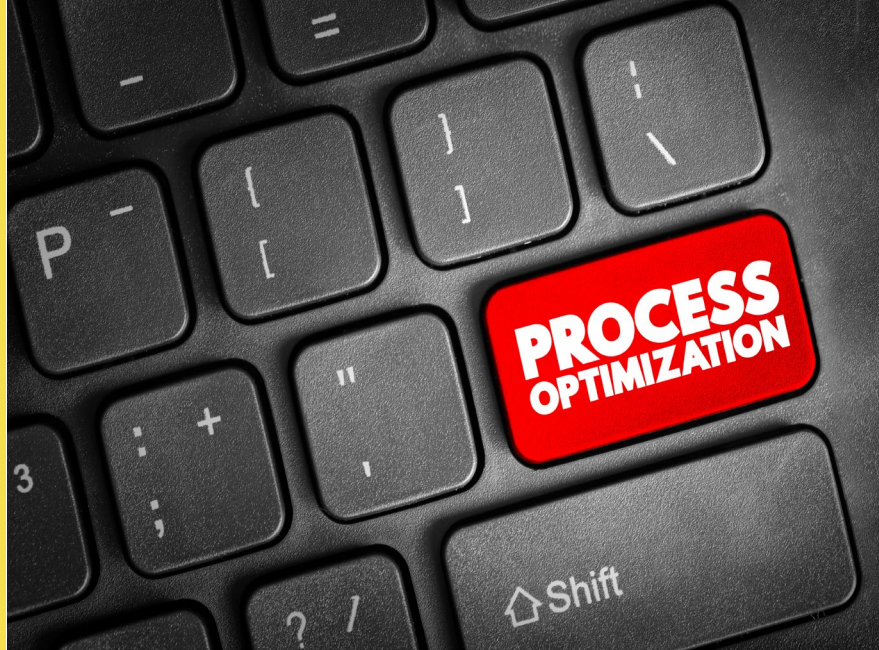# CASE STUDY

The Challenge

Our client, an established CPG manufacturer, must provide their distributors (clients) regular product data updates for new and discontinued items. The data must contain product codes, descriptions, pricing information and other product attributes. This information is contained in the company's ERP. However, each distributor has different data format requirements, including the following:

- Specs on column content and order
- Combine input columns
- Find and replace specific words
- Variations in the product descriptions.

The distributors use the data to update their own online portals and product databases.

The customer service team was spending an exorbitant amount of time manually formatting their ERP reports to meet each distributor's needs.

Excel-VBA.Pro developed a practical solution using Excel and VBA

DATA TRANSFORMATION

Using Excel-VBA

X VBA.PRO

Excel-VBA.Pro

Process Improvement

THE SOLUTION

There are many third-party solutions for data transformation challenges. Unfortunately, many of them are very costly and are not easy to implement and maintain. That was the case here, so the company reached out to Excel-VBA.Pro for an evaluation.   After a brief review of the workflow, Excel-VBA.pro proposed an Excel model that would take in the ERP product data and perform the necessary transformation steps.   The model and VBA coding would be structured so users could define the individual customer output specs and only run the code that resulted in that desired output.   This structure also allows for future enhancements, if needed. Excel-VBA.Pro's initial development time estimate was 10 hours.   The company engaged Excel-VBA.Pro and the work started 3 days later.

THE OUTCOME

As proposed, Excel-VBA.Pro developed a flexible Excel-VBA model that allowed non-technical users to easily define the required CUSTOMER SPECIFIC output format and generate the required data file.   This recurring process can be run as often as needed. What used to take an individual user 1-2 hours to manually format a single customer's data file, now takes less than 5 minutes. Our customer ultimately saved about 12 hours per week, or approximately 30% of an FTE.   More importantly, their distributors (clients) are happy that they are getting the accurate and updated data more quickly.

PRACTICAL SOLUTIONS TO COMPLEX BUSINESS PROCESSES

WE SAVE YOU TIME BY ELIMINATING REPETITIVE MANUAL TASKS AND INPUT ERRORS

FAQ answers:

- No project is too small
- Average project is 10 hours
- Free evaluation/quotes
- Bug-free guarantee
- Usually start in 3 days

Other areas of expertise:

- Cash Management
- Data Transformation
- Data Mapping
- AR Dunning
- Budget/Forecast Models
- Dashboards

ABOUT

Excel-VBA.Pro is a service offered by L5 Metrics, LLC. Our unique approach is to utilize 20+ years of financial management experience to quickly develop custom Excel-VBA solutions to streamline business processes.   We work directly with end users to make work life easier.

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