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BACHELOR OF SCIENCE PROJECT REPORT

(Computing)



ZED OFFICE

A Business Documentation and Client Management System

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Abstract

You are running a limited company or working as a sole trader in the construction industry. HMRC advises that you must keep all records of all your business paperwork for up to six years. When they state business paperwork, the meaning is all relevant information issued and received from you over the years related to the income and expenses you had.

Imagine a scenario where you have worked in the sector for a couple of years. You were lucky, and your successful business model completed thousands of projects, and most certainly, many of them were to returning customers. That is great, but you may be surprised that keeping information for old customers, such as their phone numbers, emails, correspondence, and business paperwork, is a big headache to get organised and filed. You often get into a confusing situation by not recognising returning customers' calls and finding what you have done, the cost, and when it happened.

Last but not least, answering the question of how much you earned a couple of years ago, what expenses you have had and how many projects you finished every month is an impossible question answer.

Summarising the above, it appears that finding a way of keeping all those records is an unavoidable part of the administration of such business. Unfortunately, using many different applications to achieve all needs is a management issue. This approach can trigger errors, data loss, or leakage, decreasing sales or starting crucial business decisions.

This report details the development process of business documentation and clients management system named "ZED Office". It is a digital solution for the above-described problems.

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1. Introduction

Data is a crucial asset for any business as it contains essential, sometimes critical and sensitive information for placing an order, creating an estimation, invoice or contract. Most of these documents are usually kept on paper, but that makes it difficult to recover, salvage share or analyse them later, especially if they are physically stored.

So, it is clear that we need a mechanism for transparent processing of the data, which can only be made by using a digitalised system that is the purpose of this project.

1.1 Motivation

The inspiration for creating such software was based on the fact that I have been running a construction company for 11 years and have faced all the problems related to organising the business documentation over time.

At one time, it was simply impossible to track and find all relevant documentation or customer details, so I started using many different web applications (some of which are analysed and described in detail in section 1.3) that provide similar services. Still, I did not find any that provides all that is needed in one place.

From another perspective, using 3rd party programs and filling personal customers information without their explicit permission can breach GDPR. So that complies with the need to have a single application that can combine all the needed features for administrating such information.

Before creating a digital estimating document, for instance, you need to know the following:

Mandatory:

- Company details
- Customer details
- Document number and Order number
- Issued date
- List of products and services
- Total cost (including taxes)

Optional:

- Related documents / attachments
 - Notes
 - Signatures

This information is usually entered by the user and saved in the provider database so that further documents such as invoices and receipts can be issued based on that information.

The main problem is that most companies that provide that service do not do it all in one place.

You can find invoicing software, bookkeeping services, estimating software, client management software and many others, but not many that provide all. That creates a big headache of what to rely on and use and also makes it challenging to use data produced by one provider to another. Beside security aspects, transferring the data from one service to another may also become very complex.

When it comes to payments, document sharing with the customer, signing agreements and customer feedback, those services provide no support or some of it.