



# Hilltops IT Case Study

## Craigdon: Bespoke QuoteWerks Development

*“Hilltops IT developed another solution that again met all our requirements and did so at a very competitive rate. We would not hesitate to use their services again or recommend them to other companies.” – Patrick Malone, General Manager, Craigdon Business Gifts*



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# Project Brief

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## Situation

Craigdon Business Gifts has been using QuoteWerks successfully for a number of years. In order to further improve the consistency and accuracy of their sales quotations, they identified the need for an enhancement to QuoteWerks that would check and validate users' entries before quotations could be saved, printed or emailed to customers.

## Customer Profile

Craigdon Business Gifts was established in 1973 and is Scotland's leading and best known supplier of promotional merchandise. They offer a wide range of gifts, corporate golf items, corporate clothing and workwear. They work with all sizes of organisations both in the UK and overseas. Their product range is competitively priced and supported with fast delivery. They can print, embroider or engrave on a wide range of products.

## Business Challenge

With their large number of QuoteWerks users, Craigdon Business Gifts noticed that there was inconsistency in the information being included on sales quotations and also in the accuracy of the information that was included. Craigdon needed an automated process to check the validity of their quotations but could not find a way of achieving this from within QuoteWerks without someone having to check each document manually. Consistency and accuracy of data entry was essential to ensure that Management Reports and Sales Forecasts were correct.

## Objectives

In order to ensure accuracy and consistency, Craigdon Business Gifts' objective was to implement a solution that would automatically check and validate users' entries on QuoteWerks documents. As this feature was not available in QuoteWerks "out of the box", Craigdon decided to commission a bespoke development that would force users to populate certain fields and which would validate their entries in other fields. The utility should automatically check users' entries upon specified trigger events, such as saving, printing and emailing.



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## The Solution

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### Finding the Right Solutions Partner

Craigdon Business Gifts chose the services of their existing QuoteWerks partner, Hilltops IT, because of their proven success in developing “add-on” products to QuoteWerks. Hilltops IT had already developed and implemented an add-on utility to QuoteWerks that manages their Production Schedule, so Craigdon had every confidence that Hilltops IT would again be able to develop and deliver the exact solution they were looking for and integrate it seamlessly with their existing systems and procedures. They were also very pleased that Hilltops IT would be able to develop a customised solution specifically for Craigdon at a fraction of the price of an existing, more generic add-on which did not fully match their requirements.

### Solution

Hilltops IT designed and developed a Bespoke Utility that automatically starts as soon as QuoteWerks is opened. This Bespoke Utility checks the entries that users make in specified QuoteWerks fields and notifies users automatically when the specified QuoteWerks fields are not populated as required. Different levels of warning are given depending on the type of validation error. In certain cases, the QuoteWerks document in question can not be saved, printed or emailed until the error has been corrected. In other cases, the user is just warned about the potential problem. A variety of rules has been set up to check that certain fields are not blank, whilst other fields must contain one of a limited number of options.

### Results and Benefits

Hilltops IT designed, developed and then implemented the required Bespoke Utility, as per Craigdon’s specific business requirements. The Bespoke Utility fully meets Craigdon’s objectives and now validates that users have entered the required information in the required fields.

The benefit of this is that customers and suppliers always receive complete and consistent information straight away. This immediately increases the efficiency and productivity of the sales order process, by eliminating the need to re-issue quotes and orders with missing information filled in at a later date. Maintaining the integrity of the data input into QuoteWerks also maximises the power and accuracy of the Reports that are generated which means Management has better information upon which to base business critical decisions.



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## Summary

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### Craigdon Business Gifts

"I am delighted with the positive impact that the bespoke utility has had on efficiency and productivity as I now no longer need to manually check quotations and orders on a one by one basis before they are sent to customers and suppliers – I know that they have all been validated and therefore that they are all correct." – Emma Strathdee, Team Leader, Craigdon Business Gifts

"Hilltops IT developed another solution that again met all our requirements and did so at a very competitive rate. We would not hesitate to use their services again or recommend them to other companies." – Patrick Malone, General Manager, Craigdon Business Gifts

### Project and Service Delivery Timescales

QuoteWerks Consultancy:	April 2009
QuoteWerks Training:	February 2009
Bespoke Development:	February 2009
QuoteWerks Support:	November 2005 to date

### Software

QuoteWerks:	<a href="http://www.hilltopsit.co.uk/quotewerks/">http://www.hilltopsit.co.uk/quotewerks/</a>
ConnectIT-Workflow:	<a href="http://www.hilltopsit.co.uk/connectit/connectit_workflow.aspx">http://www.hilltopsit.co.uk/connectit/connectit_workflow.aspx</a>



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## More Information

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Customer Name: <http://www.craigdonbusinessgifts.com>  
Hilltops IT: <http://www.hilltopsit.co.uk>

### Software Solutions

QuoteWerks: <http://www.hilltopsit.co.uk/quotewerks/>  
ConnectIT-Workflow: [http://www.hilltopsit.co.uk/connectit/connectit\\_workflow.aspx](http://www.hilltopsit.co.uk/connectit/connectit_workflow.aspx)

### Service Provision

QuoteWerks Consultancy: [http://www.hilltopsit.co.uk/quotewerks/quotewerks\\_consultancy.aspx](http://www.hilltopsit.co.uk/quotewerks/quotewerks_consultancy.aspx)  
QuoteWerks Training: [http://www.hilltopsit.co.uk/quotewerks/quotewerks\\_training.aspx](http://www.hilltopsit.co.uk/quotewerks/quotewerks_training.aspx)  
QuoteWerks Reports Authoring: [http://www.hilltopsit.co.uk/quotewerks/quotewerks\\_reporting.aspx](http://www.hilltopsit.co.uk/quotewerks/quotewerks_reporting.aspx)  
QuoteWerks Support: [http://www.hilltopsit.co.uk/quotewerks/quotewerks\\_support.aspx](http://www.hilltopsit.co.uk/quotewerks/quotewerks_support.aspx)  
Bespoke Development: [http://www.hilltopsit.co.uk/software\\_development/](http://www.hilltopsit.co.uk/software_development/)

### Hilltops IT

Hilltops IT was established in 2005 to provide software services and solutions to small and medium sized businesses. Hilltops IT specialises in delivering end-to-end contact management, quoting, ordering and invoicing systems and business intelligence solutions with "off the shelf" products backed up with expert consultancy, training and support services. Hilltops IT also has a proven track record in developing bespoke software solutions, software products, add-on utilities where "off the shelf" products do not completely fulfil a client's requirements and business intelligence solutions.

Our key "out the box" product offerings are QuoteWerks, ACT! by Sage, Microsoft CRM, ConnectIT, Sage 50 Accounts, Sage 200 CRM and Sage 200 Financials and Commercials. We also have an extensive range of product development, custom bespoke development and website projects in our portfolio.

Working with Hilltops IT, you will receive a warm, down-to-earth and professional service which will exceed your expectations.

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Media Contact Details: Stephen Siggs, Managing Director

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