

## Case Study

# vivalis

## Migration of Business to Sage ERP X3

### Client

Vivalis Limited (“Vivalis”) and Fine Fragrances & Cosmetics Limited (“Fine Fragrances”).

Vivalis is a global manufacturer of cosmetic products, providing high quality consumer products at competitive prices. Vivalis is based in Skelmersdale in Lancashire and supplies products to major retail chains and a vast array of independent chemists in the UK, as well as exporting to over 80 countries worldwide. Vivalis have been operating the Sage ERP X3 system for over 2 years.

Fine Fragrances owns and operates a strong portfolio of branded products within the hair colourant, haircare, fragrance, toiletries and cosmetic categories. Fine Fragrances had been operating the Sage Line 500 system for a number of years.

### Requirement

The Fine Fragrances business was operating its Accounting, Stock Control and Ordering functions on a Sage Line 500 ERP system. Having physically re-located its business from Surrey to Skelmersdale, onto the same site as the Vivalis business, it made sense to streamline the back office systems into a single solution.



It was decided that the Fine Fragrances business was to be migrated from the Sage Line 500 system onto the Sage ERP X3 system, and fully integrated into the existing Vivalis operation that existed on Sage ERP X3.

The migration of the business onto Sage ERP X3 had to be managed in such a way that it caused minimal disruption to either business, as both Fine Fragrances and Vivalis deal with the large grocery multiples, who work to a very tight regime regarding deliveries and timing.

Vivalis appointed Inixion to manage the complete project.

## Project Scope

The project scope was therefore defined as follows:

Migration of the Fine Fragrance business from the Sage Line 500 ERP system to the existing Sage ERP X3 system. Full integration of the operational and accounting processes of the two businesses.

## The Solution

Inixion provided a number of services into the project:

- Overall management and budgetary control of the project, reporting into the Finance Director.
- Business process review & change management.
- Management of third parties, i.e. EDI system suppliers.
- Training of users new to the Sage ERP X3 system.
- Document and Report design.
- Full data conversion process:
  - Extraction of data from Sage Line 500.
  - Cleansing and de-duplication of data.
  - Loading of data into Sage ERP X3.
  - Full accounting reconciliation of all transactional data.
- Go Live support.

## Challenges

A number of challenges were expected and managed during the project:

- **EDI Communications** – Nothing less than completely uninterrupted EDI communications with the Vivalis and Fine Fragrance customers was acceptable. Inixion worked with the third party EDI system supplier to create a stepped solution, enabling all of Fine Fragrances customers to continue to trade during the cut over period without being aware that systems were changing.
- **Data Conversion** – Inixion commenced the data extraction and testing process at a very early stage of the project.



Data was extracted, checked and imported into Sage ERP X3 before being fully reconciled back to the Sage Line 500 system numerous times before the final data conversion took place. All financial data was fully converted in a test environment and reconciled completely a number of weeks prior to go live.

Further full conversions were tested up to the actual go live, which meant that the final go live data conversion process was a seamless and accurate process.

Finally, a full audit folder of all converted data, along with full financial reconciliations to balance sheet accounts was produced, and each element was signed off by the relevant responsible person.



## Results

Following a controlled and methodical implementation phase, the go live process was extremely smooth, and was commented on by staff and management as an “anticlimax”.

Operational processes commenced on the system at 9:00am on go live day, and goods were shipped and invoiced as normal.

Inixion remained as a visible presence on site for a number of days after go-live, to ensure that any outstanding issues were dealt with promptly and satisfactorily. An on-going assessment of workloads was carried out, along with a Post Live Project Review with all key users. The Post Live review was carried out prior to month end, to ensure that all users’ current and expected month end requirements were in place in good time.

## Comments from Vivalis

Ken Kramer, Financial Director at Vivalis, commented:

*“I have been involved in numerous ERP system implementations over many years and can confidently state that none of the projects has run as smoothly as this one. The team at Inixion provided solid skills at all levels, which were backed up with sound understanding of real world issues, including a deep understanding of management accounting.*

*During the course of the project, the Inixion team immersed themselves into the business and became part of the Vivalis and Fine Fragrance teams, working along side all members of staff to ensure a smooth and accurate cut over.*

*Project Management is the key to the success of this type of project, and Inixion delivered a high calibre of management, ensuring that people at all levels were informed, expectations were set, and where necessary, issues were raised immediately at the correct level so that any required action or decisions could be carried out confidently.*

*The project was delivered in full, on time and on budget.”*

## Vivalis’ Website

The website for Vivalis Limited can be found at [www.vivalis.co.uk](http://www.vivalis.co.uk).

