

Justrite Manufacturing:

**Best Practices & Technology for MS Excel Financial Reporting,
Forecasting, & Budgeting**



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Agenda:



- Introduction
- Justrite Manufacturing Project Review
- Presentation:
 - Automation Roadmap Strategy™ for Microsoft® Excel
 - Financial Reporting
 - Financial Forecasting
 - Budgeting

About Justrite Manufacturing:



- Manufacturer and Distributor of Safety Containment Systems
- Worldwide Sales
- Founded in 1906
- Based in Mattoon, Illinois
- Running XA R 7.7 with IFM and FRx
- Microsoft® Excel for Budgeting

Justrite Manufacturing:



- The Challenge
- The Solution
- The Results

The Challenge:



- FRx not supported, limited product knowledge
- Budgeting processes in Microsoft® Excel lacked efficiencies
- Objective is a single integrated solution to manage financial reporting & budgeting requirements in Microsoft® Excel
- Lack of an effective solution from Infor
 - F9 fell short on functionality and PM10 lacked integration – neither are Microsoft® Excel based/real-time
- Requirements: seamless to install, intuitive to learn and rapid implementation
- Big Requirement: References!

The Solution:



The Automation Roadmap Strategy™ From Global Software, Inc.

- ✓ Pre-configured Microsoft® Excel based Reporting + Budgeting for Infor ERP XA
- ✓ References too good to be true....
 - ✓ Seamless to Install
 - ✓ Intuitive to Learn
 - ✓ Quick implementation
 - ✓ Customer Service – second to none in the industry

The Results:



- Implementation exceeded expectations: “no scraped knees or bruised elbows”
- Installation in just hours
- Converted key financial statements and balanced to old FRx reports in 3 days
- Learned budget tool and defined template in five days
- 10 days from initiation of budget to board presentation
- Fulfilled stringent requirements of private equity owners

Presentation:



- Automation Roadmap Strategy™ for Microsoft® Excel
 - Financial Reporting
 - Financial Forecasting
 - Budgeting



Thank you!

Questions?