2025 Training Calendar for Microsoft Dynamics GP
Experts in GP since 1996

To register for classes, please contact Lisa Daigle at LDaigle@DataSysCorp.com or 508-321-7313. Lisa can also coordinate onsite and Web-based training for your specific company.

Live, Web-based Classes for 2025

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Mastering AP, I & II	7th & 14th		4th & 11th		6th & 13th		8th & 15th		2nd & 9th		4th & 11th	
SmartList to Excel	21st		18th		20th		22nd		16th		18th	
Management Reporter, Beginner I & II		4th & 11th		1st & 8th		3rd & 10th		5th & 12th		7th & 14th		
Management Reporter, Intermediate I & II		18th & 25th		15th & 22nd		17th & 24th		19th & 26th		21st & 28th		
Management Reporter, Advanced		27th		24th		26th		28th		30th		
Credit Card Payments in AP			25th						23rd			
1099 Processing												2nd
Year-End Closing Procedures						5th						9th

Mastering Accounts Payable, Sessions I & II

Dates: Jan 7th & 14th; Mar 4th & 11th; May 6th & 13th; Jul 8th & 15th; Sep 2nd & 9th; Nov 4th & 11th
Time: 9:30 am–noon ET
Price: $650 per attendee for both sessions. $50 discount per attendee for multiple attendees from same company.

Streamline and de-mystify Payables Management:
- Learn strategies for creating Vendor IDs and changing an existing Vendor ID
- Review how the Options in Payables Setup impact all aspects of Payables Management
- Gain a 360-degree understanding of all types of payables transactions
- Understand the impact of setup and transaction entry on year-end processing
- Access information through Reports, Inquiries, and SmartLists
- Reconcile and troubleshoot at month- and year-end
- Review how Payables Setup impacts Payables and the General Ledger
- Discover ways to find information in response to requests from management
- Edit posted transaction information, process voids, and automate data entry
- Troubleshoot common issues
- Hear about recommendations for Best Practices

Technical Pre-Requisites: Security privileges to all functionality in GP. No known issues with exporting Smart Lists to Excel. Installation of Professional Tools if want to learn how to rename Vendor IDs. Access to your TEST company. Recommend having two computer monitors.

Management Reporter, Beginner, Sessions I & II

Dates: Feb 4th & 11th; Apr 1st & 8th; Jun 3rd & 10th; Aug 5th & 12th; Oct 7th & 14th
Time: 9:30 am - noon ET
Price: $650 per attendee for both sessions. $50 discount per attendee for multiple attendees from same company.

For people with limited or no experience with Management Reporter, gain the skills to build an Income Statement and Balance Sheet. Includes one hour of Lab time to practice your skills.
- Understand row definitions
- Generate reports with current month, prior month and year-to-date data
- Simplify reporting by using rows and columns effectively
- Create professional-looking reports
- Build a balance sheet and income statement using your own data
- Learn reporting best practices
- Practice your skills during a one-hour Lab

Technical Pre-Requisites: No known issues with logging into MR, connecting MR to GP, generating reports, or exporting reports to Excel. Recommend having two computer monitors.

Management Reporter, Intermediate, Sessions I & II

Dates: Feb 18th & 25th; Apr 15th & 22nd; Jun 17th & 24th; Aug 19th & 26th; Oct 21st & 28th
Time: 9:30 - noon ET
Price: $650 per attendee for both sessions. $50 discount per attendee for multiple attendees from same company.

Build an Income Statement and Balance Sheet with your data by gaining these (and more) actionable skills:
- Store and distribute reports
- Generate the same report for every department or location with the click of a button
- Email reports
- Incorporate GP budget data and perform calculations
- Add calculated columns and attributes
- Learn to use the Report Viewer and Web Viewer
- Build key performance indicators into your reports
- Add comments to reports
- Get recommendations for Best Practices
- Practice your skills during a one-hour Lab

Technical Pre-Requisites: No known issues with logging into MR, connecting MR to GP, generating reports, or exporting reports to Excel. Recommend having two computer monitors.

Management Reporter Advanced

Dates: Feb 27th; Apr 24th; Jun 26th; Aug 28th; Oct 30th
Time: 9:30 - noon ET
Price: $325 per attendee. $25 discount per attendee for multiple attendees.

Gain advanced skills to streamline reporting with these (and more) actionable skills:
- Create a trial balance that never needs to be updated
- Consolidate companies or departments
- Calculate a percentage of sales column
- Link Excel data to a report
- Use values from other Management Reporter reports
- Practice your skills during a one-hour Lab

Technical Pre-Requisites: No known issues with logging into MR, connecting MR to GP, generating reports, or exporting reports to Excel. Recommend having two computer monitors.

SmartLists to Excel: Shedding Light On Your Data

Dates: Jan 21st, Mar 18th; May 20th; Jul 22nd; Sep 16th; Nov 18th
Time: 9:30 - noon ET
Price: $325 per attendee. $25 discount per attendee for multiple attendees per class.

See your data in a new light with a 360-degree view of SmartLists and the key Excel essentials
- Gain a 360-degree understanding of SmartLists, such as using wildcards in searches
- Troubleshoot common issues
- Learn how to manage your data in Excel with Advanced Filters and Pivot Tables
- Practice skills at your computer, and with your data, during this hands-on Web-based training session
- Take a brief tour of the Advanced Smart Lists add-on

Technical Pre-Requisites: Security privileges to all functionality in GP. No known issues with exporting Smart Lists to Excel. Access to your TEST company. Recommend having two computer monitors.

1099 Processing

Dates: Dec 2nd
Time: 9:30 – 10:45am (75-minute class)
Price: $180 per attendee. $15 discount per attendee for multiple attendees per class.

Description: With 30 minutes devoted to each topic, you'll understand how to process credits/refunds and prepare for 1099 processing.

- **Credits/Returns in Accounts Payable:**
    - Learn how to process a vendor credit or refund
    - Discover the difference between a credit memo and a return
    - Determine which Reports, Inquiries, and SmartLists for doing research or responding to Vendor questions.
    - Discuss common challenges, such as applying credits to invoices after documents have been posted.
- **1099 Processing at Year-End**
    - Create a SmartList to reconcile the 1099 Edit List with payables transactions from 1099 vendors.
    - Print 1099/1096 forms and edit list
    - Learn what information on the Vendor Card/Options factors into transaction entry, reporting, and 1099 processing.
    - Create a SmartList to identify missing 1099 info.
    - Hear about common tech support classes.
    - Note: we will not be covering aligning the fields on the 1099 form.

Technical Pre-Requisites: Security privileges to all functionality in GP. No known issues with exporting SmartLists to Excel. Access to your TEST company. Recommend having two computer monitors.

De-Mystifying Credit Card Payments in Accounts Payable

Dates: Mar 25th; Sep 23rd
Time: 9:30 -10:45am ET (75-minute class)
Price: $180 per attendee. $15 discount per attendee for multiple attendees per class.

Description: Gain step-by-step knowledge of how credit card payments affect the AP & GL modules
- Overview of the flow of debit and credit card transactions through GP
- Learn how to perform accurate, step-by-step processing of debit and credit payments for AP invoices, including voiding debit and credit card payments
- View how transactions appear and drill back in related Inquiry windows

Technical Pre-Requisites: Security privileges to all functionality in GP. Access to your TEST company. Recommend having two computer monitors.

Year-End Closing Procedures

Dates: May 27th; Dec 9th
Time: 9:30 – 11:00 AM, ET
Price: $325 per attendee. $25 discount per attendee for multiple attendees per class.

This lecture-style session focuses on Fiscal and Calendar Year-End Closing Procedures:
- Gain a comprehensive understand of closing procedures for General Ledger, Accounts Payable, Accounts Receivable, and Bank Rec. Fixed Assets and Inventory will be covered at the end if relevant.
- Learn how to and troubleshoot common issues that impede the year-end close.
- Understand the key steps to efficiently and accurately produce 1099s.
- Receive written Best Practices from DataSys, including "insider tips".
- Take a brief tour of the Advanced Smart Lists add-on

   Technical Pre-Requisites: Security privileges to all functionality in GP. No known issues with exporting Smart Lists to Excel. Access to your TEST company. Recommend having two computer monitors.