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CASE STUDY

Another Business Central RE-Implementation

You Should NOT Set Up Business Central in USD - and Your Partner Should Know That.

The Problem

Issues from Inexperienced Partners

Crestwood's Business Central team went to work. We identified quite a few issues (simple ones, too, like relationships between tables and problems creating two distinct numbering series). Their data connector didn't function properly, and they would have to manually input invoices, delete duplicates, and double-check constantly. It was a massive time drain.

Crestwood fixed it in approximately 30 minutes. Now we've opened a can of worms, and the client is loading our team up with even more advanced customizations. They're thrilled to no longer be wasting time, money, and effort on something that ostensibly exists solely to make their lives easier in Business Central. Now the system is humming like it should be.

And the only difference? Not the software, obviously – the ERP partner doing the implementation.

Overview

You read our title correctly; even American companies working solely in US dollars shouldn't be setting up their Microsoft Dynamics 365 Business Central system in USD. Why? Well, because those three small letters become embedded in code throughout your data and could render any customizations impossible. Which is exactly what happened to a new Crestwood client before they came to us.

Wrongly Assigning USD Code

It is a rookie mistake, seemingly so intuitive; if a company does business in USD, the system should be set up in USD, right? Wrong. It is redundant and unnecessary, and those misplaced currency designations were present everywhere from vendor masters to A/P and A/R documents. It didn't look wrong to anyone involved (the former partner or our client) because the transactions were USD.

Nobody noticed anything was awry until our client reached out to an ISV (incidentally a company we know and love: Binary Stream) to integrate a payment processor. It should have been a straightforward integration with their solution, but it wasn't. The team at Binary Stream caught it right away: the system was set up in USD.

Unhappy with their original partner, our customer sought help elsewhere and found us.



“If the issue was that simple but that damaging – I wonder how many other things are wrong?”

The Solution

To Fix the ISV Code or Scrub the Data: That is the Question

When the ISV partner told our team, “hey, the old partner set it up in USD,” we knew exactly what that meant. We often see that issue with self-implementations because, again, it seems so intuitive.

Our options at that point were to have Binary Stream rewrite all of their code to fit the wacky USD designations that pervaded their system, or we could take the time to do a system-wide cleanup of their data, from all the bank accounts and records, vendor/customer masters, and all the payables and receivables. The latter choice is still obviously better, and that’s what we did.

The thing is, though: that was not difficult or time-consuming. This is yet another story not of some niche and advanced skillset (though our team IS skilled); this story is interesting because it demonstrates just how much many partners do not know. The IT director of our new, happy customer shook his head and said, “if the issue was that simple but that damaging – I wonder how many other things are wrong?” “Well,” our team said. “Let’s take a look!”

About Crestwood

Crestwood Associates is more than ERP. We bring current technologies - such as modern ERP systems like Acumatica and Microsoft Dynamics, along with cloud and business services - all while “Doing the Right Thing” by our clients. Living by this motto helps us to lead the way to change the widespread failure of ERP implementations over the past 30 years. With our modern methodology, over 20 years of experience, and expert, certified staff of business consultants, we see this as a chance to pave the way to aspire to achieve a 100% client success rate. How? Crestwood is committed to being beholden to our clients, not the software vendors and, in a larger sense, we want the people who work with us to enjoy technology and enable them to enhance their own lives.