Quadrant Software's Electronic Document Distribution Solutions Cut Costs and Streamline Workflow at Packaging Dynamics

Established in 1947, Bagcraft - a division of Packaging Dynamics (PKDY) - has been a leading force in the field of foodservice packaging and carryout wrapping. Headquartered in Chicago, IL, PKDY maintains four operating companies, including manufacturing and paper mill facilities, in locations like Baxter Springs, KS, and Detroit, MI, to name a few. To run the operation, PKDY utilizes PRMS 8.4 on the System i (iSeries 400 or AS/400) with over 500 users.

According to Tina Colon, PKDY's Manager of Systems and Programming, up until two years ago the company's document handling procedures didn't quite keep pace with its leading reputation.

"I would say we were still in the 1970s," she remembers. "We had a typewriter that produced our checks. We did have another piece of equipment that put the signature on the check, but it wasn't automated." According to Colon, document delivery using manual fax machines wasn't going much better. "The way we were doing it wasn't working. Half the time customers were saying they weren't getting their faxes. A fax machine doesn't tell us when a customer doesn't get a fax."

At one point, PKDY graduated to using pre-printed checks, but that also had its

drawbacks. "We were spending almost $900 dollars for a case of checks," says Colon. In addition to that, the convenience of pre-printed checks was

mitigated by the security concerns. "Our checks had to be locked up within the IS area," says Colon. "We had to keep a log of what checks were actually run through. At one point, we were missing a couple of checks. We didn't know if it was because the paper company missed check numbers on the check run. We never figured it out. And that's not a good scenario."

In addition to check printing woes, PKDY needed to completely rethink their forms, fax, and label processes including delivery by print, fax, and email. "What happened was that one of the companies coming on board had to be up and running in less than a month," says Colon. "So we had to get the system in place very quickly."

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– Tina Colon,
Manager of Systems & Programming

Bagcraft already had Quadrant Software's FastFax/Ultra solution in place, but it was drastically underutilized and only produced invoices. "I had used FastFax in my prior work history," she says. "I felt that it would be a good application for us to use." PKDY started its move to Quadrant Software's Electronic Document Distribution (EDD) suite by upgrading to FastFax/Enterprise with email delivery.

The company then acquired Quadrant Software's Formtastic Fusion5 forms software as well as the PRMS Integration Module (an interface between PRMS and

Quadrant Software's EDD solutions) that made installation both seamless and easy. "When we were looking at software," says Colon. "We tried to see what we could do better for our customers. With the integration module, we'd be able to fax and email using what we currently had without doing more work, and it resided on the AS/400." As a result, authorized PKDY users could manage, deliver, and look up forms and checks from within familiar PRMS screens.

"The actual install of the software, on the AS/400 side and the client side, was basically no different than installing a Microsoft product. It was very easy and there weren't any glitches," says Colon. "The checks portion of Formtastic was up and running in a day. Then I moved on to forms, and then I had to have the AS/400, FastFax, and the email server all linked together to push out our data from the 400 to email. And that went fairly smooth also."

According to Colon, her products were in place and running within a few days. And since then they have required practically zero maintenance. "Once the solutions are in place you're done unless you choose to make a change," says Colon. She also appreciates the ability to make changes to the programs from either the 400 interface or the client interface with equal ease. "You have your choice. On the client side, it's basically the same as looking at a Microsoft screen. It makes it very easy to use."

Using FastFax and Formtastic, PKDY currently creates, faxes/emails 1,500-2,000

documents including acknowledgements, purchase orders, and invoices per week. They also print over 500 MICR checks weekly, including check runs and manual checks.

"The users now send out their own invoices," says Colon. "They can use the 'reprint' function if someone didn't get an invoice. Before FastFax, they had to get up, find the invoice in the filing cabinet, make a copy, and then fax it through a regular fax machine. It was time consuming. Now they ask the customer 'What was the order number?' Then they pull up the invoice and send it out again right from their screen. After they send it out they can make sure that it was sent. It's very friendly and straightforward."

According to Colon, the documents they used to print and then mail or fax almost all go out through FastFax. "I'd say 95% of our documents go by fax or email directly from FastFax. We have very little paper usage and we've saved a tremendous amount in paper and postage. We don't file anymore because we have everything on the system. So, now we have paperless document managing."

Colon also estimates that PKDY's paperless system saves about 80 hours of labor per week. "The savings in one year more than paid for the investment."

Colon has been completely satisfied and at times surprised at how easy her users utilize both FastFax and Formtastic. "I showed one of the users parts of Formtastic," says Colon. "She created a form in one day. That's just how easy the software is to use."

Things have also dramatically improved for PKDY's check printing procedures. Instead of paying $900 for a box of pre-printed checks, they pay $50 for a box of blank checks.

"It's a better scenario. It's not manual or people dependant. It's strictly within the system and automated," says Colon. "Security wise, it has improved 100%. We bought the Troy printer, which has the key lock that can only be accessed by the AP department." Colon has also taken advantage of Formtastic's ability to provide multiple levels of authority to users. "There's no way that someone can actually go in to produce a check or even reprint a check."

Colon also enjoyed the fact that she could lock signatures into Formtastic Checks for greater security, but if she needed to modify signatures, a user with the proper authority can accomplish the task in about 15 minutes.

Formtastic Checks also played a key role in PKDY's ability to completely automate post-processing and sealing. "The type of check paper that we use is a form type and we purchased a good sealer. So, AP does their check run and Formtastic puts all the data and signatures on the check. Then they take the checks over to the sealer. They just put the paper in, it seals it up, and you're done. The mailing label is already on there because that's done in Formtastic. They used to stuff the old checks into an envelope, seal it, and put the label on. It was all manual. Now there's no time involved."

Formtastic Checks also gave Colon an opportunity to benefit from Quadrant Software's expert technical support. "I had to do a lot of check conditioning," says Colon.

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"I hadn't done any conditioning before and Quadrant Software's tech support was very good at helping me understand that portion of the product. They know where I've gone with the software and what's in place. It's not like I'm talking to someone who doesn't know what we're using and what we're trying to accomplish. That's very helpful."

Colon was equally impressed with Quadrant Software's sales team. "When I did the demo we were actually able to see what Formtastic would do for us along with FastFax and the modules. The sales rep answered every question and was probably as knowledgeable as the support techs. That makes a difference."

Happy with the positive results to date, PKDY isn't finished taking advantage of Quadrant Software's EDD solutions. "We're bringing on more companies and that means more check forms, invoices, and credit memos. We haven't even finished going

through our own company to see what forms can be converted to Formtastic."

That said, the biggest upcoming project for PKDY will be to utilize Formtastic's Labels Module. "We have a huge project to phase out our current PC-based labels program which doesn't integrate with the AS/400. We actually have people who create labels and stick them on the box as needed," says Colon. "Our goal is to take Formtastic Labels and integrate it into order entry and have the labels for thousands of customers automatically generated from that process."

PKDY couldn't be happier with their EDD solutions from Quadrant Software. Installation of the products just took days and was hassle-free. The entire system provides incredible stability, usability, security, and integrates seamlessly with PRMS. Just as important, Quadrant Software's EDD solutions continue to easily accommodate PKDY's ever-increasing goals. And Tina Colon loves the way fax, forms, and email integrate together seamlessly on the client side as well as the System i (iSeries 400 or AS/400) with PRMS.

"That capability was the best thing out of it all," says Colon. "If I wasn't able to take electronic forms and then email or fax them out, the package wouldn't have done me any good."

Powerful in scope, but modular in design, Quadrant Software solutions can be used separately or seamlessly integrated together for a complete document management strategy that saves both money and time while increasing security across the entire enterprise.

Quadrant Software has over a decade of experience providing Electronic Document Distribution solutions for System i and Windows enterprises. Our products create a paperless workplace by allowing you to create, capture, distribute and archive documents electronically, while managing them through their lifecycle.