

# Formwise @xport systems

will cut  
document  
processing  
time  
and  
greatly  
improve  
management  
formation





### Background

Using relational data-base software, **FORMWISE EXPORT** systems provide a range of solutions, working in the user friendly Microsoft Windows 98 or later environments, for the management of the export department and the production of export documentation using standard Windows printers, to print both data and format on to plain paper, or graphics files (PDF or PNG) or to output files to transfer data in CSV or EDI formats. The most recently developed output file is XML format where both document image and data for direct input to suitably enabled business control software.

The Windows version of the software was written to take advantage of the capabilities of the Windows environment, in both single and multi-user variants, to meet a range of customer needs there are three versions of the software :-

**ELITE** is the basic module holding the elements of an export transactions, providing an inexpensive solution for the smaller volume exporter

**ELITE PLUS** has a wide range of additional formats and reporting functions and can manage a transaction from quotation to invoice/consignment.

**EXPORT** is designed for the larger export function and also provides European Union Reporting and Commission Management and Labelling modules.

In short there is a **FORMWISE EXPORT** software system available to match the budgetary and power requirements of a range of users.



### FORMWISE ELITE

is the base system contains databases for complete export transactions, which apart from all the names and addresses of parties such as consignees, forwarders/ carriers, banks, etc. also includes, amongst others :-

products	additional charges	shipping descriptions
shipping instructions	bank instructions	countries
invoice declarations	signatories	document sets & distribution

together with control dates and fields.

**Documents covered by the system** are :-

Order Acknowledgment	Export Consignment Note	Invoice
Packing List	Shipping Instructions	Bills of Exchange
Despatch Advice / Document Enclosure	Bank Instructions	L/c Presentation
Certificates of Origin	Air Freight Inst. (incl. Security Certificate)	EUR-1 / ATR-1

Also included as standard is the capability to produce submissions for HM Customs NES (New Export System)

There is also the possibility to import data transferred from a sales order processing system, to save re-keying the data and thus improve productivity but also maintain systems integrity .



- Easy to learn and use*
- Full on-screen help with links to significant web sites*
- Comprehensive range of documents*
- Prints form and data onto plain paper*
- Electronic submissions included as standard*

### FORMWISE ELITE PLUS

This version of the system builds on the functionality and user friendliness within the **FORMWISE ELITE** software and adds more power to allow the creation of quotations and a wider range of document formats, including :-

- a full range of commercial documents with either English, French, German or Spanish headings to improve customer acceptability, covering Quotations, Pro-forma Invoices, Packing Lists, Invoices and Credit Notes
- a range of twenty special combined invoice and declaration formats for countries such as Caricom, Gambia, Ghana, Malawi, Malaysia, Mauritius, Nigeria, Papua New Guinea, Sierra Leone, USA, Zambia etc.
- a full range of transport documents eg Collection and Delivery Order, Standard Shipping Note, Dangerous Goods, CMR and both House and IATA Airwaybills
- a full range of bank and insurance company formats
- Certificates of Origin (both EC and Arab British)
- a full range of HM Customs & Excise formats - C88's and CAP SAD's, T5's, EUR-1's, ATR-1's etc.

The software also contains additional reports regarding the workload of the department.



### FORMWISE EXPORT

This version, the most powerful in the range of the systems, builds on the functionality and user friendliness of **FORMWISE ELITE PLUS** software but for the high volume exporter adds significantly to the productivity of the system by the inclusion of more document and reporting formats :-

- a routine for the printing of DHL Waybills for both goods and documents within a consignment
- a suite of reports to allow the printing of mailing and package labels
- a full range of reports for consignments shipped to the European Community, eg Intrastats, Sales Listings and a range of validation routines and an audit trail for such consignments, including files which can be uploaded to HM Customs web-site
- a routine for the printing of the NCM monthly business report
- an additional database for the storage and reporting of freight rates for various modes of transport
- a wide range of marketing and shipment reporting, including the ability to track shipping costs
- a suite of programs to record and manage commission agents' payments



- ✓ *Links to sales order systems for data integrity & no data re-keying*
- ✓ *Includes range of reports with multiple criteria*
- ✓ *Can be quickly tailored to make software fit your procedures*
- ✓ *On-site training*
- ✓ *Continuing enhancement AT NO COST to supported users*

**F**ormwise Export is a "Service" industry for the management and documentation of consignments throughout the world. The company offers a professional and quality service, which is envied throughout the industry. Through years of experience, the staff at Formwise Export have developed individual systems and support procedures which can help shippers and freight forwarders operate their businesses more effectively. It is this flexibility which makes the Formwise range stand out from the crowd.

Our friendly and personal approach to business allows the development of strong professional and personal relationships with our clients, which yield immeasurable results in the complex area of management systems for export shipping.

Attention to detail is essential, particularly in the ever changing world of export procedures, especially in the European Union, and the prompt provision of system upgrades to cope with such changes is a matter of prime concern.

The provision of a "help and support desk" is an essential commitment from **Formwise Export Limited**, with advice provided free of charge, not only on the system, but on computing and printing matters generally, as well as acting as a source for general export queries by being able either to answer questions directly, or by reference to the vast fund of experience residing in our customer base.

The advent of e-mail allows remote support and enhancement to be carried out quickly and efficiently with the consequent minimum of disruption.

Additionally our policy is, and always has been, to continually review with our customers the features in the software, issue generally requested enhancements and, by keeping in touch with SITPRO and other bodies to ensure that upgrades to cover changes in standards are issued in good time to allow for changes in administrative procedures. These changes are issued to supported customers **FREE OF CHARGE** to ensure there are no nasty budgetary surprises.

**This then is our approach to total customer service.**

The main employees of the company built up a fund of knowledge in the design of forms for laser printers which were used by many customers to merge with their data to print form and data on plain paper. Amongst such users were **Weddel Swift** in the UK, **Givaudan Roure** and **SICPA** in Switzerland, and **Smith Klein Beecham** in France.

In 1989 a system running under MSDOS and Unix was launched to hold the data and then print either on to pre-printed forms or merge format and data and print on to plain paper. For example **Monarch Aircraft Engineering** were in the former category and **AB Technology** in the latter.

The windows version of the software involved a total re-write and was actively extended in response to customer requests which therefore broadened the scope of the software to allow export traders to do purchasing and sales order processing an example being **Consolidated Tools International**.



Most of our customers however are running a sales order processing system, on a range of computer platforms, and have had their systems customised to extract and download such data as is available. This is then read and processed by **FORMWISE** so that any re-keying of the data is avoided and systems integrity is maintained.

A further significant inclusion in the software is the ability to create documents which can be attached to e-mails, thus making document delivery almost instantaneous and giving customer care a significant boost.

All versions of the software have the capability to output submissions to HM Customs & Excise New Export System, for the cost of an e-mail rather than pay the forwarder/carrier.

This transmission of "documents" has now been extended to the inclusion of the creation of XML files to the UN-eDocs UK standard. These "documents" not only allow a recipient to view and print the information, but also to import the data into his own business software and save re-keying and allow a seamless transfer of data.

**Thus a wide range of customers can benefit from the wealth of features in FORMWISE EXPORT's systems..**

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# Formwise Export Systems documents for the electronic age

## PRODUCT OVERVIEW

for

## FORMWISE EXPORT

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# Formwise Export Systems documents for the electronic age

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## WHY COMPUTERISE EXPORT DOCUMENTATION ?

In today's increasingly competitive markets the need to respond quickly, and accurately to customer needs is a paramount requirement, be that a quotation for another shipment, documentation for an urgent air-freight despatch, or an analysis of sales and freight costs. FORMWISE has been designed as the export administration tool to fulfil that wide range of requirements.

Whilst you may need a system which encompasses functions from quotation, through invoicing and shipping, to marketing and shipping statistics, it may be that you already have a company wide sales order processing system and need specialist software to handle export administration. FORMWISE EXPORT has been designed to link to business control software simply by reading and writing transfer files, thus ensuring systems integrity, with enhanced productivity as data does not have to be re-generated. (see Links sheet with this pack for details of software which has been linked, by the end user, to Formwise)

We are SITPRO electronic forms licencees and use the latest SITPRO Topform pack as the basis of our forms, but as FORMWISE was designed to be adaptable to your requirements, we also produce bespoke forms, some of which, for example the defence contractors exit documents, are unaligned. Apart from a few statutory forms, the use of pre-printed forms, which can cause bottlenecks and wastage, is abolished as the form and data is printed at the same time, using standard Windows printer drivers.

The ability to get information to other parties quickly is of paramount importance, and as FORMWISE EXPORT in the Windows environment uses manufacturer's standard printer drivers thus allowing the use of a huge range of bubble-jet and laser printers. It is possible to send document by fax/modems. Possibly of greater impact is the ability to create compact graphics files, thus allowing a system of documents attached to e-mail messages no matter what the e-mail delivery system, such documents being available for viewing and printing by version 4, or better, standard internet browsers.

We assume responsibility for changes in regulatory procedures and issue advice through our telephone support line, quarterly newsletter and via our website. This ensures that Formwise Export systems will be maintained to the latest standards at no extra charge for those customers contracted for annual maintenance.

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# Formwise Export Systems documents for the electronic age

## LINKS TO SALES ORDER PROCESSING SYSTEMS

We believe that a user should continue to run their own business control package, and by means of a structured ASCII file, pass data to FORMWISE for the production of aligned export invoicing and shipping documentation.

Using this method maintains systems integrity and control mechanisms, and also save possibly substantial time re-keying data.

The data will be written, or transferred to, a nominated position for FORMWISE to be asked to process the transfer file to

- create the specified consignment(s),
- merge the extended default customer data,
- add the variable consignment data from the transfer file,
- allow the keying of any data to complete the consignment, and
- summarise the job for HM Customs purposes

### ESTABLISHED CONNECTIONS

Data can be extracted for transfer to FORMWISE using routines supplied by yourselves, or the business control software supplier/reseller or in certain circumstances by ourselves (see next page).

Below is the ever expanding list of software to which connections have already been made, so please call us to discuss the requirements to connect your software, or alternatively visit our web site for an explanatory file.

3EX	Jobs 400	Sage Enterprise (Sequel Server)
- Royal Mint	- Firth Cleveland Steel	- Lowepro
AIA POS	JVS	Sanderson PICS
- Community Foods	- Marathon Belting	- Haldex
Access Accounts	Kewill—Micross	Sanderson Cotswold
- Rotabroach	- Feedback Instruments	- Mason Coatings
Axapta	Madison	Sanderson Unity
- Sandler Seating	- Victor Products	- Protex Fasteners
BPCS	Mancos	SAP R3
- BSN Medical	- Ultra Hydraulics	- Zeon Chemicals
Command	Mfg-Pro	Sigma MS400
- W Lucy	- Cussons UK	- Denso Manufacturing
JD Edwards	Micross	Sincom Supra
- Pratt & Whitney	- Feedback Instruments	- St Gobain Pipelines
Efacs	MPCS XA	Smartstream
- Doncaster Structures	- Gradus	- Siemens
Epicor	MTMS	Strategix
- Cerulean	- Flexello Castors	- Seward Medical
Fairhurst	Multisoft	Swan MRP2
- Manro	- Hewetson Floors	- Ultra Dynamics
Fourth Shift	Navision	Symix Syteline
- Chemence	- Community Foods	- Porvair International
Gould Hall	Openitem	Tetra 2000
- Edinburgh Weavers	- Motorola	- G & J Hall
Impact Encore	Oracle	Tetra CS3
- Speed Saws	- Newport WaferFab	- Sheen Instruments
Impcon	Pegasus Opera	Titan
- Firth Rixson	- Thor Hammer	- Eveden
Infor:32	Protean	Tropos
- Standall Tools	- PPG	- Morganite Electrical Carbon
Intellect	Safes 5	Unix Mega
- Derek Rose	- Colson Castors	- The Royal Mint
IS3000	Sage	Visibility
- FEB	- Failsworth Hats	- Printpack Europe
JBA System 21	Sage Line 100	Winman
- G Costa	- Tullis Russell Hotpress	- Drytac

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# Formwise Export Systems documents for the electronic age

## LINKS TO SALES ORDER PROCESSING SYSTEMS—2

We really do believe that a user should continue to run their own business control package, and more and more of those packages have ODBC drivers which allow the extraction of data. If you are in a situation where there is no IT experience to produce the extract files, then we are in a position to help produce routines to do this.

The first batch of these are three extract files which can speed up the installation of Formwise :-

1. An extract of Account holders Names and Addresses
2. An extract of Delivery Names and Addresses
3. An extract of the stock product descriptions, commodity code, weights, cubes etc

This populates a large part of the database and allows the expansion of delivery address default data, which will in turn speed up the production of documentation later in the cycle.

In a situation where :-

1. the business control software does have ODBC drivers available
2. there is an installation of Microsoft Excel, or preferably Access
3. there is the possibility of speaking to someone, either within your organisation, or from your software supplier, who has a knowledge of the database tables

then we can offer a service of installing routines to extract the above data, on installation of the system.

The other extract is of despatch/invoice information to cut down the amount of re-keying of data and maintain systems integrity. This would install a routine which allows the user to input the despatch note or invoice number for which data is required, have the data extracted and routines within Formwise to read that data, so that no re-keying of numbers and dates, and product quantities, descriptions, commodity codes, and weights is required. Such that documentation processing is reduced to the minimum.

### Costs (excluding VAT):

- |                              |        |
|------------------------------|--------|
| 1. Static data extract       | £ 600  |
| 2. Consignment data extract  | £1,200 |
| 3. Combined extract routines | £1,500 |

Please call our support line to discuss these possibilities in more detail.



# Formwise Export Systems documents for the electronic age

## DOCUMENTS BY PRINTER, FAX / MODEM OR E-MAIL

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### Printers:

The Formwise software uses your installed windows printer drivers, so that any printer capable of printing on A4 size paper with the necessary fonts can be used, indeed we have found a dot matrix printer capable of printing documents.

### Facsimile:

Not so many years ago the only way to transmit documents was sending by mail or courier and then along came facsimile machines, and also, through a print driver, fax software to send documents direct from your desktop personal computer. The cost of transmission can be quite expensive, and with certain countries merely getting through is somewhat of a lottery.

### E-mail attachments in PNG format:

With the speed and minimal cost of e-mail, more and more business is being conducted by this medium, and we have enhanced Formwise systems to create files which are documents for attachment to e-mail messages, these files are e-mail software and printer independent.

Sending e-mail messages ensures that the correct party receives the message, through notification if it does not arrive, and with the speed of e-mail there is an obvious improvement in customer service. Quite apart from that there are distinct cost benefits from using e-mail in that to send three pages attached to an e-mail message is likely to be transmitted in under a minute, AT LOCAL CALL RATES, whereas sending a 3 minute fax can be quite expensive.

It is extremely difficult to estimate how much of the total usage of a fax is for sending documents, but customers making use of this facility estimate savings in a range from £60 to £600 PER MONTH. There are other ways to make savings and one of our enterprising customers has set up an arrangement that these "documents" are e-mailed to a consular services company, who print them and then obtain certification and legalisation, and then courier them back with the consequent savings in cost and speeding up of delivery time.

Our standard e-mail documents, which can be attached to messages from your e-mail system, are in the PNG (Portable Network Graphic) format, and providing your trading partner is using a PC using either Windows 95 / 98 / NT / 2000) and either Internet Explorer 4 or Netscape Navigator 4, or better, will be able to view and print the attachments. If no browser is available, we can supply a small executable program which will provide those facilities. This will provide your customer a non-printer specific method of printing your documents as soon as he collects his e-mail.

### E-mail attachments in PDF format:

An alternative would be the use of a print driver which outputs Adobe Acrobat PDF files for which many users have the reader programme which is freely available on the web. Our preferred software is PDF Print Factory from Software-Partners, and there is a professional version of the driver (cost £60) which allows the attachment of passwords to protect the documents from being edited.

### E-mail attachments in XML format:

A further alternative for transmission of documents is in the format of an XML file. The Formwise System is currently being updated to allow the creation of XML files in accordance with SITPRO's UN-eDocs-UK specification.

# Formwise Export Systems documents for the electronic age

## DOCUMENTS BY PRINTER, FAX / MODEM OR E-MAIL

E-mail attachments in XML format: continued.....

An XML document has the capability of allowing the recipient to view the file through a suitably enabled software package (Word / Excel / Internet Explore). The "document" is translated on screen, but holds the data in a format which has the potential to be input into the recipient's business control software without re-keying. Obviously this would speed up the process of data input and has data integrity inbuilt between disparate packages. Currently Formwise will output the commercial and transport master documents.

However, the files do tend to be quite large, especially when compared with PNG and PDF file formats, and therefore the current thinking is a single file containing all data for a consignment will be constructed, and you may rest assured that Formwise will be modified to produce this single file in due course. In terms of customer service, we think a customer would be more than happy with this extension of customer service.

Speeding up the information flow by the use of e-mail means that your customer can pass these "documents" to the receiving warehouse, import agent etc., and thus within minutes of despatch, necessary parties are thoroughly advised of the transaction.

NB Please also see the following page on reporting by electronic message



# Formwise Export Systems documents for the electronic age

## H.M. CUSTOMS DOCUMENTS AS ELECTRONIC DATA

Obviously using electronic data messages, output from the system, to give information to other parties about a consignment is efficient from the exporter's point of view in that no re-keying of data is required and information can be passed quickly by electronic mail to the relevant parties. If the recipient of the message has access to systems which read that data, and allow further processing, then the efficiency savings are doubled.

A few years ago the use of electronic data interchanged (EDI) was seen by many as the ideal way to proceed, but take-up by all sectors of industry was very low because of the complexity and costs of implementation. However over the past few years with both the growth of software tools to take away some of the mystique and the growing familiarity of all levels of staff with electronic messaging, the staff time saving potential has become an irresistible force for change. In one specific area HM Customs have also made things much simpler to provide Intrastat and Sales Listing data and NES submissions by a range of options and thus save themselves having to enter that data for themselves.

The big plus is that it is now possible to send that data, without having to spend not inconsiderable sums to join specialist EDI communities, and merely use e-mail or the internet. This provided the impetus and we at Formwise developed the capability to output these electronic messages. The take-up has far out-stripped our expectations with most customers converting to electronic rather than paper reporting in a short time.

The implementation of the "New Export System" will further reduce data entry and the "paper chase" of C88's (SAD's). Thus HM Customs can use their staff more effectively in other target areas, eg smuggling and fraud detection.

We have modified Formwise to work via three routes:-

1. Via the Bell Davis or CNS service for the implementation of NES. A ball-park figure for implementation is approximately £2000 start-up with running costs for a quantity of messages, and
2. to output the message direct from Formwise and use e-mail
3. XML wrapper for submission via the government gateway for secure sending for RPA claims

We have tested, as far as possible, to ensure that Formwise systems are capable of producing the relevant messages to ensure that the minimum of effort will be required to comply with the new system and obtain clearance quickly and effectively. The added benefit for CAP product exporters should be the use of one message to cover both HM Customs and CAP procedures.

The average charge from a forwarder/carrier for an NES submission would appear to be £15, which can be replaced by an e-mail or gateway upload of data extracted from the system, so a fast payback for the system cost is within reach.

Users now have the ability to output documents by printer, facsimile, or e-mail attachment, and to report data to HM Customs by electronic message.

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# Formwise Export Systems documents for the electronic age

## E-Commerce and Formwise

In co-operation with another software house, we have mapped out the possibility of creating a suite of programs to allow you to create an upload to a web-site, of products extracted from the Formwise files. There will also be the opportunity for your customers to complete orders and prospects to make enquiries on-line .

These are as follows:-

1. Output a CSV file of the products which can contain code, description, quantity, ex-works price etc., and when a field is added a link to a picture of the product.
2. Import that CSV file into say Microsoft Access or Excel to allow formatting for fonts etc.
3. Output a file from Access/Excel in the required format to upload and update the web-site.
4. Prospective customers would be able to log on to the site, and complete an enquiry or request for a quotation, whereas
5. Given the maintenance of passwords etc for customers, a customer would log on to place an order
6. In either of the two scenarios above, the web-site would generate an email advising of the placement of an enquiry or order.
7. The site manager can then log on to the site, extract the necessary data
8. The extract can then be read the file into Formwise, which will allocate the next order reference as the consignment key and create products only for those items which the customer has specified quantities.
9. The enquiry / order can then be handled through Formwise in the normal way, but without the need for data to be re-keyed.

This should

- A. Improve customer service
- B. Save a considerable amount of time in data entry
- C. Ensure accuracy as you will be working with the prospect/ customer data
- D. Ensure that enquiries / orders are never overlooked

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## END-USER PRICE LIST

	Single-User	Multi-User
<b>Formwise Elite</b>	£	£
Software licence	440	990
Annual Support	200	300
Training per day	450	
Training (one and a half days)		725
<b>TOTAL COST OF SYSTEM</b>	<b>1090</b>	<b>2015</b>
<b>Formwise Elite Plus</b>		
Software Licence	950	1200
Laser Forms	495	495
Annual Support	300	400
Training (one day)	450	
Training (one and a half days)		725
<b>TOTAL COST OF SYSTEM</b>	<b>2195</b>	<b>2820</b>
Upgrade from Elite Licence	1105	805
Upgraded support charge	100	100
<b>Formwise Export</b>		
Software Licence	1450	1950
Forms Pack	495	495
2 days on-site training	900	900
Annual Support	450	700
<b>TOTAL COST OF SYSTEM</b>	<b>3295</b>	<b>4015</b>
Upgrade from Elite Plus Licence	500	750
Upgrad support charge	150	300
<b>T</b>		
Training: Mileage, including return, will be charged at Inland Revenue rate of 45p per mile (from Bristol), with overnight accommodation, if required, charged at cost		
<b>Additional Work / Software:</b>		
Signature Scans & Programming (per 4)	100	100
Logo Scan set up	100	100
Spex Master file data extract & import	400	400
Adobe Acrobat V5 (per screen installed)	225	225

### Terms of payment:

Our standard terms of payment are:-

1. a discount of 7.5% for cheque with order or on day of installation,
2. a discount of 5% for payment within 7 days of installation, or
3. net cash within 14 days of the date of invoice or installation.
4. the software remains the property of Formwise Export Limited until paid for in full.

All prices quoted are exclusive of VAT

Please bear in mind the potential saving of £25 per NES submission, which is required for each consignment going to non-European Union destinations by either road or sea.

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## SAMPLE DOCUMENTS

A set of SITPRO / UN aligned documents is available on the **DOWNLOADS** page of the web-site at [www.formwise.co.uk](http://www.formwise.co.uk).

The file includes a representative cross-section of documents but there is a wide range of specialised documents designed for specific customers.

The software was designed to make this process simple to bespoke which makes this a cost-effective option for customers.

If you have a specific requirement please contact us.

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