Parent to child inventory… advantages and options

* Some of the packages and/or batches may have a blemish and/or something that is different – expiration date, colors, options, etc.
* Cost of goods sold… going way back (1500’s) – Accounting and the lack of technology… they had ledger books, journal books, t-accounts, chart of accounts, etc.
* LIFO and FIFO – last in first out, first in first out, average, last known cost, stepped costing, etc.
* New technology like a hosted solution
* Steve was talking about how the costs kinda get to ride… say they come in at $1 per… then it goes up (or down) to $1.5… how does the system know what cost to use… all of the products are in the same bucket… so, do you use the $1 cost or the $1.50 cost on the invoices going out?
* With new technology, and sub inventory, you could get perfect costing! That is awesome. This is a game changer.
* As everybody contributes… the whole story gets played out.
* If you go to the sub inventory level… You could literally have “perfect” cost of goods sold. That is awesome.
* What hangs on a parent item? You could get children, sub attributes, parent attributes, etc.
* How do we boil this down… Danny and Steve were talking about features, advantages, and benefits… Danny wanted to say… keep going all the way to the benefit to the owner. For example: perfect cost of goods will affect the bottom line and taxes owed.
* Think about your kids (if you have them)… Do they all have the same talents, hair color, build, etc. Sub inventory allows for testing, sub details, etc.
* People would really like to have a special barcode that is unique to the subs. This is a request from multiple people who have played in this land.
* On sub inventory… We are already in round 3 of this feature… Garret, Calvin, Alan, Steve, and Brandon
* Question on cannabis… how does this apply? Say you have a parent item called Blue Dream. That is the parent. Every time that you harvest and/or create a new batch of that, that becomes the child and/or children.
  + Parent item… Blue Dream (exists for ever)
    - Sub or child – package done on 9/13/18 (they have a smaller life cycle – they get used up and/or destroyed – the parent still exist as the placeholder or main pipe)
    - Sub or child – package done a week ago
    - Etc.
* On smart group buttons, they want it to go even further… click, scan a sub barcode, limit and then just add it to the cart. That may require more settings and/or rules.
* Request… if a batch number is entered on the first screen, help to pass along to the next page.
* Request on edit po line items… they would like a small outline such as 1 and 1.1, 1.2, 2, and 2.1, etc. Think of an outline. They also were talking about possible CSS and how to display things. Also look at samples of tons of data and try to help make it easier to look at and find things.
* We do have a round 4 level planned for sub inventory. That will help, because we will be changing the whole background logic and how we loop over things.
* It would be really cool if we could select columns and then show/hide features, fields, and columns.
* Using templates and/or a easy copy button on the add/edit subs page. Help them not have to re-enter over and over again. That might help to have a new copy and add button.
* Josh was going through some scenarios about opening and closing packages. Different scenarios about bringing things in and then even selling multiple pieces from different packages. Pretend you have 3 left in a single package but the person wants 5. That would be 3 from package A and 2 from package B. The cool thing is, you could still have a perfect costing model.
* As a side note… I’m already hearing grams, ounces, pounds… It will eventually need to go out to the mini conversions level. Tons of different units of measurement and who has what.
* Often some of the subs are being used for testing results and recording additional data points. The question is what carries over and what does not?
* Internal builds… taking raw goods and doing something to create something new. Internal inventory tweaking and changing. Using, consuming, building, etc.
* In closing… some of the training meeting almost turn into brainstorming sessions, requests, ideas, and train the trainer.
* There are huge golden egg out there dealing with training and education. All kinds of levels… marketing, sales, newbies, beginners, and up to the sky.

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Notes from the CRM section…

CRM – Customer Relationship Management

CRM – from Shari O. – Can’t remember much ☺

* Marisa – Adilas is pretty deep
* Steve – Roll call accounting – 250 tables (or more), that equates to 4,000+ fields and columns where the data could be stored.
* Marisa – Show me how to clock in/out using elements of time.
* Shawn – slaving over a hot stove… just being funny.

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Exploring Ecommerce and Custom Emails

Alan Williams – bear stories… be as big as you can be.

Molly – She loves the ecommerce – Sell in cases, but still need to count things. Questions on selling parents – suggestion on alerts – possibly spitting out a physical ticket (talk to Calvin).

* Straight up… there are huge challenges between web and hardware vs web to software to hardware. It gets crazy. Web browsers on purpose try to block web to hardware. Hybrid solution.
* Alan – Working with PayPal – Molly has some questions
* Calvin – Talking about bulk emailing.

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Drea and the compare inventory page – great demo

* Molly and Drea were talking about what happens between adilas and Metrc. Certain changes happen in different systems, and then we either need to work through the issues or make other changes. Sometimes, we end up playing hide and seek (aka smoke and mirrors).
* Getting a sense of completion and a real finished status. Getting that checkbox (small success).
* Sometimes we have to build things in steps… you first do it manually, one-by-one, and then later on you can automate it and do it in bulk.

Next Up – Small demos by Calvin and others – If time allows, also, an open Q & A session

Calvin – he did a great demo on his GMext Pro application – Group mass texting (all texts are individual texts)

Expo – What do you know about Expo? eXPO – electronic exchange portal

[www.getexponow.com](http://www.getexponow.com)

* Optional money type for paying things
* Banking solution for our clients
* Some sort of shopping type network
* They offer multiple business offerings
* Value added services
* Financial – a way to work and bridge the gap
* White label adilas.biz as eXPO total tracking
* Compliance – state, IRS, governments, etc.
* Full financial solution (virtual bank and/or a bank like solution)
* Legal and compliant banking solution for Cannabis clients and others
* Weedstream.net – marketing arm – pop-up events, radio (visual and multi-media stream), eXPO network, transferring eXPO credits
* They are a fully legal middle man of sorts… From Pat – We are the stuffing in the middle of a double stuff oreo
* [www.weedstream.net](http://www.weedstream.net)
* Hosted by iHeart radio – free streaming of music
* Kiosk (visual displays)
* Team – Tina S., Pat, Kit, Shay, Katayna (spelling), Jack, Larry, Jimmy, Tina V., others on other teams including media
* eXPO credit no s on credits

Next Up – Denver Local Power User – Kelly Whyman

* Good clean system – can you operate adilas in a transparent level?
* Challenges with high turn over and education
* What you do you physically? You need reflex those actions in the virtual environment.
* If then else… lots of choices
* She has been with adilas for about 8 years.
* Kelly asks – what are you physically doing? Give me a process, even with variables.
* Next, we take those steps and we figure out how to track that into a process.
* Breaking down work flows… think flow charts.
* Defining the workflow – define the physical, who, what, when, where?
* She uses a lot of worksheets… going back to basic paper and pencil or the likes of that… this is training grounds and creates the background.
* We need info in order to make decisions – Lots of front-end time and setup.
* We have lots of different state (compliance and/or tracking system). What requirement are needed for other or outside systems?
* We love freedom, but what is the cost?
* KISS – keep it simple silly (stoner)
* Get the top 10 data points. Lets try to get 1.0 before we try for step 20. Line by line.
* Controlling the user expectations… what is being promised vs what is being presented?
* Adilas – shows the optimism and sometimes projects the “vaporware” (almost there or headed there) type of a system.
* Business exercises – Good consulting – communication and putting things in our system and in their systems… do your 100% to keep yourself transparent.
* Adilas, when used transparently, is awesome. When you try to avoid and/or skirt around things, that is when you get in trouble.
* Go back to the physical world and say, what were you doing (step by steps)… let’s see where we were at.
* Reporting is a good spot to work backwards from. What data points… that leads to good SOP’s (standard operating procedures). Find and setup standards.
* Owners and different than operators… we have to play differently – it tends to be a two-part setup. Focus on one need at a time.
* If things are too complicated, they, the users, stop putting it in.
* Black box – being able to support a system that you may not even know if they are running custom code. We may need a list of clients who are using custom code.
* Different consultants… pick and choose, and shop for a style
* Different levels – think of a pool… deep water and shallow water… not everybody swims in all of the levels. Consultants are very similar. It gets back to communication.
* Same with developers… it is hard to jump in on someone’s project.
* People have skills and also things that they like to do and things that they do well. We may need to have people who play different roles.
* What about ongoing help and support – Maintenance – Services and being able to help where needed
* Snowball of cause and effects
* Maybe an ongoing support for the first few months… that is the starting of habits and processes. Training is huge and key.
* Ongoing oversight
* New systems, changing between systems, clean-up (projects), overall oversight
* Health of a system… ongoing relationships and helping to let things surface. At some point you have to talk about things.
* Some people want to be unique – others just want to use the basics and then run from there. Kelly was saying a milk or juice option – Try to get to a yes/no answer… sometime going down too far down the custom route gets a little crazy.
* Build off of the basic and then see if you really need a custom option
* Have people help tell you what they want
* Adilas is not for everyone – you have to want to play the data (feeding) game
* Just because you could… doesn’t mean that you should – it comes down to a internal cost analysis.
* Hardware and browsers create conflicts… We don’t specify this… but we may need to define this a little bit more.
* She would love to get a Slack forum to have some kind of a challenge hotline of sorts. Just a way to talk and communicate.
* Ideas on how to bring peoples on to the platform – Amazingly… it has a lot to do with setup.
* Define a setup, fresh setup, migration, un happy client and/or frustrations.
* Speaking to a client… industry specific verbage – corp-wide settings. Maybe even a small glossary. What do you call what and what words are important?
* Coach – what are your goals? Helping them have success matrix values.
* First quarter is the key… usually the biggest key… once again it comes to the setup
* Being physically onsite with clients… technology may come in later but it helps to put people, names, and faces together.
* Templates and standardized things
* Bitesize pieces – boxes, circles, lines, arrows
* Draw like crazy
* Start out of the system and then go back in the system
* Two things with new users. 60 to 90 minutes. 60 minutes of instruction and then some Q & A
* No being scared to make a mistake – then learn how to correct it
* Overthinking things… just start and it will come
* Once a week – Q & A sessions – have them prepare a list of questions. Then even give them homework to get things going.
* Other tools – Slack (forums and quick chat), Zoom, GoToMeeting, recording videos, sending them a video, other resources.
* Danny – Initial demo questions… 2 hours – who am I speaking to (audience)? What are your needs (what is important)? Maybe do a 30-minute consult and cater the demo based on the initial consult.
* Life cycle of inventory or life cycle of X, Y, or Z. Flow and where things go.
* Let’s do another demo with subject A or B – it is ok to make it bite size.
* Office and paperless flow
* Give them a life jacket
* 4-square – PO’s, Invoices, Expense/Receipts, and Deposits
* Are you using a positive or a negative (+ or -) – The 4-square are the main players. Showing the inter-relationship – not even showing adilas, just the concepts and then help them figure out what is happening.
* Scenarios of how these 4 things interact
* Kelly thinks that these 4 pieces are the heart of adilas
* The concepts are the key
* When people are scared, they need a response fairly quickly – the escalation of the emotion
* Marisa – She would love to be a travelling consultant. Kelly says, yes, you can do it… I’m in 18 states currently
* You could be anywhere… it is a cloud-based system. All you need is the Internet.
* What kind of client do you want?
* Lots of options… the sky is the limit
* Build your business on referrals
* How much do you want to work? Figure that out and then set your goals from there.
* Mentoring others in the same field
* Running your own business using adilas – think higher ground and helping people up.
* Power DMS – project management – document uploads and electronic sign-offs.
* Slack – multi channels – email and texts
  + Great tool – quick communication channel
  + Kelly has her clients use a Slack channel
* Going before we have a plan
* Google drive – cloud storage – assign and response
* FogBugz (spelling) – Project management, phases, emails, assignments
* So many tools out there… Mixing and blending tools
* Cost analysis is sanity
* Getting back into your zone… we lose a lot through transition
* Good consultants need to be multi-channeled … lots of incoming pieces.
* Women and men working together. They do things differently but that works.
* We need a good consultant base – to handle the needs that are out there
* How long does it take to bring someone up to speed? The training process does take time.
* The adilas community
* Working together and sharing values and ethics.