

SUCCESS STORIES

Currency Caution: The Hidden Pitfalls of Setting Up Microsoft Dynamics 365 Business Central in USD



Microsoft Dynamics 365
Business Central



The Overview

Contrary to common belief, American firms exclusively trading in US dollars should avoid setting up their Microsoft Dynamics 365 Business Central in USD. This practice embeds USD coding deep into the system, potentially blocking any future customizations. This exact issue was encountered by a new client at Crestwood.

The Misstep of Setting Up in USD

It might seem logical to configure a system in USD for businesses operating in this currency, but this approach is flawed. Such a setup leads to redundant USD coding in critical areas like vendor masters and accounts payable/receivable documents, which initially went unnoticed by both our client and their previous partner, due to all transactions being in USD.

The issue surfaced when our client attempted to integrate a payment processor with the assistance of Binary Stream, an ISV. What should have been a simple process was complicated by the system's USD setup, quickly identified by Binary Stream's team.

Disappointed with their original partner, the client turned to Crestwood for a solution.

COMPANY

Anonymous

SOLUTION

Microsoft Dynamics 365 Business Central

The Problem

Deciding Between Code Revision or Data Overhaul

When informed by the ISV partner about the previous setup in USD, our team at Crestwood immediately recognized the implications. This is a common issue, especially with self-implemented systems, as setting up in USD can appear to be the most logical step.

Faced with this scenario, we had two choices: either request Binary Stream to extensively modify their code to accommodate the pervasive USD designations in the system, or undertake a comprehensive clean-up of the client's data. This would involve scrubbing everything from bank accounts and records to vendor/customer masters, as well as all accounts payable and receivable. We opted for the latter, which, despite seeming daunting, was undoubtedly the better choice.

Surprisingly, this cleanup process was neither difficult nor time-consuming. This case highlights not just the proficiency of our team (which is indeed high) but also illustrates a larger issue: the extent of knowledge gaps among many partners in the field. This revelation prompted the IT director of our now-satisfied client to reflect on the simplicity yet critical impact of such issues, leading to a broader examination of their system. Our team's response was proactive and encouraging: "Let's take a closer look!"

The Outcome

Challenges Arising from Inexperienced Implementation

When the Crestwood Business Central team took over, a thorough examination revealed several issues, some of which were basic yet critical, such as improperly configured table relationships and difficulties in establishing two separate numbering series. The client's data connector was malfunctioning, leading to a labor-intensive process where invoices had to be manually entered, duplicates removed, and records double-checked, resulting in significant time wastage.

Remarkably, Crestwood's experts rectified these issues in just about 30 minutes. This successful intervention opened up new possibilities, leading the client to entrust our team with more complex and advanced customizations. They expressed immense satisfaction in seeing their investment in Business Central finally paying off, as it now efficiently facilitates their operations without the previous time, financial, and effort costs.

What made the difference in this scenario was not the software itself, which remained constant, but the expertise and approach of the ERP partner handling the implementation. Crestwood's experience and skill in navigating Business Central's intricacies proved to be the game-changer for the client, transforming a challenging situation into a streamlined and effective business process.



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