DataSys CORPORATION

2023 Training Calendar for Microsoft Dynamics GP
Experts in GP since 1996

To register for classes, please contact Lisa Daigle at LDaigle@DataSysCorp.com or
508-303-9490, x223. Lisa can also coordinate onsite and classroom training for your specific company.

Live, Web-based Classes for 2023

	Jan	Feb	Mar	Apr	May	June	July	Aug	Sept	Oct	Nov	Dec
Mastering AP, I & II	10th & 17th		7th & 14th		2nd & 9th		11th & 18th		8th & 19th		Oct 31st & Nov 7th	
SmartList to Excel	24th		21st		16th		25th		26th		14th	
Management Reporter, Beginners, I & 11		Jan 31st & Feb 7th		4th & 11th	30th	6th		1st & 8th		3rd & 10th		
Management Reporter, Intermediate, I & II		14th & 21st		18th & 25th		13th & 20th		15th & 22nd		17th & 24th		
Management Reporter, Advanced		23rd		27th		22nd		24th		26th		
Credit Card Processing in A/P			28th								21st	
1099 Processing in A/P												12th
Year-End Closing Procedures						2nd						7th

Mastering Accounts Payable, Sessions I & II

Time: 9:30 am–noon ET
Price: $650 per attendee for both sessions. $50 discount per attendee for multiple attendees from same company. $100 Auditor's Fee.

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
- sReview 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

Time: 9:30 am - noon ET
Price: $650 per attendee for both sessions. $50 discount per attendee for multiple attendees from same company. $100 Auditor's Fee.

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

Time: 9:30 - noon ET
Price: $650 per attendee for both sessions. $50 discount per attendee for multiple attendees from same company. $100 Auditor's Fee.

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

Time: 9:30 - noon ET
Price: $325 per attendee. $25 discount per attendee for multiple attendees. $75 Auditor's Fee.

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

Time: 9:30 - noon ET
Price: $325 per attendee. $25 discount per attendee for multiple attendees per class. $75 Auditor's Fee.

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 for Accounts Payable

Time: 9:30 – 10:45am (75-minute class)
Price: $180 per attendee. $15 discount per attendee for multiple attendees per class. $25 Auditor's Fee.

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.

Credit Card Processing in Accounts Payable

Time: 9:30 -10:45am ET (75-minute class)
Price: $180 per attendee. $15 discount per attendee for multiple attendees per class. $25 Auditor's Fee.

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

Time: 9:30 – 11:00 AM, ET
Price: $325 per attendee. $25 discount per attendee for multiple attendees per class. $75 Auditor's Fee.

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".
- Practice skills at your computer, and with your data, during this hands-on Web-based training session (DELETE)
- 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.