DataSys CORPORATION

2024 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 2024

	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Mastering AP, I & II	9th & 16th		5th & 12th	30th	7th		2nd & 9th		3rd & 10th		5th & 12th	
SmartList to Excel	23rd		19th		14th		16th		17th		19th	
Management Reporter, Beginner I & II	30th	6th		2nd & 9th	21st & 28th		23rd & 30th			1st & 8th		
Management Reporter, Intermediate I & II		13th & 20th		16th & 23rd		4th & 11th		6th & 13th		15th & 22nd		
Management Reporter, Advanced		27th		25th		13th		20th		29th		
Credit Card Payments in AP			26th					27th				
1099 Processing												10th
Year-End Closing Procedures						18th						17th

Mastering Accounts Payable, Sessions I & II

Dates: Jan 9 & 16; Mar 5 & 12; Apr 30 & May 7; July 2 & 9; Sept 3 & 10; Nov 5 & 12
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
- 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: Jan 30 & Feb 6; Apr 2 & 9; May 21 & 28; Jul 23 & 30; Oct 1 & 8
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

Dates: Feb 13 & 20; Apr 16 & 23; Jun 4 & 11; Aug 6 & 13; Oct 15 & 22
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

Dates: Feb 27; Apr 25; Jun 13; Aug 20; Oct 29
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

Dates: Jan 23; Mar 19; May 14; Jul 16; Sep 17; Nov 19
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

Dates: Dec 10
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.

De-Mystifying Credit Card Payments in Accounts Payable

Dates: Mar 26; Aug 27
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

Dates: Jun 18 and Dec 17
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".
- 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.