



Adilas

All Data Is Live & Searchable

2022

# WELCOME PACKET

## For New Cannabis Clients



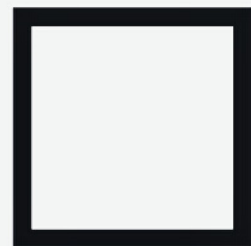
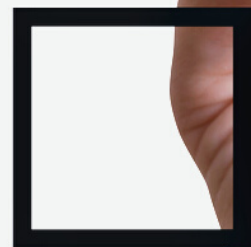
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# Introduction

Welcome to the Adilas family! Our goal is to make the deployment and implementation process a smooth and easy transition for you and your company. This packet will provide an outline of what this process will look like and help set the expectations of what is needed in order to make this as seamless as possible.

As always, if you have any questions or concerns after reading through this information, please do not hesitate to contact us at 720-740-3076 or via email at [support@adilas.biz](mailto:support@adilas.biz)



# "What We Need" Email Request

You will be receiving an email directly from our Accounts Manager that provides an outline of exactly what we need in order for us to set up your system and provide you with the login credentials. Simply reply to this email to get the process started.

Below is a list of those items so that you can start gathering the appropriate information and be ready to reply to our email.

## Information Needed:

- ☐ Full Company Name
- ☐ DBA (Doing Business As)
- ☐ Type of Company IE: Dealership, Retail, etc.
- ☐ Owner/Officer/President
- ☐ Company Address
- ☐ Business Telephone Number
- ☐ Email Address
- ☐ Billing Contact Name, Title, Phone # and Email
- ☐ Other Contact Names, Titles, & Contact Info
- ☐ Website
- ☐ Company Logo & Desired Color Scheme
- ☐ Credit Card Information for Initial Payment & Monthly Billing

# Logo, Watermark, and Colors

One of the things that makes Adilas so unique is the look and feel of the system. We will upload your company logo, create a watermark, and design the entire system around your company colors so that the platform looks like it is YOUR software.

We can design our color scheme around your website if you can provide us with your web address. Also, if you provide us with your social media platforms and other "frequently visited websites" we can add Quick Links inside your Adilas system.

Below is a list of items we need from you in order for this to happen.

Item Needed	Requirement	Notes
<b>Company Logo</b>	at least 72 dpi	File types: PNG, JPG, or JPEG
<b>Company Colors</b>	at least 2 colors	Be as specific as possible (IE: Sky Blue & Light Green)
<b>Websites &amp; Social Media</b>	secure URLs with https://	links to company website, social media platforms, and frequently visited sites

If you do not initially have a logo because you are still in the process of designing and selecting one, we can still get your system started with some colors. The more specific about what colors you want, the better. (IE: Instead of just saying "blue", something more specific like "Royal Blue" or "Sky Blue" is helpful.)

We accept HTML color code palettes, as well.



# Deadlines and Expectations

Does your company have any deadlines or expectations that we need to be aware of? Any insight that you can provide to us will give us the ability to assist in setting certain deadlines for tasks and actions that need to be taken in order to get things implemented in a timely manner for your company.

Below are some examples of deadlines and expectations that you might start thinking about:

- **Login Credentials Deadline** - the date on which you wish to receive login credentials for your employees/users
- **Location & Tax Data Deadline** - the date on which you wish to add your locations and tax information into the system
- **Data Entry/Import Deadline** - the date on which you wish to see the majority of your data and information in the system (this includes things like Vendors, Item Categories, Items, Customers, etc.) Please see the section titled "Importing Data vs. Manual Data Entry" to learn more about this process.
- **Practice Functionality Deadline** - the date on which you wish to start practicing using the functionality in the system to perform daily tasks and procedures
- **"Go LIVE!" Deadline** - the drop-dead date on which you hope to have the system fully set up and functional for you and your employees to start using it.



# Deployment Checklist

After you have been emailed your login credentials to the system, we will share with you a "Deployment Checklist" spreadsheet that includes steps and descriptions of the deployment process. This will help keep everyone on track as we progress through each action and request made. This spreadsheet is usually shared as a Google Sheet so that multiple people can access it and make changes accordingly, however, it can easily be converted into an Excel or CSV spreadsheet if needed.

The screenshot shows a Google Sheet titled "Cannabis Client Deployment Checklist". The sheet has a header row with columns: Steps/Description, Date Requested, Date Received, Date Completed, and Notes. The rows are numbered 1 through 18. The first row is highlighted in green. The second row contains the text "Outline of Info Needed" and "Reply to our email with Company DBA, Address, Phone, Email, etc.". The third row contains the text "Billing Credit/Debit Card Info" and "You may either call, text and/or email the billing information to us.". The fourth row contains the text "Company Logo & Colors Scheme" and "Provide us with your logo and preferred color scheme so we can make the system look like yours.". The fifth row contains the text "Complimentary Intro Training" and "Overview of the Look and Feel of your system". The sixth row contains the text "Set up Metrc API Settings" and "Need Metrc User API Key Number, License Number, and License Type to activate the Metrc API". The seventh row contains the text "Activate Metrc Package Table" and "Discuss company's packing preferences and apply settings accordingly". The eighth row contains the text "Activate Metrc Gram Controller" and "Activate the Shopping Cart Gram Controller and apply settings based on the requirements of the State". The ninth row contains the text "Review State Label Requirements" and "Review the State's requirements for item labels and use Adilas attributes to design POS labels". The tenth row contains the text "Thinking about what you want to name certain things IE: items vs. products" and "Thinking about what you want to name certain things IE: items vs. products".

Steps/Description	Date Requested	Date Received	Date Completed	Notes
Outline of Info Needed				Reply to our email with Company DBA, Address, Phone, Email, etc.
Billing Credit/Debit Card Info				You may either call, text and/or email the billing information to us.
Company Logo & Colors Scheme				Provide us with your logo and preferred color scheme so we can make the system look like yours.
Complimentary Intro Training				Overview of the Look and Feel of your system
Set up Metrc API Settings				Need Metrc User API Key Number, License Number, and License Type to activate the Metrc API
Activate Metrc Package Table				Discuss company's packing preferences and apply settings accordingly
Activate Metrc Gram Controller				Activate the Shopping Cart Gram Controller and apply settings based on the requirements of the State
Review State Label Requirements				Review the State's requirements for item labels and use Adilas attributes to design POS labels
Thinking about what you want to name certain things IE: items vs. products				Thinking about what you want to name certain things IE: items vs. products

Please let us know which format you would like for us to email this to you.

- Google Sheet
- CSV
- Excel

# API Integrations

Adilas has software integration with Metrc and Biotrack for state reporting and compliance. If you are in a state that requires the use of one of these reporting systems, there are a couple of steps that you will need to take on your end to get things started. You will need to obtain your license number and API key from your state's system. The API key is generated by your team, from within Metrc or Biotrack. Please contact the appropriate state reporting system directly if you have any questions about how to access this information.

Once you receive these pieces of information, please email those over to us. We will then go into your Adilas system and “open the door” to this line of communication between Adilas and the State, including implementing the package table that will allow you to compare your inventory and make adjustments directly inside Adilas.





# Cannabis Implementations

Meanwhile, if you are waiting on your license number and/or the API key, there are some features that we can still be implementing within Adilas to ensure a timely setup of your system. These are things like your Labels, API Homepage, and your Gram Controller.

## LABELS:

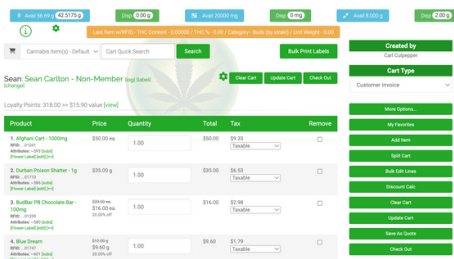
One of the most important features to start working on is the state-required labels for your items. Adilas has standard labels that are included with your system. However, if these labels do not meet the needs of your business, we can customize labels for a small fee. It is important that you do the appropriate research for your state's requirements and let us know what type of information is needed on the labels (IE: disclaimers, THC requirements, batch requirements, etc.) These requirements can be set up as field attributes within your system, to automatically print on your labels.

We have two main types of labels within Adilas:

- **Purchase Order (PO) Labels** - are printed when bringing items into your inventory
- **Point-of-Sale (POS) Labels** - are printed at the point of sale when a customer purchases items

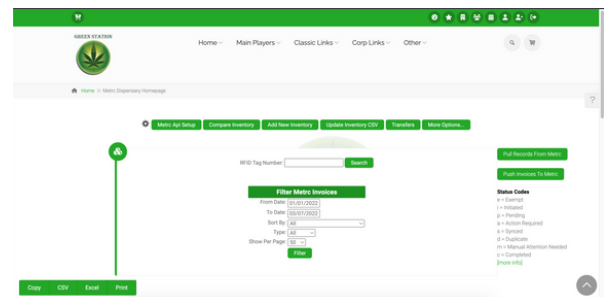
## GRAM CONTROLLER:

Next, we will set up the Gram Controller for your shopping cart. Whether you operate a Medical facility or a Recreational facility, this is a very important step. This feature will track the items added to the shopping cart and alert the salesperson when/if the customer has reached their daily limit. We will set up a training session where we will go behind the scenes into the settings and set the allotted limits based on your state's requirements for Medical Patients vs. Recreational Users.



## API HOMEPAGE:

As soon as your system is set up and login credentials are sent out, we will be sure that the most recent version of our API Homepage (either Metrc or Biotrack) is enabled. This homepage is where you will be able to Add New Inventory, Compare Inventory, Push/Pull Records, and Update Inventory directly inside of Adilas. We will schedule a training session with you and your team to go over the functionality of this page once your API key has been set up.



# Complimentary Intro Training

As part of the initial setup of your system, one of our team members will be reaching out via email to schedule a complimentary 1-hour training that is usually done via Zoom. This training is an introduction to the system including the theme settings, corp email settings, and e-commerce settings. Please keep an eye out for this email after you have received your login credentials to the system.

- 1 Hour Complimentary Training.
- Choose a Day and Time that works best for you and your team.
- Items Covered:
  - Theme Settings
  - Corp Email Settings
  - e-Commerce Settings



# Hardware Recommendations

If we have not already emailed you our list of recommended hardware, **please click here to read our blog post article** that is always up-to-date with Adilas compatible hardware. At this time, we do not sell any hardware directly through Adilas or through a third party. All hardware purchases are at the discretion of you and your company. When choosing the appropriate hardware for your business, there are some things to think about depending on the setup of your business and how you would like your operations to flow.

Some “areas” to think of when considering purchasing hardware are:

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## Reception Area

- Desktop or laptop computer
- Laserjet Printer/Scanner
- Telephone
- Driver's License Reader (optional)

## Sales Area

- Desktop or laptop computer
- 2-D Scanner that can read standard barcodes as well as complex barcodes like QR codes
- Driver's License Swiper
- POS Scale
- Receipt Printer
- Cash Drawer
- Label Printer

## Inventory Receiving/Processing

- Desktop, laptop or tablet
- 2-D Scanner
- RFID Scanner
- Label and/or Barcode Printer
- Laserjet Printer/Scanner

# Merchant Processing

Merchant processors provide a secure portal to take credit/debit card payments from your customers. As we all know, in the cannabis industry, cash is king because it is still federally illegal. However, Adilas does partner with a company called Greenlink Merchants to bring PIN Debit merchant processing to your cannabis customers.

Please be sure to let them know that you are signing up with Adilas as your new software provider.

## GreenLink Merchants

**Jonny Smith**

**President**

**Greenlink Merchants**

Work: (303) 875-0670

[jon@greenlinkmerchants.com](mailto:jon@greenlinkmerchants.com)



# Importing Data vs. Manual Data Entry

There are two ways of adding data into your system: 1) Import data using csv files or 2) Manual data entry by your staff members or a member of the Adilas team. This is best determined by the amount of data that you need to transfer. Typically, if any of your lists have under 100 entries, manual entry is often suggested. This can be done by one of your team members so that they can become familiar with the system, or to save on time, it can be done quickly and efficiently by an Adilas professional for a nominal fee.

Anything with more than 100 entries, should probably be considered for an import which can be done at a very reasonable cost. We can provide you with an import template for the various options so that you can determine which fields you currently have and which fields you wish to bring over into your Adilas system.

Data Import	Manual Data Entry
Can be done with Vendors, Items, and Customers	Can be done on all aspects of the system
Best used when there are <b>over</b> 100 entries to be made	Best used when there are <b>under</b> 100 entries to be made
Tons of field options available	Tons of field options available
Cost: \$65/hour	Cost: \$65/hour



# Practicing Basic Functions

Once we have some data inside of your Adilas system, the next step is to get you and your team navigating through the system and practicing the functionalities that they'll perform on a daily basis. We typically start with the basic functions that your employees will perform on a daily basis. Once you feel like you have a good understanding of the basics, then we will practice more advanced functionality. Below are some examples of Standard Operating Procedures (SOPs) that we can help with:

## Basic Functionality

- ☐ Employee Clock-in/Clock-Out
- ☐ API Homepage
- ☐ Point-of-Sale (POS)
- ☐ Discount/Loyalty Rewards Functionality
- ☐ e-Commerce Orders & Fulfillment
- ☐ Daily Reports

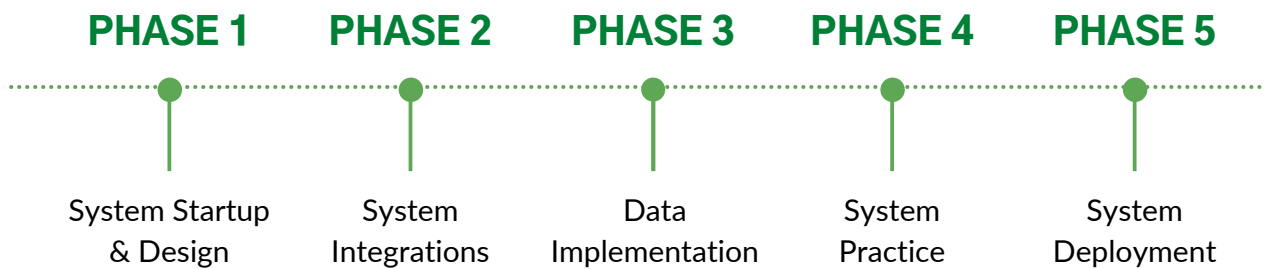
## Advanced Functionality

- ☐ Inventory Management
- ☐ Sync/Update Inventory Using API
- ☐ Accounts Receivable (Deposits)
- ☐ Accounts Payable (Expenses)
- ☐ Bank Reconciliation
- ☐ Check Writing



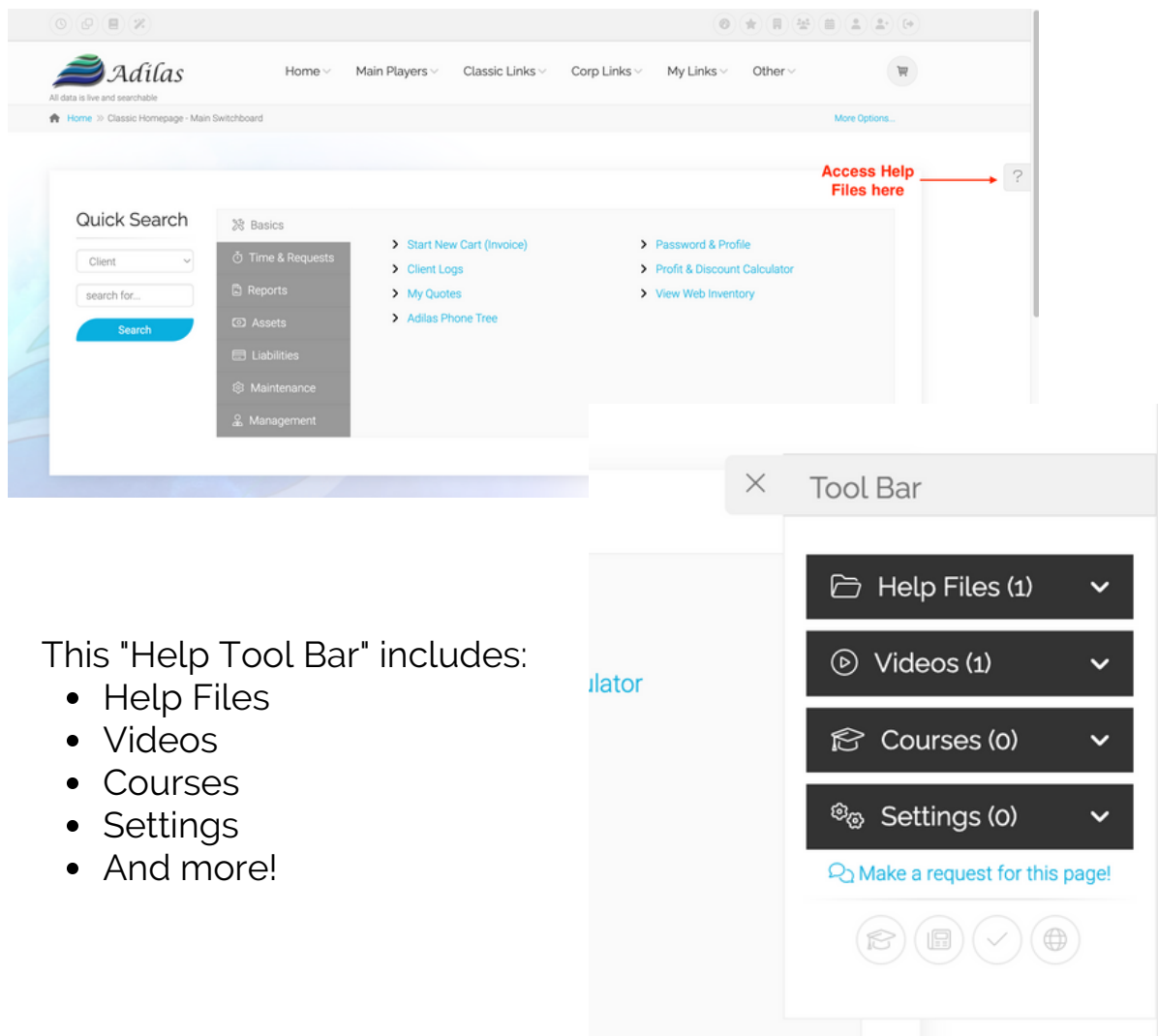
# Deployment Finalization

After practicing some daily functions, the last step is putting them all into action. When we get to this step, be sure to let us know if any additional instructions or training is needed. We do offer additional training after deployment for a small hourly fee, if needed.



# Conclusion

We know that taking on a new system can be overwhelming and stressful, however, our team is here to ensure that it is as painless as possible. We will be with you every step of the way to ensure that the transition is smooth and successful for you and your company. Even after the final deployment is completed, we will still be here to assist you should anything arise. Also, we have quite a few Help files throughout the Adilas system. These can be found by clicking on the "Question mark icon" located on the right side of every page inside Adilas.



This "Help Tool Bar" includes:

- Help Files
- Videos
- Courses
- Settings
- And more!



# Questions or Concerns?



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