



http://



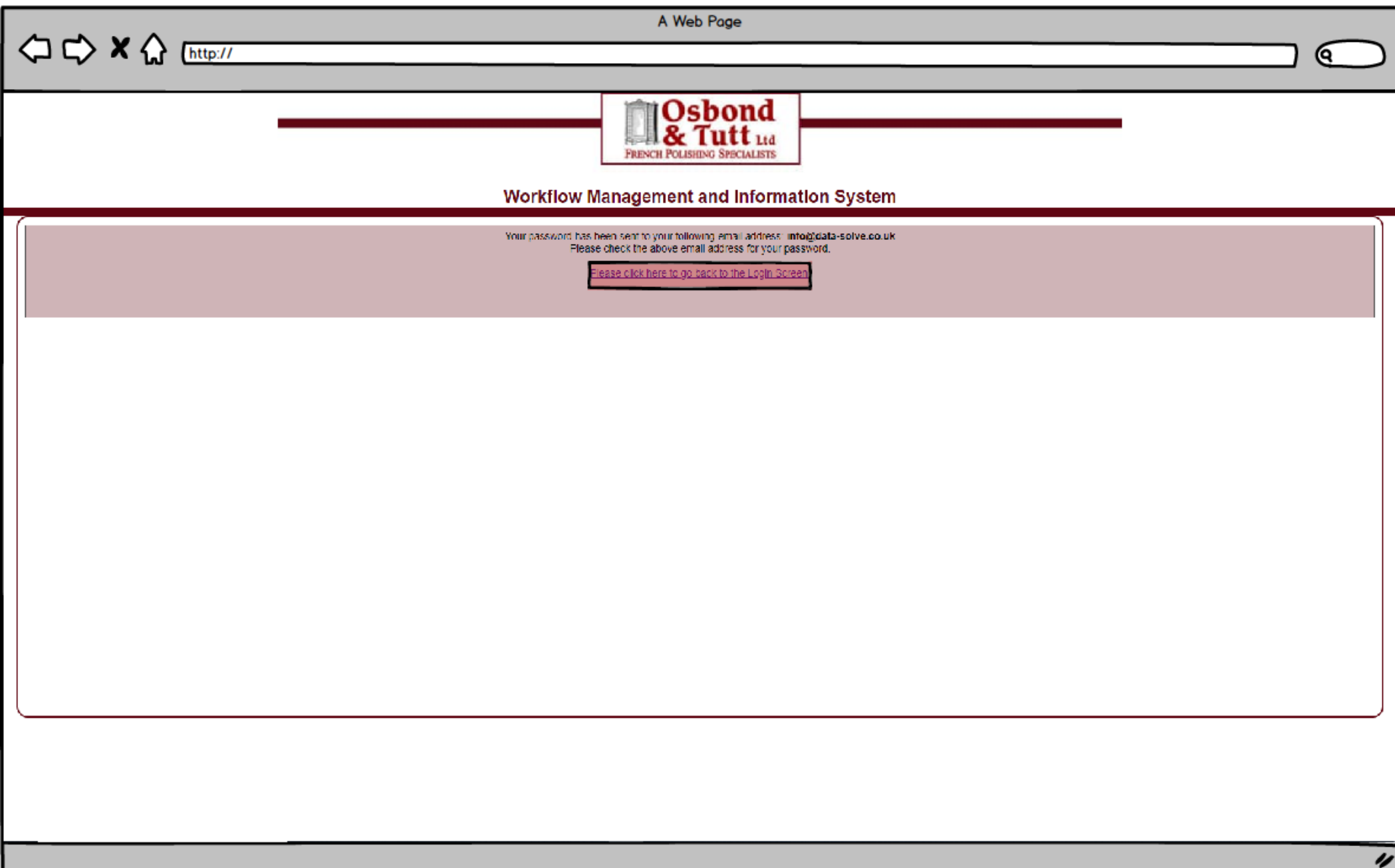
Workflow Management and Information System

Osbond and Tutt - Login

Please Login

Username

Password





Enquiries

5

Estimates

7

Snoozes

J-A-T-S

Job Allocation and Timesheet System

Logout

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) \geq (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) \geq (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)



1. The searches are self explanatory
2. Clicking on any of the Key Performance Indicators will automatically filter the Enquiries on the left
3. "Delete Enquiry" is missing. An button can be added between "Email" and "Convert 2 Estimate"

Key Performance Indicators

Enquiry Counts

Live	Converted
1	1
2	2
3	3
4	4
5	5
6	6
7	7
8	8
9	9
10	10
11	11
12	12
13	13
14	14
15	15
16	16
17	17
18	18
19	19
20	20
21	21
22	22
23	23
24	24
25	25
26	26
27	27
28	28
29	29
30	30
31	31
32	32
33	33
34	34
35	35
36	36
37	37
38	38
39	39
40	40
41	41
42	42
43	43
44	44
45	45
46	46
47	47
48	48
49	49
50	50
51	51
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62	62
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66	66
67	67
68	68
69	69
70	70
71	71
72	72
73	73
74	74
75	75
76	76
77	77
78	78
79	79
80	80
81	81
82	82
83	83
84	84
85	85
86	86
87	87
88	88
89	89
90	90
91	91
92	92
93	93
94	94
95	95
96	96
97	97
98	98
99	99
100	100

15 25

Closed Enquiries

Too expensive	3
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Found convenient alternative 2

Slow response to enquiry	6
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Another competitor contracted 4

Client not contactable	1
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Total Enquiries Todate

56

A Web Page

http://

Osbond & Tutt Ltd
FRENCH POLISHING SPECIALISTS

J-A-T-S
Job Allocation and Timesheet System

Enquiry No: [v] Date From: [v] Date To: [v] Name: [v] Company: [v] Reminders: [v] Snoozes: [v] Status: [v] Reason Close: [v] Search: [v] Back To All: [v] Add Enquiry: [v]

Dashboard
Enquiries
Estimates
Jobs
Allocations
Operatives
Invoices
Maintenance
Logout

ENQ056
Name: [v]
Mobile: [v]
Email: [v]
Remint: [v] Snoo: [v]
Status: [v]
Reason Close: [v]
Save: [v]

ENQ053
Name: [v]
Mobile: [v]
Email: [v]
Remint: [v] Snooze: [v]
Status: [v]
Reason Close: [v]
Save: [v] Email: [v] Conv 2 Est: [v]

Add Enquiry

Name: [v]
Company: [v]
Enquiry Description: [v]
Reset Lists: [v]
Save Enquiry: [v]
Cancel: [v]

Add Contact

Name: [v]
Company: [v]
Telephone: [v]
Mobile: [v]
Email: [v]
The above Name and Company already exist within the Contacts Database.
Save Contact: [v]

Performance Indicators

Enquiry Counts	
ive	Converted
15	25

Closed Enquiries	
expensive	3
d convenient alternative	2
response to enquiry	6
er competitor contracted	4
t not contactable	1

Total Enquiries Todate: 56

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.