

# Top 5 Reasons to Replace Your IBM i Forms Solution

Read this eBook to learn how to reduce printing costs,  
improve customer service and increase IT efficiency.



A Fresche Solutions Brand

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# Executive Summary

Document output systems are often overlooked when organizations are considering IBM i modernization initiatives. But modernizing your printed forms, checks and labels with an electronic forms solution is one of the fastest projects to implement and can generate one of the quickest ROIs.

Your homegrown applications, legacy ERP systems and even your trusted Query/400 tool remain a core part of your business systems. They regularly grind out countless printed reports and forms such as invoices, purchase orders, and packing slips. It's easy to forget that these documents are tied directly to revenue-generating activities.

Unfortunately, most companies devote significant time and resources to dealing with paper documents. In addition to printing and postage costs, employees often spend a lot of time physically handling documents. Whether stuffing envelopes, waiting in line at the copier to scan and email, or just archiving a copy in the filing cabinet, many employees waste hours each week processing paper forms.

## Executive Summary

Customer service also suffers when customers have to wait for their documents. It might take several days to a week for a customer to receive their invoice in the mail. In addition, most IBM i-generated plain-text documents aren't easy to read and may not be reflective of the company's brand. This has a negative impact on consumer perspective.

Too often, we see IBM i shops limping along with old solutions. Many have even tried to improve their processes but still face challenges. Perhaps they've relied heavily on older technology nearing the end of its run, such as IBM's AFP Utilities. In some cases, they've purchased document modernization tools only to find them lacking some critical aspect, such as being unable to support newer versions of Windows, or receiving little-to-no ongoing support or product updates from their vendor.

Companies frequently feel stuck with their current processes, unable to allocate the time and resources to change. Unfortunately, they often don't realize how much their status quo is costing them in time, money and customer satisfaction. In this eBook, we've laid out the top five reasons to replace and modernize your IBM i forms solution.

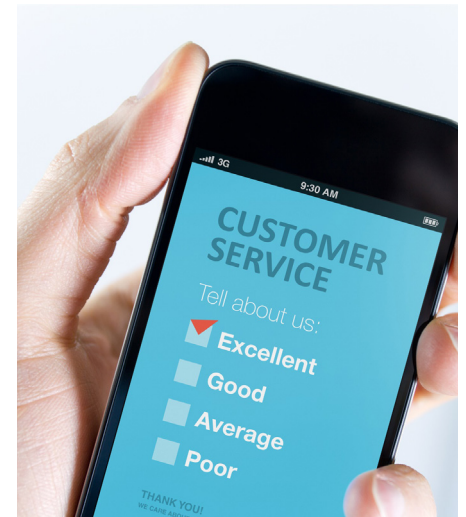


# Reason 1: Improve Customer Service

The first (and arguably, the most important) reason to replace your IBM i forms solution is to improve customer service. You can do this by getting documents to your customers faster in electronic format and by improving the document's usability.

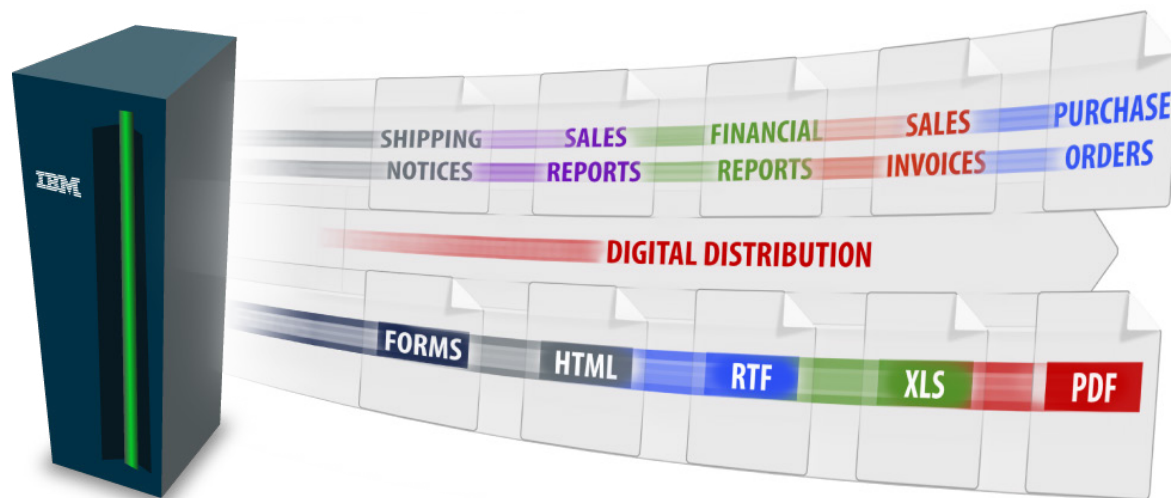
Modernizing your forms solution enables you to electronically deliver documents that would normally be printed. Instead of waiting for an invoice that might take days or weeks to arrive by mail, your customers get their invoices delivered as a PDF email attachment within minutes. This means they'll have a digital copy which they can easily archive, distribute, and access from their mobile device. Customers today expect digital accessibility. Not to mention the added bonus for your accounting department – getting invoices to customers faster helps you get paid faster!

Now consider form usability. Most IBM i-generated documents are considered ugly, hard to read and often have limited page layouts. They are often missing important information like subtotals, tax rates, contact information - any number of elements that your customers would like to see.



## Reason 1: Improve Customer Service

It's important to have forms that are easy to read. When forms contain things like line items with descriptions that span multiple lines and disorganized header information, it makes it difficult for customers to read. These can be improved by making a few changes. For example, changing the layout from portrait to landscape may make some forms easier to read. Adding elements such as barcodes and product graphics also goes a long way and will improve your customer experience.



## Reason 2: Reduce the Burden on IT

Your IT department is probably already flooded with requests for new and modified forms and reports. These might be new business requirements, or could be driven by new legislation affecting your industry. Maybe you need to update your Terms and Conditions pages, or perhaps users want additional data on their forms.

These types of changes almost always fall on IT, but in many cases IT is already backlogged with piles of requests. Getting a simple change to your form could take weeks or months.

Sometimes, you may just need to make a small change, like adding a column from one of the source tables. Others changes may require more time, like if you need to modify the report to pull data from a different table. In some situations, editing the form via the application may be impossible. If the application is a “black box” solution, you’re simply at the mercy of that tool’s limitations.

With an electronic forms solution, you can make changes to forms without modifying the reports or original applications. You can automate distribution to reduce the burden on IT. You can also set the layout and add graphical elements.



## Reason 3: Reduce Printing and Distribution Costs

By replacing printed forms with digital documents, organizations can quickly save money on printing, postage and labor.

Organizations that print from IBM i often use preprinted paper stock with company letterhead which can cost anywhere from \$0.05 to \$0.20 or higher per page. This also applies to preprinted check stock, which is both more expensive and less secure than using blank check stock.

And what about design changes? Almost every company has been forced to destroy thousands of preprinted forms because of a new logo, address, or some other factor that makes the existing forms obsolete.

Also, consider how much you might be spending on postage and envelopes. As of 2017, the postage cost of mailing a presorted first-class letter is \$0.46.

*Cost to print and send a letter can easily exceed \$1*

*Providing electronic statements can reduce printing by 70%*



### Reason 3: Reduce Printing and Distribution Costs

The cost of printing and delivering documents is significant. If you're sending 2 pages per mailing (\$0.05 per page to print), postage of \$0.46, throw in an envelope for \$0.02, we can estimate a lower limit of around \$0.58 per letter.

Now consider how much time an employee spends separating, sorting, stuffing, folding, and mailing printed documents. If we attribute just three minutes to each letter, at an employee wage of \$15 per hour, the cost to process each letter is \$0.75. Combined with printing consumables and postage, costs can easily surpass \$1 per letter. Labor costs can vary, of course. You might invest in a folding machine or other specialized equipment to save time; but there's the initial investment cost along with the maintenance costs for the equipment to consider.

Using a modern forms solution, you can easily redesign your documents and deliver them in an electronic format such as PDF, eliminating the need to print. If certain documents or checks must be printed, you can still offset your printing costs by eliminating the need to purchase preprinted forms or check stock.



## Reason 4: Leverage and Future-Proof Existing Technologies

You've likely spent years or even decades customizing your core IBM i applications to fit business requirements. What happens when these requirements outgrow your document-generating applications? Replacing these applications or migrating ERPs is simply too expensive and risky in most cases. In addition, many IBM i form solutions lack adequate support, while others such as IBM's AFP Utilities are nearing end-of-life.

The safest and most cost-effective solution is to leverage your existing IBM i applications with a modern, well-supported electronic forms solution.

Consider the following scenario: you work at a company that uses an invoice-generating application running on IBM i. It prints thousands of invoices each month, which are physically mailed to customers. A new CIO might take one look at this process and think "These invoices are costing us thousands of dollars a month and look completely outdated. We need to replace this!"

The CIO might consider migrating to a new ERP or replacing the application with one supporting better document design options and electronic distribution. But again, the challenge here is the cost and risk of disrupting the business processes that your organization has relied on for years.



## Reason 4: Leverage and Future-Proof Existing Technologies

The much better option is to leverage what you already have on IBM i. With a document modernization solution, you can retain your existing applications while modernizing their document design and extending their distribution capabilities. You can improve the look and feel of your forms, automate distribution, and even provide web and mobile access.

In our previous example, a modern electronic form solution enables the application to continue generating invoices. Instead of being printed, however, each invoice is generated as a spool file and intercepted by a document modernization tool. The tool applies a new design and layout, and generates a PDF file that is delivered to the customer via email or web-portal. All of this happens without making changes to the existing application, enabling you to extend the life and value of existing systems.

We frequently encounter customers with electronic form solutions that fail to meet all their needs. Some common limitations we see include poor technical support and failure to keep up with new features and basic enhancements such as supporting the latest Windows versions. With IBM's announcement that they are discontinuing AFP Utilities in version 7.3, many customers are concerned about future support for AFP. If you currently rely on AFP or own an electronic forms solution with limited functionality, you might be able to transfer to a modern solution faster than you realize.



## Reason 5: Improve Branding Equity

This is more of an intangible cost, but an important one. Providing documents that are unprofessional looking, difficult to read, or missing information that people want can lead to a negative perception. But when customers regularly see your company's logo on professional, easy-to-read documents, they'll develop a better perception of your company.

This increases the likelihood that they'll remember you, buy from you again, and recommend you to friends or colleagues. Companies with higher brand recognition often enjoy the ability to charge premium prices. According to V. "Seenu" Srinivasan, the Adams Distinguished Professor in Management at the Graduate School of Business, there are several variables that create brand equity, but the most important is brand awareness. "Greater awareness of your brand is the major component driving brand equity," Srinivasan says. "If you can get your name to pop up in people's minds when they think of the product category, you've won a big part of the battle."

## Reason 5: Improve Branding Equity

By showcasing your brand in its best light on the documents your customers and prospects see on a regular basis, you can passively build brand awareness and, by extension, brand equity. Next time your customer or prospect needs a product that you offer, they'll be more likely to remember you. And because they recognize your brand, which is key to building trust, customers may be more willing to pay a higher price for the same product. So, while not easily quantifiable, the value of brand equity is significant.

*"A brand is the set of expectations, memories, stories and relationships that, taken together, account for a consumer's decision to choose one product or service over another."*

Source: [http://sethgodin.typepad.com/seths\\_blog/2009/12/define-brand.html](http://sethgodin.typepad.com/seths_blog/2009/12/define-brand.html), 2009.



# Replacing Your Spool File Process with Formtastic

Modernizing your IBM i document design and distribution can have an immediate, tangible impact on your bottom line. From improving customer service and brand equity, to extending the life of applications and the platform, to reducing printing and distribution costs – a modern forms solution is one of the most valuable investments you can make in your IBM i system.

Given the high costs of printing and mailing alone, an electronic forms solution can pay for itself in a matter of months. Quadrant Software's Formtastic is the leading IBM i document design and distribution solution. Formtastic enables you to custom design forms, checks, and bar code labels from an intuitive desktop-based design interface. From there, Formtastic extracts spooled data from your IBM i and inserts it into a new business form. You can then automatically distribute the final document via email, print, fax, shared network drive or even from a secure web portal on PCs or mobile devices.

You can see how Peruvian Connection was able improve their direct marketing activities and immediately cut their printing costs with Formtastic. Click [here](#) to read the case study.



# Replacing Your Spool File Process with Formtastic

To learn more about how Formtastic can modernize your forms solution, visit the [Formtastic page here](#). You can also learn how much Formtastic can save you by downloading our [Formtastic ROI Calculator here](#).

REPUBLIC OFFICE SUPPLY		ABC COMPANY		ABC COMPANY		Quote Number: 3652	
555 Any Street		Attn: Bob Jones		Attn: Shipping Department		Account Number: 1245	
Anytown, Massachusetts 12345		999 Main Street		999 Main Street			
USA		Yourville, FL 23456		Yourville, FL 23456		Page number: 1	
Telephone: (508) 222-3456		USA		USA		Date: 09/20/16	
Fax No.: (508) 111-2333		Terms: Net 60 Days		Discount: 3% Balance Paid in 15 Days		Quotation Valid for 60 Days	
1	3915555	Brown Kraft Interoffice Envelopes	2	10"x13"	55.3500	BX	110.70
2	4903333	YO-290 768KB Tablet Style, Pen Touch Organizer	1	EA	49.9900	EA	49.99
3	1634444	AMPAD Steno Notebooks	10	EA	1.8300	EA	18.30
4	4407777	GP Bright White Ink Jet Paper	5	EA	14.6900	RM	73.45
5	4885522	V-Ball Liquid Ink Rollerball Pens Black Ink, Fine Point	6	EA	29.8800	DZ	179.28
6	3588888	EarthWrite Pencils	10	EA	2.3900	DZ	23.90
7	1380001	Marks-A-Lot Large Chisel Tip Permanent Markers-Black	2	EA	16.5600	DZ	33.12
8	3960002	Marks-A-Lot Large Chisel Tip Permanent Markers-Blue	2	EA	16.5600	DZ	33.12
9	4213333	Marks-A-Lot Whiteboard Dry-Erase Markers-8 Color Set	1	EA	13.6900	ST	13.69
10	8977771	LaserJet Print Cartridge for LaserJet Series Printers	1	EA	185.0000	EA	185.00
11	1645552	Metal Edge Wood Desk Rulers Single Metal Edge	12	EA	1.2500	EA	15.00
12	4660003	Straight Scissors Two-Pack All-purpose scissors	6	EA	21.9500	PK	131.70
13	5043333	Commercial Full-Strip Metal Stapler	2	EA	25.9500	EA	51.90
14	1122222	Full Size Standard Staples Precision-made premium speedpoint	6	EA	2.4900	BX	14.97
15	1306666	Tape Dispensers; Holds one roll of transparent tape	3	EA	5.9100	EA	17.73
16	4879990	Scotch Transparent Tape Multi-Pack General-purpose tape	1	EA	32.7600	EA	32.76
17	7703000	"Important Message" Neon Note Pads; Self-stick note pads	2	EA	9.2700	EA	18.54
18	3423333	Gel Wrist Rests	2	EA	32.4100	EA	64.82
19	4594444	Classic Banker's Lamp	1	EA	89.9500	EA	89.95
20	4932222	Economy Insertable Tab Dividers Single-sided, clear	10	EA	5.7000	EA	57.00
21	6068888	Manila Single Ply Top Tab File Folders, 1/2 cut	10	EA	22.2000	BX	222.00
22	4613333	CD-Recordable Discs 80 Minute CD-R, Neon	1	EA	37.3400	PK	37.34
23	3567777	3.5" Neon Formatted Diskettes	1	EA	6.5600	EA	6.56
24	5189998	Markerboard w/Aluminum Frame	1	EA	201.9500	EA	201.95
25	3184999	Heavy-Duty View Binders, 1" Locking E2D ring	6	EA	10.0800	EA	60.48
26	3184666	Heavy-Duty View Binders 1 1/2"	6	EA	10.0800	EA	60.48
27	5155999	Full-Top Adjustable Desk Organizer	1	EA	124.9500	EA	124.95
28	5916000	Deluxe Clear Front Report Covers, Black	1	EA	45.4000	BX	45.40
29	6737888	Two-Four Hole Heavy-Duty Adjustable Punch	1	EA	114.4900	EA	114.49
30	4405222	Optical Wheel Mouse 800 dpi Optical precision	2	EA	30.0000	EA	60.00
31	3919418	Rubbermaid Image Planner Stand	1	EA	11.2900	EA	11.29
32	5090027	Deflect-o Glasstique Front-Load Document Tray	2	EA	19.9900	EA	39.98
33	1589210	Page Manager	5	EA	4.3500	EA	21.75
34	4407859	Expandable Casual Brief Bag	3	EA	34.9500	EA	104.85



SOLD TO		SHIP TO		SALES REP		Quote Date	
ABC COMPANY		ABC COMPANY		Name: Joe Smith		09/20/16	
Attn: Bob Jones		Attn: Shipping Department		Direct: (508) 555-1234		Account No. 1245	
999 Main Street		999 Main Street		Email: email@email.com		Terms Net 60 Days	
Yourville, FL 23456		Yourville, FL 23456				Discount 3% Balance Paid in 15 Days	
USA		USA				Quote No. 3652	

Item	Part No.	Description	Quantity	Size	List Price	Pack	Total Price
1	3915555	Brown Kraft Interoffice Envelopes	2	10"x13"	55.35	BX	110.70
2	4903333	YO-290 768KB Tablet Style, Pen Touch Organizer	1	EA	49.99	EA	49.99
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4	4407777	GP Bright White Ink Jet Paper	5	EA	14.69	RM	73.45
5	4885522	V-Ball Liquid Ink Rollerball Pens Black Ink, Fine Point	6	EA	29.88	DZ	179.28
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8	3960002	Marks-A-Lot Large Chisel Tip Permanent Markers-Blue	2	EA	16.56	DZ	33.12
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15	1306666	Tape Dispensers; Holds one roll of transparent tape	3	EA	5.91	EA	17.73
16	4879990	Scotch Transparent Tape Multi-Pack General-purpose tape	1	EA	32.76	EA	32.76
17	7703000	"Important Message" Neon Note Pads; Self-stick note pads	2	EA	9.27	EA	18.54
18	3423333	Gel Wrist Rests	2	EA	32.41	EA	64.82
19	4594444	Classic Banker's Lamp	1	EA	89.95	EA	89.95
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27	5155999	Full-Top Adjustable Desk Organizer	1	EA	124.95	EA	124.95
28	5916000	Deluxe Clear Front Report Covers, Black	1	EA	45.40	BX	45.40
29	6737888	Two-Four Hole Heavy-Duty Adjustable Punch	1	EA	114.49	EA	114.49
30	4405222	Optical Wheel Mouse 800 dpi Optical precision	2	EA	30.00	EA	60.00
31	3919418	Rubbermaid Image Planner Stand	1	EA	11.29	EA	11.29
32	5090027	Deflect-o Glasstique Front-Load Document Tray	2	EA	19.99	EA	39.98
33	1589210	Page Manager	5	EA	4.35	EA	21.75
34	4407859	Expandable Casual Brief Bag	3	EA	34.95	EA	104.85

Internal use	Rep Name: Joe Smith	Customer Name: Bob Jones	Total: 1,743.16
	Signature: _____	Signature: _____	Page 1 of 1

Modernize and automatically distribute IBM i-generated documents with Formtastic

## About the Author: Jon Jeuck

Jon has spent 6 years at Quadrant Software, a Fresche Solutions brand, guiding the development of IBM i spool file design and distribution solutions and promoting their use. With 12 years in tech and software, Jon has seen countless organizations maximize the value of their IBM i platform and improve customer service by modernizing their IBM i document output processes.



**Jon Jeuck**

Product Marketing Manager  
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A Fresche Solutions Brand

#### **About Quadrant Software**

Quadrant Software is a brand of Fresche, one of the most successful software organizations in the IBM i marketplace. Fresche has a combined 60 years in the IBM i space and has successfully helped thousands of organizations worldwide modernize. Together, Quadrant and Fresche help customers maximize their investment in IBM i with solutions and services for web development, mobilization, business intelligence, spool file modernization and document distribution. For more information, please visit <http://www.quadrantsoftware.com>.

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