

Jeld-Wen and Forte

Working Partners

Based in Oregon, USA, Jeld-Wen started as a small millwork plant in 1960 and today is one of the largest manufacturers of doors and windows in the world, with over 12,000 employees worldwide. In August 1999, the John Carr and Boulton & Paul brands were acquired from the Rugby Group and integrated into the Jeld-Wen family. The company continues to be committed to outstanding service, through the supply of joinery products, to its customers throughout the United Kingdom.



Planning Ahead

In 1997, Doncaster-based John Carr decided that its current in-house ledger systems were not supportable in the longer term, and in any case, were not Y2K compliant. Management surveyed the market for a suitable replacement package and working partner, and identified Forte as able to provide the flexibility required.

Implementation began immediately, and the system was installed running under Windows NT with interfaces to the existing AS/400 systems, which continue to service the Order Processing requirements.

Initial emphasis was on the introduction of the Forte Sales Ledger to enable a

more interactive approach to the account management of the existing £10m of receivables.

Meeting the Challenge

Immediately after installation, the flexibility of the new system was challenged by the company's acquisition of a major competitor, Boulton & Paul. Overnight, there was need to cater for double the turnover and amount of customer receivables, and to provide for the integration and rationalisation of the existing outsourced accounting facilities.

Forte rose to this challenge admirably, demonstrating its flexibility and scalability, and within a few months, the new operations were consolidated into Forte, and were administered uniformly from Doncaster. Now, Forte was accounting for the combined operation with nearly £25m in receivables and processing 40,000 customer invoices a month.

Implementing the Plan

With this priority provided for, Forte consultants worked closely with John Carr staff to rationalise and improve the provision of the financial and management accounting requirements for the combined operation.

The Forte General Ledger and integrated Cyberquery report writer were used to provide the requirements for financial stewardship and timely reporting.

As part of the need to support local accountability, five sites became self-accounting whilst contributing to the central consolidation.





The purchase ledger was soon introduced universally, and was used to implement a cheque-less payment policy with all payments now made routinely through the BACS system. Forte consultants provided active input into this highly successful exercise by providing system-produced invitation letters with fax-back replies. More recently, the Forte Fixed Asset Register was introduced to provide improved control in this important area.

There was now an opportunity to revisit the area of receivables management to ensure that the power of Forte was fully harnessed to achieve increased efficiencies with the Debt Management function. The large volume of accounts and transactions, compounded by Corporate/Branch relationships had resulted in an historically complex cash allocation and credit control requirement.



Again, Forte consultants worked closely with those involved to provide enhanced convenience features to strengthen the already powerful Forte functionality. Cash could now be applied against a branch or corporate account, and would automatically be reflected in both views. Debit note recognition was improved, and users had many ways of applying cash, depending on what method was relevant in individual circumstances.

Return on Investment

Dramatic savings were achieved by reducing the number of staff required for accounting functions, where 80 staff were reduced to a team of 35, providing

a a vastly more efficient service. Increased efficiency also resulted in the number of staff required to apply cash being reduced from four to one.

Efficiently working together

By August 1999, Forte was well established when the acquisition of Jeld-Wen presented a new challenge to its ability to move with change. The new America-based owners had their own coding and reporting requirements and local management was given six months to implement these new standards.

Here, Forte consultants took a pro-active role and suggested ways in which these requirements could be met immediately. They were able to introduce a new coding model, involving 10,000 codes, virtually overnight. Because of this, the UK operation was the first unit to present its results in the first month, and has continued to do so ahead of the rest of the world and within five working days of the month end.

Recognition

Mike Ward, Jeld-Wen UK's Financial Director, recognises the contribution and benefits of pro-active suggestions from the Forte team who regularly suggest ways in which features can be used more productively. His comments on the introduction of Forte and its contribution to the ability to cope with the tremendous changes are unequivocal. He says:

“Our ability to react quickly has been crucial over the last four years. Forte gave us that flexibility and much more”.

Geared for the Future

With these massive changes behind them, Forte is now routinely providing for the accounting and management information needs, both locally and for the Group, and stands ready to respond to whatever changes are demanded of it in the future. Whatever this may be, the company remains confident that Forte and its support team will be able to respond to the challenge.

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