



# Tidy Software

## High Quality Service

Over 30 years experience in software development



### Case Study: Surveyor Business Control System Page 1

**Software Name:** Builder.

**Type Of Software:** Microsoft Windows PC based.

**Client:** Bristol & West Preservations The Coach House, Stable Yard, 41B Henleaze, Bristol, UK.

**Software Development Cycle:** February to March 2008.

**Development History:** We were approached by this small local company who had been completely relying on an old legacy system (pre-windows) to control their survey work for them. The system was re-written to run as a Microsoft Windows based system by us.

It was agreed that no specification should be used to develop this system. We were instead provided with a full working copy of their old system and used this as a template. The details that we needed to develop the new system was provided by the old one.

Following our review and analysis of this system, we were then able to suggest additional improvements to the software, which were then incorporated into the project brief.

As we made the new system Adobe Acrobat (for survey document viewing), JPG (a picture format used to capture survey photographs), Microsoft Word (used for writing letters) and Excel (used to control job cost and debtors).

This meant that the company was finally able to expand it's capability to control all aspects of their business (from client correspondence, first estimate, full estimate, survey, job costing and through to debtor control). Survey images were also incorporated into the system.



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**What The Software Does:** The software holds client addresses, self generated reference numbers and the dates for survey estimates, survey reports, invoices, final account, letter correspondence, warranty receipts and statements.

It also holds key template wording for this correspondence and generates these documents via Microsoft Word. Currently completed documents are not held in the system. Development is planned to expand the system to hold all these details required when interacting with the clients, as well as controlling invoicing materials and labour expenditure to ensure that these are less than the work quotation.

**The Brief:** To convert an outdated database to run in a modern Windows environment. It was also decided to update some of the more 'quirky' features contained in the old software.

The challenge of this project was to carry out the development on a rapid development cycle without a specification, using just the old software as the development template. The software was presented to the customer several times throughout the process for review and developed further from the comments received.

**Major Challenge:** User testing was carried out by the client with our support to control development costs and bring the project in on a limited budget. As the company was local to us and good rapport established from day one, what was deemed initially to be a medium risk project turned out to be low risk.

**Product Development Highlights:** Including web linked product images, quote wizard to take new sales staff through a clear stepped process, automatic web download and install of product, terms files, program updates and a whole host of special offer pricings.

**Keys To Continued Success:** Maintaining a great relationship between developer and client, good communication and training. The software meets the clients objectives.



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