

Adilas recent projects

Prepared for Brandon Moore | October 22, 2026

Recent work from September through October 22

The big picture

This is a portfolio update across recent Adilas work by multiple contributors. It explains what the changes do, why they matter and what remains before broader release. It is organized by project rather than listing every changed file.

What is driving the changes

The main efforts are APEX modernization; purchasing and inventory; commerce and customer communication; payroll and accounting; manufacturing and cultivation; and controlled AI assistance and demonstrations. Supporting work includes security, database installers, help, migration tools and operating guides.

Why so many files change

A single workflow can touch its screen, shared services, permissions, settings, help, database updates and tests. APEX also separates reusable page content from the surrounding theme. Large file counts therefore do not mean an equal number of unrelated new features.

How to read the status

MERGED means the code is in shared master. It does not establish that every server has deployed it, installed its database updates or enabled its settings. PILOT means limited validation or controlled availability. PLAN means a document or proposal exists, not a delivered integration. OPEN means evidence or a decision is still needed.

Immediate answers to your email

Steve will handle Shay's fixes. Both reported issues are now merged: Snow Owl footer settings save correctly, and company words no longer receive an extra plural s. Andrew's signed-document status still needs confirmation. Preserving the old website is part of the proposed transition safeguards; this review does not certify a complete website archive.

Reading map

Pages 2-3: purchasing and commerce. Pages 4-5: communication, APEX and workforce. Pages 6-7: payroll and accounting. Pages 8-9: production, cultivation and AI demos. Page 10: websites, history and security. Pages 11-12: proposals, open integrations, next steps and evidence.

Purchasing and inventory

Practical improvements from ordering through receiving and reporting

Partial PO receiving | MERGED

Receiving supports parent and child inventory details, quantities actually received, and a linked request for the remaining backorder. A visible partial-receive action was added to the manual flow. The intended result is a completed received PO with a traceable path to the unreceived balance, rather than treating every shipment as complete.

Finding the right PO | MERGED

PO search was expanded around vendor and item information so an operator can locate orders using the words a customer or vendor knows. This helps companies whose purchase orders have limited descriptive information.

Inventory Planning | MERGED; setup required

Managers can review company-wide replenishment suggestions, save snapshots, approve or skip items and create Request POs. Daily reviews and optional Grok summaries support that review. This is a purchasing decision aid; it should not be presented as unsupervised purchasing.

Purchase cost and profitability | MERGED

Latest Purchase Cost by Item shows the latest qualifying child purchase cost with parent-cost fallback, vendor/category filtering and spreadsheet exports. Product profitability gained a Customer Type filter, helping users compare different customer groups without exporting everything first.

Reservations and sub-lot inventory | MERGED

Current Reserve and EOT reservation changes retain the reservation ticket when quantity changes and release it when quantity reaches zero. Strict versus flexible builds remain configurable. Newer child/sub-lot inventory work adds category and status filters and safer close actions.

What to validate next

Run a full receipt, a partial receipt and its linked backorder on the intended server. Compare report costs with representative source purchases. Verify planning storage, company settings and scheduling before enabling daily reviews; forecasting refinements such as seasonality and pack conversions remain future work.

Checkout and storefronts

Make purchasing easier while preserving company-specific controls

Cash nickel rounding | MERGED

Cash payments can use configured rounding up or down to a nickel. Follow-up fixes address preparing the rounding adjustment, payment submission, explanatory text and settings clarity. Whole-dollar rounding must be disabled for this special cash flow. Validate fee setup, change due and mixed tenders; noncash payments should retain their intended precision.

Discounts and pricing | MERGED; regression checks remain

Changes cover bundle pricing, discount-edit persistence, quantity edits, rounding and weekday schedules. October 22 adds backward-compatible weekday handling. A previously reported inactive/Sunday-only promotion still deserves a fresh POS and ecommerce check before the customer issue is called closed.

Green Skin and allowance displays | MERGED

Updates improve gram-control integration, item details, missing images, menu accessibility, return links and long tier-price URLs. October 22 work also accounts for cart quantities in Oregon allowance displays. Behavior remains dependent on the company's configuration; this is not a blanket compliance certification.

Guided ImagePads | MERGED; controlled rollout

Menu owners gain shared drafts, create/update controls, review, preview and reviewed imports before switching an active menu. Test-order tools help review the experience. Newer ZIP-import work preserves paid-choice labels and notes. Preview and simulated-cart results should be distinguished from a completed live transaction.

VAAS / Grok Voice | MERGED; pilot verification

An optional voice drawer adds product search, loyalty context, typed fallback and hide/restore controls, with mobile layout improvements. It starts behind company controls. Live audio, provider setup, authenticated loyalty and end-to-end checkout still need deployment-specific proof; merged search and drawer code are not proof of autonomous voice checkout.

Other customer-facing fixes

Invoice emails now use the saved invoice due date, including when it differs from the invoice date or default terms. Receipt/privacy and storefront access fixes are part of the wider cleanup. The most useful demonstration is one realistic customer journey from finding an item through payment and the emailed invoice.

Customer communication

Messaging, campaigns and a direct path back to shopping

Messaging Center and Icon App | MERGED

Recent work includes reviewed audiences, live customer conversations, company branding, installation links, mobile messages and alerts. Session-expiry and reopening fixes support the installed-icon experience. Hosted notification delivery and reopening after a long idle period still need separate acceptance checks.

Bulk messaging and email campaigns | AVAILABLE WITH RECENT UPDATES

The communication approach connects customer outreach with ecommerce and the shopping cart. Campaign reporting and conversion tracking are intended to show whether outreach leads to shopping and purchases. Demonstrate the actual attribution path and dashboard numbers with a known campaign before making claims about coverage across every channel or device.

Intelligent Email Builder | MERGED

Template editing is being centralized in the Intelligent Email Builder, giving email content a clearer editing home. October 22 adds a New Campaign action directly on the Campaigns tab. These changes make it easier to find the tools rather than requiring users to know which older screen contains them.

What we are offering

The current offering centers on rich in-system messaging and email campaigns. SMS/text messaging is not part of this offering. The advantages to demonstrate are relevant content, links directly to items or shopping, and measurable follow-through within the same system.

News and release communication | MERGED; operations to verify

The News & Updates work includes a hub, editing tools, alerts/digests, assisted drafts and a path for generating draft news from merged changes. Draft creation does not mean automatic publication or confirmed feature availability. Server configuration and the human publication workflow still need to be verified.

Next demonstration

Build one approved audience, send a controlled test campaign, follow its product link, complete a test order and compare the resulting campaign and sales reporting. Separately test installation, idle-session reopening and notifications on a phone. These checks give a stronger story than showing an editor alone.

APEX and employee workflows

A more consistent interface across everyday work

APEX modernization | MANY MERGED BATCHES

Work spans theme foundations, company and personal appearance controls, palettes, help drawers, responsive tables and common financial and operational pages. The changes are intended to make older workflows easier to use on modern screens while keeping their business functions recognizable.

Navigation and homepages | MERGED

Homepage/dashboard browsing is being unified across Snow Owl and APEX. Flex Grid page work, favorites and access to permitted homepages support easier navigation. APEX menu and Quick Action work also exposes newer production and operational tools.

Workforce and time | MERGED SLICES

Updated areas include department assignment, payroll hours, holiday calendars, employee pay settings, time-clock reporting, timecards, scheduling and a standalone employee kiosk. Role-based acceptance is still needed. Earlier preserved workforce changes require reconciliation before the entire workforce backlog can be described as complete.

Recent usability and support fixes | MERGED

Shay's footer-save problem came from validation intended for a WordPress feeder being applied to other footer choices. That validation was corrected. The duplicate plural s in company wording was also fixed. Other work adds a copyable support reference and corrects client-website preview routing.

Performance and reliability

The customer-queue incident was traced to fulfillment_progress_board.cfm; deploying the newer file resolved the reported outage. The broader opportunity is to avoid repeatedly retrieving the same growing record sets. Recent master work includes a ten-minute APEX footer API cache and cached Metrc reference lists. A wider page-by-page performance review remains useful work, not a completed system-wide optimization.

Validation boundary

An earlier APEX live review passed 84 of 88 pages; three required bank permissions and one legacy vendor-log page failed. A later vendor-log fix exists. That earlier sample should not be represented as a complete acceptance test of all subsequent APEX changes.

Payroll

Substantial preparation and control work; bank delivery remains separate

Preparation and recording | MERGED

Modern review screens, saved calculation evidence, employee withholding instructions, recording safeguards, commission tracking and correction/replacement references support a more reviewable payroll process. Broader reversal and reissue of already-paid payroll remains additional scope.

State instructions and annual maintenance | MERGED; setup/testing

State coverage reviews, saved instructions, annual tax-package maintenance and controlled activation were delivered. The October 20 handoff still identified intended-state setup and hosted testing for Connecticut, Mississippi, New York, North Dakota, Ohio, West Virginia, Wisconsin and Wyoming. Installing tables alone does not establish correct employee elections or calculations.

Finish Payroll and payment drafts | MERGED

Payment preparation, a Bank Review CSV, outside tax-payment tracking and a combined Finish Payroll view help a manager see what is prepared and what still needs action. The CSV is a review worksheet, not a bank-ready ACH transmission file.

Tax-payment register | MERGED; follow-up work

The register supports outside-payment confirmations, reconciliation, return/void status and history. It does not itself establish the tax liability owed to an agency. Audited amendments, split allocations and supporting attachments remain follow-up items in the reviewed handoff.

Demo history

The October 20 status report records historical payroll examples across 75 playsites, including eight clearly labeled Colorado-baseline examples pending intended-state setup. These are demonstration records, not evidence of nationwide payroll readiness.

What is still needed

Choose an approved bank/provider route, then implement authorizations, submission, acceptance and returns, and reconciliation. Complete company-specific federal/state acceptance and verify the hosted storage updates. Until that evidence exists, describe this as payroll preparation, review and tracking - not full-service direct deposit or tax filing.

General Ledger and accounting

A broader accounting workspace with explicit acceptance gates

Shared General Ledger build | MERGED THROUGH PHASE 24

The shared build now reaches well beyond the earlier ledger review. Work includes trial balance and financial statements, journal workflows, bank reconciliation, fixed assets, close workpapers, schedules, allocations, departments, consolidation, tax mappings, search and cash-flow reporting.

Latest accounting changes

Phase 24 adds self-maintained balance-sheet items, with a company switch for sales-tax behavior. Related fixes address gift-card sales and cost of goods, and date handling. These are material accounting changes that deserve sample transactions and reconciliation, not only a visual page check.

How to demonstrate the value

Walk through a transaction into its supporting accounting detail, review the trial balance and statements, then show a close or reconciliation task. This shows how operational records support the books and why the new pages exist.

Readiness is more than merged code

Confirm server migrations, accounting permissions and company switches. Reconcile representative sales, inventory, cash, liabilities and adjustments with the existing records. Confirm the intended accrual/cash-basis scope with the accounting owner before rollout claims; newer shared work expanded beyond earlier accrual-only assumptions.

Demo balances and daily integrity

The demo objective is realistic sales, purchasing, payroll, jobs and other activity with balanced books day by day. The existence of historical demo records does not prove every company's current balance sheet is reconciled. Baseline balances, generated activity and any changes by other users need an explicit daily reconciliation.

Local code/database maintenance

The local maintenance process preserves unfinished work, backs up the loopback database, reviews required installers, verifies schema and reloads affected components. The current runtime was found at master df543c9e9 with update evidence available. Final maintenance-record reconciliation is separate from this portfolio report; this report does not deploy production or enable jobs.

Manufacturing and cultivation

A shared production engine and clearer operating screens

Manufacturing | MERGED; APEX beta

The production work consolidates execution in a shared engine and adds Production Runs, a run detail page, New Run, Scan, a printable traveler, Templates and Production Settings. Instant and phased work, exact cost splits, partial outputs, input adjustments, cancel/write-off handling and package attributes are part of the build.

Planning and practical shop-floor work

Changes include plan-and-reserve, oldest-first recipe picks, shortage/tag checks, template inputs, free-form manufacture, phase readings, expected yield and aging, recalculation, and saving a finished run as a recipe. Guards protect documents belonging to open runs; a limited Undo path supports eligible corrections. October 22 changes also route older build/sample forms through the engine.

Cultivation | MERGED PILOT WORK

Plant logs, setup/action pages, harvest and dry/finish handling, partial packaging and bulk-action feedback have been expanded. Newer work includes per-company plant-batch behavior, strain/item matching confirmation and clearer labels and navigation. The plant log supports operational history whether or not a company uses Metrc.

Metrc | GATED; sandbox work

Recent changes cache reference lists, protect logs, validate before saves, queue external writes after database commits and record responses. Additional production reporting and partial write-off/undo/cancel support remain behind switches. Sandbox testing is restricted to playsites. These safeguards and code additions do not establish approval for live regulatory reporting.

What remains for acceptance

Validate source/output quantities and cost, partial output, phase transitions, repeated submission, cancellation and eligible Undo. Confirm phone scanning and stale-page recovery where needed. Have the domain owner confirm Metrc keys, sandbox results, company switches and the currently supported live path before enabling any regulated workflow.

Reading the detailed plan

The 65-page Manufacturing Upgrade plan dated October 22 contains a newer status section followed by the original October 13 plan. Statements such as nothing is built yet belong to that original plan. Later October 22 commits also supersede some open items; use the current change history alongside the plan.

AI assistance and demo sites

Useful assistance with controlled actions and realistic examples

Auto Pilot and Today | MERGED; controlled pilot

The original 29-page master plan has been followed by substantial shared implementation: company policy and budgets, business context, Today, conversations/panels, proposed actions, consent, metering and reviewed billing controls. Later fixes address the panel, consent and usage handling. This is not a blanket authorization for autonomous financial actions.

Controlled availability

Confirm company switches, provider/model configuration, permitted actions, consent and usage/billing behavior. Some actions and invoice posting remain gated or deferred. A feature being present in master does not mean its job or outbound integration should be enabled on every company.

Daily playsite activity | MERGED; pilot before scheduling

The service generates company-specific activity by industry with controls and retry protections. October 22 changes support an 11 p.m. schedule per company. Keep it off until an approved pilot demonstrates the desired records, dashboard effects and reconciliation. Do not infer that the service is already running everywhere.

Demo content and guided experiences

Manual playsite work has added vertical-specific sales, purchases, payroll, time, projects, tasks and quotes. A separate 24/7 Grok demo effort includes a front door, leased demonstration seats, company checks and a voice guide. Live voice, lead handling and monitoring still need pilot evidence.

Multi-user and company boundaries

Humans and other agents are adding records too. Preserve their work, avoid duplicate entries and use an explicit approved playsite list. Earlier demo notes identified companies requiring classification checks; a company name or accessible login alone is not evidence that it is safe to populate.

Local agent access

Separate provisioned local agent accounts and normal sign-in allow authorized testing without repeated manual login help. The local addresses share clean master and the loopback database; they are not isolated feature deployments. Company permissions and authentication remain in place.

Websites, history and security

Preserve what came before while improving the platform

Adilas website refresh | REVIEW DELIVERABLE

A private 13-page preview and a 90-page full-content review were delivered with updated branding, FAQs and examples. These are review artifacts, not proof that the old public website has been replaced. Final content, hosting, redirects and any named customer references need approval.

Preserving the old website

Before retiring or renaming an old site, retain a complete file and database backup, uploaded media, original URLs and a usable archive location. Keep the original version recoverable and document redirects. News migration work alone is not a complete website backup, and this report does not certify that the full archive already exists.

News history and client websites | MERGED; deployment checks

News migration work is designed to retain historical posts and original-source information. Separately, the client website engine adds settings, page editing, ZIP import and shopping integration; custom-domain/IIS routing remains an operational dependency. Recent work fixes the preview destination.

Security and API cleanup | MERGED

Work includes stricter company/permission checks on sensitive API paths, protected Grok access, signed customer sign-in links, safer content-upload tickets, protected production writers and reduced exposure of banking or credential details. These are separate safeguards across several areas, not a claim of a complete security audit.

Retiring legacy paths carefully

Legacy integrations and abandoned code are being cleaned up. Content upload and sign-in changes include staged transition requirements, so server rollout order and compatibility matter. Preserve the historical source before removing a public surface; a modern replacement and a historical archive can coexist.

Infrastructure plans

The database/server consolidation effort has planning and fleet-report tooling, with Fleet Report v4 appearing in current master. Actual consolidation remains a reviewed operational decision. Password recovery/modern sign-in and the Maritime custom-skin work are plans in the reviewed portfolio, not completed launches.

Proposals and open integrations

Keep finished documents separate from delivered products

Business proposals | DOCUMENTS COMPLETE

QuikCover has a revised scope, estimate and vendor assumptions. Tyson Korner has an eight-page system proposal covering APEX, AI First, adoption and pilot outcomes. Funding, accepted scope, responsibilities and access still precede implementation commitments. Commercial terms are intentionally omitted here.

Training and operating guides | DELIVERED

The Andrew project guide and a 67-page Ultimate Brew operating guide covering 27 requested areas were delivered. A shorter sales edition and traceability/production demonstrations remain possible follow-up work. Guides do not establish completed customer deployment.

Herbo Pay | OUTSIDE EVIDENCE NEEDED

Checkout preview and recovery groundwork exist. A separate WooCommerce gateway was identified, but reuse is unproven. Needed evidence includes plugin/version details, a successful redacted transaction, API/result lookup, sandbox behavior and reconciliation. Do not announce a working processor connection or ACH route from a preview.

Other integrations and collateral

Zywave company activation now appears in Third-Party Solutions; a switch is not evidence of the complete insurance integration. Uber delivery and social publishing work still depend on provider credentials/configuration. Trinity Fasteners label work needs a real test print. AI workspace and historical Fracture reviews identify further planning and access decisions.

Projects requiring owner confirmation

Yogen Früz, SparkPlug, Print Node, checkout.com, California license scanning and Queue/KDS appear in project materials, but their names alone do not establish completion. Customer CSV upload/corporation-ID examples and older hosting-review requests also need closure evidence. Remaining API sockets and permission decisions should be checked against their owners' current lists.

Do not overstate coverage

This report covers the recent projects identifiable in the reviewed histories and two portfolio reports. It is not an audit of every open Adilas backlog item. Where fresh delivery evidence is missing, the next action is to confirm the owner, deliverable, deployed location and remaining acceptance test.

Next steps and evidence

A practical walkthrough and an honest release record

A useful walkthrough for Brandon

Start with a partial PO and its backorder; then a production run with cost/output tracking; then a General Ledger transaction-to-statement example. Follow with an APEX tour and one campaign-to-purchase demonstration. Show payroll and voice features with their current limits clearly stated.

Immediate follow-through

Steve owns Shay's fixes, which are merged for the next deployment. Confirm the outstanding Andrew paperwork separately. Establish the old-website archive checklist before any retirement. For each project, record the deployed server, required database changes, company settings, test result and owner before announcing availability.

Evidence reviewed for this report

1. Adilas Codex Project Status, October 20, 2026 (10-page portfolio report and its task references).
2. Adilas agent projects status, October 20, 2026 (6-page shared-project handoff).
3. Manufacturing Upgrade plan, October 22, 2026 (65 pages, including its current-status section and historical plan).
4. Shared master history inspected through df543c9e923822e7a98666ab9ca1fbd4d06f3014 on October 22; recent history since September 10.
5. Stephen's October 22 email confirming both Shay fixes, and the merged Snow Owl/pluralization change.
6. Local maintenance review, backup, schema and health-check evidence from October 22.

Selected current-history anchors

f8351b8e2 - Snow Owl footer/pluralization fixes. 5096c639c - weekday discount compatibility. 327a0b458 - per-company demo scheduling. 3a58fef7f - Zywave activation. 0fc940897 - GL phase 24. bd6f99c51 - Guided ImagePads drafts/imports. eba0fb34a - optional VAAS search/loyalty. October 21-22 production and cultivation commits extend the earlier portfolio reports. Short prefixes here are navigation aids, not release versions.

Limits and interpretation

Commit history proves integration into shared code, not deployment to every host or correct behavior under every company's data. Prior reports provide project-level handoffs; unresolved setup and tests are retained unless newer evidence closes them. This report introduces no production changes, enables no integrations and makes no new customer release promises.

The goal

Make the work visible in terms of real business workflows, preserve Adilas history, and give each project a clear next step. The most valuable update is not the number of files changed; it is what users can reliably accomplish with the delivered system.