

For
Business Management
Workflow Essentials

Selected Screen Images



Opening Screen

January For Business Management

User Name

- Customer Quotes
- Customer Jobs
- Customer Orders
- Customers
- Supplier Orders
- Supplier Purchases
- Suppliers
- Products
- Product Requirements

▲ ▼

- Defaults
- Data File Management
- Introducing
- Exit

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...



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

Customers List Screen

The screenshot shows a 'Customers List' window with a table of customer records. The table has columns for Last Name, First Name, Enterprise Name, Phone 1, Postcode, Customer Type, Enterprise Type, Status, and Batch. Below the table is a search and filter section with various dropdown menus and buttons. Callouts provide instructions on how to interact with the interface.

Last Name	First Name	Enterprise Name	Phone 1	Postcode	Customer Type	Enterprise Type	Status	Batch
H	Stewie	StewieH Management	3679	4850	Business	Charity Organisal	Lead	Batch 2
J	Mary	MaryJ Inc	1234	4829	Business	Insurance Compa	Lead	Not Defined
K	James	JamesK Services	0007	4415	Business	Government Bod	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 Bod	Not Defined	Not Batched
Y	Clint	ClintY Industries		4671	Business	Charity Organisal	Lead	Batch 2
*								

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

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

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
Mktg Source: All Current: Yes
Suburb: All
P/Code: All

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

Customer Details Screen

January For Business Management

User Name

Product Requirements

Work Orders

Parts

Deliveries

Payments

Employees

Associates

To Do

Assets

Defaults

Data File Management

Introducing

Exit

Version: 5.96.20090507

Last Name	First Name	Enterprise Name	Phone 1	Postcode	Customer Type	Enterprise Type	Status	Batch
K	James	JamesK Services	0007	4415	Business	Government Bod	Lead	Batch 2
L	Mario	MarioL P/L	6247	4152	Business	Insurance Compe	Lead	Batch 2
O	Mark	MarkO Manufacturing	1111	4122	Business	Manufacturing	Repeat Business	Batch 1
R	Martin							
S	john							
T	Mary							
Y	Clint							
Z	Stewie							
*								

Customer Details

First Name: Mark

Last Name: O

Enterprise Name: MarkO Manufacturing

ABN Number: 111 222 333

Customer Type: Business

Enterprise Type: Manufacturing

Phone 1: 1111

Phone 2:

Mobile: 0404 111

Fax: 2222

Email:

WWW:

Directory: C:\Test_Docs\Clients\MarkO Pty Ltd-25

Lock Create Directory Create Directory and Copy Files Locate

First Contact Addresses Quotes Orders Jobs Payments Documents File Notes Notes Email Contacts

Marketing Source: Magazine Ad

Status: Repeat Business Current?

Gender of Contact: Male

Notification Preference: Phone

Entry Date: 22/05/2006

Contact Classification: Advocates Happy To Be Contacted?

Referred By: An Associate

Batch: Batch 1

Next Action: Action 1

Next Action Date: 27/08/2009

Result: Result 1

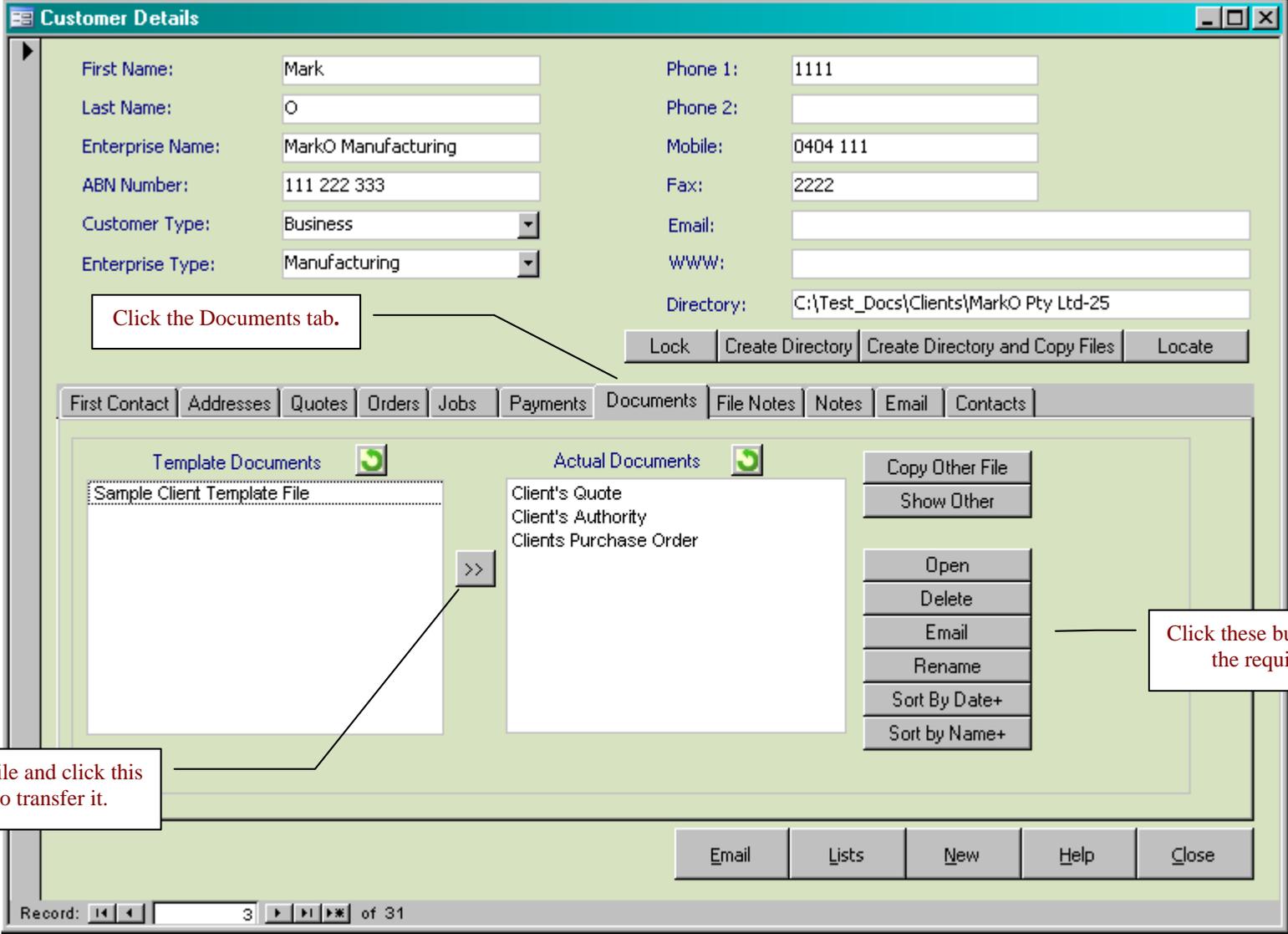
Email Lists New Help Close

Record: 3 of 31

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

The image displays two overlapping software windows. The top window, titled "Customer Job Details", contains a form with the following information:

- Job Name: New Sample Job | Job Code: AA01
- Invoice No: 00001234 | Invoice Date: [empty]
- Brief Description: Client specific job.
- Print on invoice?:
- Job Type: Standard Development | Add Stages
- Job Manager: B Manager
- Job Status: Waiting for Parts
- Completed: | Chargeable?:
- Customer: MarkD Manufacturing - O, Mark
- Contact: [empty]
- Customer Ref#: 1234
- Ph: 1111 | Mob: 0404 111 | Fax: 2222
- Job Location/Delivery Address:
 - Office No: [empty]
 - Street: Sample Street
 - Suburb: BRISBANE
 - State: QLD | Postcode: 4000

Below the form is a tabbed interface with the following tabs: Job Stages, Job Dates, Time Spent, Work Performed, Products/Materials Used, Parts Used, Other Costs, Delivery & Installation, Payments. The "Job Stages" tab is active, showing a table:

Order	Stage	Start Date	End Date	Billing Hrs	Stage Value	Responsible Officer	Fnsht
1	Requirements Clarification	1/04/2008	5/04/2008	4	\$34.00	Assoc Second	<input type="checkbox"/>
2	Stage 1 Development	7/04/2008	14/04/2008	5	\$21.00	[empty]	<input type="checkbox"/>
3	Stage 2 Development	7/04/2008	22/04/2008	12	\$4.00	[empty]	<input type="checkbox"/>
4	Delivery						<input type="checkbox"/>

The bottom window, titled "Client Jobs - Monthly Schedule", shows a calendar for March 2008. The month starts on Saturday, 1 March 2008, and ends on Monday, 31/3/08. The calendar grid highlights the days from 1 to 31. Below the calendar, there are three job entries with Gantt charts:

- New Sample Job: Start Date: 10/03/2008, Date Due: 31/03/2008
- Design: Start Date: 26/02/2008, Date Due: 20/03/2008
- Update database: Start Date: 16/01/2008, Date Due: 4/08/2008

At the bottom of the window, there is a "3" and buttons for "Help" and "Close".

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

The screenshot displays the 'Monthly Schedule' window. At the top, it shows navigation controls for the calendar, including '<< Prey', 'Week Starting: Sunday, 1 March 2009', 'Ending: Tue 31/3/09', and 'Next >>'. A small calendar icon is visible on the left. The main area is a Gantt chart with a grid of days (Su to W) and tasks listed on the left. Tasks include 'Establish Plan', 'Send Supplier Orders', 'Receive Supplier Orders', 'Establish Foundations', 'Establish Framework', and 'Add Roof'. Blue bars represent the duration of each task. The bottom of the window features filter controls for Project, Project Status, Task Type, Resource, Resource Type, and Claim Type, all set to 'All'. A 'Show' section includes checkboxes for 'Payments', 'Clashes', and 'Scheduled Only'. 'Print', 'Help', and 'Close' buttons are located at the bottom right.