



Adilas

All Data Is Live & Searchable

2022

WELCOME PACKET

For New Clients



WELCOME ABOARD

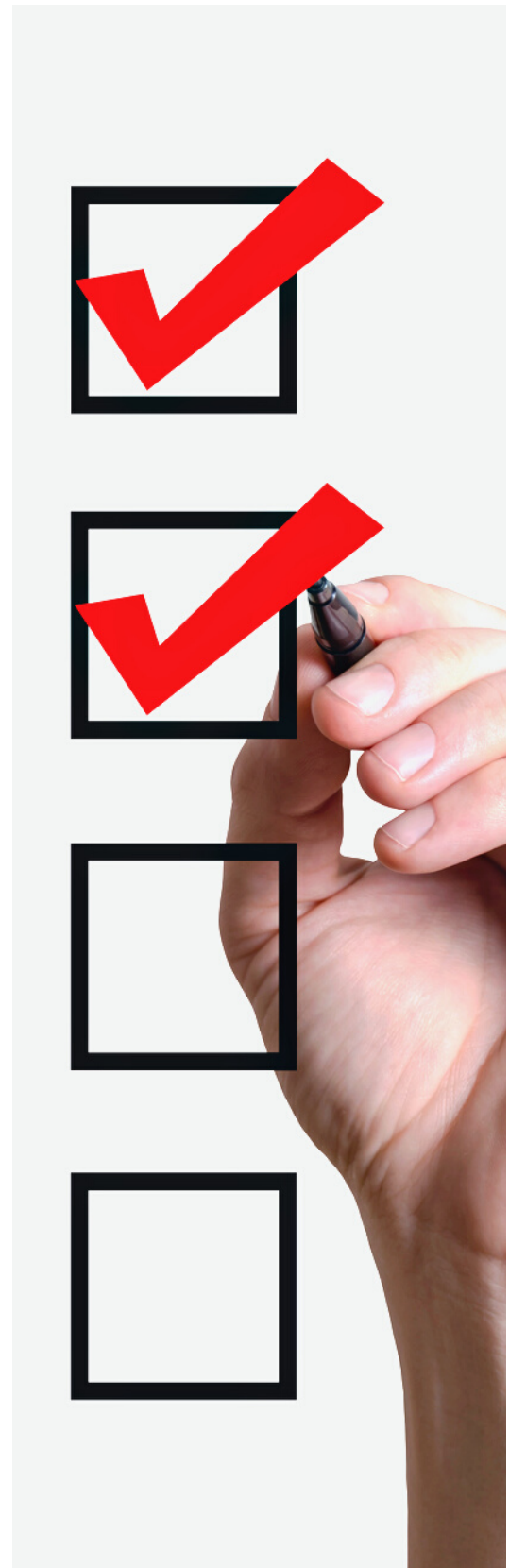
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Introduction

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



"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
Company Logo	at least 72 dpi	File types: PNG, JPG, or JPEG
Company Colors	at least 2 colors	Be as specific as possible (IE: Sky Blue & Light Green)
Websites & Social Media	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.

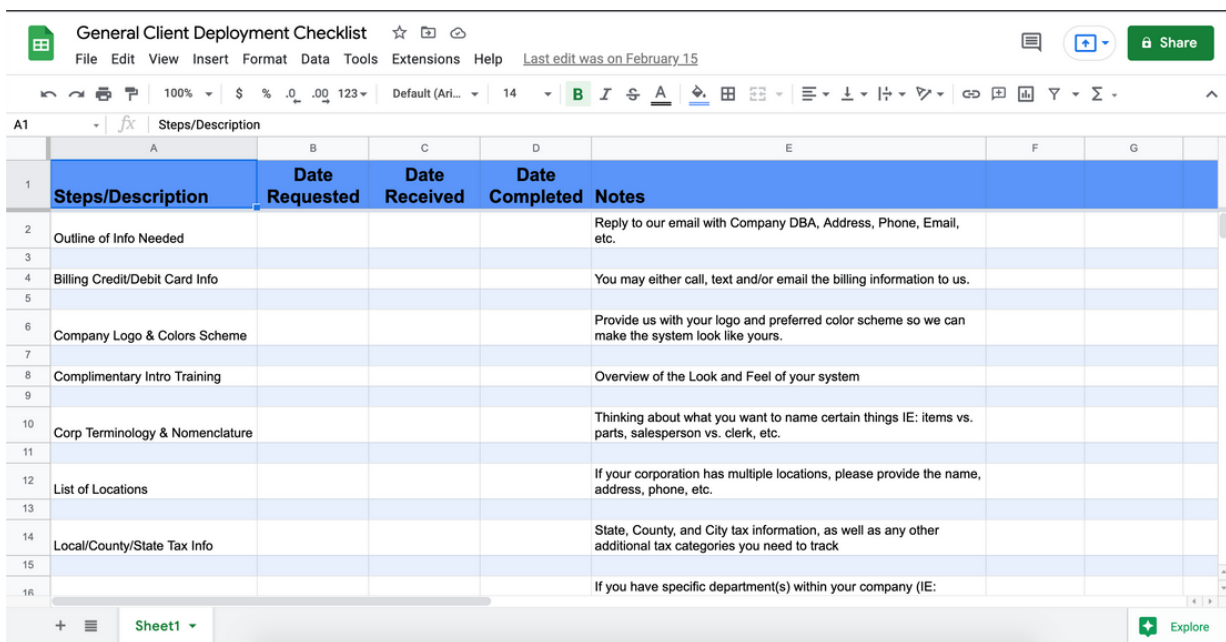
Below are some examples of deadlines and expectations that you might start thinking about:

- **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 "General Client Deployment Checklist". The sheet has a header row with columns: Steps/Description, Date Requested, Date Received, Date Completed, and Notes. The first 16 rows contain deployment steps with their descriptions and notes. The sheet is currently on "Sheet1" and has a "Share" button in the top right corner.

1	Steps/Description	Date Requested	Date Received	Date Completed	Notes
2	Outline of Info Needed				Reply to our email with Company DBA, Address, Phone, Email, etc.
3					
4	Billing Credit/Debit Card Info				You may either call, text and/or email the billing information to us.
5					
6	Company Logo & Colors Scheme				Provide us with your logo and preferred color scheme so we can make the system look like yours.
7					
8	Complimentary Intro Training				Overview of the Look and Feel of your system
9					
10	Corp Terminology & Nomenclature				Thinking about what you want to name certain things IE: items vs. parts, salesperson vs. clerk, etc.
11					
12	List of Locations				If your corporation has multiple locations, please provide the name, address, phone, etc.
13					
14	Local/County/State Tax Info				State, County, and City tax information, as well as any other additional tax categories you need to track
15					
16					If you have specific department(s) within your company (IE:

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

- Google Sheet
- CSV
- Excel

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:

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
- Receipt Printer
- Cash Drawer
- Label Printer

Inventory Receiving/Processing

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

Merchant Processing

Merchant processors provide a secure portal for your business to be able to take credit/debit card payments from your customers. If you currently have a specific Merchant Processor that you are working with, be sure to let us know who that is.

If you do not already have a merchant processing company that you are working with, we suggest the following company. Please be sure to let them know that you are signing up with Adilas as your new software provider.

Newtek / USA ePay
Newtek Merchant Solutions
USA ePay Gateway

Jonathan Pazmino | Vice President – Payment Processing Solutions

Work: (414)-831-3937

Mobile: (610)-490-8611

Fax: (866)376-0369

jpazmino@newtekone.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 over 100 entries to be made	Best used when there are under 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
- ☐ Point-of-Sale (POS)
- ☐ Discount/Loyalty Rewards Functionality
- ☐ e-Commerce Orders & Fulfillment
- ☐ Daily Reports

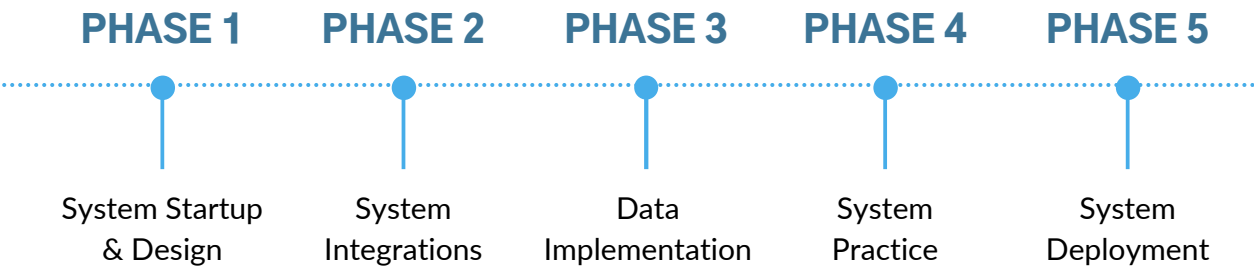
Advanced Functionality

- ☐ Inventory Management
- ☐ Accounts Receivable (Deposits)
- ☐ Accounts Payable (Expenses)
- ☐ Bank Reconciliation
- ☐ Check Writing



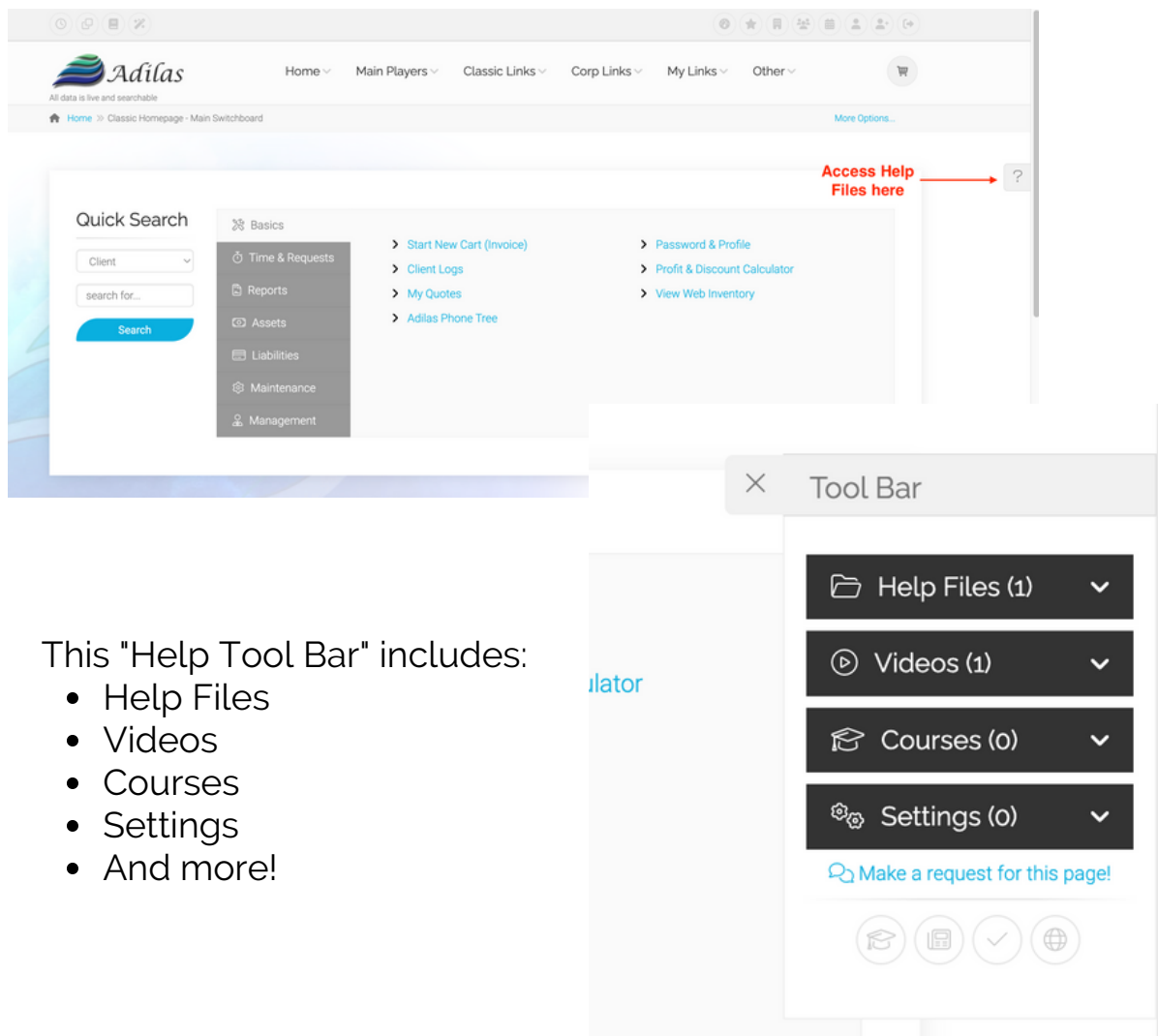
Deployment Finalization

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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Website: www.adilas.biz

