



http://



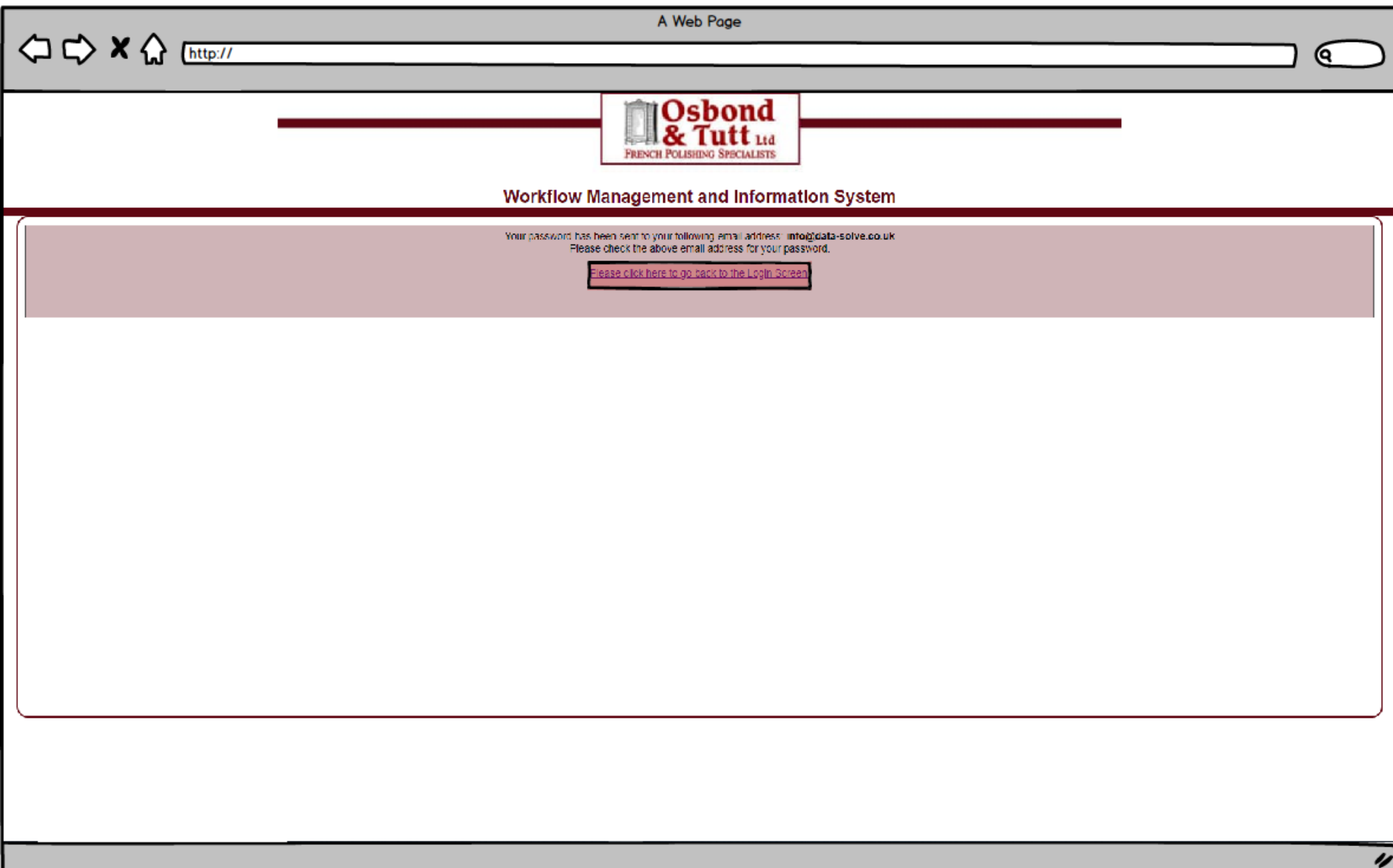
Workflow Management and Information System

Osbond and Tutt - Login

Please Login

Username

Password





Logout

Estimates

7

3

Job Allocation and Timesheet System

1. Enquiry Reminders:
This is the number
reminders that the
Enquiries has matured
as of todays date:

Count the number of records where (current date) - (reminder date) >= (reminder value)

2. Clicking on Reminders for Enquiries should take user to the Enquiries screen and filter out all reminders whose (current date) - (reminder date) >= (reminder value)


3. Enquiry Snoozes:
This is the number
snoozes that the
Enquiries has matured
as of todays date:

Count the number of records where (current date) - (snooze date) >= (snooze value)

4. Clicking on Reminders for Enquiries should take user to the Enquiries screen and filter out all reminders whose (current date) - (snooze date) >= (snooze value)

A Web Page

http://



Osbond & Tutt Ltd
FRENCH POLISHING SPECIALISTS

J-A-T-S

Job Allocation and Timesheet System

Dashboard

Enquiries

Estimates

Jobs

Allocations

Operatives

Invoices

Maintenance

Logout

Enquiry No

Date From

Date To

Name

Company

☐ Reminders

☐ Snoozes

Status

Reason Close

ENQ056 Date of Enquiry

Name <input type="text"/>	Company <input type="text"/>	Email <input type="text"/>
Mobile <input type="text"/>	Telephone <input type="text"/>	Remind <input type="button" value="Remind"/> Snooze <input type="button" value="Snooze"/>
Description of Enquiry and Notes		
Status <input type="text"/>	Reason Closed <input type="text"/>	<input type="button" value="View Details"/>

ENQ055 Date of Enquiry

Name <input type="text"/>	Company <input type="text"/>	Email <input type="text"/>
Mobile <input type="text"/>	Telephone <input type="text"/>	Remind <input type="button" value="Remind"/> Snooze <input type="button" value="Snooze"/>
Description of Enquiry and Notes		
Status <input type="text"/>	Reason Closed <input type="text"/>	<input type="button" value="View Details"/>

ENQ054 Date of Enquiry

Name <input type="text"/>	Company <input type="text"/>	Email <input type="text"/>
Mobile <input type="text"/>	Telephone <input type="text"/>	Remind <input type="button" value="Remind"/> Snooze <input type="button" value="Snooze"/>
Description of Enquiry and Notes		
Status <input type="text"/>	Reason Closed <input type="text"/>	<input type="button" value="View Details"/>

ENQ053 Date of Enquiry

Name <input type="text"/>	Company <input type="text"/>	Email <input type="text"/>
Mobile <input type="text"/>	Telephone <input type="text"/>	Remind <input type="button" value="Remind"/> Snooze <input type="button" value="Snooze"/>
Description of Enquiry and Notes		
Status <input type="text"/>	Reason Closed <input type="text"/>	<input type="button" value="View Details"/>

Comments:

- The searches are self explanatory
- Clicking on any of the Key Performance Indicators will automatically filter the Enquiries on the left
- "Delete Enquiry" is missing. An button can be added between "Email" and "Convert 2 Estimate"
- Status can either be Live, Converted or Closed
- Closed Enquiries are those Enquiries that were not Converted. They should have a "Reason to Close". These have been given in the KPI section
- Remind shows the number of days from the "Date of Enquiry" whereas snooze shows the number of days from the Reminder.
- When a value for Reminder or a value for Snooze is populated, a hidden field that stores the date of the day when those values were populated is also filled in. This will help with the calculations.

Key Performance Indicators

Enquiry Counts	
Live	Converted
15	25
Closed Enquiries	
Too expensive	3
Found convenient alternative	2
Slow response to enquiry	6
Another competitor contracted	4
Client not contactable	1
Total Enquiries Todate	
56	



J-A-T-S

Job Allocation and Timesheet System

Add Contact

Name

Page 1 of 1

Company

Reset Lists

- Images

Audio

Add Audio

[Save Enquiry](#)

Cancel

Enquiry Description

[illegible]

Name

Company

Telephone

Mobile

Email

The above Name and Company already exist within the Contacts Database.

Save Contact

Comments:

[Add Enquiry](#)

1. Name will contain all the Names from the Contacts Database

2. Company will contain all the Companies from the Contacts Database

3. Selecting a "Name" from the list should filter out the "Company" or "Companies" associated with the selected "Name"

4. Selecting a "Company" from the list should filter out the "Name" or "Names" associated to the selected "Company"

5. Clicking on "Reset Lists" should reset the lists to display all the values within them (both "Name" and "Company")

Add Contact

1. This portion may have to use Ajax, but if the programmer is intuitive enough, then ajax can be avoided. Explanation given when discussion takes place.

2. If Name and Company added already exist within the database, error message to be displayed.

3. Otherwise all details to be added to the Contacts Database (if ajax is used) and then those details to be added within the Name and Company lists and automatically displayed as well.



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Job Allocation and Timesheet System



Dashboard
Enquiries
Estimates
Jobs
Allocations
Operatives
Invoices
Maintenance
Logout

ENQ056

Date of Enquiry

Email Contact

Convert To Estimate

Save Enquiry

Contact Details

Name

Name

Company

Company

Email

Email

Mobile

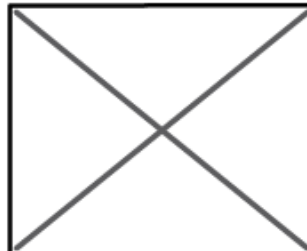
Mobile

Telephone

Telephone

Enquiry Description

Images



Delete Selected Image

Add Image



Audio



Delete Audio

Add Audio



Administration

Reminder

Snooze

Remind

Snooze

Status

Status



Reason

Reason Closec





J-A-T-S

Job Allocation and Timesheet System

[Save Estimate](#)

[Dashboard](#)
[Enquiries](#)
[Estimates](#)
[Jobs](#)
[Allocations](#)
[Operatives](#)
[Invoices](#)
[Maintenance](#)
[Logout](#)

Contact Details

Name

Company

Email

Mobile

Telephone

Quotation To:

PO No. Project Ref Estimate Date Job No Due Before

Enquiry Description

Description

Amount

VAT

<input type="text"/>	<input type="text"/>	<input type="text"/>	Add
----------------------	----------------------	----------------------	---------------------

<input type="text"/>	<input type="text"/>	<input type="text"/>	Update
<input type="text"/>	<input type="text"/>	<input type="text"/>	Delete

<input type="text"/>	<input type="text"/>	<input type="text"/>	Update
<input type="text"/>	<input type="text"/>	<input type="text"/>	Delete

<input type="text"/>	<input type="text"/>	<input type="text"/>	Update
<input type="text"/>	<input type="text"/>	<input type="text"/>	Delete




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Job Allocation and Timesheet System

- Dashboard
- Enquiries
- Estimates**
- Jobs
- Allocations
- Operatives
- Invoices
- Maintenance
- Logout

Job No	Date From		Name	<input type="checkbox"/> Reminders	Status			
	Date To		Company	<input type="checkbox"/> Snoozes	Reason Close	Search	Back To All	Add Estimate

[illegible]

Key Performance Indicators

Estimate Counts

Live Estimates Converted To Job

15 25

Closed Estimates

Too expensive	3
---------------	---

Found convenient alternative	2
------------------------------	---

Slow response to enquiry	6
--------------------------	---

Another competitor contracted	4
-------------------------------	---

Client not contactable	1
------------------------	---

Total Estimates Todate

56



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Job Allocation and Timesheet System



Dashboard
Enquiries
Estimates
Jobs
Allocations
Operatives
Invoices
Maintenance
Logout

Save Estimate

Contact Details

Name

Company

Email

Mobile

Telephone

Quotation To:

PO No. Project Ref Estimate Date / / Job No Due Before / /

Add Contact Details

Name

Company

Email

Mobile

Telephone

The above Name and Company already exist within the
Contacts Database.

Save Contact

Description

Amount

VAT

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Add"/>
----------------------	----------------------	----------------------	------------------------------------

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Update"/>	<input type="button" value="Delete"/>
----------------------	----------------------	----------------------	---------------------------------------	---------------------------------------

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Update"/>	<input type="button" value="Delete"/>
----------------------	----------------------	----------------------	---------------------------------------	---------------------------------------

<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Update"/>	<input type="button" value="Delete"/>
----------------------	----------------------	----------------------	---------------------------------------	---------------------------------------

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**Osbond
& Tutt Ltd**
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Job Allocation and Timesheet System



Email Contact

Generate Estimate

Convert to Job

Save Estimate

Contact Details

Name

Company

Email

Mobile

Telephone

Quotation To:

PO No. Project Ref Estimate Date / / Job No Due Before / /

Administration

Reminder

Snooze

Remind Snooze Status Reason

Description

Amount

VAT

Add

Update

Delete

Update

Delete

Update

Delete