For
Business Management
Workflow Essentials

Selected Screen Images

OST T/A
OST Database Group
Specialists in Database Design, Development & Renovation

Opening Screen

For Business Management - Workflow Essentials

Purpose

A well considered custom designed business management system can free up a substantial portion of a full-time staff member's time every year, allowing them to work on tasks to advance your business.

Workflow Essentials is a well-designed, broad-based product that allows OST Database Group to customise a solution specific to your business' needs, at an affordable price.

Getting Started

Using Workflow Essentials as a base product, OST Database Group assists businesses to manage the key functions and processes within these 5 Portals of Business:

* Resources - Assets, Employees, Stock...
* Marketing - CRM, Leads, Sales...
* Operations - Jobs, Sales, Production, Systems...
* Admin - Sales, Purchases, Timesheet Tracking...
* Leadership - Management Reporting...

More>>   Print Help   About   Close

Left navigation menu

January For Business L Management

User Name

Customer Quotes

Customer Jobs

Customer Orders

Customers

Supplier Orders

Supplier Purchases

Suppliers

Products

Product Requirements

▲ ▼

Defaults

Data File Management

Introducing

Exit

You are able to click these links to bring up a list screen in accordance with the title links.

Customers List Screen

Customers List

	Last Name	First Name	Enterprise Name	Phone 1	Postcode	Customer Type	Enterprise Type	Status	Batch
▶	H	Stewie	StewieH Management	3679	4850	Business	Charity Organisa	Lead	Batch 2
	J	Mary	MaryJ Inc	1234	4829	Business	Insurance Compa	Lead	Not Defined
	K	James	JamesK Services	0007	4415	Business	Government Body	Lead	Batch 2
	L	Mario	MarioL P/L	6247	4152	Business	Insurance Compa	Lead	Batch 2
	O	Mark	MarkO Pty Ltd	3455	4122	Business	Not Defined	Not Defined	Not Batched
	R	Martin	MartinR Gym	6738	4013	Business	Social Service	Not Defined	Not Batched
	S	john	BillS Engineering	1222	4343	Business	Government Body	Not Defined	Not Batched
	Y	Clint	ClintY Industries		4671	Business	Charity Organisa	Lead	Batch 2
*									

Button Headers:
You are able to click on a number of these buttons to sort the list in accordance with the button pressed.

Double click the customer's name' to bring up the Customer details.

Search String:

8

Contact Classification: All

P/code Range First: 0000   Last: 4999

Customer Type: Business

Next Action: All

Enterprise Type: All

Batch: All

Status: All

Result: All

Mrktg Source: All

Current: Yes

Suburb: All

Reset

P/Code: All

Contacts   Print   Batch   New   Help   Close

Add To Mail Merge List   Email Mail Merge Clients

Clear Mail Merge List   View Table

Enter or select various search strings or options to filter the customer list.

Customer Details Screen

Click on the various tabs to add additional information.

Click on the Lists button to manage the combo box lists.

Clients - Documents Tab
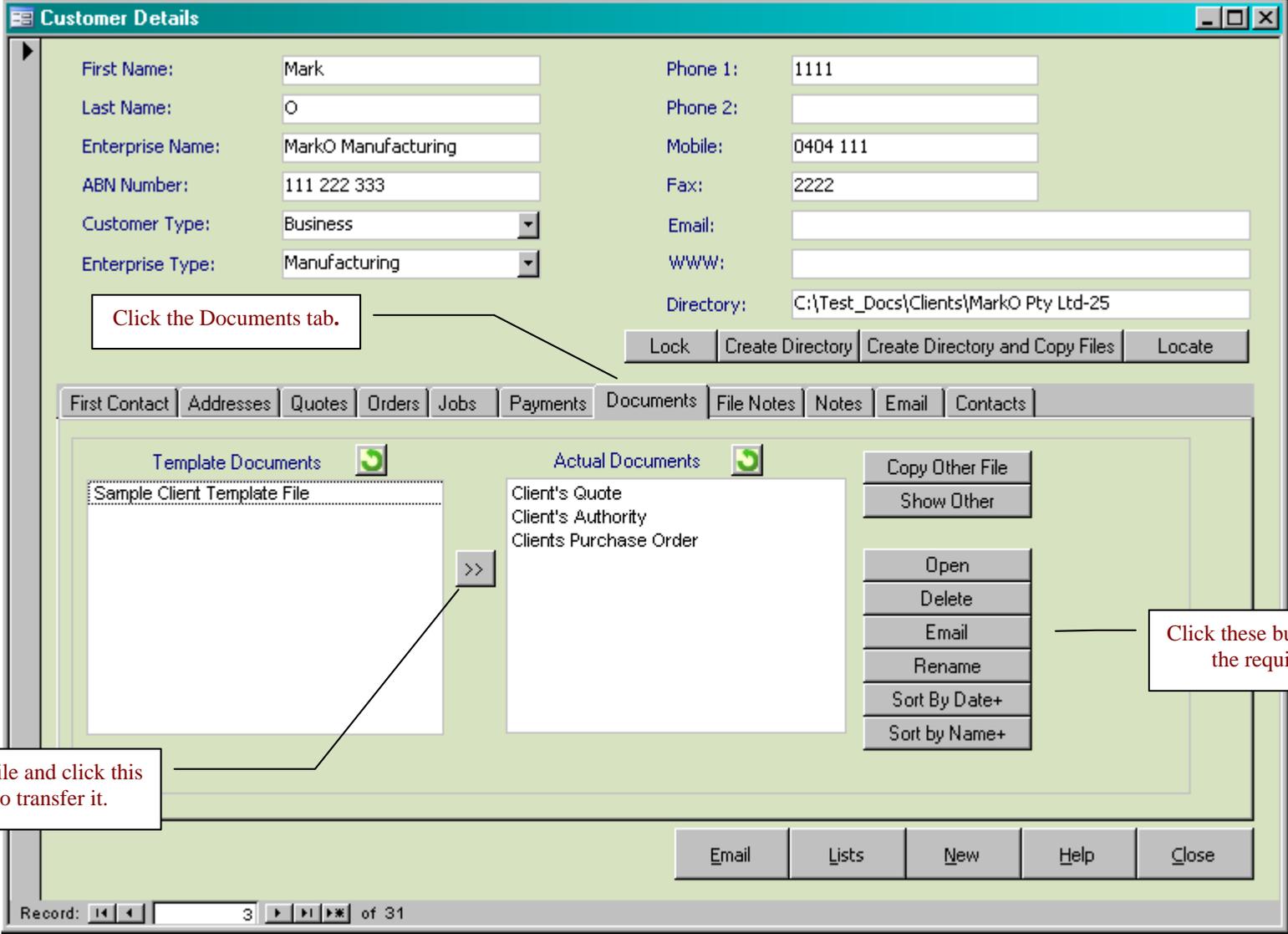
Customer Job Details and Monthly Schedule Screens

Additional Component - Advanced Project/Job Management

NOTE: *This component is not included in the base product as it may only be more applicable to some clients*