

The Five Microsoft Dynamics GP “Worst Practices”

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Articles often highlight best practices, that is, the consensus right way to do things. I've decided to take a look at some common worst practices. These are practices that organizations should discontinue with Microsoft Dynamics GP. Here are five of the worst:

1) Ignore Backups

Companies know that they should backup their Dynamics GP data, and may even think that it's being backed, but unless they've done a test restore, all they have is a hope and a prayer. Users need to stop guessing and ensure that the GP database is being backed up (not just replicated via a RAID system or stored on a SAN). Users should check that customized forms and reports, along with integration manager databases and the FRx SYSDATA file, are all being backed up. Some configurations may even have more items to back up.

2) Load up the Chart of Accounts

Some users are like pack rats--they like to store everything in the chart of accounts. They have a segment for customers, a segment for projects, a segment for fixed assets, and often a blank segment for certain one-off transactions. Stop! Slim down the chart of accounts and let Dynamics GP's sub-ledger connections provide the needed reporting, without bloating the chart of accounts.

3) Customize the Interface Instead of Changing the Process

Customizing the application is fine, but customizing the interface instead of changing the company's process is a recipe for scope creep, increased costs and upgrade problems. Customizations should add value, not simply reproduce what a company already does. Too often, the old process is in place because of limitations from a previous system. Companies that start working with the default interface are often surprised at how little customization they have to do. By waiting to develop customizations that are really critical, companies are better able to focus their customization efforts.

4) Put off Training

Microsoft Dynamics GP is a large application with lots of opportunities to improve day-to-day work. Too often, however, training and learning end with the initial training. No one is ever able to absorb everything in initial training sessions, so follow-up training and continuous learning are critical. In addition, each new release of Dynamics GP brings even more functionality to learn. Lots of inexpensive learning opportunities are available, including online opportunities from Dynamics GP's CustomerSource support site, blogs, newsgroups, and the annual Convergence conference. Not providing ongoing training wastes part of the valuable investment that a company has made in Dynamics GP.



5) Use Only Part of the System

Dynamics GP is an integrated Enterprise Resource Planning system. Not using it as a fully integrated system makes it extremely difficult to provide timely and complete data. This doesn't mean that everything needs to originate in Dynamics GP, but everything does need to flow into the system regularly. Having all of a company's data in one place also provides a benefit for reporting. Employees no longer need to worry about different reports providing different sets of data. Companies can finally have that elusive one version of the truth.

It's not always enough to focus on following best practices. Often companies need to get rid of their bad habits and stop their worst practices.

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