

Standards of Excellence Uses Formtastic with VAI's System 2000 To Save Time, Money, and Eliminate Pre-Printed Forms

Based in Rohnert Park, CA, Standards of Excellence North (formerly McPhails) is one of the largest suppliers of designer home appliances serving Northern California and Nevada.

With over 20 years of experience, Standards of Excellence has built a customer and vendor roster that spans thousands of companies and contacts. It's a big, complex operation that generates almost a thousand printed documents per day. To be competitive and maintain customer / vendor satisfaction, Standards of Excellence has to stay on top of its paperwork.

To do this, Standards of Excellence utilizes an IBM System i (iSeries) eServer and Vormittag Associates' System 2000 distribution ERP. About a hundred users access this system to work with nine different form types on a daily basis. Standards of Excellence does not have a proportionately large IT team to keep up with user questions and issues regarding forms and paperwork.

"We're pretty small," says IT Manager Cynthia Simmons when asked about her IT staff. "There's two of us. I do the software and someone else does the hardware and the network."

According to Simmons, their old system for printing business documents was neither efficient nor user friendly. "I got phone calls every day about forms that were missing or had incorrect information," she says. "It was kind of embarrassing to tell everyone that I couldn't do anything, because

the system funneled spool files into a PC system where outside consultants had to figure out where things should print. And then if you had a character like a colon or a slash in your spool file, and you tried to use a network printer, well, then it would just never print. It would disappear completely."

Obviously, this generated a lot of phone calls to Simmons. "I was getting calls and emails every day and there was not a single thing I could do," she says. "It was a horrible waste. I'd say we spent about six hours per week troubleshooting between my time and a full-time consultant."

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-- Cynthia Simmons,
IT Manager

At one point, Simmons had to batch FTP spool files to PC programmers so they could format the data to the forms manually. "They really didn't know what to do once they got it," she says. "I don't think they really believed I would do it for them."

At the heart of almost all of Simmons' problems was document conditioning. In other words, she needed



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the same document to display different information and graphics based on the form, the company division producing the form, and where the form was being printed, among other factors.

Finally, one of her PC programmers multiplied out all of the conditioning combinations for a single document and proposed creating 64 versions of the same form. "And that's about the point where I thought, 'Well that's just not going to work'. So, I started looking at other things."

After finding Quadrant Software's Formtastic and Formatter solutions on the IBM's PartnerWorld website, Simmons met with Quadrant Software's sales staff at the Vormittag Users Conference. "I sat through a demonstration and they worked with me on what the solutions could do. I just didn't see a single problem with it."

Using Formatter and Formtastic, Simmons creates a single design template for each form type. Within this template, she can include an unlimited number of conditioning statements to automatically control how data and graphics get displayed based on numerous customizable factors including the user creating the form, the destination printer, the end recipient of the form, and a lot more.



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"I have had so much positive feedback," says Simmons. "I had people kissing my hand. They can print documents wherever they want and it always comes out. And it's in such a clear format. It's like heaven here."

Also, Standards of Excellence can control the overall appearance of all of their forms by including color graphics, barcodes, lines, shading, numerous font types and treatments, as well as custom margins and text alignments. Even better, if Simmons needs to change a form type in the future, she only has to edit one template.

Simmons also liked the fact that she could gradually implement Formtastic and Formatter according to her schedule and without disrupting any ongoing processes.

"Every time I created a new form, people would have ideas," she says. "We would talk with people ahead of time, but you couldn't get all of the information on what they were doing with these forms. So, it took about two weeks to stabilize a form and then I'd work on the next one. Our receipts are really complicated, they have layers over layers, and it works really well for us."

While Formatter and Formtastic were already a hit with Simmons on the IT side, a formidable hurdle for any new implementation is whether or not the end users will buy into it. At Standards of Excellence, Simmons had to win over about a hundred users including several sales representatives operating from remote locations.

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Because Formatter and Formtastic made forms production easy and

automatic, she was also able to cut the expense of an in-house consultant and outside consulting services. "We don't need the inside consultant full time anymore. She's fixing printers and that's about it. So we're actually saving a lot of money every month!

Going further with Formtastic, Simmons also integrated the solution with Standards of Excellence's archiving system. "On the 400 version of the form, I can add file commands that send forms to an address on the file server," she explains. "Then, we created a new directory on one of our common servers and separate folders for invoices, shipments, quotes, and then pointed those types of forms into those folders. Now, every time an end user prints something, a copy of it goes into the archive. It works really well for the salesmen who are at home. They can print on their own printer off of the archives."

In addition to Formatter and Formtastic for forms, Standards of Excellence implemented Formtastic Checks to print AR reports and AP checks. Previously, Standards of Excellence had used another third party vendor to print checks. "That was really slick," she says regarding Formtastic Checks.

"The company that previously did the checks had configured them to print on the stock upside down. So that was a great fix for us."

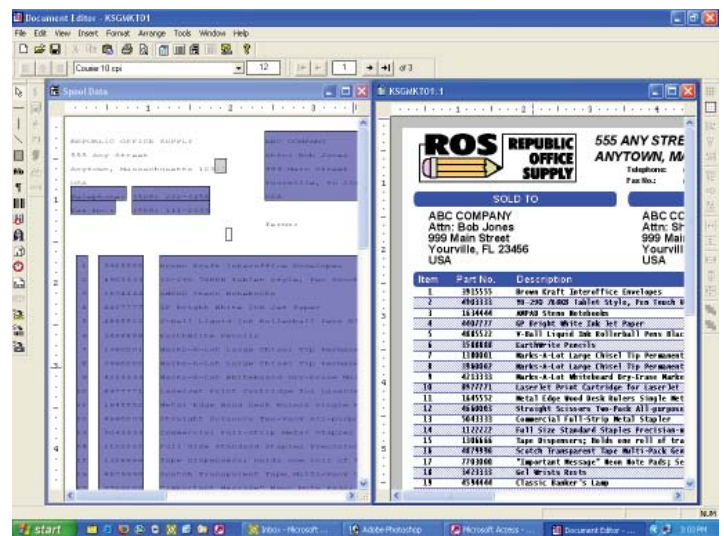
Aside from being able to print her checks correctly, Simmons can also utilize a single vendor whenever she has tech support or training requirements regarding forms or MICR checks.

"Our tech support experiences have been really great," she says. "I also received a day of training and it was very useful. I took notes and was able to use it right away."

As Standards of Excellence continues to use Quadrant Software's electronic forms solutions, they increase their ongoing ROI through streamlining workflow, cost savings, improved response time to customer and vendor requests, and overall improvements to efficiency and security. Also, Quadrant Software's solutions integrate seamlessly with VAI's System 2000 to further leverages their investment into that ERP.

"All I can say is that I think it's a wonderful product," Simmons concludes. "I had a friend using VAI in Arizona and I was trying to get her to buy it because she was having similar issues with forms. So, it's something I tell people about if they have a similar to mine."

For details on Quadrant Software's solutions for System 2000, call us at 508-594-2700, email sales@quadrantsoftware.com, or visit our Web site at www.quadrantsoftware.com.



Formtastic's dual-screen design GUI allows you to quickly design and populate business documents. You can even insert conditional commands allowing you to customize your documents without manual intervention.