

- As we were talking, Chuck said that he sees himself as being able to be the bridge between the tech side and the people side. He likes that kind of stuff.

After the first part of the meeting, we got back into some campground and camp adilas stuff. See attached for a number of screenshots and an overview of where we are headed. Here are some notes from that part of the meeting:

- We talked about tons of options on different flags and tags. These could be things like notes, red flags, warnings, etc.

- Options for simple reservations and options for advanced reservations.

- Being able to collect vehicle information, customer information (counts and types), payment information, etc. There is some basic information and potentially, some more advanced or one-to-many detail information that may need to be gathered. Lots of moving parts and pieces.

- We talked about primary reservations, secondary reservations, and being able to stack and unstack those reservations and payments or deposits on the reservations.

- On the payments, be able to apply discounts to all reservations or just certain tickets.

- Be able to send out emails to help collect other information to help fill in the gaps and speed up the process.

- We got into some details on the different screenshots. Detailed site overviews, handicap accessible (wheelchair icon), color coding, using flags and tags, etc. On the color coding, we even talked about allowing the color codes to be setup using settings. We would set some defaults, but allow each company to change or alter

those settings. Say something like yellow for partial paid, red for need to pay, and green for good to go (already fully paid).

- Chuck showed us some map options. He had actually used a drone to capture an aerial view of a campsite. We talked about all kinds of map and map overlay options. We talked about mixing maps, photos, icons, services, options, site photos, descriptions, filters, add to cart, set or choose date ranges, etc. All of these options, right from the map. Kinda fun. One of the cool ideas was using the icons on the map to help filter and show sites that matched your filtered search.

- We got into some of the other sub screens and talked about a customer info screen with flags and payment options. ?

- Lots of options for settings on a per section or per page level. That is awesome and we would encourage the development to be build off of settings.

- Be able to build your own reports and then be able to save those reports with the settings and configuration values needed. We already do this in places inside of adilas. Keep going along those lines.

- Showing reports on earning and services sold. Be able to see sales based on tents, RV's, cabins, firewood, power, and swimming. Whatever the services and/or options might be.

- As we build this business vertical out, it will open up new options for other companies that need scheduling and reservations. Good stuff.

- One of the last things that we talked about was using all of the different kinds of resources such as other developers, trainers, code, google, other team members, reps/consultants, etc. No specific rules there, just use what you need and play well with others. We want to keep it pretty open, but still make the resources available that are needed and wanted.



Shop
5132



Discount
research for Josh

10/30/2019

Working on some discount and my cart favorite research for Josh. He is looking at a possible project to add discounts to my cart favorites and also take the my cart favorite buttons and the group options (tiered pricing levels) out to ecommerce. Here were a few things that I found:

searching for "my cart favorite" in the developer's notebook - from 1/1/7 to 12/31/19 - sort by oldest first - then do a sub browser level search for the word "discount"

Web link - time_web_gallery.cfm?corp=748&id=3659 - working on in-line discounts and wanting to extend them to my cart favorite buttons

Web link - time_web_gallery.cfm?corp=748&id=3764 - need to expand the my cart favorite buttons - a client wanted it

Web link - time_web_gallery.cfm?corp=748&id=4032 - more need and heading towards discount engine with Josh

Web link - time_web_gallery.cfm?corp=748&id=3666 - mixing of buttons and discounts

Web link - time_web_gallery.cfm?corp=748&id=4137 - three ways to tie-in discounts on buttons

Web link - developers_notebook_home.cfm?sort=ASC&q=tiered%20pricing - multiple entries with tiered pricing (may have to sub search in the browser for the words "tiered pricing") - as a side note, some of the tiered pricing pieces started to come into play as early as 2011. Interesting. Still a big need in end of 2019.



Shop
5133



Recording notes
and general stuff

10/30/2019

Adding screenshots to elements of time, research, recording notes, and cross tying different resources together.

See attached for a new document from Chuck Swann. It deals with needs that schools and educational institutions need and want. That same document was also attached to an older element of time in the adilas university site that had ideas about using adilas for schools and education. See this element for those other ideas and details.

Web link - time_web_gallery.cfm?corp=371&id=2844 - ideas of how adilas could help out schools and educational facilities



//////////

I was also trying to gather some graphic resources for Shay (adilas graphic designer and logo/setup wizard). Here is an email that I sent to Shay with some links to different graphic resources.

Good evening. We have tons of graphic assets... the only problem is that they are not super organized. Here are a couple of links:

Web link - time_web_gallery.cfm?corp=748&id=4933 - tons and tons of images (including some new ones), you may need to click on the links within the document text and then save the images to your local drive.

Web link - help.cfm?id=393&pwd=map - there are tons of graphic links just below the map on this help file

Web link - photo_gallery_full.cfm - tons of fun teaching tool graphics, if you need any originals, I can get them for you.

Web link - Item shop page - tons of pdf links and image links. See the other teasers tab

Anyways, I hope that helps. Enjoy!

//////////

The other thing that I was trying to do was sign some documents for Wells Fargo and small business banking changes. Somewhat of a random afternoon.



Shop
5061



Work with
Shannon

10/31/2019

Shannon and I jumped back in on the adilas user guide project. We were working on the section 11 stuff dealing with old school accounting vs new school accounting. This is still unfolding, but we were trying to get back into the flow and swing of things.

Web link - time_web_gallery.cfm?corp=371&id=4038 - entry for the old school accounting vs new school accounting - still working here



Adi
1540



Issue with Snow
Owl - WebPageID
Edit

10/31/2019

Issue with Snow Owl on

Web link - [add_edit_web_page_comments.cfm?main=762&mode=add&id=new](#)

See the screenshots for more details.





Shop
5196



Meeting with
Chuck

11/14/2019

We started to build out a visual tile board based on the adilas formula flyer. Here is a link to the older flyer...

Web link - [adilas_formula.pdf](#) - adilas formula flyer

We had a small discussion about world building and how it sometimes confuses people - almost too bold and too abstract. We talked about ways of softening that. For example: Say the different stores in a mini mall or different departments in a big organization. In a way, those smaller pieces or entities are building their own world.

What if we approached it by saying... currently you need a POS, an ecommerce package, a CRM, an ERP system, accounting, etc. Inside of adilas we allow you to pull those things all together under one umbrella. This becomes the virtual universe for that company. Show them how we can pull all of these things into one system. We are also really flexible, configurable, and nimble.

Results is one of the main four topics (results, business functions, application players, & core concepts). The results (what you are looking for) are huge. This side plays more on the emotions and wants of our users.

Link to a fun Ted Talk by Simon Sinek - [Web link Ted Talk](#)

Here are a few notes from the Ted talk:

- Why - Share the why
- The golden circle - 3 levels - innermost level Why, middle level How, outer level What
- Help people learn from and be driven (of their own free will) from the inside out (why, how, what)
- People buy why you do it, not what you do
- Attraction of people - people who believe what you believe
- Driven by a cause - willing to put in and work with blood, sweat, and tears
- Prove what you believe by why you do it
- Helping to take and push a cause further - Once again, because they want to...

//////////

Going back to the sales document that we were working on (notes from above), Chuck sent me an updated link. Click below to see the Adobe XD layout. Pretty cool.

Web link [Adobe XD File](#)



Shop
5197



Meeting with
Chuck

11/19/2019

- Camp adilas overview - see screenshots - lots of new work on the mobile side of things. Exploring all of the different screenshots and options.

- We spent some time and did a small review of the demo yesterday.

- We still used world building but we related it to pieces that they could understand (going from full abstract to hey, this makes sense - speaking their language and at their level). That is huge. We talked about how we could do the same thing in a more general way.

- The demo felt more prepared and more simplified. That was good. ?

- One thing that came up... tracking history and seeing who does what in the system (the hidden audit trail and use of different logins). We introduced this later on in the demo but they really got excited about it. We may want that to surface earlier as what is going on and a key feature.

- When doing the ecommerce demo... that was a little rougher. We had to keep switching between systems due to images, settings, and being able to flip to the more pretty and mobile ready version. We had a few rough spots in this part of the demo.

- Lots of talk about the permissions page (aka the football field of permissions). We want to get the permissions broken down to a better level that is easier to understand and to copy/apply. They (our users) are wanting to break them (the existing permissions) into custom permissions, sub functions, and other functionality. Deeper control, yet a simpler interface and experience.

- We spent some time and talked about the new sales outline that Chuck is working on. We used it in our demo, our morning meeting today, and almost every other meeting today. Pretty cool. We like the direction that we are headed. [Click here to see a small sample.](#)

- As we build things out (in the sales flyer)... we would like to connect these to videos - we talked about keeping things generic and highlighting the pieces vs our brand (white label options).

- There were some conversations about talking about world build and getting it into a more simple thing analogy right off bat. Maybe even some scenarios that deal with beginner, intermediate, and advanced concepts. Once again, help it be more consumable.

- Brainstorming on world building ideas... We could start with a web layout, index page and then it goes from there, or icons and a more structured layout. We spent some time talking about how to help get our users and others to get their heads around the concepts. We ended up watching two videos to help us get into the frame of mind. The links are below.

Web link - [video-bestbook.html](#) - Brandon Mull (author) - What makes a great book (world building concepts)

Web link YouTube - Shannon Moore - System thinking - fun video from an older training session





- People will often use examples to base their judgements off of.

- How we think and what we think we know. The perception of knowledge.

- Senses and how people perceive things - say choosing and seeing a color - lots of variations - first the physical pieces are different, secondly how does the brain perceive things.

- Distraction, multi-tasking, true focus



- Training and a preset of memory items - recalling learned pieces and then mixing those things together as things happen in real time.

- In certain scenarios, we start filling in certain blanks based on what are brains are giving us vs what is being actually shared.

- At times, some of the people involved can almost see a picture in their head of what is needed and where things are going and how things will work. They have the original vision even before they start into the project. Some people will start catching the vision as it starts to unfold over time.

- Questioning our own belief systems - checking things at the door (to the mind).

- Meeting expectations - Was what was delivered what was really asked for? This is hard to hit this mark. Often we are off by some degree or another.

- Small story of linked pieces (security based) and what people perceived to be the problem. Sometimes they pointed to one piece but technically, it may have been some other contributing factor or some other process that occurred. Some times the end user, using our site, they see a certain problem and assume that it means something. However behind the scenes we have multiple servers, different technologies, permissions, settings, user interface, etc. All of those things get mixed together to make the outcome.

- In Adilas, we have a mixed bag due to how many different things we offer and how many different ways these people use what we have to offer. That makes it a challenge. Wayne also started talking about some historical aspects and how things came to be. At the time, based on the needs, the knowledge, the skills, the technology, the outcome came from those mixed variables. If looked at from that historical perspective, things may make more sense vs looking at things later on based on a new set of variables.

- Group effort - it takes a village to raise a child.

- Wayne was having fun and wanted to serve in the church - As part of that, he moved to Portugal and wanted to get involved. He has been involved. Kinda like

a senior mission of sorts. Sometimes higher leadership callings are a ton of work. Wayne was talking about different callings, responsibilities, and options to serve. As you get into things deeper, you end up learning tons from who you are working with and serving vs just teaching them in a one-way direction. It becomes a great two-way street of learning. We are constantly learning. Enjoy those learning opportunities.

- Often we think that we are right about something (pick a subject). If someone proves us wrong (in a nice way) and helps us think in a new direction, we become an advocate for that cause. This really comes into play when working on a team or in a team setting.

- Customers - super important. We get paid to do a job (whatever that job is). We may not get extra praise for doing our job. Our customers have certain expectations. They may not compliment you on doing your job. If they, the customers, have a problem... and you help them and fix the problem, you could gain a customer for life. That is where you get an elevated level of praise.

- Customers are always right except when they are wrong - kinda funny. At times, you even need to fire a customer. Wayne was talking about being a nice guy vs transacting business and still being a nice guy. There may be a difference. Being able to say no.

- Rationalization - still thinking of being in a start-up mode. We are getting better and better at that. It has been a slow process. We were talking about sales, but this could go into a lot of other areas.

- Steve was talking about some future goals and where we want to take things. We would like to keep progressing the ball down the road.

- Light talk about server issues and getting help from our team (aka Wayne on the server side). Good stuff.

- The dream and where are we headed... even with a dream, we have had multiple 90 degree corners that we didn't expect.

- The reoccurring revenue model is kinda like an insurance agent and basing things off of those reoccurring services and playing as a group.

- Pioneering the road. We are constantly unrolling and watching what is happening all around us. We don't have a book or a full plan to follow.

- When a new business starts... it tends to be on a smaller level. Everybody knows what is going on and hopefully following the same vision. As you grow, you start getting some new variables and they may not be part of that same vision. As it grows from there, it could completely change. It grows in needs, complexity, resources, etc. Sometimes the original startup people may not like and/or accept all of the changes and complexity.

- Light talks about changing job titles and job responsibilities. What are you passionate about? Do you like what you are doing right now?

- What is our model? Currently we are trying to structure our model so that it could keep persisting. We honestly don't know where all of these things are going. Wayne said... Ok, how do you get there (meaning the vision and dream)?

- What is it that we are selling? What is our model (in writing)? That is somewhat hard to put a finger on. It is so flexible and versatile it makes it hard. We have a lot of customization and lower priced offerings. Some of those pieces have been huge for us. From big to small - we are finding that if we can help the customers out with their dreams, things for us keep unfolding and unfolding for us and for them. Taking the next logical step. We don't want a tidal wave, but we would like to increase sales.

- Questions about managing pricing and updates (what is rolled out) - Who pays for what and who uses what?

- Wayne has a brother, Scott, who does a lot of consulting on sales.

- Steve's idea is you get everything vs selling a multiple module application. It seems easier to sell the whole thing and then just set the prices based on their sizes (business sizes). We talked about seed money and even doing some project fund matching to get the project pushed forward. We have full custom (black box code) and we have core products that everybody gets. Steve was saying that we are a somewhat community funded, open source product, but still slightly different. We are a software as a service type model (SaaS).

- Wayne was talking about direct metrics - What are our customers using and doing inside of the system? What can we measure and what can we check? Basically figuring out a price per value type metric. Subscription and what are you getting for your dollar value. We have even talked about giving the software away for free and living off of the other services (byproducts) that get produced. We have talked about charging for hosting, storage, processing, etc. vs just charging for the software.

- One of the extra services that they were talking about was "business coaching". Sometimes, as we go down the road, we have seen some of these same scenarios play out and we are gaining knowledge. Some of the knowledge and experience is worth quite a bit of money. What if the system could help coach someone through the process through navigation, processes, and training.

- Steve is trying to get into some of these CPA (certified public accountants) groups and helping them run with all of the off shooting products and byproducts. If we allow for some white labeling options, these CPA groups could really run with some of the other pieces of the puzzle.

- Steve turned some of his thoughts to the adilas café and getting this single login and then they could come and work, play, learn, train, buy, sell, and participate in the

adilas community. We just build the software and then let the others who are around us help provide the other outside services that are needed.

- Steve would really like to help change the business model and the ways that employees and employers work and coordinate together. As a fun side note, we, at Adilas, are already doing some of this. It is very loose right now, but we are currently helping companies get interconnected and plugged into the correct pieces (reps, consultants, designers, customer code, business coaching, oversight, fulfillment, etc.). If we use the adilas café correctly, we could allow so many other parties and/or individuals to help provide a piece of the puzzle for any number of different companies. We would like to make that part of the adilas model.

- Wayne was talking about even outsourcing inventory control and inventory management. Often we think that topic, inventory management, resides inside the company, but it doesn't have to. More analytics, more oversight, more management tools, etc. We could build that.

- We, as a company, need to really look into the user login process and how to separate the users from the systems (single sign-on). They the users, need to exist outside the systems but still be able to play within the different systems. Eventually, we want to turn the request and accept process out to the users.

- The deeper we get, the deeper we are seeing more and more needs to be built out on the global adilas café model. The system is too big for one single person to know everything. It seems natural for the adilas community to help fill those needs.

- Wayne - What is your action list? Where do we head from here?

- Steve - Let's get the servers and database stuff super stable. Then we work on the single sign-on and the database split up (datasource and/or world building model). Build up the adilas café and the adilas community - this could be the adilas marketplace, adilas university, and the main system (adilas as a platform).

- Wayne wanted to know what the tick list was and then also how are we going to make that happen? Goals, budgets, timeframes, etc. Basically, going beyond the dream and into the logistics of getting there. Making assignments and allocating funds and time and resources.

- Web link - developers notebook - [q=adilas%20caf](#) - link for some research on the adilas café concept.

- If we were to get super busy, say 10 times or 100 times more than what we have, we would need some major help. The adilas café and the adilas market would really need to be in place for that to happen.

- From Wayne - The art of leadership is helping other people do what they want to do because they want to do it.

See attached for the video recording of this meeting.

////////////////////////////////////

After the meeting, Steve and I kept talking about some options.

- We could use the camp adilas project as a precursor and even be able presell an industry specific buildout. That could be really cool.
- Help push the adilas café and help people see that they could make some great money by learning adilas and providing different skills.
- If we got enough of the community into the adilas café, they could virtually help staff the adilas university model.
- Steve talked about giving away personal adilas accounts and then allowing them to schedule, train, or do work for other clients who need their help.
- Steve wants to build the ultimate business tool and then let others provide the services that come from that product.
- Light talks about playing at the wall (API sockets) and custom white label solutions.
- Our goal is to head North (speaking about a general business plan vs a perfect goal setting and fully budgeted business plan). Everything that we are doing is in a constant state of flux. That gets really hard to nail down.
- There is a fun paradigm shift taking place using Adilas and the adilas café and adilas market as tools to help solve the employer/employee relationship. Tons of great options.
- We are surrounded by tons of cofounders. Each person is playing a role.
- The next biggest thing is a step in the right direction.
- We are going to keep breaking our projects into more and more chewable pieces. That will help with energy, moral, and code sign-off.



Shop
5306



Adilas Time

1/2/2020

Steve and I met as part of the morning meeting. I can tell that Steve has a lot on his plate. He is running from fire to fire. Some of that may be year end stuff and pressure and some of it may just be busy times. Danny checked in and said hi. After Steve left, I jumped back on the year end stuff for 1099's and W-2's. I also had a couple of phone calls, emails, tech support stuff, some developers checked in, and other random stuff.

As a side note, Russell sent me this link. It has some great UX and UI quotes.
Web link - 16 quotes

UX and UI mean user experience and user interface - how does your product act and interact with a user?



Shop
5481



Eleleve:
eCommerce
purchase limit
planning

1/8/2020

Bryan and I pushed up some new code and some custom reports. We then spent the rest of the session talking about ways to virtually extend the functionality for clients. We went over some of the existing pieces such as black box code, flex grid tie-ins, parent attributes, sub attributes, web page settings (JSON or object storage), and then we settled on real in-line database extensions.

We did a lot of drawing and talked about how we could virtually extend any table without hurting any other corporation (super light and non intrusive). This concept allows us to virtually use the custom tables (custom_numeric, custom_text, custom_dates, custom_json) and create new add-on columns for almost any database table. I showed Bryan how easy it was and we even went through some mock-ups (text and drawings based on scenarios). The nice thing about these custom tables is that the data could be a specific data type (a real number, a real date, a real string/characters, or a JSON object). Plus the tables are much smaller than normal flex grid tie-in records.

Here is some older research on custom extensions, real in-line database extensions, and custom columns on a per table basis. Aka - the big brother of the flex grid tie-ins.

Web link - developers notebook -
[q=in%2Dline%20database%2Bdatabase%20extension](#)



Adi
1620



Fulfillment
Homepage
additions

1/23/2020

3/3/20: RFID tag in quote is complete as of today. Still need RFID tag number to print on print ticket.

Queue is complete.

Add a cancel/remove button to the fulfillment homepage- just like the one on the queue page (Web link)

Display RFID Tag on Fulfillment Home Page for QUOTES. This requires adilas to allow users to save RFID tags to a quote. (I would also suggest displaying the RFID on the print ticket). I have heard the argument against why someone wouldn't want to save the rfid to a quote but I have many company's that want to.

?

This piece required a new column, back fill, new code, then restore cart piece and some logic. Then it catches up to natural flow. This is \$1500.

Associate the orders that are on the Fulfillment home page with the QUEUE they were originally assigned to. One person will manage fulfillment home page for "in store queue" while someone else may manage the "delivery queue". You should be able to see all or select just one.

Once they turn on their sub queues, we can connect it and add the settings in the fulfillment page. \$1,000



Shop
5446



General

1/23/2020

Meeting with an outside developer who is setting up a custom VPS with some data for a company to run his own analytics. This developer was hired by the company to run some other reports and such through his own environment. Our job is to supply the VPS with a copy of the live data so that the developer has a working model and environment that he can play with. Awesome idea and concept.

Anyways, we went over some database stuff, mappings, key fields, data relationships, and how things tie in together. We did some drawings and other tech talk stuff. As a fun side note, it would be really cool if we have some of this same stuff (what makes it tick) really documented out so that other developers (ours and outside developers) could tap in and play. That would be super cool. Future project. As an idea, maybe a tech mode (similar to the education mode or data mode or permission mode) for the fracture stuff. In tech mode, we could get into the nitty gritty details of how things flow, connections, data relationships, decision trees, conditions and conditional logic, switches, validation, keys, etc. Super techy stuff. The tech mode would talk to the developers, programmers, and/or the curious persons who want to see the backend logic and design.

Recording notes and adding documentation to the different entries and elements of time. Lots of fun screenshots in the past couple of days. Here are some fun entries:

Web link - time_web_gallery.cfm?corp=22&id=1532 - WanderWays - camp adilas project

Web link - time_web_gallery.cfm?corp=748&id=5530 - WanderWays website prototype project

Web link - time_web_gallery.cfm?corp=748&id=5864 - internal adilas mock-ups - fracture project



Shop
5950



General

2/3/2020

Emails, follow-ups, and watching some new videos passed over to me from one of our designers. See this element of time to see the new videos. They are concept art and mock-ups for our future navigation system - code named fracture.

Web link - time_web_gallery.cfm?corp=748&id=5868 - see the attached videos for a sample of the interface we are designing.

Working with some of the domain names that we own. Pointing them to the main www.adilas.biz website.



Shop
5483



Working with
Shannon

2/4/2020

Shannon and I did a session dealing with calendar and elements of time. This is prep work on the outline for the presentation gallery. Today was just some brainstorming on calendar and time options - one of the twelve main business functions. See attached for our brainstorming. As part of the brainstorming, we read three older help files to help us get some ideas. They are listed below.

Web link - help.cfm?id=381&pwd=time - help file for the main time homepage

Web link - help.cfm?id=383&pwd=template - help file for master time templates

Web link - help.cfm?id=391&pwd=sub - help file for subs or functions of time



Adi
1640



TBC/OBC add on
to sales report
icon

2/7/2020

2/10/20: Loops over corps. Any developer could do. Add columns. Not a huge project. Condition this page too:
Web link - multi_corp_sales_report.cfm?corp=multi

2/7/20: TBC/OBC wants to add more data to their daily icon report. Existing columns in icon report are: **
Instead of the column saying "value" they want it to say "gross" - Columns: Category, Loc, Qty., Value

Then they want to add Sales, COGS, Profit, and Profit % for each listed category.

** the icon report columns are slightly different from the multi location report in the link above.



Shop
5979



Zack 710 with
Cory

2/11/2020

Discuss project id #1599- secondary barcodes project. We met and recorded a number of new notes for that project. See this link for some more details.

Web link - time_web_gallery.cfm?corp=22&id=1599 - project details



Shop
5991



General

2/12/2020

General clean-up for the day and recording notes. Pushed up a bunch of new screenshots from a meeting with Chuck and Alan.

Web link - time_web_gallery.cfm?corp=748&id=5966 - screenshots for WanderWays website and the camp adilas project



Shop
6007



push code

2/18/2020

Bryan and I pushed up some new code. We did two small projects (merge and push) and then talked about a new project. Bryan would like to use the custom numerics table to do some real in-line database extensions. He has done a couple projects like this, using the custom tables and tying them in as needed. This particular project deals with a company that needs a 3rd salesperson (user/employee) added to the invoices. We talked about how to do that via black box code and using the custom tables (text, numeric, dates, json) as the extensions. It's fun to see them being used. More solutions to come.

Web link - [developers_notebook_home.cfm?q=real%20in%20line%20database&sort=asc](#) - research on real in-line database extensions



Shop
5494



Working with
Shannon

2/25/2020

Met with Shannon and went over some brainstorming and some notes from meeting with the business consultant. Mostly just talking about ideas, concepts, and how we are learning from these different scenarios. See this link for more info.

Web link - [time_web_gallery.cfm?corp=748&id=5524](#) - business consulting notes



Shop
6011



Meeting with
Jonathan

2/25/2020

Meeting with a number of folks. The goal was dealing with the shopping cart. We had Steve, Chuck, Jonathan, Cory, and a client on the meeting. The first part of the meeting was the client going over some of their requests. Here are some highlights from them...

- They would like to be able to send text messages from the customer queue

- They would love to have a hand-held scanner and have it automatically be able to update an unmanned cart. Some talks about using the built-in cameras on certain tablets and such. Other talks about hardware and software problems and solutions. Through the web, sometimes those pieces are hard to get to perfectly talk to one another.

- Lots of questions about barcodes, labels, and auto/bulk actions.

- They would like possible popup/modal type windows to see customer notes, maybe the last invoice, and even a modal popup on the ++ or advanced add to cart (haggle tools)

- They also spoke about major needs for tiered pricing - the same options that work on my cart favorite buttons and smart groups and tiered pricing. As part of this discussion, there were options mentioned about parent attributes, barcodes on buttons, advanced barcodes (QR codes), mini conversions, etc. This becomes a bigger and bigger need. It also needs to be more standardized. Lots of options, but because it could go so many ways, it is hard to find the correct path. Too many options.

- Along the tiered pricing vein, there was also a request to be able to assign items (subs or child packages) to a pricing tier through the build new PO process (bringing in the items and assigning them to a pricing tier as part of the inbound process).

- They really want a fully interactive cart, yet still locked down, yet still super powerful, yet super simple, yet, yet... Lots of requirements.

- Training mode, how to get to the best training and how to connect the dots. We have help files, news and updates, videos, etc. - but we need a way to get to that really quickly. They, the client, were also requesting that each new feature has a full tutorial and/or video. They only wanted the things that were fully done to be added to the news and updates.

- They would love for more onsite or local training options. They love the time and are willing to spend the money. They would love to get the training options to be standardized and regular (scheduled and consistent).

- They love the bulk update cart functionality

- Being able to bulk print labels and skip steps (save as a quote or cart checkout). They also wanted to be able to flag certain items that they only need one label vs multiple new labels per quantity, etc. It sounds like it could be pretty deep. There were also requests to be able

to bulk print labels from the PO. Calvin's new adilas label builder does do bulk labels for invoices and PO's. They just might need some training.

- Online orders, ecommerce, and even options for delivery.

- In the cart, being able to see it at all times. Having some sort of split screen where there are items or look-ups on one side and all of the items on the other side. Lots of one pagers with asynchronous connections and easy flow through the sections and/or pages.

- We love ideas and helping to push the ball forward. The needs keep coming. We just try to keep solving those pieces as we can.

- We also allow the clients to chime in and help us prioritize, fund sharing, and have a say in where things are going.

///// more notes after the client left - Just Chuck, Jonathan, Brandon, and Steve

- Steve - a big thank you out to both Chuck and Jonathan - you guys are stepping up the game. He was also talking about collaboration between the different developers and how cool that will be.

- There may end up being 8-10 versions or variations of the shopping cart. At some point, we need to separate the logic from the view/design. Jonathan was also talking about putting the specialty features into settings so that each cart may be more configurable. Good stuff.

- Questions from Jonathan about market analysis and what does that say for us? Sadly, the reality, we haven't done anything there. Lots of options.

- There were some talks about having a system to run your stuff vs trying to marry all of the individual pieces together. There is pain on both sides, but we are heading towards the systematic type approach. Trying to bring all of these things together.

- Time to value - how many clicks to get those needs fulfilled. Not that we can't do it... we just need to figure out how to help speed up the process and make it easier and more easy to get to those pieces and features.

- Smoothing out processes and making it easy to get to the places that they need to. It kinda comes down to navigation and visual flow process. Aka - the full user experience.

- Steve was talking about how making these pieces work together to get all of the POS (point of sale) systems, inventory tracking, CRM (customer relationship management), CMS (content management systems), accounting, reports, and backend storage all in one place. That is the dream.

- Some of our clients are virtually starving for instructor lead training. Jonathan is saying that there is a barrier to entry to this... meaning the learning curve to fully know

adilas. We need to help provide it and also help to standardize it. Small talks about competition, reps/consultants, and ways of teaching the processes, pieces, and principles.

- Small mention of the adilas café and how some of that would help us provide training and service type options. You could get training from the adilas university or you could get direct training and/or hire a certain person to help fill a certain need. Think of all of the power users that could offer services and/or training. What if we could show user stats on who has done what and what level they qualify.

- From Chuck - what about a monthly webinar? We could plan it out, record it, charge for it, etc. We could do digital meetings, in-person training, instructor lead trainings, etc. As we keep updating the system, we need to keep updating the videos. Maybe even using YouTube as a primary source of training. Possible Facebook groups, tips of the day, etc.

- From Chuck - doing light idea mining when we are out and about. For example: Hey, what processes do you do to sell things? We then record that and start making some settings, permissions, and selections together to help them with what they are doing. Presets per industry. Sometimes it is so overwhelming... we could really create virtual profiles and help with settings and configuration stuff.

- From Chuck - small talks about web components and being able to customize things on the fly. Separating logic, functions, views, displays, processes, etc.

- Lots of settings and even helping those people get to those settings and help it make sense for each industry. Settings and configuration options. Groups, categories, settings, nested presets, tiered pricing, labels, etc.

- From Chuck - he really doesn't like it if we do a process and then virtually dump him in an unfamiliar page (backend navigation). That comes back to page flow and user interface. We will keep working on this. If we send the users to the correct spot, we don't lose them and we even help them know what the next step should be. This may take some mapping and design stuff.

- Trying to stay small but still looking for talent and help.

- Help file on barcodes - Web link - help.cfm?id=413&pwd=cart - barcodes can really speed up shopping carts and there are tons of options. This is an area that could still be developed out further and enhanced. Just an idea.

See attached for a number of other resources. There are a couple of videos and some research on shopping carts and POS interfaces (point of sale interfaces).



Shop
5492



Working with
Shannon

2/27/2020

Shannon and I met and talked about some of the new happenings within the company. Lots of talk about some of the new shopping cart prototypes. We then spent the last part of the meeting going over the business function of accounting and how to break up the ideas and concepts for the presentation gallery. Here are a couple of links to other things that we were talking about:

Web link - [time_web_gallery.cfm?corp=748&id=6011](#) - new shopping cart and POS (point of sale interface) mock-ups

Web link - [time_web_gallery.cfm?corp=748&id=5484](#) - brainstorming on accounting topics and functions



Adi
1663



API for the Queue 3/4/2020

9/11/2020:Documentation

[getSubQueueDetails](#) - Web link - [printable_web_api_documentation.cfm?id=976](#)

[addcustomertoqueue](#) - Web link - [printable_web_api_documentation.cfm?id=977](#)

6/30/2020: Moving ahead with this project. Starting with \$500 and will most likely go up to \$900, then \$100/hour after that.

List of queues, view queue, add to the queue= 3 sockets, possibly more.

3/10/20: 5hrs

3/3/20: Molly really wants to help make adilas e-commerce better. Using word press in the meantime to connect to adilas through API.



Shop
6056



Adilas Time

3/5/2020

On the meeting with Steve and Danny. Going over small items, projects, and new changes. Lots of moving pieces. Steve was showing me a shopping cart demo done by Spencer (outside developer) and how cool it was.

Web link - [Adilas/Main_GUI.html](#) - demo page for the short and sweet cart

Steve was also showing me some of his cross-corp (enterprise level) vendor mapping project. It is looking good. We talked about a few tweaks, but making progress.

After Steve left, Wayne joined the meeting. We logged into some of the remote VPS servers and made a few changes. He also helped me with my local box, as it was running slow. While rebooting my local machine, I called and talked with my dad. He has done some grant writing in the past. I briefly talked to him and asked him if he would be willing to help me and play that game again. He said yes and we'll set something up. Fun stuff.



Shop
5958



Working with
Shannon

3/5/2020

Working with Shannon and brainstorming and going over features and benefits of using the adilas accounting functions as part of the system. See attached for the full presentation outline document that we are working on. Our eventual goal is to get all 12 business players defined, all 12 business functions defined, and to also organize and present the 12 business concepts that we are built on.

The goal is to complete what we call the adilas formula: Results - Mix(Functions, Players, Concepts)

See attached for an older PDF flyer that lists out the pieces. The new outline will take things further and really get into more of a sales and education tool and a presentation gallery of sorts.



Web link - adilas_formula.pdf - web link to the adilas formula flyer



Adi
1686



Condition
Customer
Contact Types 1-
3

3/19/2020

3/19/20: Reports for NJ DOH will require filling out all of these fields. Creating a template that makes this easier is what is involved here. When you create a new customer, you can scroll to the bottom and enter all of the necessary fields. They will say ie caregiver instead of contact type. We will do this via settings added to the gear at the top of the customer add/edit page. Web link - field_settings_customer.cfm - is the settings page where these will be added.



Adi
1690



Website
developer needs
to connect to
adilas db

3/23/2020

3/25/20: Said no thank you via email. Will save just in case.

Sent em 3/23/20 with help link - Web link - help.cfm?id=464&pwd=api - help file as well as option to meet with a developer (\$400).

3/23/20: I am building a website and app for my customer (a dispensary). They maintain their product inventory in Adilas. I am seeking information on how a web developer (me) would be able to connect to their inventory db so pull and display information from their product inventory from Adilas to the new website. That is all we are seeking to do. They do not want to maintain two separate inventory lists. If this can be done, please help. If not, please just let me know, and I'll talk to them about alternatives.

I have been asked to design a website and app specific to my customer, who is also your customer. I was able to browse through Adilas and saw Option 3 on your website. In order to fulfill customer requirements, I will need more information, (Relevant Code), etc., to create db connection structures and fully access and manipulate data related to their website and pwa. Is this information available, and do you have requirements for accessing such information? Thank you for any direction you can provide.



Shop
6068

Adilas Time

3/25/2020

Steve and I were on this morning going over budgets and forecasting stuff.

Chuck joined the meeting around 10 am. The notes below here really show be on the meeting with Chuck. See this URL/web link:

Web link - time_web_gallery.cfm?corp=748&id=6052 - meeting with Chuck, Shannon, Marisa, Steve, and Brandon

- Target marketing vs broad or general advertising - industry specific - medical, alternate medical, herbs, homeopathic, preparedness stuff - industries that are helping or assisting other people right now - what about mom and pop little cafes and restaurants that want to do delivery or online orders or curbside pick-ups?

- Using social media to help sell and advertise things - we haven't spent much effort there - helping to get people more engaged

- Small little places that need ecommerce and delivery options - In the last couple days, we have turned on the existing ecommerce package for multiple clients

- What about lists of different businesses

- Facebook marketing - super targeted and affordable - Facebook has a ton of ways to target certain demographics

- Other methods - radio, email marketing, google ad words (can be expensive but productive - you need a budget and a good ratio per click), flyers and beating the street - most of these were expensive and did really do much

- Email marketing worked good for your current clients because they knew you a little bit - Maybe do our own campaign.

- What if we did some more training, while everybody is at home. Sell it online, do it, present it, and record it. Basically a stuck at home boot camp. We would even harvest our own email list for that. Brandon volunteered to help teach classes if needed. Shannon has also taught in the past.

- Focus and target it in such a way to say - here is how we can help you!

- Maybe run some small experiments on some of these things - meaning make sure that you have a landing plan

- Videos are a huge way to get some training out there and done

- We had Steve, Brandon, Chuck, Maris, and Shannon on the meeting. Good input from all parties.

- Light talks about the existing 2020 model and selling things where we are at

- Steve wants to go full speed ahead on the existing ecommerce solution - this seems to be the current focus and/or target we want to pursue

- Small plan - Email marketing to our existing clients, news and updates, and get some training on how to setup and use ecommerce - we have a number of people who are very good with the ecommerce solution. We can coordinate those trainers and presenters. Prep things in such a way to help the clients. Open to anyone.

- Russell did a great job prepping the existing training on the ecommerce solution.

- We could also offer consulting, training, and even a series of training events to keep pushing the ball forward. Maybe start with the existing things and build from there.

?

- On training efforts during the next six months - adilas 10% and the other 90% is for Chuck and his team - note added by Brandon

- We have a viable solution and we just need to get our offerings out to the public in order to become more stable.



Adi
1727

changes to the
custom PO Label
and custom PDF
Invoice

4/6/2020

4/6/2020: Changes to these pieces that were created by Bryan several years ago. In two corps: 979 and 980.

URL PO Label Corp 1: Web link -
doc_form_980_the_medicine_room_sub_po_label.cfm
URL Invoice Label Corp 1: Web link -
printable_invoice.cfm

URL PO Label Corp2 same but 979
URL Invoice Label Corp2 same but 979

1. Update PO label:

change current data points = Total Weight = Item FLEX
data points = item sub = Package Total(g)

Change sub id shown to sub barcode
Change QR code to scan sub barcode not sub id.

Change PO sub item display to show SUB BARCODE.
PDF code is not allowing sub barcode to display..

2. Update Custom Printable PDF invoice

change current data points = FLEX GRID = est mmj and
package total

to

new data points = item: weight or line item quantity
depending on category (some logic from PO, will need to
check what is currently there) AND Sub attribute
Package Total.



Adi
1736



Rework the
payables section

4/10/2020

We need to do some rework on the payables section of the site. Also, we need a super admin level for expense/receipt and some of the paid status and payables portions. This could be a special page that allowed for backend admin controls, manual paid switches, etc. See element of time id # 26 for more info (going way back).

Web link - [time_web_gallery.cfm?corp=22&id=26](#) - payables rework project ideas



Adi
1737



Sub
settings/Behavior

4/10/2020

4/17/2020: See quote. Old notes below. Sub settings will cure the restore to cart issues related to gram control.

4/10/2020: When you restore to a cart, the gram control isn't working.

I have many companies that want to assign subs to quotes, them included.

I did confirm settings for #2, work the same regardless of what it is set to. I had confirmed that didn't work in another system previously. It may be as simple as "fixing this setting" or we need to "fix the gram tracker". If a sub is assigned to a quote, which it currently can be, when it is restored to the cart, the gram tracker needs to work the same as if it was added to the cart the first time.

Please feel free to quote/invoice me for however long you think it will take to fix this with me.

(see email- creating quotes that work)

URL - Web link - [view_cart.cfm](#)

Gram Tracker: - Web link - [settings_cannabis_gram_control_sub_attribute.cfm](#)

Picture, showing gram tracker total, which is calculating of the line item quantity instead of the sub attribute "usable marijuana"



Adi
1740



Show/Hide
Search Criteria
link doesn't work

4/14/2020

4/14/20: Web link - [check_search.cfm](#)

when you go to check, all, can't use the link



Shop
6185



Meeting with
Chuck

4/22/2020

Chuck and I met and touched base on a number of different projects. I gave him a small review of some of the new direction with the core and value add-on's to that base core. We went over the different outer rings and some of those ideas. After that, we jumped into some of his projects. We talked about the corp-wide settings page, the new slides for the presentation gallery. We spent some time there talking and going over ideas and concepts. Looking good.

After going over his current projects we spent some time looking for a code bug in a page that he is working on... pretty hidden bug, we couldn't find it with our first initial glance. We then closed the meeting just chatting about general things that are happening and going on - life stuff. Good meeting.



Web link - XD file - current slides in the Adobe XD layout for the presentation gallery (still under construction)



Shop
6369



Auto-print POS
Labels

5/12/2020

Working with Eric on his auto print POS (point of sale) labels. Added in some new settings for the cart and did some testing both locally and live. Pushed new pages to all servers.

After Eric and I got done, I went in and added some notes and images for earlier meetings today. Here is link to some fun dashboard ideas and concepts.

Web link - time_web_gallery.cfm?corp=748&id=6368 - dashboard overview mock-ups



Adi
1789



User report for
CC

5/19/2020

As of 5/25/2020: Holding off on this project for now due to funding.

Adding 4 columns to payee permissions report: corp id, email address, status, and last log in date and time.

Web link - reports_payee_permissions.cfm



Shop
6372



Working with
Shannon

6/16/2020

Shannon and I did a session on the presentation gallery outline and doing some clean-up and formatting. Certain sections we will leave very basic and others will be more in depth. Trying to get a grasp of things without making it tooooooo big... (easy to do). See attached for our progress.

Web link - help.cfm?id=483&pwd=building - help file for world building concepts



Shop
6375



Working with
Shannon

6/23/2020

Shannon and I had a good session and talked about where we are going next. We've been working on the presentation gallery for weeks and months now. We are getting close to finishing that up, at least for this round. We determined that we will start planning and preparing for an important project for us called "fracture". This is the next level we want to take adilas to. It included concepts like: 3D building blocks, world building, data assembly lines, beautiful and configurable user interfaces, permissions & settings, and dynamic paring. Super cool stuff.

See the bottom of the attached document for some of our concepting and brainstorming. We want to present the vision of where we are headed. We want to start tapping into the raw potential of what we are doing. The potential of what we are working on is far greater than all of the code and pieces put together to date. The sum of the whole and where that could go... It's good, I want more... Good stuff.

Web link - help.cfm?id=483&pwd=building - help file that talks about world building concepts



Adi
1816

Elavon Payment
Solution 6/25/2020

As of 4/12/21: 4338.45 + 1000 from Brandon?

paid 2600 +1500= \$4100 so far. Will need to bill again by the end

10/27/2020: Bryan needs to spend no more than 2 hours looking into this project. Dig around and make sure this is correct. Make a scratch file- does this work? If so, then Bryan will meet with Brandon to move forward. *May need hardware to complete.

10/19/20: \$200 spent by Bryan. \$300 by Alan. \$200 by Cory= \$700 total (on the wrong project)

?

9/24/2020: New merchant processing. Starting piece and database piece.

***Please make sure you look at their documentation. You should start with a blank scratch page so you can build this thing to connect to the gateway. This is the first milestone. Please get sign off with Brandon before moving on with the project. If you have any questions, please get with Brandon before starting.

Merchant types is the name of the table.

Name it, create a path, where do we go to get their gateway? This usually holds some sort of url path they provide in their documentation.

Web link - developer.elavon.com

Database update needs to be done for this script.

Did a similar one here: [update_20140311.cfm](#) (this was for paypal)

Not running like 3rd party solution. Run it like a normal merchant processor.

The next portion is the admin portion- called merchant account settings. Here is url where this starts:

Web link - [merchant_home.cfm](#) - where it starts or we do a new assignments

The next page requires a password to get into (you may have been here before):

Web link - [add_edit_merchant_accounts.cfm?mode=add&id=new&corp=0&name=new](#) - requires a password

Text Brandon if you need it.

Web link - [help.cfm?id=347&pwd=merchant](#) - need to update this help file so admin users know how to proceed.

Then you need to test. You will need to change the parameters:

Web link - test_merchant_settings.cfm?id=67&corp=263&name=000%20Office - this is the account setup and test page... basically a quick ping. This link comes off of the merchant_home.cfm page

Go to these pages and search for USAePay per page. Use them as a handrail so you can see all the pages you need to touch.

shop/web_payments_action.cfm

shop/web_submit_cart_final_invoice.cfm

top_secret/cfc/cart_2.cfc

top_secret/cfc/Services/MerchantCustomerServices.cfc?? (not sure)

top_secret/cfc/Services/UsaepayService.cfc ?? (not sure)

top_secret/secure/add_cart_payment.cfm

top_secret/secure/add_payment.cfm

top_secret/secure/merchant_processing.cfm

top_secret/secure/process_payment_action.cfm

top_secret/secure/test_merchant_settings.cfm

top_secret/secure/view_transaction.cfm

top_secret/secure/void_prep_transaction.cfm

top_secret/secure/void_transaction.cfm

top_secret/secure/void_transaction_multi.cfm

6/25/2020: see quote for details



Shop
6500



Meeting with
Chuck

7/15/2020

Quick meeting with Chuck. He has been out doing other things for a while. Just getting back into the swing of things. Touching base on a number of projects. I sent him a copy of the presentation gallery outline. He is mostly working with Russell, Marisa, and small projects for me.

After we finished, I worked on converting the presentation gallery outline into a PDF to put it on the web.

Web link - adilas_presentation_gallery.pdf - presentation gallery outline flyer

We also added a link to the online glossary to help other users.

Web link - time_web_gallery.cfm?corp=371&id=4030 - online glossary link



Adi
1842



Condition no
purchase page
for Snow Owl

7/30/2020

Assigned to John Maestas with guidance from Dustin:
7/30/2020: This page needs to be conditioned: Finding
patients who have not been in 90 days

Web link - no_purchase_report.cfm

This is the guide for what it should look like: Web link -
sales_parts_by_weight.cfm

?



Adi
1845

EMV Chip
Integration

8/5/2020

As of 4/13/21: \$13,709.90

As of 2/26/21: Eric wrote the code and it is in code review by Alan. Should be finished with review this week. Then back to Eric for testing.

8/25/2020: As of today, chip reader is en route to Alan's so he will have that for setup and testing.

Alan asked to add this link to the project:

Web link - docs.paymentengine.io

Sent from the client:

Here is the link to Usaepay developers sandbox system login info. Hope it helps you. Are you using java script to call API?

Please call me @ 303-506-7088 I will explain you in detail.

Web link - help.usaepay.info

Developer Portal Web link - sandbox.usaepay.com

User name : highlandvineyards@yahoo.com

Password : Highland1234

Usaepay Sandbox

Web link - sandbox.usaepay.com

User name : highlandvinyards

Password : Highland1234

Generating an API key:

1. Click on settings
2. Click on API keys
3. Click on +Add API Key
4. Provide a name
5. Provide a Pin (if required)
6. Click on Save

The sandbox server is a complete replica of the production environment with a few exceptions:

It is self-contained and will not send any data to outside processing platforms (Visa, MC, or any banks). Charging a "live" credit card will not result in a charge showing up on the cardholder's bill.

While "live" credit cards will work on the sandbox server, it is recommended that you use the test card numbers. A list of testcards can be found in the developer's center. The sandbox is designed for testing functionality, and is not a load testing environment. Transaction throughput is intentionally throttled.

The transaction database is cleared every few months.

Direct any questions regarding the sandbox to sandbox@usaepay.com

Here is a link to our developer center: Web link - sandbox.usaepay.com - SOAP WSDL's and REST Endpoints are generated here.

Please don't hesitate to reach out if you need assistance. Here is a link to our developer page: [Web link - help.usaepay.info](http://help.usaepay.info) for examples and to help you get started.

8/5/2020: The second project was the EMV chip integration project. This project got to the point of where I got the go ahead to order the card reader and then they pulled me off because they weren't getting many people asking for it, so it has been sitting for over a year now. Still no card reader and zero development has been done. As far as project timeline goes, once I have a card reader and test card, it shouldn't take too long. Typically there are 3 stages:

1. Get the card reader setup - biggest unknown. Should be quick, but some of the other integrations I did took close to 50 hrs to figure out what the heck was wrong with the card reader connecting to their software. My guess and hope would be an hr or 2.
2. API integration - my guess would be \$500-\$750 (10-15 hrs).
3. Certification - we will have to go through a series of tests with USAePay to verify what we sent and got back from them is the same which usually takes a couple hours.

So I would say it would fall in the range of 13 - 20 hrs to complete the project, but in my experience these integrations tend to take a little longer because it usually take a day or 2 to get responses back from the merchant provider and then several days if they have to send new cards/hardware.

If things super smooth and we have no issues it wouldn't surprise me if it was done in 8 hrs, but I have yet to experience that :)



Adi
1850

Sub barcode

8/12/2020

8/12/2020: Need to add the 'auto' to the code so when a new sub id is created in production, the sub barcode is auto-populated.

Web link - custom/cannabis_package_build.cfm



Adi
1851



Montana METRC Patient 8/13/2020

8/13/2020: Handle this through the gram controller. It will make a call to METRC once the patient is added to the cart. It would be about 15 hours (\$1500). Adilas is willing to pay for this once you land an account in Montana.

Here is the link to the look up (GET) and below the values returned

Web link - metrc.com

“ As I have been speaking with Montana Providers, a few of them have mentioned that Montana requires the Dispensary to check the Patient's Total Monthly purchases, from all Montana Caregivers, prior to completing the current sale. Is this something that could easily be set up in the METRC API, or is this something that would require some additional coding? Obviously, an API call would have to be made to METRC, before the current transaction begins, to verify that the Patient hasn't already hit their monthly limit. After seeing some of the behind the scenes coding, I'm sure that this could be implemented on our end, but I'm wondering if the same communication issues with METRC would still apply, and hold things up. One of the prospects told me that they physically call METRC, before each sale, to check monthly limits. I would like to be able to give a more solid answer, the next time that I'm asked about this functionality. Thank you!



Adi
1854



Redirect of inventory in transit to an item search 8/18/2020

8/18/2020: Currently this look up is the same as the others for transition invoice- it takes you to the invoices. It would be much more useful to see a list of actual inventory in transition instead of another look at the invoices. This will help for live inventory counts.

Assets - Current Assets - Inventory
In Transit on Transition Invoice(s) (5)
\$96.38
[view/look up]

Web link - balance_sheet_qti_invoices.cfm



Adi
1859



The datasource
project and
splitting up the
databases

8/24/2020

8/24/2020: The datasource project and splitting up the databases – help with load balancing. 50-100 hrs. It could be more like 1,000 hours. Somewhat unknown.

This project is also known as the bus to motorcycle project, world building, or the datasource project.

Web link - time_web_gallery.cfm?corp=748&id=6726 - This is a list of 3 of the big projects that need to be done before we can get into database clustering and data server (web server) clustering.



Adi
1860



The image and
media/content
storage paths
and actual asset
storage locations

8/24/2020

8/24/2020: The image and media/content storage paths and actual asset storage locations. 50-100 hrs. We don't really know. It could take up to 10 times longer or closer to 1,000 hours. We know that we have 12 photo galleries, close to 40 servers, a number of custom pdf and csv storage options, as well as logos, watermarks, and other custom content that is not part of the master and user controlled.

Need more of a plan on this one.

Web link - time_web_gallery.cfm?corp=748&id=6726



Shop
6654



Meeting with
Chuck

9/2/2020

Chuck and I met and chatted for about an hour. We covered a bunch of different topics. No special order, but here were a few of the topics:

- Decisions of a leader to get out of the way to let things happen in a better manner. Sometimes that is hard.

- Report on WanderWays (camp adilas) project - see the screenshots and this link for more info: [Web link - Adobe XD file](#)

- Report on the adilas docs (internal how to manuals and style guides for developers and designers). See these links for more info: [Web link - adilas-docs-home.html](#) and [Web link - core-components.html](#)

- Full stack developers vs small teams and virtual departments to get the job done.

- We also talked about cannabis vs other business verticals. There are many of us who would like to explore other options and business verticals. WanderWays is a venture into one of those realms.



Shop
6681



Projects

9/22/2020

Emails and working on a fix for the photo upload API socket. Added in the outbound photo name and special corp-specific path name. Pushed up some new files.

I got a link from Cory dealing with Flash and end of life stuff. Soooo sad! I really liked Flash. Web link - upsidelearning.com

I got this link from Chuck - dealing with the adilas docs. Some new updates.

Web link - [adilas-docs-home.html](#)



Shop
6945



Templates

10/5/2020

Meeting with some of the guys to go over new needs for the gun company and what they are calling templates. Basically, paperwork and processes that they need. Here is a link from Chuck with a couple quick concepts and ideas.

Web link - Adobe XD file - couple of pages for concepting flow

Other notes may be found by looking here ([time_web_gallery.cfm?corp=22&id=1880](#)) - look at the sub notes on this other entry.





Shop
6977



Brandon and
Cory short video
for flash to html

11/3/2020

This meeting didn't happen. Cory and I were going to record a video for my cart favorites and the flash buttons. Instead, Sean, Steve, and Cory were talking about sales and the needs to be able to sell in bulk, including items that are not yet in inventory, and still keeping the inventory tight and manageable. That is a challenge. Steve was showing Cory and Sean a demo on his orders homepage (orders is another word or alias for quotes).

If you think of quotes, you may get hung up on the name. If you think of it as a tool and are able to name it whatever... it becomes more clear what is going on. Basically, they have clients who are requesting products and inventory. They want to keep track of the orders and/or virtual requests but don't want them (the orders) to affect inventory until they are ready to be shipped and sent out. There are also all kinds of backorder type needs. A quote, or a non inventory invoice of sorts, is the perfect tool. It just needs a little tweaking and it could be the order process. We could then track the fulfillment of those orders as they become real invoices.

Currently, one quote can have one invoice as a built-in relationship. We are seeing the need to expand and/or extend that relationship from a one-to-one to a one-to-many, meaning one order (quote) could be filled with multiple invoices. The difference between what is ordered and what is fulfilled, becomes the backorders or what is still wanted.

As part of our conversation, we also talked briefly about a possible elevator pitch for sales and marketing. Here is the brief pitch - High-end software as a service (SaaS). Anything dealing with operations and accounting. We use a standard product and then allow for custom on top of that. Click here to see more info on the elevator pitch (30 second intro into adilas.biz).

Web link - time_web_gallery.cfm?corp=748&id=7089 - elevator pitch for adilas - ideas and concepts



Going over option for inserting meta data in key pages. Danny was heading up a discussion about SEO (search engine optimization) with John M and myself. I was taking notes and the other guys were commenting and providing ideas and info. We started out with intellectual property and went from there. Here are the basic notes.

- IP - intellectual property - natural flood - you can't copyright or trademark or patent things that already exists... if we flood the area with prior art, that effectively prevents others from claiming things as their own intellectual property. Fun discussion about where we are headed. We are sharing to protect ourselves.

- SEO - buzz word - science and art of making things show up for searches and on search engines



- Seen and unseen - matching SEO content with real natural content - light talks about the history (good and bad) of SEO

- Marketing and getting a new website for adilas - we really want to get a good plan in place and then follow that plan - up until now, it has been a very natural progression that just sort of happens. We want to be more specific and deliberate on our efforts, messages, and marketing. It is time.

- We have a bunch of different levels - main website, secured content (SEO not needed - due to login and permissions), shop (ecommerce - a little bit more tricky), web/API sockets, and other pages and documentation.

- Web content - they virtually and really score your site based on responsive design (mobile ready), same domain name (traffic and visits), amount of time on that domain (frequency and length of time on certain sites), reciprocal links (who links to who), matching content (good natural content), etc. Going over the basics.

- Meta data - key words, buzz words, include photos and videos with built-in meta data

- Sometimes it is the little itty bitty things that help - small things but a lot of small things really start adding up - almost like a virtual score sheet

- We don't want to do anything that is sketchy... off canvas text, hidden things, tags and random content, etc. Play well and be honest.

- We want a main landing page and home base that deals with what adilas is and does (as a whole). This is not industry specific, but who and what are we.

- Animated story lines and time lines

- Some other links - see chat - elevator sales pitch, presentation gallery, outline, chuck's new sales tools, etc.

Web link - [adilas_formula.pdf](#) - adilas formula

Web link - [time_web_gallery.cfm?corp=748&id=7089](#) - elevator pitch

Web link - [adilas_presentation_gallery.pdf](#) - presentation gallery outline

Web link - [time_web_gallery.cfm?corp=748&id=6914](#) - internal questionnaire summaries (sill working on this - progress)

- Put Danny in charge of the team - pick a team, get a plan in place, set a budget, and help to roll things out.

- What do we want to sell and pitch? Up to this point, we have been pretty off the hip... we need a strategic plan as we go forward. It is time.



Adi
1895



Fix Charts report in quick sales reports 11/23/2020

12/21/2020: Project finished- added 8 more hours



12/2/2020: As of today, JM= 14.47 hours

11/23/2020: Fix charts so the items show. From classic home go to reports, then reports homepage, then under sales, then category 1st.

Web link - [custom/quick_sales_reports.cfm](#)

Go to this page and see what it's doing. Do some research on what you can do with cf charts. When this was built, it limited what you can show. Maybe now they allow you to show more. There was an option to have a rollover, or a legend so you could look below and see the details of the columns.

Then zip code: Also look at the zip code report: Web link - [custom/sales_reports_zip_code_graph.cfm](#)
Notice the rollover ability.

If you can't get it figured out with cf charts (native to native) then you can look into js charts: <https://www.chartjs.org/>



Adi
1896

SEO Optimization 11/25/2020

**Total for everyone 12/3/20 to 4/14/21: \$13,837.34

3/18/21: 4.92

2/23/21: 2.83

12/21/2020: JM hours as of today: 10.31

11/25/2020:

Brandon and Steve have asked me to head up a project to work on our SEO optimization. To start with, John Maestos and Marisa Shaw will be assisting me. I am sure there will be others once we get things rolling. Could you please start an element of time id for me to use to track billing, expense, and progress of this project?



11/27/2020

At this point Marisa and John have agreed to help with this project. We are in the investigative process of determining who else should be a part of this and forming a plan of action. Danny will head the project and while I would like to have as much involvement and input as possible; I don't want to stretch resources. I would much prefer to keep the core team small then reaching out to other key members defined as a consultant committee to give feedback and direction to the core team. Those who I would like to ask to be part of the consultant team would include (yet not limited to): Brandon, Russell, Steve, Sean, Cory, Shari, and Charles.

We will keep notes in Google Docs at the following url:

Web link - Google Doc

12/2/20: As of today, 4.65 hours for JM



Adi
1901

Surface salesperson in two reports

12/7/2020

12/7/2020: Expose salesperson on 2 reports.

need the employee who made the invoice to appear on the invoice line item export and normal line item search. A field was added on the search but not exposed on the export. This is very important. This will need to be present on the advanced line item searches and super line item searches.

Web link - [advanced_invoice_line_results.cfm](#)

Web link - [super_invoice_line_results.cfm](#)



Adi
1905



Bug-Fixing Error-
Cleanup

12/9/2020

11/11/25: Bug in the snow owl database search. Even if there are more than 50 records, only 50 records display.

Needs to be fixed: Web link -
custom/metrc_dispensary_homepage_new.cfm

Fixed: This page is an example of it not working: Web link -
deposit_home.cfm

This is a page where it works: Web link -
receipt_home.cfm

As of 3/1:12.33

10/18: 2.37

10/7/21:JM: 59.57

12/9/2020: Project id for John M and Wayne



Shop
7217



Project #1909 -
Payroll Updates

12/16/2020

Working with John and going over a payroll overview. We ended up spending a bunch of time looking at time cards and how those play into the mix. See attached for a video recording of most of our session. We kept going after we stopped recording, but it will give you the flavor, if you want to see what we were saying.

Web link - time_web_gallery.cfm?corp=748&id=2042 - link to a page with tons of notes about payroll, timecards (time cards), other smaller mini project pieces. Basically, a small core of a project that could be connected to and/or linked into the rest of the adilas system. Possible starting place or core.



Adi
1924



Payables look
back with snow
owl data table

1/15/2021

1/15/21: Reviewed all the moving parts in this project. Important to capture aging. Web link -
balance_sheet_accounts_payable.cfm



Adi
1997



AWH- Azure SSO

3/12/2021

3/12/21: Sent a quote yesterday for 40 hours- could be as many as 50.

Does Adilas integrate with Azure Active Directory (i.e. SSO)?

We need to be able to automate provisioning the users. Here is some high level info on SSO & SAML. Thanks!

Web link 1 - azure.microsoft.com

Web link 2 - docs.microsoft.com

Web link 3 - docs.microsoft.com



Shop
7490



Adilas Time

3/16/2021

Quick merge for Danny and some new custom labels for Highland Vineyard. Steve and I then rolled into some talks about sub inventory and trying to help to speed things up through queries, logic, and database storage values. We would love to rework the po/invoice line items table and the custom dates, custom text, and custom numerics tables. They all could use a few more values to help better connect them. Currently, they are connected, but only through a series of virtual bounces and upward threads. We would like to make it more clear and more easy to get the data back out again. Here is some info that may help with this project: [Web link - time_web_gallery.cfm?corp=748&id=4848](http://Web%20link%20-%20time_web_gallery.cfm?corp=748&id=4848)

After that discussion, we got into other ways of speeding up the cultivation process. A lot of the ways we can speed things up is dealing with how much data we return and/or try to render out to the user, once they have completed a specific step. Eventually we will need to go clear back to the design and mock-up phase and/or stage. Simple drawings for what we want and then go build the dream. Right now, we just keep coding and fixing, coding and fixing. That helps to figure out the process, but it will definitely need a facelift at some time, in order to make it more efficient.



Shop
7542



Meeting with an
outside software
engineer

3/31/2021

Meet with Steve McNew via GoToMeeting. Steve M. lives in Colorado and is a retired software engineer and project manager for US Air Force level project and contracts. He is going to be helping Steve Berkenkotter (normal Steve) and I out with taking things to the next level.

Brandon (myself) has a seven page document that goes over a bunch of questions and ideas that Steve M. was proposing and pitching. Much of the meeting today was going over that document. Here are some of my other notes:

- Pull in some nuggets from other places
- Base line assessment – top down and bottom up
- Finding the low-cost solutions and putting those pieces in to play
- We do have a place for the docs to land and be housed – docs, reports, standards, forms, checklists, letters, updates, etc.
- Steve M. has some possible samples – may need to be sanitized (from other projects and other clients)
- Capture some of the proof of concepts, prototyping, risks/approaching, telling the story, R&D – we already do tons of this... maybe bring it more into the forefront of what we are doing and even marketing
- Model based engineering
- Throw a few things around and see what fits
- Connecting the dots – lots of existing pieces, let's just start connecting the dots
- As we connect these dots – how can we turn this into marketing?
- Some migration stories – where are we headed, where were we, and where are we now?
- Layering the big picture
- Trade studies – why do you do what you do? Prove it and/or show the reasons
- Finding our own mix of methodologies
- Steve M. will throw things at us and we'll judge and respond
- Letting some of the things rise to the surface and even showcase things

The following are a few URL's (web pages) that we used while talking. Some fun things:

Web link - adilas content - word doc - starting of a plan for our company

Web link - help.cfm?id=393&pwd=map - help file and diagram of the interactive map - inside look at adilas

Web link - help.cfm?id=479&pwd=core - help file and diagram of the core interface and world building concepts

Web link - adilas content - excel file - versions of adilas

?



Shop
8232



Internal adilas
meeting - part of
the June training
conference

6/11/2021

On Friday, June 11th, 2021 we had an internal conference day for just the adilas team. We went from sales to internal code to ideas and plans. All over the place. See attached for my notes. Many great things were discusses. Once again, this was an internal team meeting, but we don't mind sharing what we were talking about. :)

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The attached notes are better formatted, but I wanted to push some of them here for searchability:

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Group Sales Meeting

Marisa, Danny, John, Cory, Sean, Steve, Dustin, Shari O., Dawn, Brendan, Steve (mac), Brandon, Chuck, Alan, Kelly, Bryan

- Kelly was saying that there is some public records per states
- We may try to pull our own list
- Questions... who, what, where, how good, etc.
- Maybe look at a sample of 10
- We may need a more focuses approach
- What about different industries?
- We need to get the name out there
- Kelly was pitching a social presence
- Do we know anybody who wants to do the social stuff
- Word of mouth
- Testimonials
- Some new video graphics
- To the penny, to the gram, every day
- What about small streaming commercials – focused and pointed
- Kelly recommends that we maybe focus on a slightly larger pool
- Dawn – maybe focus on start-ups or that small to medium range
- Get them at the beginning – maybe even tradeshow
- It is a pain in the but to switch over – pain creates options for change
- Focus on services... deployment, oversight, consulting, training, best practices

- How can we deploy something easily and repeatable?
- It is tough to get some of the people started, but once they get all in, they tend to stay
- Kelly has done this over and over again
- Using the professional resources that are available
- From Kelly – Help get the clients all the way in – full system and platform
- Getting the success on the first implementation and then building from there
- What about focusing on those who are having trouble and/or are struggling ?
- Dawn loves the support, training, and feel good part of it – duplicate that feeling to others
- How quick can we respond – we jump pretty quickly on custom needs, development, training, and support
- Get more testimonials from our clients
- We have some experience to offer to those who want it
- What about pitching best business practices
- It's ok to be non-traditional
- Being Relevant!
- Focus on helping over sales – from Steve (mac)
- Simple things that bring the relevant pieces
- Social webbing – group effort
- Danny, straight up, I don't want to be the social media guy! We have to find the right person and/or persons (small little team)
- We are not QuickBooks... what does that mean? Be our own style!
- Packaging this platform based on the target audience
- Formulating a plan – ease the lift – maybe a monthly meeting with some planning
- Influencers and YouTube options
- Small info tips...
- New age marketing – we have to play to the current market
- Big Dumb Animal Pictures – super simple
- We have to do a cost analysis to see which one(s) make more sense for us

- John, what if we setup our own little social piece (aka maybe the adilas cafe) – we could allow all of our users and power users to pitch and promote – we may need to approve things, but we have tons of very knowledgeable people and users

- We are looking for engagement – back and forth – a relationship – maybe get an intern to help handle this

- Danny – Switching over to the modal message marketing

- How to save the app to your phone

- Make the email piece better

?

- Small web tool to help with building special html links to embed promotions, direct add to cart, discounts, campaigns, etc. A simple form to help with the backend tech of those URL's and web links.

- Maybe, we need to upgrade our email platform. It is a small holdover from years gone by.

- What about the delay on the outbound emails?

- Marisa – maybe outsource things as needed

- Steve – would like more input on the bulk tools

- Better filtering and target marketing

- Steve wants to work direct with Dawn and Branden

- Matrix and target marketing – even predictive

- Maybe a little itty bitty (super small) native app on the different phones – iOS, Android, etc.

- Steve wants to get into possible predictive marketing

- Steve – looking for great feedback and even ideas and dreams...

- Archiving, saving for later, dismissing, etc. We have the data, what do we want to do with it? – Wet clay...

- Danny – Going back to past clients

- Version 1 vs Version 2 – type attitude

- What kind of clients do we want? We may not want certain kind of clients.

- We love people who like details and are willing to play

- We love people who take things to the fullest level

- We love people who just need a small little piece – there is a gap in their current model and they need some help. We can then grow from there.

- Do a full comparison of what we offer

- Pitch what we do differently – we help deploy and maintain your ERP
- White glove approach
- Playing with the tools that we have and flipping those into marketing messages
- Chuck – maybe check out some groups on Facebook
- Blog posts, articles, info snippets, quick videos
- Talking with Kelly – how have we helped small businesses become bigger or big business – showing the potential – dreams to reality
- The small goals to achieve – steps to get to the next level
- Small goals lead to bigger goals – getting some small successes along the way
- Clients and expectations – not all money is the same – budgeting and planning – what kind of client do we want
- Reoccurring revenue vs one-time revenue
- A quote is just one of many pieces that needs to be done
- People, skills, and cogs in the wheel
- We all care... where would you and your skills fit in best
- Seeing the bigger picture
- Maybe looking at personalities and figuring out the mixing and blending of our options and resources
- Slowing down and taking the time to see where we are at? Virtual time travel – child, youth, adult – as a company
- What's the difference between a goal and dream? A plan!



- The internal group summary that we did... a great start

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Second session - Servers & Infrastructure - Refining Our Processes - Tech Support & Training - Project Management

Steve wants us to show the online label builder

- We had some good talk about where we want to go
- We pointed to our internal summary report
- Steve McNew – helping with the strategic marketing plan, technology road map, timelines to position, plans for action
- Scale – can we grow and can we shrink

- Conversation between big and small – perspective – big and small (sales, number of team members, lines of code, etc.)
- Molly – Is adilas the big guy or the small guy? Think of code (lines of code). We could be considered a big guy if you were looking at code and functionality.
- We like being small (ish), but what if we are big already
- If we want to grow, that means that we want to get better – grow in a good manner and sustainable manner
- The underlying services that support the whole
- Be your own style!
- Steve McNew – old classmate with Steve Berkenkotter – guest speaker – part of the adilas team to help us get some things more standardized – processes and procedures
- Defense contractor for the military – 28 years
- Testing, software, management, auditor
- He has already called, interviewed, and talked with a number of different team members
- He did a 20 page audit and report on what he was seeing
- Getting into some testing and processes – he would like to see more of this
- Not trying to derail the train – we are trying to polish the Ferrari (spelling – awesome car)
- Whitepapers – catering to a higher audience – going beyond stick figures and into technical docs – not everybody will want to read some of these, but there will be some that require it
- Steve B – if we try to sell our product to those who can't afford it, it doesn't really work. They have to be able to pay for what we do (really do – billing for our time and efforts)
- Fin-tech – financial technology
- Using whitepapers as part of our marketing plan
- John M – unit testing – confidence of the developer team – currently only Wayne and Alan are doing this (unit testing)
- Going to ease into this – refining our testing plan
- Version control and when do we update these systems? The older way was wild west... we may want to figure out some specific micro builds.
- It would be nice to keep track of the versions and options.

?

- The balance between core and custom development
- The application needs some spring cleaning – what is being used, what isn't, what is going slow, etc. – Refactoring
- Priorities – customer priorities or our internal priorities – what is the mix and blend of these pieces
- We all wear many hats... we may need to define that so that we don't overstretch ourselves
- We all use (and can use) the system in different ways – how do we translate that information to our clients, other developers, and other team members (upstream and downstream) ?
- 2 minute videos – no more
- Work instructions – even giving it to someone who has never done anything in the system
- Danny – Shoutout to Steve and Brandon – we have done great – what is coming next? Resources?
- Talks about earn and burn ratios
- Prices have to match the services
- We are a growing business
- Kelly – going from 1.5 to 10 (millions) – that is a huge change
- We are competing with companies that are hugely funded... what do we want to do?
- There are some real things in our path – there is tons of potential – what do we want to do with it – also, sometimes there is shelf life on potential or advantages
- We don't want debt – however, there is a time for debt – cost analysis and being smart about it
- Making choices, but also being willing to fail
- Marisa – look at our new website
- Steve – there are some percentages of adilas that are available – not looking for vulture capital (just being silly – vulture vs venture)
- Someone looking to take on some risk but helping us to get to the next level, without taking over the company
- Kelly – pitching our vision and business plan – we have to define the vision – Danny seconded the define the vision before looking for the funding – goals, sales, budgeting, maintenance, and getting a business plan.
- Adilas Trust option – co-founders
- Possible option – Maybe take some of IP (intellectual property) and sell that to a new entity and then restructure those new pieces

- Dustin – thoughts on corporate structure – we are all on our own little islands – Ferrari to a tricycle – frontend compared to backend – splitting up those pieces and functions – he wishes that we could be more collaborated.

- John – teams and buddy projects – small sub teams – full stack (all levels) vs specific skills or somewhat limited skills – this needs to be part of our plan.

- Sean – we already have some small teams that are working on some of these projects – cogs of the wheel – buddy tagging the workflow and processes

- John – the adilas docs project – and being able to go to it and also add to it – working on standardizing the pieces – filling in the gaps

- Danny – Navy Seals – two is one, and one is none – at least two on a project – two-by-two

- Kelly – scale – having a back-up

- Danny – accountability back and forth

- John – confidence levels

- Kelly – what about a succession plan?

- John and Dustin – real life buddies and how they help out each other – seeing a different angle or perspective

- Marisa – tooooooo much weight gets put on single persons

- Kelly – relieving pressure and helping with scale

- Marisa – Cory, Kelly, and Marisa – wonderful training slides, presentation, and delivery for the conference. Awesome job!

- Alan – modularize things – able to be reused – code concepts can relate to business functions – one to many relationships – translating knowledge into real life and different scenarios

- Chuck – last summer Chuck was on a joint project with he, Russell, and a different John. It worked out awesome – Keep pushing towards that kind of rollout of the project


- Molly – thinking and coming up with ideas. Keep it going!

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Next Session - Deployment & Oversight - Design & Layout
- Internal Core Development - Custom Development

- Deployment – where are we going and how can we make this all work – team effort

- Shari O. – first touch and setup corp, Sean and Shay first hour or so, Sean helping to coordinate the next steps and pieces

- Sean does a great job of reporting back
- Report on things, record the notes, get back with us to help us keep pushing
- Doing great with testing and prototyping
- Kelly – who is on settings, who is on planning, maybe even looking at pre-deployment options
- Before Kelly even does a demo, do some consultation – figure some things out without doing any pitching or selling. This is called listening.
- What are you looking for, wanting, expecting, hoping for? 
- Make the demos custom to the pain points or key wants and needs
- The prep work is huge to help them be successful
- This platform is not a turn on and go type system – there may be pre demo, consulting, custom planning and demo, then custom hand holding to get them going down the road
- Picking the point of contact... who is going to own this thing?
- Owners, managers, and users
- Users want the easy button – Steve calls this the tail wagging the dog vs the dog wagging the tail – what is and how can we get buy in?
- Tools are great, but solutions to problems and pain points are even better
- Give to get! If you give too much, it can get you into trouble.
- What is the cost to fixing things... on the other hand, failing does help with major learning – there has to be a balance
- We tend to remember pain – setting people up for success
- Often users are looking for a quick switch. This system takes work. Please sell it that way.
- Not going to custom too quickly – learning the manual way – then automating it
- User buy in – light pain and then helping them learn a better way
- Change proposals and scope of work – setting up boundaries
- Feature creep – setting that scope of work – cause and effect of what they want and what they give – expectations and timelines

- Sometimes I start with NO – interesting
- A saying no - sandwich... Yes, I'd like to, no, I can't. Yes, I would love to help do this... - people think that no is a bad word
- Having a plan to say yes, vs just saying yes
- We like to please people – that is awesome – what does that cost?
- Help make the plan to say yes. Maybe, no (first), however we could do this...
- Making things repeatable
- What are the internal costs to do deployment?
- Say \$350 for a setup fee – does that cover it? If yes, great. If no, where does that put us?
- Maybe on the setup, prep, an activation fee (define this – turning on the lights), setup and deployment fee (range), training, custom code, imports, labels, etc.
- We like to cater to everyone – that had bitten us
- Actual prices and then use discounts if needed. You can't really ever raise a price after the fact.
- Back-up our prices
- Use adilas to run adilas!!! This is our communication tool, let's use it.
- We are good at the dreaming and software building part of things, we need some major loving on the service side
- There is demand!
- What pulls at our time - It is time, money, skills, etc.
- Kelly – earn has to be more than burn
- Flipping the demand to sales or services that could be provided
- MVP – minimal viable product, plan, player, etc.
- Intangibles



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Next Session – Show and tell! What are you working on?

Calvin – Advanced file and folder finder, resize images, convert images

Brandon – harvesting assets from element of time

Steve – parent attributes report, items not on a recipe (manufacturing), modal message marketing for customers, log notes for vendors and employees

(payee/vendor logs), backorders homepage, mini units, auto add item (quick PO behind the scenes), bulk update on the vendor – master copy paster... :)

- Branch 122 – fun

Bryan – cfqueryparams – stop SQL XSS (database hacks – cross site scripting) - SQL injection – converting from dynamic queries to secure dynamic queries - Example: Corp_id = #Trim(some form or URL var)# or Corp_id = <cfqueryparam etc, etc,> - this stops the SQL hacks

Bryan is also working on eChecks for eXPO, Hypur checkout in the shopping cart (eComm), new API's for delivery (with documentation and samples)

?

John – Payroll project to allow holiday date picking, timecard flags, timecard totals (pre summing the math to go faster and lead towards bulk payroll), new timecard reports showing grouped sums and totals.

Page templates and style guide defaults with Chuck – Going from old school tables and links to the newer grid and mobile ready code. Part of the adilas docs project. Build once, use many (effective copy and paste). Basic templates (3 new ones). New information icons and popups (modals). Style guides and usage of those pieces.

Servers with Wayne

Chuck – Huge new web site!!! Awesome Job!!!

Global Design Dashboard, adilas docs, and new presentation gallery (sales tool).

Danny – message marketing, custom labels, sales team meetings – hats off to all of us! Keep listening and keep finding solutions. Open table – follow your highest excitement and be yourself! Be happy!

Alan – enterprise level catalogs, refactoring code (custom page settings), standardizing code for speed and reliability.

Random comments – Cory really liked having access to all of the team members, right here at the conference.

Marisa – great to meet everyone – keep floating the boat. Sean – he likes the team. Molly – loved watching and wants to be involved. Chuck – idea of everyone joining slack



Shop
7919



Adilas Time

7/21/2021

Emails and reviewing some of the outlines that Sean was working on. Watched a number YouTube videos from Marisa and Danny (adilas YouTube channel). Here is the link to the YouTube channel that they are working on. They are hoping to add to it.

Web link - New YouTube Channel - new adilas channel

Web link - Adilas YouTube Videos - older adilas channel (100's of videos)



Shop
8037



Adilas Time

8/31/2021

Emails and small bug fixes (misspellings). Eric checked in and had some questions about the new expense types that he is making and creating for his sales tax aggregate project. As we were talking, I had to tell Eric that his job is not to make things match, within the system, but that his job was more along the lines of "read them and weep" type numbers (what they really are). It's funny that I had the very same conversation with Steve back in 2008 and 2009. I wanted to make things balance and Steve just wanted me to show what was real and what was in the system. The balancing comes later, by user input, not by a heavy code hand (virtually). Interesting.

Steve and the guys were going over sales and trying to fill our client's needs. That's what we try to do, fill our client's needs. ?

I spent some time clicking through the presentation gallery that Chuck put up. This was my first time to really click through and play around. So many fun pictures, small verbiage sets, and great flow. I really liked it. I was showing some of the guys on the meeting what I was finding out. This is funny, but I was pitching the adilas guys on adilas - internal pitching.

I replaced the temporary landing page with the real one. This is the correct web address for the page (modified as of 10/5/21).

Web link - [adilas-advert-index.html](#) - live presentation gallery or sales gallery page



Shop
8160



Projects

9/7/2021

Recording notes from the June adilas training event and training conference - a little bit behind (only three months - no big deal). See these elements of time for details. Lots of good stuff.

Web link - [time_web_gallery.cfm?corp=748&id=7765](#) - Overview of the adilas training conference with some user requests for tweaks and changes - additional notes attached

Web link - [time_web_gallery.cfm?corp=748&id=8232](#) - Internal adilas team meeting - Friday - June 11th, 2021 - Sales, plans, ideas, shout outs, deep and probing questions for us a company and us a team - additional notes attached



Adi
2052



Revamp the Bear 100 mile race
and runner portal 9/8/2021

Revamp the Bear 100 runner portal - make it mobile friendly.

Currently this is the public runner portal -
<https://data0.adilas.biz/bear100/>

The runner portal allows users and persons watching their runners to monitor progress, add comments and notes, and upload photos. They can also see the whole race, check on aid stations, and view other comments and photos for other runners. We just want to make it look great and fun.

Here is a link to some screenshots of the old Bear 100 runner portal page - Web link - time_web_gallery.cfm?corp=748&id=8179



As a side note, Chuck may end up using this new race/event face lift as a springboard so that we could maybe do more events and races. Just trying to carve out a niche or specialty product.



Shop
8250



Work with
Shannon

10/26/2021

Work session with Shannon - going over some ideas and concepts for the origins papers - how did we come up with and/or discover the adilas core concepts. See attached for where we are working. As part of our conversation today, we were talking about chipping away at things, like an arrowhead, one chip at a time. Sometimes, that is the best we can do.

Towards the end, we were doing a little bit of research and I found a number of fun developer notebook entries from clear back to 2010. Here are a couple of them that we were briefly looking over.

Web link - time_web_gallery.cfm?corp=371&id=2774 - protecting the core concepts by sharing

Web link - time_web_gallery.cfm?corp=371&id=3681 - huge brainstorming session (from a training event) dealing with the core concepts

Web link - time_web_gallery.cfm?corp=371&id=2279 - brainstorming on core concepts

Web link - time_web_gallery.cfm?corp=371&id=2278 - some analogies about concepts

Web link - time_web_gallery.cfm?corp=371&id=3627 - trying to draw and illustrate some of the concepts

Anyways, a fun session and making progress. One little chip at a time (arrowhead analogy).



Shop
8438



check and push
code

11/3/2021

Meeting with Bryan to talk about tips and how to record and take them through the full process. Often tips are done via cash and not even part of the system. However, if credit card transactions are part of the mix, then we have to be able to handle tips and helping that money flow across all of the financials without leaving huge holes. We went through a number of different options and ways of doing it. I imagine that it will end up being a setting or series of settings as to how it runs through the system. We covered cash payouts, actually setting up individual tip jars per person (special accounts), negative receivables (credit), adding in a "tips" money type, showing a liability back out to the employees, etc. Lots of scenarios.

?

We were drawing on the screen using GoToMeeting drawing tools and also using a tool we call the financial flow calculator. We have a version inside the system and also built a free version outside of the secured environment. No data gets entered into the database, it is just a scratch or worksheet type calculator. Anyways, we used it to track the pieces through the P&L and the balance sheet. Lots of cause and effect relationships. This little tool is a great helper for those type of things.

Here is a link to the free - public version of the financial flow calculator. Great little training tool.

Web link - [financial_flow_calculator.cfm](#) - free financial flow calculator

Web link - [help.cfm?id=363&pwd=flow](#) - help file for the financial flow calculator



Shop
8806



CSS stuff for
Chuck -
Challenge

2/24/2022

Emails and making plans. Checked and prepped some CSS stuff for Chuck. I also made some small fixes for Cory. Anyways, getting back to the CSS stuff, I sent Chuck an email with a small challenge to see if we could update the existing classes to make them look more modern. Here is some of what I sent Chuck in an email.

Chuck,

Good afternoon. I'm just playing with some ideas... I've got a challenge for you. Back in the day we only had the classic version of the site. So, to get more options, I wanted to run a contest to see if anybody could come up with a new design. Russell came up with 5 new design options. They all look totally different but are based on the same raw HTML code. Only the CSS code changes. I'm wondering if we could make some bigger, global changes for snow owl so that we didn't have to rewrite every page. I'm thinking ROI and bang for the buck. Basically, can we make some global changes to the existing CSS that would make everything have a more up to date look. ?

Here is a link to a page that has some of the old stuff.

<https://data0.adilas.biz/css/index.cfm> - The page is totally static (fake data) and most of the buttons and links are just dummy links. Some of the buttons do work and interact with the pages. If you right click and view the page source, I have the rules for the game (old ones). The page is also inside of Git and Bit Bucket and part of our code repo, if you want to play around.

Anyways, I would be interested to see what this might look like for a generic snow owl theme. That currently doesn't exist on that page. I would be interested to see what it would look like and what improvements we could make globally vs page by page. Basically, tie into the cascade part of CSS. If you want more information, I could help.

Here is the help file for that page. It has links to all of the different versions that Russell setup. If you view them, scroll from top to bottom to see how they interact with all of the existing CSS. At the time, every known class was and/or is represented on the page. I would love to get some newer more modern look and feel pieces tied into the older classes that already exist inside the system. By way of a challenge, I'm just wondering if we used the older CSS classes and just updated that, what would it look like for the new snow owl theme.

Web link - [help.cfm?id=497&pwd=css](https://data0.adilas.biz/css/help.cfm?id=497&pwd=css)

Anyways, I'm interested in seeing what it might look like. Would you be up for the challenge? Just tossing around ideas... Thanks Chuck!



Shop
9027

eCommerce
images for items

5/16/2022

We had a client ask for some info on ecommerce images. This is what I wrote. Just recording it for the record.

Good morning. This is going to be good news for you... The images are under the top_secret folder but there is no way of protecting a .jpg file. We only protect the code and data files. Images are images, if that makes sense.

Each company has a different path or corporation folder. If I were you, I'd do an API call, get the path one time, and then store that folder name as part of that company's record. Here is a sample for two corps – 53 and 54

top_secret/images/corp53_5FC2B3D1C9

?

top_secret/images/corp54_22C0DEC894

As you can see, the last ten digits are a small hash (mini password) to help protect the images. If I were you, I'd figure that folder name out and just store that part of it. For example – for corp 53 – store this - corp53_5FC2B3D1C9.

Underneath that folder, there are the following other sub folders. thumb, small, and large. These are standard and exist for each corporation.

- The thumbnails are in the thumb folder – really small. 29x22 pixels – file name pattern is "part-[part id]-th.jpg" for example: part-55555-th.jpg
- The smaller images are in the small folder – little bit bigger – width is set to 160 pixels – height could be anything – file name pattern is "part-[part id]-[image number].jpg" for example: part-55555-1.jpg or part-55555-2.jpg, etc.
- The large images are in the large folder – biggest images that we store – width is usually between 640 (older files) and 760 (newer files) – height could be anything – file name pattern is the same as the small folder. Often people will just use these larger images out in ecommerce.

Here are a couple of sample paths for a large image:
Web link - corp53_5FC2B3D1C9/large/part-225406-1.jpg
Web link - corp53_5FC2B3D1C9/large/part-225406-2.jpg

Hopefully that helps you understand a little bit more about the images and where they are stored and the naming conventions.



Shop
9197



Up the character limit on searching for customers - while starting a new cart 7/21/2022

We had a request to up the max character count for the customer search - when creating a new invoice. I wrote back (to Michael Webber of McCorvey's) about the advanced search and the quick search. Those exist right now, maybe we could up the max to 10 or 12 and it would help out. Just a thought! We have had other requests to do the same thing. People feel limited by the 4 character limit.

Here is what I wrote in the email back to Michael:

Good afternoon. Thanks for the note and the request. Please see the attached image and screenshot. I added some notes to help you out. The answer may be a slight retraining of your guys and gals. There is an option, right? below the existing one, that has all of the power that you are requesting. You only fill out the info that you want, leave the rest blank. Both the simple and the advanced searched go to the exact same search results place.

Please try that out and see how that works. Another free option is to use the quick search. There is no limit using the quick search. The only thing that it can't do is blend first and last names. For example: You could totally search for "Webber" or "Michael" and it would find you. However, if you tried "Michael Webber" it won't be able to match that up with a database record because both Michael and Webber are stored in different database fields. I hope that make sense.

The quick search is super powerful and has tons of options that you may or may not know about. Here is a quick and simple help file with some tips and tricks for using the quick search.

Web link - help.cfm?id=376&pwd=quick

////////

Small update on 7/27/22 - Michael wrote me back via email and requested that we remove the limit. We decided that it was a good idea and took off all of the 4-character limits on the fields for both customer searches and vendor/payee searches. New code and changes were made and pushed up to all servers today on 7/27/22.



Shop
9696



Custom data export tool 12/26/2022

More work on the custom data export tool. It is getting really close, and I pushed up new code. Writing out some documentation and getting some screenshots. I had to install Photoshop to edit the screenshots (my hard drive crashed, and I didn't have that installed yet). Recording notes while waiting for the program to download and install. Sent an email out with the screenshots and the web link to the export tool. The export tool has a series of checkboxes to show/hide data or sub data relationships. You can filter it and it shows JSON data for customer info. It also includes customer additional contacts, flex grid tie-ins, customer log notes, media/content files and data uploads, etc. Pretty deep customer-based export tool.



Shop
10013

Adilas Time

4/17/2023

Sean checked in and was telling me about a demo that he did last Friday. He is getting better at prepping things, making an outline, and even having preset URL (web links) ready as they go through the system (quick way of jumping around without having to navigate and/or fill everything in). That's awesome and good to hear.

After Sean left, I was doing emails and other small to do list tasks.

?



Shop
10137

Brandon, Kelly,
Steve and Cory
sub reporting-
how to move
forward

5/18/2023

Zoom meeting with Cory, Kelly, Steve, and I. Going over plans for sub inventory reporting. I took a number of notes. See below.

- Kelly did some prep work and had a small spreadsheet- Here is the link: Web link

- Some of the report settings need to be at the user level vs the corp or global level- for example: the new advanced part search settings. They are controllable at the corp level but not at an individual user level. We are seeing a need for deeper levels of control, per user.

- She, Kelly, found a good report (that still needs some tweaking)- advanced invoice sub line search for all item categories. The current report shows and does some sub attribute grouping (text based off of the names). ?

- Kelly thinks that a limit of a 31-day month (whatever the range) would work for now. For both PO line items and invoice line items. If they want to pull info per item category, no date range limit. If they want everything or "all" we limit it to a month or 31 days.

- Ideally, she would like grouped output for PO's, invoices, and items. That's where subs play (currently).

- Steve is working on some sub inventory reports right now.

- We have a currently working model in the advanced invoice sub line search. If the part category of "All" is selected, the actual search page shows all possible sub attributes as filters. We then pass that list of combined attributes over to the results page. The results page then loops over the combined list and fills out what it can. We may be able to use some of these pieces.

- As a side note, we actually looked over some code for the working model to see how it was switching, grouping, and pulling the data. For now, we may take that code and push it over to other sections as a patch and/or band-aid of sorts.

- The sub reports need all of the main line item details plus the sub information. Currently, the sub reports are only showing the sub details. Kelly wants all of the data out of the system. Cory wants to be careful not to get in trouble if we add a bunch of new columns (past history with clients complaining - changing their reports or exports).

- The reports homepage is kinda messy- We may need to rework that page to make it look better.

- We need sub attribute information on its own, parent attribute information on its own, and mixed sub and parent attribute information together. Along with this... We need these same reports for PO's, invoices, and items in inventory. We need all of these pieces. Consistency across those reports.

- Kelly is sort of stuck- helping out the clients. She is pulling tons of reports and piecing them together. She is looking for some time savings and better reporting, out

of the system or out of the box vs having to pull things and piece them together.

- Up next, once we have the good reporting that we need, we can build in bulk update tools where you can see it, fix it, repull the report. Export it as needed. We need the visual representation of the data first (good reporting). The other features and tools will come later.

- Steve, Dustin, and Alan are going to be working on some bulk tools for subs.

- Be able to export beginning inventory, ending inventory, and what is in between. That's the goal.

- Kelly likes the super invoice line item search/report. Could we add on a bit there? That might be nice. We talked about creating a super sub invoice line item search (same as above with subs). Maybe a link to that new page from the bottom of the advanced invoice search page (maybe at the top as well).

- At the end of the meeting, Kelly was asking what we needed to get going. She is going to build out a spreadsheet with columns and instructions per column for us to use as a reference. That should really help. We will pass this on to the correct developer to help them know what is wanted and needed.



Shop 10484



Emails and research

9/5/2023

Sent an email to Steve with some ideas for a high-level plan (word doc and a couple of web links). Looking at possible changes for the adilas lite mini website. Reading over an outline and thinking about what needs to be updated to make the outline and mini website match.



Shop 11059



Work sessions

5/8/2024

Sorting line items. Allowing for different sorts (manual, natural, and level 1).

Meeting with Cory. Checking on some older projects. We walked through some settings and flow to connect PO date/time flex attributes with elements of time. We did a couple practice runs. We also checked on some payroll settings for a client that wants a new state added.

More sorting line items. Allowing for the URL's (web links) to help with the sort orders (presets based on sort numbers, natural numbering, and sub line level grouping). Making good progress.



Shop 11711

check and push QB API code

1/14/2025

Meeting with Bryan to go over questions and code. We talked about using a tablet or a phone to browse inventory for customers (on site in a show room or warehouse floor). Including the ability to link to PDF's or other information packets per inventory item. We talked about options, including QR codes and web links and buttons. We then switched and talked about quote and invoice (cart) flex attributes. Went through a few questions and I made a few suggestions. Next, we flipped over to some on account stuff for QuickBooks API for one of the clients. We pushed up some code and he was doing some testing and running through scenarios.



Shop 11852

Action Strategy Meeting

3/12/2025

Meeting with Bryan Dayton and his brother Charles Dayton. Charles owns a company called ActionStrategy and they do consulting, project management, and planning for companies. We looked at his software and what it does. We then had some fun conversations about how it might look if we merged both companies together to offer more options and features for their/our users. Lot of fun, just playing around with ideas.

We, Bryan and I, then gave Charles a fun mini demo of adilas and how we use it and have used it. We put a bunch of links through the chat window for him to look at. see list below.

Web link - help.cfm?id=381&pwd=time - elements of time - general

Web link - help.cfm?id=383&pwd=template - time templates

Web link - help.cfm?id=391&pwd=sub - subs of time

Web link - sales-gallery/bf-calendar.html - calendar and scheduling overview

Web link - sales-gallery/cc-vision.html - where are we headed

Web link - help.cfm?id=323&pwd=flex - flex grid options - custom out of the box

Towards the end, we did a small mini consulting session with Charles. He was telling us what he has and what would be required. We took some notes and then showed him how we could do that inside of adilas. Lots of talking and drawing and even jumping into certain parts of the system to show him what the existing interface looks like. Fun little brainstorming session.



Shop 11963

Working on content

5/6/2025

Paying bills and checking emails. Working on the text and verbiage for the investment options for adilas. Grabbed all of the text that we had finished and made it into a PDF document for easy passing around. See attached for the new PDF. The same text is also available online at: Web link - lite/adilas_investment_opportunities.cfm





Shop
12235

Meeting with
Steve

8/25/2025

Great meeting with Steve. We were going over options to help let AI agents and AI bots use the adilas application. Steve is working with some guys out of China who do that kind of things. We spent some time going over some ideas and where we could go with things. We talked about the external adilas API sockets, an internal option that involved cookies, tokens, and JSON data storage. We also talked about using the existing structure and URL (web addresses) and how that might look. Our favorite option was the web links and URL crafting ideas. See notes below...

- Use the custom_json table - if we went with internal data storage options, this database table could be used for storage. ?

- Cookies and tokens - We help them save and retrieve them and then they have a spot to stick and store their data.

- Mix a hash... say something like this... auto id, main id, app type id, date, and then get a hash from mixing those pieces. This would end up being the virtual token that would let you look-up the actual JSON object.

- This internal cookies, tokens, and JSON data storage would virtually provide them a small shelf space for them to use. This could totally work and we may end up using it by itself or in conjunction with other options.

- On the ColdFusion side, internal app stuff, we could do a virtual 1-off on the code pages. Basically, don't stop or interrupt the main page flow. Just build little side or frontage roads as needed.

- We were looking up existing API sockets and methods. We may end up using the addEditCustomJSON method - in search_15.cfc - possible new API

We then switched gears and were talking about using the URL... hyper links or web address links - We really liked this option.

- With simple URL's or hyper links we could virtually use the system just like a normal user - We could let AI do or make interactions vs human powered links.

- AI could potentially help with understanding normal voice controls or prompts and even different languages - translate and convert to the options or prompts.

- Let the user talk to the system

- Steve's word or phrase "URL crafting" - I liked that

- Natural conversation and then boiling things down to the prompts which will translate to the correct URL crafting option

- Normal html pages and web addresses. Once the pages come up, you could do some scraping and then using those pieces

- AI, the user, the interface, and the URL crafting - perfect marriage

- Steve had so many ideas... recording time, recording notes, etc. - so cool!!!! AI could help our users be a super user

- 3-legged stool analogy... One leg is the system and its features and functions. Another leg is the users and the money that they spend to use the application. The last leg of the 3-legged stool is education and training. AI could help be the trainer and navigator (major help on the education side).

- My mind was blown a bit today... that's been awhile since I had that much fun dreaming and brainstorming. We had help from above - guidance and inspiration. I'm so thankful for that. Just trying to give some credit where credit is due... :)

?



Shop
12392

Phone call with
Steve

10/16/2025

Phone call with Steve after our AI meeting. Going over tons of ideas and options... Exciting times.

- On the 3rd party solutions page, add in the other API's that Nxtling may need to access their data. Do this all behind the scenes so that a user doesn't have to go in and turn any of those settings on. That way, all of these API sockets will be monitored and controlled via the 3rd party solutions channel.

- We can handle the user level permissions - meaning allowing a user to turn the AI agent on/off at will. The corporation may turn it on, but not all users may want it. Basically, the corp level will be the top level and the user level will be on an individual basis level.

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- Earlier today, we were talking about subsets of aliases - Steve had the idea... What about multiple levels deep? Aliases of aliases of aliases... We can totally keep it all strait but what if a user does something all the time... What if the AI agent was able to make its own aliases for common tasks. Talking about predictiveness and interpreting input and intent - We even talked about slang or certain terms that may be used in different regions.

- "Adi go" - command prompt - We already have "Adi" as our little blue dog avatar (helper or mascot). Maybe using "Adi" as a command prompt. This would be similar to how smart phone users can talk with Siri or Alexa. Ours would be "Adi". Idea from Steve.

- Sell what we have

- The value of hyperlinks - mixing command line, Gui interfaces, web, and API - we are built for this

After Steve and I got finished, I was wrapping up for the day. I was really grateful that everything was going good, meeting wise, direction, etc. I was saying a little prayer and had a number of thoughts pop into my head. Call it inspiration, direction, or whatever. I'll take it and I love it! Here are my notes:

- On the user set aliases (making their own prompts), for the AI quick search prompts, what if we used a "#" (pound or hashtag sign) for all user specific prompts. That would not compete with any of our existing prompts. For example: #xyz or #something or #somethingelse... - we could even reclaim certain existing prompts by just add the hashtag in front of it. Another example may be... The prompt or keyword for clocking in/out has an alias of "my time" - what if a user wanted to use that for his/her own prompt for project time tracking. They could create "#my time" or "#time" and it would totally work. Even though both of those values are normal keywords by themselves. It could be really cool. Imagin a hashtag and at least one letter, more if needed. Super simple for quick speed.

- Be able to build and show the prompts and what they are tied to. Simple user interface to setup and maintain their own AI quick search prompts. Very similar to the icon payee top links in the snow owl theme, but even more, and easier to get to... they would be clickable and usable in the AI quick search text fields. Anywhere in the

system... That would be super cool! Even better than the icon payee top links (existing link building or special button feature inside of adilas right now).

- What if we used the "go mode" page (new AI quick search prompt page) to show their own prompts or even a fracture type interface - simple tiles and buttons - (small sample image)

- When creating your own buttons, be able to name them, color them, set an icon, a link (advanced - they have to know the URL or web link) or a simple quick search prompt. Maybe even tie the user created prompts and buttons together or make it a dual-purpose database action. Some of the buttons may need to open up a new window and some (most) will just jump to that new page. Just some ideas.

- What about being able to tie multiple prompts together in a mini list, process, or mini prompt recipe? That would be super cool. Imagine something like this: start cart, choose customer, show x or add y to the cart, simple cash checkout - simple English or natural language instructions and the system would help them walk through that process... kinda hold their hand. It won't just do all of them at once, but it will know what the process should be. We could easily create those one-to-many relationships and virtual steps or phases of the process. Just for fun, it makes me think of a data assembly line or assembly line for data. Cool stuff!

- Along this multi-prompt line... We already allow for duplicating invoices to the cart. What if we used a template type scenario and setup a master invoice and then were able to duplicate the exact thing in one click. If changes are needed, they could modify it, but cut out all of the searching and such. What about a partial duplication process... once again a mini recipe for certain steps or data assembly line controls.

- We have a page inside the current system called "my favorites". It currently has a number of buttons on that page. This was one of my todo list notes from a couple of days ago... It totally fits here (see below).

todo: Get back to the ideas of the my favorites page inside of adilas... it got taken over and a bunch of hardcoded buttons put on it. But it does have some potential. See this help file - help.cfm? id=418&pwd=favorites - or visit this page - top_secret/secure/my_favorites.cfm. Added this note on 10/14/25 - it would be so cool to let the users choose anything that they want in the system and then organize it and name it. Cody Apedaile started a draw your own interface (but got pulled off of it for budget reasons). Anyways, the goal is still there to help create your own interface and organize your own buttons as you see fit.

- Super simple, using old school tech with a modern or new school flare... it will work

- What about helping with memory... We could help hold small comments, save/hold this or that, or even helping to string things together... Maybe help them with their memory... It won't tax the server very hard (store simple

things in session - per login). Imagine small AI quick search prompts like clear memory, save to memory, view memory, etc. Super simple stuff. Use JSON storage if saving memory in a more long-term fashion. Simple interface to get things in/out of memory and even use the AI quick search field to help. That would be cool.

- This may not be ready yet - but what if we record and then help them go from one thing to the next to the next... simple session memory with a display... If we know a series of AI quick search prompts... It wouldn't be that hard to display something with a next button, help them step through the process.

?



Shop
12645

Brainstorming
and planning

1/24/2026

I got up and started doing some planning and brainstorming. I was just planning on doing a little bit and the ideas kept coming, so I wrote them down. Here is what I got.

- Do some 1-pagers (one-pagers). Maybe even 4 or 5 of them. Quick reference stuff that could be used alone or used together as part of a group. This could be for sales, intros, quick guides, showing pieces. Make them all simple 1-pagers.

- Include the elevator pitch on one of the 1-pagers

- Show correct web links on the flyers or 1-pagers

- Link to the plan - fracture or adilas lite

- Old adilas GPS core image

- Old adilas formula flyer

- Old adilas map or interactive map flyer

- Maybe update some of those older one-page flyers

- Link to the presentation gallery

- Talk about ways to invest - 1/10th of a percent, 1% (full percent), 10% - show some levels and options

- 75% of the company (adilas, llc - adilas.biz) is available for purchase

- We are doing a capital raise - Looking for 2 million to 10 million for a new buildout

- Setup some small rules - this would be for investments and raising capital for the new buildout. Straight prices, don't worry about taxes (basically with tax included). Simple 1-pager, you get x percentage for y dollars. Super simple and cut and dry. No promises of future value. Basically, if you buy in, you then own part of the company. In the case that it sells, you would gain from that sale. There are differences between buying a percentage and active funding of projects. Maybe make small 1-pagers per section with some super simple rules. Add links to the web site for investment options.

- Talk about options for commissions - 10-20% - leaning towards 20%

- White labeling - minimal starting investment of \$100K - buy in at a percentage (could be small), then do a plan and figure out the scope. Detail things out. Then figure out the plan from there and how complex the new white label is going to be. The initial \$100K pays for the ability to build on top of the kick butt engine and the detailed scope and development plan. The rest will be determined from that point. The goal with the white labeling is geared towards future revenue and rolling things out in scale (future reoccurring revenue from multiple clients or business verticals). White labeling is an investment and plan for the future. If the project feels like less than \$100K, we may push you in the direction of custom code vs actual white label.

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- Dealing with white labeling - This is something that gets built on top of the adilas engine, ideally built by our team for a 3rd party vendor, that 3rd party vendor would then run the marketing, billing, tech support, etc. for their clients. We would most likely host their white label on our servers, and let it ride on top of what we have. It could even limit access to the underlying pieces. If someone wants to host it themselves, code it themselves, and just use API's (backend connection sockets and such), that is different. That would be a 3rd party solution and would go through the adilas marketplace.

- For white labeling deals or buildouts, we will end up setting some rules and prices for monthly fees, profit sharing, wholesale costing, dedicated or shared hosting, and other details.

- Talking about scope, timelines, feature creep, and change orders. If the plan changes, in any way, we need to be able to adjust (change orders). That could affect scopes, timelines, deliverables, budgets, milestones, etc.

- For me, think about the trystorming type approach with a known need to circle back around and refine things

- Contact info on the 1-pagers and in the packet(s)

- Old graphics about ecommerce, system players, choose your skin, show your stuff, etc. See image.

- Ideas - You could go around with some flyers and do some seeding...

- Get people to go door to door in neighborhoods and/or in business districts

- Promotion codes and lead tracking - tie back to commissions and affiliate programs

- Social media influencers and people who push products - sometimes people trust these guys/gals/people

- We start with the main adilas MMLLC (multi-member LLC) - then we open it up into the other MMLLC's - adilas.biz, adilas shop, adilas university, adilas marketplace, adilas cafe, and maybe adilas funding or adilas management - there could be others - adilas employment, adilas staffing, etc. Along with that, allow for investment options of 1/10th %, full percentages, and bigger percentages (say 5 to 10% and above).

- When ready... maybe a small glossy folder with a few key 1-pagers in it - small packet

- We need to do some market research on the pricing. This will help us be more confident in our pricing. We have to follow the market value. There is an optimal range. And, the market is changing dramatically right now with AI and SaaS mixes.

- Most credit card processing fees are around 2.5% of your credit card sales per month. We are pricing adilas around 5% of your total sales (cash and card) per month.

Also remember, most companies are doing the mash-up option and paying for multiple systems to make up the whole. Paying 5% for one integrated system, is great!

- Small samples on pricing... Basically, take a monthly sales number and times it by 5% or 0.05. Samples for some starting numbers: Monthly sales from \$0-\$400 x 0.05 = \$20 (smallest monthly fee). Then show values for \$1K, \$5K, \$10K, \$20K, \$40K, \$60K, and \$100K - using the same formula. Make a note about multiple locations. Simple math. If one or more of the locations are at a different size (sales volume), no problem. We can set those values. Once a monthly is set, we can hold that number for six months, and then we may review it if needed.

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- In sales, if there are custom needs, we are willing to talk and chat about quantity discounts, franchises, seasonal usage, clients not using the sales features but using other parts of the system, etc. We can provide special quotes and structure deals. We can't go lower than 2.5%.

- This is for me... Just as a reference, we at adilas, pay about 15% for servers and web hosting. As of end of 2025, we are paying around \$12K per month just for servers.

- \$1,500 starter package - list it out - setup, turning things on, and up to 15 hours of training and/or help getting things configured and going. Monthly fees are separate. This is just the starter package. If you don't need the training hours, it is \$500 for a one-time setup. You have to have a prior system to just do the new setup fee as a standalone. If custom circumstances exist, we recommend that you get ahold of us and we can figure out a deal. The goal is to get you going and make sure that you off to the races.

- Once the training and setup hours are done, if you need more help with monthly tasks, special tasks, or whatever, we bill at a rate of \$65/hour. This could be for consulting, setup, bank reconciliation, data entry, etc. We want to help you get going strong and we offer services where needed. The future goal is to use the adilas marketplace or adilas cafe to help fill these needs.

- Get the flyers done professionally - make them nice

- Use a temp service to help get the word out - get them the information and/or packets and let them manage it

- At some point, we will need an internal training meeting for our team members

- Make some new page (web link) redirects - some of the files and places have longer web addresses - make a number of smaller redirects - folders and path stuff - links like the adilas lite or fracture plan, investment opportunities, and the presentation gallery.

- Fix the adilas pricing page - show some other options - line it out a bit. It is pretty simple right now.

- Help work with Bryan on his sales channels - Finetech (merchant processing) and Host Huskie (web hosting). We could do similar things over and over again as needed.

- The existing software package (adilas.biz) can handle 75-90% of any business - out of the box.

- Just a thought - what if I put all of this into AI to see what I get - that would be cool. Maybe wrap it all up together.

- Get out of the way!



Shop
12752



Developer's
Notebook

3/10/2026

Working on the developer's notebook and doing some back-ups. Saving some back-up PDF's of the developer's notebook entries. These may be used for directly feeding things into AI as well. Anyways, saving out some PDF documents with time and notebook entries. As I got into certain months and years, I had to edit quite a few web links. They were too long to allow for the 8.5 x 11 inch PDF format. Changing things in all three of the main sites - Adilas, adilas shop, and adilas university - depending on what needed to be done.





Shop
12760

Working with AI 3/12/2026
on some
planning

Working with AI on some planning for adilas products and roadmaps.

Started out doing a summary of the SWOT analysis. See entry below.

<https://chatgpt.com/share/69b32c9b-a8fc-8007-bb28-265499367aaf> - summary chat session - future direction and plans

Master Category
Adilas Strategy Hub

Branches
Messaging
|- Adilas 3-Part Pitch



Community
|- Adilas Community Strategy

AI
|- Developer Notebook AI Training
|- AI Training Roadmap

Strategy
|- The Adilas Value Formula
|- Deep Dive Strategic Topics

Future
|- Future Projects & Concepts
|- World Building

Infrastructure
|- Data Assembly Line

IP
|- Protection Through Sharing

The whole rest of the afternoon and evening were spent with ChatGPT in exploring the underlying architecture of adilas. There were four different sessions, all dealing with intellectual property and protecting that through sharing. Super fun sessions. This chat session (link below) is quite long, but super cool. It will end up forming a number of help files and other pages that go over the core or key pillars of the system. Here is that chat session URL or web link.

Intellectual property - protection through sharing: <https://chatgpt.com/share/69b39e06-ff24-8007-bdf7-036f696e35d0>

As a note, there are three PDF's attached to this element of time that have the saved ChatGPT chat logs, if needed.



Shop
12763



Meeting with
Bryan

3/17/2026

Working with Bryan. He was showing me some of the work with Google Gemini as an AI agent. He is playing with a small chat option to help to use Gemini within the adilas website (certain tasks or to help with repetitive work). Bryan was talking about having a small team spending some partial time on some of these projects (a few hours a week). That would help us make progress and eventually getting things done on the trickle affect (drop by drop or drip by drip). Talking about the sales engine and pushing on projects that will allow other people to help sell adilas. Showed Bryan some of my AI chat messages.

Web link - time_web_gallery.cfm?corp=748&id=12760



Shop
12773



Research on the
data assembly
line

3/18/2026

Research on the data assembly line, new school accounting, and 3D levels. Found a bunch of old entries that Shannon and I were working on for the user guide. See section 11, for concepts on financials and accounting. Here are a number of links to show where some of the information is.

General adilas notes from back in 2008. This is when Brandon and Steve were working on the balance sheet. This is when the concept of allowing the data to flex until everything is correct or back to a stable spot. Web link - developer's notebook - balance sheet stuff in 2008

Writing out the progression of what we have learned thus far. These entries go forward from 2008 to the end of 2014. These are some notes from Brandon while helping to train some new interns and developers who were helping on the adilas project. These notes will be shown in two sections. One is the general notes from October of 2014. They will show the general flavor of what is going on at this time in history. The other notes will be specifically 10/14/14 where the actual entries hit the developer's notebook. Here are those links:

Web link - October 2014 - General developer's notebook for the month of October 2014.

Web link - time_web_gallery.cfm?corp=371&id=2894 - Specific date in time when the concepts first hit the notebook as a single entry. Progression of operations and accounting.

The next major time period was in March of 2015. This was a different set of developers that had questions and wanted to see how operations and accounting played together. This will have two sections as well. This will have the month of March 2015 and then a specific time when the process was described in more detail, with a slightly different flow, which helped in presenting the ideas. Here are those links:

Web link - March 2015 - General developer's notebook for March 2015

Web link - time_web_gallery.cfm?corp=371&id=3618 - Specific date when the process was explained using a giant Whiteboard at Bridgerland Technical College.



Shop
12756



Working with
Shannon

3/19/2026

Working with Shannon. We jumped into some older documentation for the adilas user guide. We were in the financials and accounting section, section 11. We read over the first few entries and then got to the section new school accounting. It was mostly done, but not fully done. We started working and Shannon was asking what do you really want here? We did some quick brainstorming and then I showed Shannon a small graphic from years back. See attached for a copy of that graphic. She then recommended that we use voice to text, explain what we wanted to, and then see if ChatGPT could interpret our babblings. It did a great job! Fun chat session with ChatGPT on some accounting concepts. There are some hidden gems in the comments, after it interpreted what I was saying. Good stuff. As a note, there is a web link to the chat session as well as PDF version attached to this element of time.

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<https://chatgpt.com/share/69bc3d35-4230-8007-a52d-e6b549493127>