

Case Study

Viadex

Integrating Sage X3, Microsoft Dynamics 365
and Qlik Sense





Company Details



Founded in 2001, Viadex provides enterprise class IT solutions, holistic security solutions on a global basis (Viadex Security, Powered by Performanta), supply chain consolidation, and import/export services to UK headquartered organisations with geo-dispersed infrastructures and users. It has delivered innovative and complex multi-vendor solutions to organisations in over 130 countries. In addition to its head office in Surrey, UK, Viadex also has offices and local technical and commercial teams in Dubai, Gibraltar, Singapore, South Africa and USA.



The Challenge

- Integrate Sage X3, Microsoft Dynamics 365 and Qlik Sense
- Eliminate manual processing
- Automate data sharing, reporting and alerting

Applications used

- Sage X3
- Microsoft Dynamics 365
- Qlik Sense

Platform & Capabilities Used

- BPA Platform
 - ⇒ Notifications & Alerts
 - ⇒ Report & Document Automation
 - ⇒ Data Integration & Synchronisation



The Solution

- Automated the generation and distribution of reports
- Automated alerts regarding issues with orders and distribution
- Integrated Sage X3 with Open Exchange Rates website



The Results

- Improved business efficiency
- Enhanced real-time business intelligence
- Removed the need for costly development

The Challenge

Integrating multiple systems

When Steven Oakley joined Viadex back in 2014 the company was using Sage 200 to manage the entire business. Everything was being pushed around the company in spreadsheets and invoices were being printed and sent out manually. As the company was rapidly expanding on a global basis the decision was made to upgrade from Sage 200 to an all-encompassing ERP system.

“Whilst we were looking at a new ERP system, as we had completely outgrown our Sage 200 system, we needed a quick fix to try and automate some processes, such as reporting and alerting, to make things more efficient,” explained Steven Oakley, Business Systems Manager, Viadex. “I had been using BPA Platform at my previous company for quite a number of years, which is why I introduced it to the company as soon as I started. I knew we would be able to immediately automate report distribution, generate notifications and alerts, and automatically issue invoices, remittances and licenses to our customers.”

Viadex eventually deployed Sage X3 to replace Sage 200, hoping to use it as an all-in-one solution – accounting, CRM, ERP etc. However, in the last year or so, the company felt that it needed a better CRM solution to manage its ever increasing customer base and selected Microsoft Dynamics 365 to run alongside Sage X3. This, however, introduced another problem; how to integrate the data between the two systems.

It was a similar issue when the company decided to use Qlik Sense, a cloud-based data analytics platform, to assist with reporting and business intelligence. With Microsoft Dynamics 365 being cloud-based, Viadex needed a solution to pull the information down and push it into Qlik Sense.

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The Solution

Improving efficiency via automation

BPA Platform was initially introduced as a quick fix for Viadex, primarily for reporting and alerting, until it replaced Sage 200 with a new, more powerful ERP system. However, it soon became apparent that BPA Platform was actually more competent than some of the built-in workflow processes found in the newly installed Sage X3.

“BPA Platform is not a huge investment, so it meant if we only used it for a year it wasn’t the end of the world. We did think that when we started using Sage X3 we would potentially stop using it, or not using it as much, but actually we ended up using it more,” said Oakley. “Having deployed Sage X3 we found that some of the report and notification workflows were fairly restrictive and that BPA Platform provided much better functionality. Although there is some functionality in X3 it’s definitely not as feature-rich as BPA Platform.”

Viadex is using BPA Platform to automatically generate and issue sales reports every Friday night as well as notifying the sales team about potential issues with orders and distribution.

“Automation has greatly improved the way in which the sales team receives reports, making them extremely visible. It has also helped with our logistics,” said Oakley. “We ship IT equipment all around the world so our logistics needs to be up to speed. We have therefore set up a lot of alerts to streamline that process: informing our staff if something hasn’t been done, something is still outstanding, or to double-check a large order.”

Integrating Sage X3 with external resources and software

Having resolved its reporting and alerting requirements, Viadex started to slowly explore some integration projects around Sage X3, exploiting its APIs, in order to import data from different external sources such as the Open Exchange Rates website.

“We didn’t really want to go out and learn a whole new integration suite, and as BPA Platform has a connector tool it seemed logical to use it. We are now using the Web Services Connector to pull data from the Open Exchange

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Rates website and import it into Sage X3,” explained Oakley. “We used to only have weekly currency and exchange rate updates, purely due to the length of time it was taking people to do it manually, but now BPA Platform is automating this process it happens on a daily basis without requiring any resource time at all.”

Viadex also turned to BPA Platform to automate the transfer of data from Microsoft Dynamics 365 into Qlik Sense, enabling it to benefit from real-time business intelligence as well as saving money.

“It was another, ‘we’ve got a problem, how are we going to resolve this without having to invest more money into the Azure / SQL stack?’ Fortunately, BPA Platform’s Microsoft Dynamics 365 Connector tool gives us the capability to download all the data from the CSV and push it into Qlik Sense.” said Oakley. “BPA Platform is just an extremely versatile product that helps us solve a wide-range of issues. It’s a tool that we have been using for a long time now and one that we are familiar with. As we take on more systems it’s just easier for us to keep using it. We often replicate many processes because the database structure and suite of tools we are using are effectively the same.”

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The Result

A Swiss Army knife for business

One of BPA Platform's main attributes is its ease of use, helping organisations integrate business systems and automate numerous processes without the need for high development skills. An attribute that Viadex finds extremely useful.

"It's so graphical. You don't need to sit through pages of code, which makes it easier for people like myself, who are technical and got a good understanding, but aren't developers. Obviously, some bits are more difficult than others, but you can generally pick it up and get the idea of what's going on. It means that my team can actually get on and make the changes as and when required without the need for developers to get involved," said Oakley.

"Our business is rapidly growing and our requirements are constantly changing. BPA Platform has the functionality to meet these demands and gives us the ability to plug all the gaps in the applications where we find there isn't a 100% fit for what we need. BPA Platform just comes along and manages to fix everything and save the day. It's a bit like your Swiss Army knife. We are always finding ways for BPA Platform to make life easier for us."

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Want to learn more?

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