Adilas Conference

Logan Utah, May 29, 2018

Intro to Adilas - Steve B.

General Overview:

Vision: The entire system is to be utilized as a tool for data tracking in any industry.

Login:

Demo sites

News and Update

Interface settings found under the chooser.

If you click on your logo, it takes you back to the main page.

Pay attention to the Other tab where there is a ton of customizable settings

Sales Homepage:

Choose style of sale you are performing to get a customized cart that will cater to your needs.

Once you have put in a sale, you can perform a deposit.

Select items for deposit.

Edit the main button to put in specifics and show

Since the system is a complete business solution, you can tie your deposits into a bank account, reconcile and verify deposits or payments, print checks, etc.

Demo:

Expense receipt homepage/ payables homepage.

Upload photos

Permissions: If you are denied based on a specific permission, you can look at the bottom of the message in order to see what permissions you do not have. If you need one, you can ask an admin to give you that permission from the add/edit payee permissions page.

Molly’s question about agent naming conventions:

When she tries to edit some of the agent data, it is unable to changed. Is there a reason why it is that way? This is in round one, it is still under development. It is experimental at this point but we are still working on it. Everything that is locked is likely tied to a corp wide setting. Molly finds it very helpful. She would like this to be more universal and would like to be able to toggle on or off each piece. Drag and drop functionality would be nice! Garret had done some drag and drop functionality on the child po area. We could bring that back. Does the delivery agent name change each time we change a customer profile? Do they need to be assigned to the customer or can it be assigned to a more global setting?

Brandon question:

Corp wide setting, setting up a new user. Can we create a custom template of permissions for a specific corp. so that it doesn’t have to be don each time? – Solution: set up a set of permissions, name it to create a new custom template.

There is a floating top of the page button, can we add a floating bottom of the page button.

Note:

-Adilas is so deep and functional that there is no one person who knows it all.

-The more functionality we add in, the more downstream reporting detail we can have as well.

Tips and tricks:

Permissions: If you are adding multiple employees at once, you can set one employees permissions up, then hit the back button and then change the name and id number and enter again.

Adding footer links.

World building: Brandon

-full digital scope

-unlimited params – from scratch

-ready player one – go anywhere – build anything

-individualization

-wholistic conceptualization – how the pieces fit together

Functions

Main players

Customer relationship management(CRM)

Assets and liabilities + time + function(space) = system

Flex grid tie ins: In the one to many relationship, a flex grid tie-in can tie two ones together.

Highlighting New Features:

* New navigation menus – interactive maps where you can click on each piece to navigate.
* Payee top links – add menu buttons to the menu bar based on your own needs. Including switching between corps. (settings/edit look and feel/Snow Owl theme/back to main page/other/snow owl theme settings/Payee top links/add in address/paste in icon/etc … if you want to open it in a new tab, add in (::new) to the icon field
* Snow Owl look and feel, upload pictures, change styles, make watermarks, etc.
* Templates – A way to set up specific styles for different employees/operators. (corp. main settings/add template/add new template button) this will tie the current settings to a template.

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Custom development – Alan and Brian

Black Boxing: Make your environment your own.

8 different sections – you can take over the whole page or just a part of it.

Brief overview of how you can help us help you:

Contact support or talk to a dev you have already worked with.

Adilas market: Good place to get ideas of what can be done.

Know what you want. Diagram, example, flow needs etc. Write it out.

Complete takeover (wire job) – Use Adilas back end but complete takeover of the front end – new functionality and look and feel – You can even write your own html/css and then tie it in to Adilas.

Corp Wide Settings:

How invoices/receipts look and feel, where things appear on the page, etc.

Some notable ones:

31: Default Printable invoice: types and sizes

23: Limited format invoice names: Changing names if invoice

24: Invoice/Quote thank you line: fixed line that gives a message at the bottom of the invoice.

25/26: signature lines: choose the formats and where it shows up.

\*30: this one has no limit. You can code in html or images/ links / QR codes / coupon redemption etc.

36: Cart Quick search Dropdown: Check the preset box for what you want it to do.

Notes: Make sure to use the predictive tools to ensure that you are not entering the same customer multiple times.

Very Deep and completely customizable: Discounts, Loyalty points, holiday sales, daily discounts, weight-based discounts. Etc.

These customized settings can be applied to one or many customers based on the customer type settings: Create a new customer type based on how you want to handle a discount globally.

Discounts / Other payment types: Can be handled in many ways: globally, by line item, by element of time, override, etc.

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Sub inventory – Steve

Cost of goods PER PACKAGE: If you got 10 snickers bars at 20 cents and 10 snickers bars at 19 cents but sold each of them for $1. How do you know if you made 80 cents or 81 cents unless you have a sub inventory value tied to each.

Old methods:

Average

Last in first out

First in first out

Adilas uses:

Perfect Cost of Goods. Each item has a cost and profit tied to it.

Parent: snickers (One)

Child(Sub-Inventory): each instance of purchasing a batch (Many)

Active: Stuff that is currently going through the process

Inactive: Stuff that is not around/available

Allow subs only: Forces the adjustment to only subs, (can’t sell the parent)

Flex Grid:

A giant virtual buddy system

Used for linking parts of the system together. Either multiple instances of the same part, or different parts together.

Custom fields: Flex grid ties in custom fields in order to perform the links. You may have 15 links per main application type. Each new field gets its own name, and optional preset values (drop down list format). Each field is searchable, and acts as a connection variable for the players/applications types involved.

Custom email:

Email fields (dynamic template fields): You can pick the type from a template and it will produce am email based on that template type ( you can have 5 templates stored).

* Automatic emails will send emails automatically based on parameters you set.
* Invoices will send an email with an email.
* Blind CC
* Due dates: uses a time setting to automatically send an invoice periodically.
* Default email functionality. You can set defaults for style and substance constants you want to implement.
* Invoice overdue notices. You can set an email to send out after and amount of time overdue. With increasing intensity as it increments (you can tailor the frequency and message.
* Customized footers.

Custom Templates: allow you to place in html content with a variable

You can get a custom email address as well. Example person@adilas.biz

There are many template builders online that are great for building a custom template and then passing into Adilas. IE: litmus (free template builder)

E-commerce:

Adilas has a fully customizable online marketplace. Super powerful tools for showing items for sale, building a brand and handling inventory.

Business intelligence and Big Data:

How do we use this data now?

What do you want to know?

Custom Dashboards for viewing data.

Suggestions:

Tiny dashboard with alerts that show what might be out of sync.

There is a difference between loading a report on every page and running a report every day.

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Tips and Tricks:

* Choose\_more\_interfaces.cfm: View and build interfaces.
* If you want to place a custom button on your homepage: Go to the page you want to make a button for and copy the url(after the path /)Then go to the corp\_admin\_settings page and to the field #2 and paste in the URL in the order you want to have it show up.
* In help files pulldown, click on the videos link and it will give you a video tutorial for the specific page you are on.
* Show hide search criteria: you can make adjustments to how you target searches.
* Duplicating the Cart. More options/link: Duplicate the cart: this saves a ton of steps.
* How to log back in if you lock out your login: Click “main login help file” copy and paste the link it says to into the browser. Now you can try again.