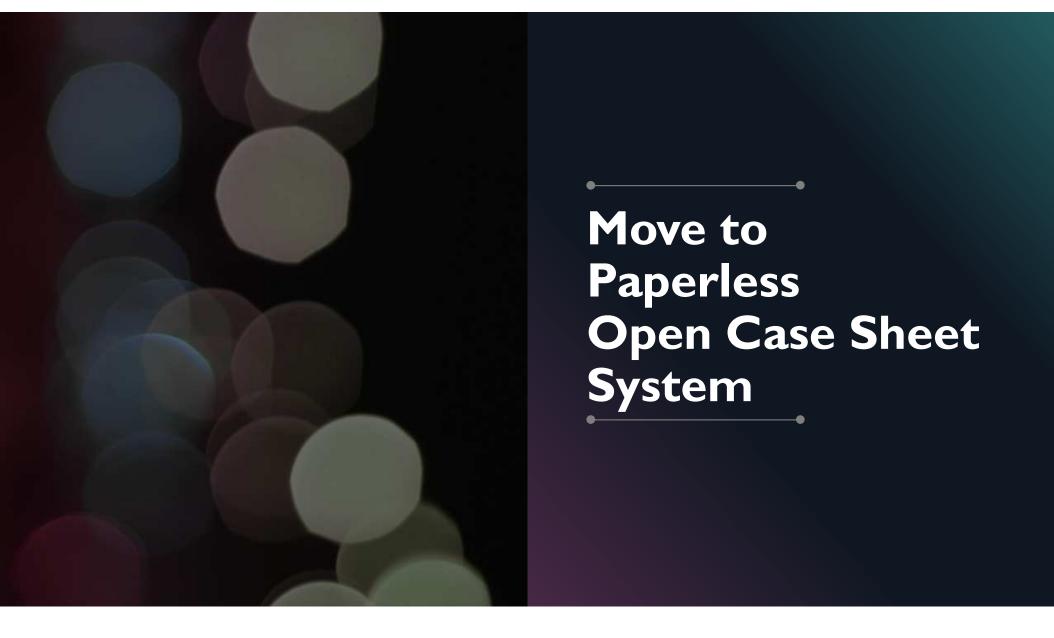


# Open Case Sheet System

Feb, 2022



### **ABOUT THIS**

This is web form for support Sales, SC and Project Manager to Collect Open Sheet Data

This system will control operation work flow Start from Sales input Customer Requirement, Submit to System Community Team and Project Manager for continue the next process



### Go to Url: http://vamsplussvr:9424/ (Recommend use Google Chrome Browser)



Open Case She	eet System	1		
	🔿 Sign	In		
	Username			
	Password	() Username is required.		
		+) Login		
			6	

- Login by User and Password CSI Domain
- If cannot to login, Please inform System Admin to Grant Permission to access this system

### **Overviews**

### o Main Menu

Open Case / Pre Com Sheet / Questionnaire / Miscellaneous/Customer Info

📔 Home   Open Case Sheet System 🗙	+					
← → C ③ Not secure   iis	01svr:9140/en					07
📕 🚠 Open Case	Sheet System					Ģ
	Open Case Sheet	Pre-Com Sheet	Questionnaires	Miscellaneous	Customer Info	
Home   Open Case Sheet System	× +					
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I≣ Pre-Com Sheet						
<b>]≡</b> Questionnaires	Open Case Sheet					
i <b>≣</b> Miscellaneous						
i≣ Customer Info						

### **Screen Permission**

•

	Sales	SC	PM	Admin
<u> 1. Open Case Sheet</u>				
-View Open Case Sheet	X	X	X	X
-Create Open Case Sheet	X			X
- Edit Open Case Sheet	X	X	x	X
2. Pre Com Sheet				
-View Pre Com Sheet	X	X	X	X
-Import Pre Com Sheet		X	X	X
-View Import History List	X	X	X	X
3. Questionnaire				
-View Questionnaire	X	X	X	X
4. Miscellaneous				
-View Miscellaneous	X	X	X	X
-Maintain Miscellaneous		x		x
5. Customer Info				
-View Customer	X	X	Х	X
-Create Customer	X	X		X
- Edit Customer		X		X

### **Open Case Sheet**

- Create New Open Case or View List
- o Input Customer Information
- o Input Customer Requirement (Prospect Type, Budget..)

🗸 Submit

🧪 Edit

- Save and Maintain Data
- Submit to System Community Process and Project Management
- o Export View List

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Pre-Com Sheet Importing File		
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Product Type*	Soloct 🔻	
Project Code		
Pre-Com Sheet File	Select files	
Schedule File	Select files	
	Submit Cancel	

### **Pre Com Sheet**

- Import Pre Com Sheet and Project Schedule
- View Detail of Pre Com Sheet
- View Import History
- o Download Pre Com Sheet and Project Schedule

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### Questionnaire

Evaluate Result From PS Staff after Close Open Case Sheet

- o View Open Case Detail
- View Evaluate Score
- o Export Evaluate Result

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	🚋 Open Case S	heet Sy	stem						•
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	OCS ID		PS In-Charge Select.	PM In-Charge	Select		Group Owner	Select	•
			Search	Clear					
Expo	ort to Excel								
#	OCS ID	No.	Question		Result		Remark	k	
1	DOM20180815001	QI	How long have you waited the response of this Open Case Sheet?		5				*
2		Q2	How long do you get this Open Case Sheet back?		5				
3		Q3	PM In-Charge gives you good suggestions and solutions		5				
4		Q4	How would you rate PM In-charge of this Open Case Sheet?		5				
5		Q5	How would you rate the process of this Open Case Sheet?		5				
6		Q6	How would you rate this Open Case Sheet?		5				
7		Q7	Do you have any thoughts on how to improve this Open Case Sheet?		0	Nothing			
8		Q8	Do you have any other comments, questions, or concerns?		0	Awesome			

OCS ID	No 🔻	Question	Result 💌	Remark 🗾 💌
DOM20180815001	1	How long have you waited the response of this Open Case Sheet?	5	
DOM20180815001	2	How long do you get this Open Case Sheet back?	5	
DOM20180815001	3	PM In-Charge gives you good suggestions and solutions	5	
DOM20180815001	4	How would you rate PM In-charge of this Open Case Sheet?	5	
DOM20180815001	5	How would you rate the process of this Open Case Sheet?	5	
DOM20180815001	6	How would you rate this Open Case Sheet?	5	
DOM20180815001	7	Do you have any thoughts on how to improve this Open Case Sheet?	0	Nothing
DOM20180815001	8	Do you have any other comments, questions, or concerns?	0	Awesome
DOM20181008003	1	How long have you waited the response of this Open Case Sheet?	5	
DOM20181008003	2	How long do you get this Open Case Sheet back?	5	
DOM20181008003	3	PM In-Charge gives you good suggestions and solutions	5	
DOM20181008003	4	How would you rate PM In-charge of this Open Case Sheet?	5	
DOM20181008003	5	How would you rate the process of this Open Case Sheet?	5	
DOM20181008003	6	How would you rate this Open Case Sheet?	5	
DOM20181008003	7	Do you have any thoughts on how to improve this Open Case Sheet?	0	good
DOM20181008003	8	Do you have any other comments, questions, or concerns?	0	best

### Miscellaneous

• View and Add New Miscellaneous Data.

This data use in system for combo box or auto filter text (Maintain Data by System Admin)

🚋 Open Cas	se Sheet System						
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iteria							
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Misc Code	Mise Name	Мізе Туре	Sort Order	Is Activo		Action	
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BU02	Banking and Financial	BUSINESS	1	truo	/ Edit	× Doloto	
BU03	Electric Part	BUSINESS	2	truo	🖉 Edit	× Delete	
BU04	IT and Communication solutions	BUSINESS	3	truo	Cedit	× Delete	
BU07	Security Service	BUSINESS	6	true	Sedit	× Delete	
BU08	Trading	BUSINESS	7	true	de Edit	× Delete	
BU09	Govertment	BUSINESS	8	true	Sedit	× Delete	
BU10	Manualfactoring	BUSINESS	9	true	🖉 Edit	× Delete	
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### **Working Operation Group**

### 3 Working Group for Operate



### Sales

### Open New Open Case

- Key In Customer Information
- Key in Customer Requirement (Work Result, Budget and Period)
- Submit Data to SC Team
- Update Open Case when have change Information and Input Evaluate

### System Community Team

Checking Requirement and Discussion with Sales

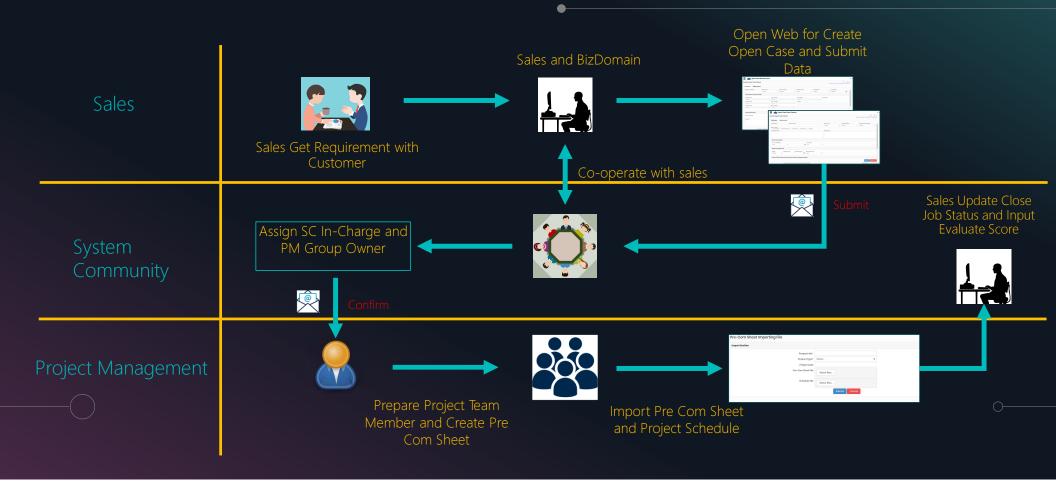
- Assign SC. Personal In-Charge
- Mapping Engineer In-Charge
- Correct Missing Requirement before Confirm to Engineer Team
- Confirm Data to Project Management

### Project Management

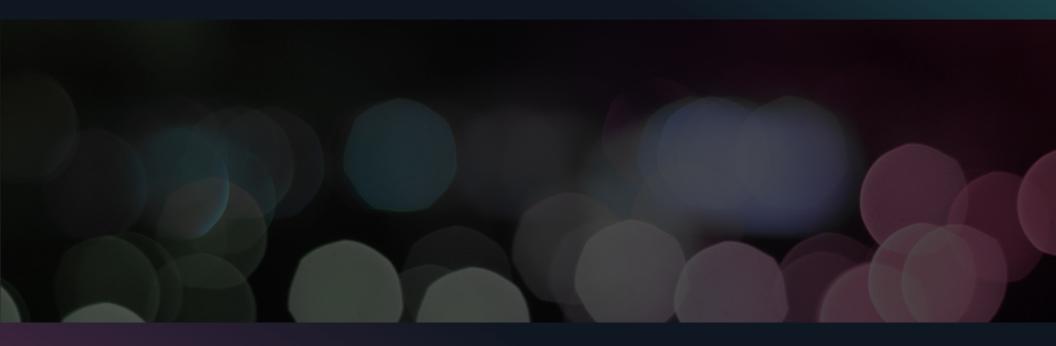
Get Information from SC. Confirm Status

- Check Resource and Discussion with Sales
- Attach Pre Com Sheet and Schedule to Open Case Sheet

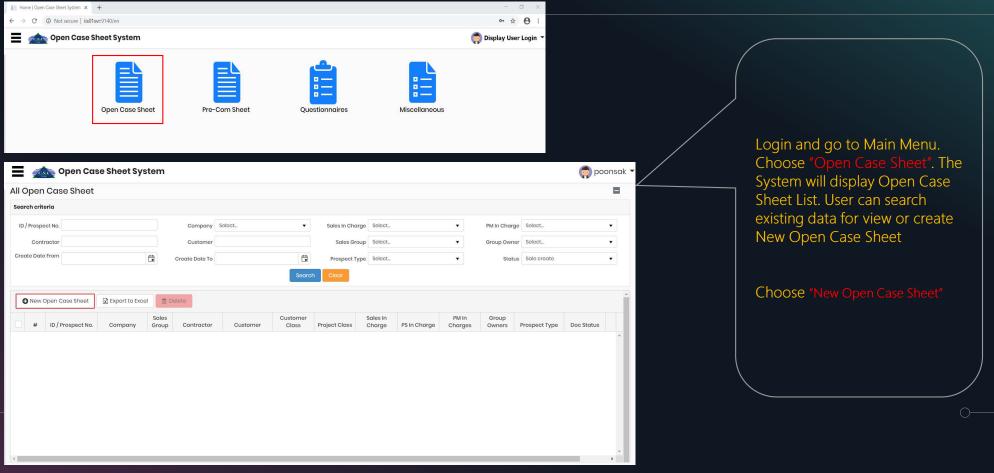
### **Open Case Work Flow**



## **Sales Operation**







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Customer Company Background*	Cust Biz Section*
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BizSec, Group Owners and PM In-Charges 6			
Biz Section*	Biz Executor 1*	Biz Executor 2*	Prospect No.*
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Group Owner 3	PM In-Charge 3		
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6. Input BizSec and BizDomain. (Default will get data from Kintone Prospect List.)

Create Open Case Sheet	Code: / Status: Update Date: / Update By:	Sales
Customer Requirement 7		
[]Kintone Prospect List		
Prospect Type*     Operation Consulting     System Development Manpower Outsource Technology Trend (IOT/DA/DX.DOT) Package Implementation IT System Operation Consulting	-	
Requirement Requirement Type* Good		
Draft Requirement* Draft Solution Please Input Draft Requirement here!		
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Policy and Competitor		
Live-run scheduled Competitor		8. Input Project Information
Plan		

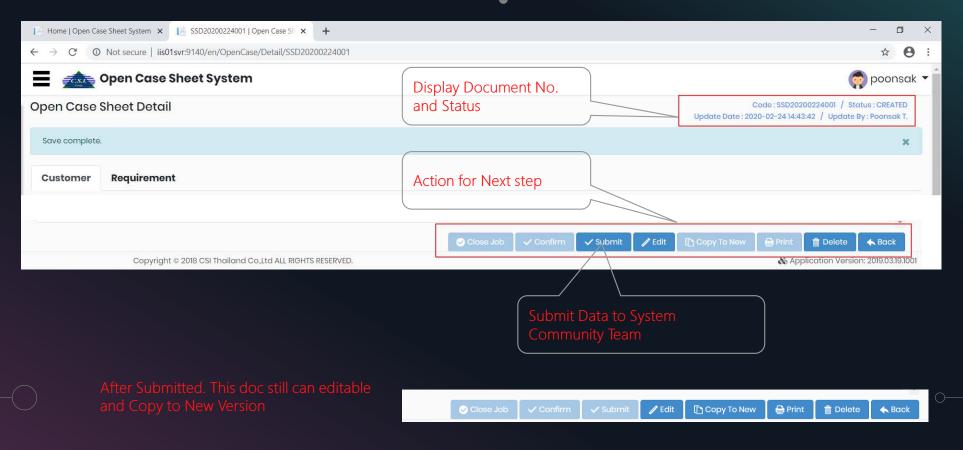
Prospect Type: System Development: Project Base (Turn Key) Manpower Outsource: Man Support (PM, SA, PG) Technology Trend: IoT, BI, Data Analytic Package Implementation: Rubix, F1, AX, RPA IT System: Help Desk, Network, IT Support H/W Operation Consulting: Work is Consultant



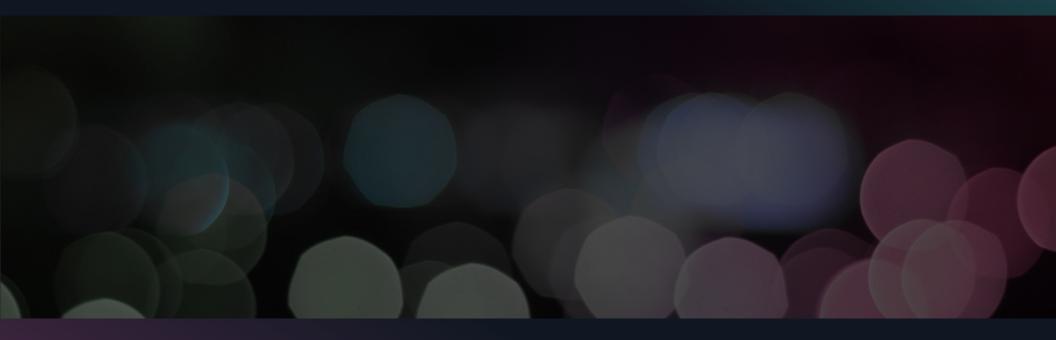
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### Sales



### System Community Operation



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# ID / Prospect No. Company	Sales Group	Contractor	Customer	Customer Class	Project Class	Sales In Charge	PS In Charge	PM In Charges	Group Owners	Prospect Type	Doc Status	2. Cł	noose "ID/Prospect No"
2 C.S.I. (Thailand) SSD20200224001 C.S.I. (Thailand) Co., Itd.	SSD	AEON Thana Sinsap (Thailand) Public Company Limited.	AEON Thana Sinsap (Thailand) Public Company Limited.	Existing customer	Existing project	Pornlapat P.				Manpower Support	SUBMIT	2	
2 SSD20181212002 C.S.L.(Thoiland) Co., Ltd	SSD	Pranda Jewelry Public Co., Ltd	Pranda Jewelry Public Co., Ltd	Existing customer	Existing project	Kitpon K.	Napasri W.	Nattasit I., Poonsak T.	BEST ,DOTNET	Manpower Support Outsourcing	SUBMIT		/

## System Community

Open Case Sheet S	ystem					🧑 poonsak 🝷			
en Case Sheet Detail ustomer 3 Requirement						ASD20210416001 / Status : SUBMIT H17:30:00 / Update By : Poonsak T.			
			ß	Location/Branch, Bangkok	Factory		3.	Review Data on Tab Customer and	
BizSec, Group Owners and PM In-Charges								Requirement	
Biz Section		Biz Executor 1	Biz Executor 2		Prospect No.				
SmartLife	w	Arada P. 👻	Otomo N.	Y	202103-PM-00059		4.	Edit Data By Click "Edit"	
Biz Domain		Domain 1	Domain 2		Prospect Status			Button	
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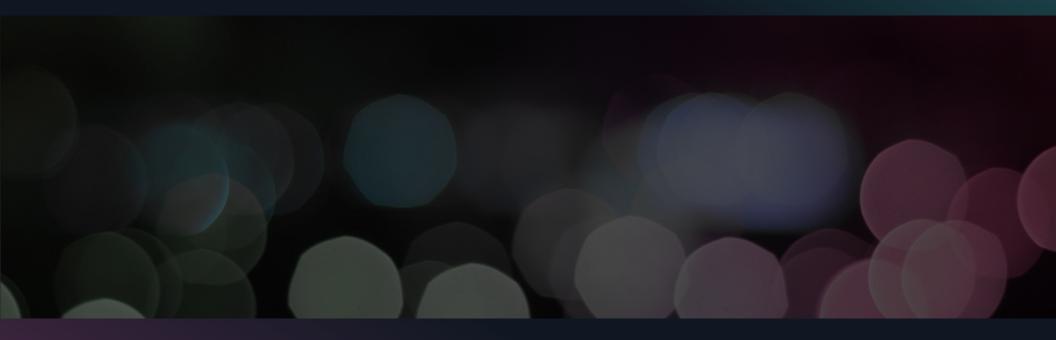
## System Community

Open Case Sheet System			🧑 poonsak 🤊	-	
t Open Case Sheet			Code : ASD20210416001 / Status : SUBMIT Update Date : 2021-05-24 17:30:00 / Update By : Poonsak T.		
ustomer Requirement					
		Location/Branch	n/Factory*		
		Bangkok			
		k		5.	On Tab Customer. Edit Group Owner, PM In-
BizSec, Group Owners and PM In-Charges					Charge and System
Biz Section*	Biz Executor 1*	Biz Executor 2*	Prospect No.		Community In-charge
SmartLife	Arada P. 👻	Otomo N. 👻	202103-PM-00059		, <u>,</u>
Biz Domain*	Domain 1*	Domain 2*	Prospect Status*		
SmartLife 🔹	Arada P. 👻	Otomo N.	IN PROCESS	6.	Click Button "Update" for
Group Owner 1	PM In-Charge 1	System Community	5		save data
Select 🔻	Select 🔻	Poonsak T. 🔻			
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## System Community

Open Case Sheet System	🧔 poonsak 👻
Dpen Case Sheet Detail	Code : A\$D20210416001 / Status : SUBMIT           Update Date : 2021-05-24 17:30:00 / Update By : Poonsak T.
Customer Requirement	
175 177 Thanon Surawong, Suriya Wong, Bang Rak, Bangkok 10500	
	Telephone
	02 233 6920
End Customer Information	
End Customer	Customer ID
BANGKOK UNION INSURANCE PCL.	CSID-2020-00393
Address	Contact Person After SC Team Update Data.
175 177 Thanon Surawong, Suriya Wong, Bang Rak, Bangkok 10500	The System will save detail and
	Telephone Display Button for Confirm Data
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Customer Company Background	
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Copyright © 2018 CSI Thailand Co.,Ltd ALL RIGHTS RESERVED.	Application Version: 2022.02.04.2103
Сог	firm Data to Management Team

### Management Project Operation



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#	ID / Prospect No.	Company	Sales Group	Contractor	Customer	Customer Class	Project Class	Sales In Charge	PS In Charge	PM In Charges	Group Owners	Prospect Type	Doc Status			The	e System will display view list
1	SSD20200224001/ 0012	C.S.I. (Thailand) Co., Ltd.	SSD	AEON Thana Sinsap (Thailand) Public Company Limited.	AEON Thana Sinsap (Thailand) Public Company Limited.	Existing customer	Existing project	Pornlapat P.	Nathwarath P.	Poonsak T.	DOTNET	Manpower Support	CONFIRMED	2			

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Exchange Tower 26 th floor.						Mr. Supawit						
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### Import file history list

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	Prospect No. 1437 Import Date From		1437		Product Type	AGSS	-	Project Code		
			<b></b>	Import Date To		<b>C</b>	Import By	Select	-	
					Search	Clear				
#	Prospect No	Produc	ct Type	Project Code	PCS Import File	SCH Import File	Version	Remarks	Import Date	Import By
i	1437	AG	iss	ISUZU-CAS.BOI	Pre-PCS-VA-JUNE2020(V2.0) _ExampleDataInput.xlsx		5	Test#5 Update Solution for Commit Solution and Schedule Plan	24/06/2020	Poonsak T
	1437	AG	ss	ISUZU-CAS.BOI	Pre-PCS-VA-JUNE2020(V2.0) _ExampleDataInput.xlsx		4	Additional Solution 4 and Revise Unit Price to Special Customer	22/06/2020	Poonsak T
	1437	AG	SS	ISUZU-CAS.BOI	Pre-PCS-VA-JUNE2020(V2.0) _ExampleDataInput.xlsx	SCH_Plan.xlsx	3		22/06/2020	Poonsak T
	1437	AG	SS	ISUZU-CAS.BOI	Pre-PCS-VA-JUNE2020(V2.0) _ExampleDataInput.xlsx		2	Test2 ทดสอบ	18/06/2020	Poonsak T
	1437	AG	ss	ISUZU-CAS.BOI	Pre-PCS-VA-JUNE2020(V2.0) ExampleDataInput.xlsx		1	Test1	18/06/2020	Poonsak T

### **Back End Process Before Use**



Setup User and Mapping Role (Sale/PS/PM/Admin)

Step 3

3

Setup PSMAIL in Miscellaneous and All Master Data

- Customer Class
- Project Class
- Miscellaneous
- Questionnaire

Step 2

 Setup Product Group Owner

# THANKYOU!

**Open Case Sheet System**