Business Functions - Business Intel

> **Business Intel**
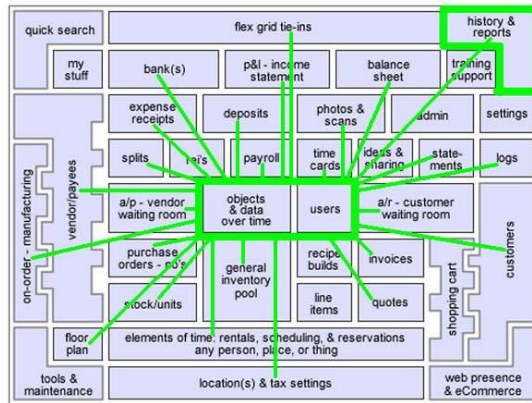
- o Making informed business decisions
    - View at a glance
    - Automated reports with aging, search & filter options
    - Already designed reports or create your own
    - Stay connected wherever you are
    - Good numbers for accountant
    - CRM - Customer Relationship Management
    - Customer history
    - Year-to-date reports
    - Customer photo/document gallery
    - Drive profits
- o Types of intel
    - Roll call - real time when you need your data
    - Update inventory counts
    - Operations intelligence on what is happening
    - Financial & backend office accounting
    - Bank transfers
    - Floor plan - business intel for funding serialized units
    - Reconcile banks
    - Manager's checkbook - slush funds
    - Up logs & follow-up logs
    - What our clients want - quick and reliable access to counts, sums, averages, maxes, mins, stats and reporting
- o Power is in the data
    - BI can help drive revenue
    - Mixing & blending
    - Virtual assistant

- Document anything
- Add photos, scans, docs, etc.
- Unlimited search potential
- Five (5) decimal accuracy
- Build your own reports
- Profit per line reports
- Peace of mind
- Transactional data core - start here - then be able to roll up the data into enterprise aggregated levels
  - Conquering gaps and needs
    - Years of listening & providing solutions
    - Bridging the gap between operations & accounting
    - Centralize the data
    - Interconnected system
    - Objects & data with structure going over time
    - Things start playing through their life-cycles & relationships without multiple entries (double, triple, quadruple, etc.)
    - Eliminate errors - if data is good let it flow to the next stage
    - Brings value, reliability, & closure for business intelligence
    - Gap analysis - where are we vs where do we want to be?
      - Questions you might want to ask:
        - ✓ Where is the low hanging fruit?
        - ✓ What is working well for you?
        - ✓ What do you want?
        - ✓ What's the difference in the middle - this is the gap?
        - ✓ What's the plan to get what you want? We can help!
    - Feedback & ideas from users
    - Build data relationships
    - Big need for exports and imports
    - Bulk tools
  - Real-time reliability
    - Live and searchable
    - Optimized for multi-windows or multi-monitors
    - Digital filing system
    - Aged reports
    - Loan calculator w/amortization
    - Profit & discount calculator
    - Sales tax reporting
    - Use API sockets to build out the totals
    - Dashboards
  - 10.6. Permissions and levels
    - Security

- Empower people to do their jobs
- Customizable roles for each user
- Based on permissions - allow or deny access
- Features change based on permission
- 100+ permissions
- Enterprise, consolidated, multi-faceted

- Activity and history
  - Digital filing system
  - Every penny in, every penny out
  - Recent activity and history - real time
  - Search, save, store, & print
  - Scan your documents
  - Store your photos
  - Archive your documents
  - Track your processes the whole way through - every stage
  - Full audit trails
  - What changed? Log it

- Cloud based platform
  - Access options
  - Remote, mobile, any device, 24/7, holidays, weekends, anytime, anywhere you can connect
  - Safe & secure using latest web based security options
    - ✓ 3 way checks on every page
    - ✓ Encryption, SSLs, or https
    - ✓ 3 strike out login policy
    - ✓ Server-side validation, commercial level scripting, secure data center, & robust database servers
    - ✓ Daily backups, 24/7 support staff/techs - your data is in good hands!
  - All your numbers in ONE place
  - Operation driven accounting
  - Cloud accounting
  - Real-time environment
  - Paperless office!
  - Know where you're at daily!
  - All under one roof

- Looking to the future
  - Actively pioneering, building, & improving
  - Heading toward full world-building - what does your world look like?
  - Challenging tradition in ways that help you!
  - We'll keep pushing on things & bringing pieces of the puzzle together
  - Huge idea farm - you are welcome to participate
  - Bringing more value over time
  - Data portal - an area where data can be secured but flow in and out

- Organized and retrievable
- Life-Cycle accounting
- Roll call accounting
- Linear accounting
- Ice-down dates
- Powered by adilas.biz - under the covers
- Possibilities - everything we have we can use to empower other software packages
- We love this stuff! We can help you too!