



CRESTWOOD ASSOCIATES | True Experts. Software that Works. No Hidden Fees.

GP Year-End & Roundtable

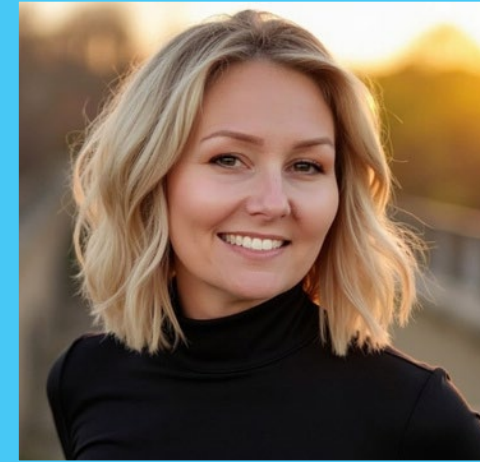
From Closing Challenges to What's Next in Cloud Efficiencies

True Experts. Software that Works. No Hidden Fees.



Crestwood Associates

Meet Our Hosts



Stephanie McColly
CMO & Business
Integrator



Colleen Schils
Director, Customer Success



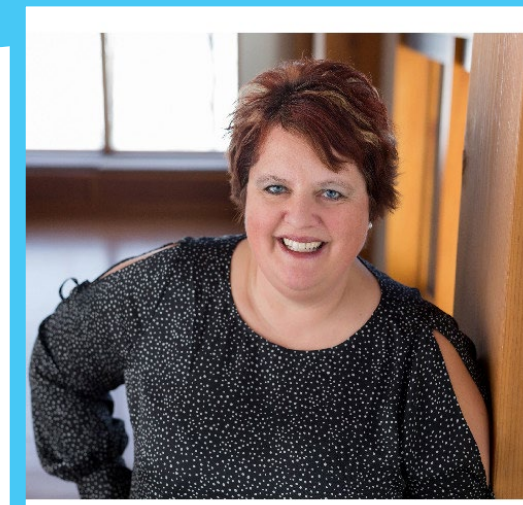
Dan Milani
Dynamics Services Director



Mike Gordon
GP Consultant



Jack Blankenship
Microsoft Account
Executive



Terry Heley
Sr Escalation Engineer
Microsoft Representative



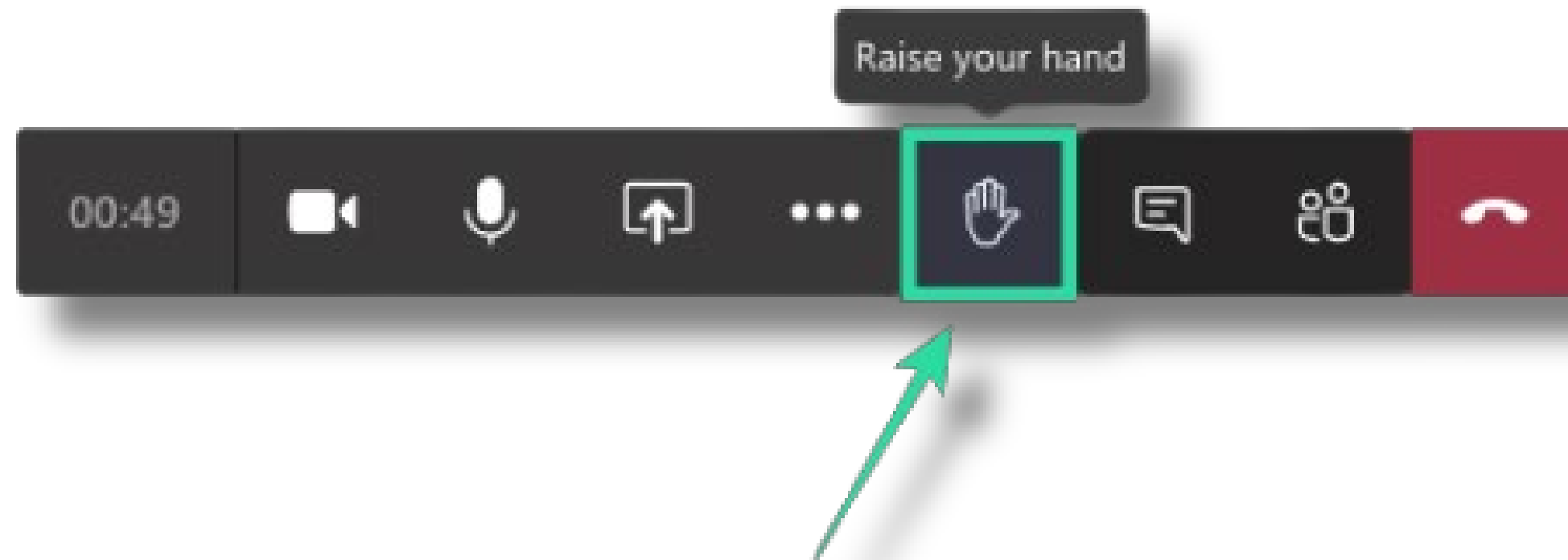
OUR OBJECTIVE TODAY:

Equip GP users with a strong year-end and equip you for the future.

OUR AGENDA:

1. Welcome
2. GP Client Survey Results
3. GP Year-End Deep Dive
4. Microsoft Perspective: Lifecycle & Compliance
5. Business Central Immersion
6. Pizza Party Winner

Interaction



GP Resources

Year-End Checklist



GP Year-End Closing Preparation

Essential steps for a smooth process

Pre-Close Preparation

- Notify internal teams of posting deadlines
- Confirm all transactions for the year are posted
- Clear out or delete unneeded batches
- Back up all GP databases (mandatory)
- Validate that backups can be restored
- Inactivate unused accounts/vendors/customers/items
- Remove unnecessary historical records
- Run File Maintenance (optional)

Reconcile Before Closing

Run in this order:

- Sales Order Processing
- Purchase Order Processing
- Inventory
- Review reconcile reports for accuracy

Year-End Closing Sequence

Comparison Guide



GP VS BUSINESS CENTRAL FUNCTIONAL COMPARISON AND PRACTICAL OPTIONS

	Microsoft Dynamics GP		Microsoft Dynamics 365 Business Central
Functional Area	Common GP Challenge	If You Plan to Stay on GP	If You're Evaluating BC
General Ledger, Reporting & Consolidations	<ul style="list-style-type: none"> • Rigid COA, limited dimensional analysis, slow consolidations 	<ul style="list-style-type: none"> • Introduce BI dashboards on top of GP SQL, streamline COA, automate board packs, optimize MR replacements 	<ul style="list-style-type: none"> • Multi-dimensional reporting without COA redesign; faster consolidations; Copilot-assisted financial summaries
Bank Reconciliation	<ul style="list-style-type: none"> • Manual matching, spreadsheet workarounds 	<ul style="list-style-type: none"> • Strengthen EFT/ACH controls, automate import scripts, tighten GP bank rec procedures, apply SQL clean-up for speed 	<ul style="list-style-type: none"> • AI-assisted matching that clears transactions in minutes; multi-currency support; reduced reconciliation time
Accounts Payable	<ul style="list-style-type: none"> • Manual entry, routing delays, heavy Mekorma reliance 	<ul style="list-style-type: none"> • Optimize Mekorma workflows, add invoice capture ISVs, create approval rules, automate voucher templates 	<ul style="list-style-type: none"> • Copilot Payables Agent automates capture, routing, coding, and policy-based approvals; 60-80% fewer manual touches
Accounts Receivable & Collections	<ul style="list-style-type: none"> • Manual follow-up, inconsistent collections, limited DSO insight 	<ul style="list-style-type: none"> • Add AR automation tools; integrate email templates; use Power BI for aging trends; strengthen cash application rules 	<ul style="list-style-type: none"> • Automated reminders, AI cash insights, Outlook-based collections, integrated cash application
Inventory & Warehouse	<ul style="list-style-type: none"> • Limited real-time visibility; no native barcoding; manual adjustments 	<ul style="list-style-type: none"> • Add WMS/barcoding ISVs; automate cycle counting; optimize SOP/POP posting; clean master data 	<ul style="list-style-type: none"> • Native barcoding, bins, warehouse automation, item tracking; real-time visibility across locations
Year-End & Month-End Close	<ul style="list-style-type: none"> • Multi-step checklists, risk of missed tasks, heavy manual review 	<ul style="list-style-type: none"> • Implement standardized close templates; automate allocations; schedule SQL maintenance; simplify posting rules 	<ul style="list-style-type: none"> • AI-assisted close, cross-ledger reconciliation, automated tasks; faster close cycles with built-in controls
Integrations & Automation	<ul style="list-style-type: none"> • Fragmented ISV landscape, manual workflows, limited cloud options 	<ul style="list-style-type: none"> • Consolidate ISVs; deploy Power Automate for email/routing tasks; integrate GP with Power BI; review upgrade paths 	<ul style="list-style-type: none"> • Native integration with Teams, Power BI, and Power Platform; Copilot automation across finance and operations
Licensing & Costs	<ul style="list-style-type: none"> • Concurrent licensing masks true user demand; rising ISV costs 	<ul style="list-style-type: none"> • Review user access levels; remove unused modules; evaluate ISV spend reduction 	<ul style="list-style-type: none"> • Predictable cloud licensing; fewer ISVs due to native capabilities; lower long-term TCO



Functional Area	Common GP Challenge	If You Plan to Stay on GP	If You're Evaluating BC
General Ledger, Reporting & Consolidations	<ul style="list-style-type: none"> COA, limited dimensional analysis, slow consolidations 	<ul style="list-style-type: none"> Introduce BI dashboards on top of GP SQL, streamline COA, automate board packs, optimize MR replacements 	<ul style="list-style-type: none"> Multi-dimensional reporting without COA redesign; faster consolidations; Copilot-assisted financial summaries
Bank Reconciliation	<ul style="list-style-type: none"> Manual matching, spreadsheet workarounds 	<ul style="list-style-type: none"> Strengthen EFT/ACH controls, automate import scripts, tighten GP bank rec procedures, apply SQL clean-up for speed 	<ul style="list-style-type: none"> AI-assisted matching that clears transactions in minutes; multi-currency support; reduced reconciliation time
Accounts Payable	<ul style="list-style-type: none"> Manual entry, routing delays, heavy Mekorma reliance 	<ul style="list-style-type: none"> Optimize Mekorma workflows, add invoice capture ISVs, create approval rules, automate voucher templates 	<ul style="list-style-type: none"> Copilot Payables Agent automates capture, routing, coding, and policy-based approvals; 60-80% fewer manual touches
Accounts Receivable & Collections	<ul style="list-style-type: none"> Manual follow-up, inconsistent collections, limited DSO insight 	<ul style="list-style-type: none"> Add AR automation tools; integrate email templates; use Power BI for aging trends; strengthen cash application rules 	<ul style="list-style-type: none"> Automated reminders, AI cash insights, Outlook-based collections, integrated cash application
Inventory & Warehouse	<ul style="list-style-type: none"> Limited real-time visibility; no native barcoding; manual adjustments 	<ul style="list-style-type: none"> Add WMS/barcoding ISVs; automate cycle counting; optimize SOP/POP posting; clean master data 	<ul style="list-style-type: none"> Native barcoding, bins, warehouse automation, item tracking; real-time visibility across locations
Year-End & Month-End Close	<ul style="list-style-type: none"> Multi-step checklists, risk of missed tasks, heavy manual review 	<ul style="list-style-type: none"> Implement standardized close templates; automate allocations; schedule SQL maintenance; simplify posting rules 	<ul style="list-style-type: none"> AI-assisted close, cross-ledger reconciliation, automated tasks; faster close cycles with built-in controls
Integrations & Automation	<ul style="list-style-type: none"> Fragmented ISV landscape, manual workflows, limited cloud options 	<ul style="list-style-type: none"> Consolidate ISVs; deploy Power Automate for email/routing tasks; integrate GP with Power BI; review upgrade paths 	<ul style="list-style-type: none"> Native integration with Teams, Power BI, and Power Platform; Copilot automation across finance and operations
Licensing & Costs	<ul style="list-style-type: none"> Concurrent licensing masks true user demand; rising ISV costs 	<ul style="list-style-type: none"> Review user access levels; remove unused modules; evaluate ISV spend reduction 	<ul style="list-style-type: none"> Predictable cloud licensing; fewer ISVs due to native capabilities; lower long-term TCO

GP YEAR-END PROCESS

True Experts. Software that Works. No Hidden Fees.



GP YEAR-END AGENDA:

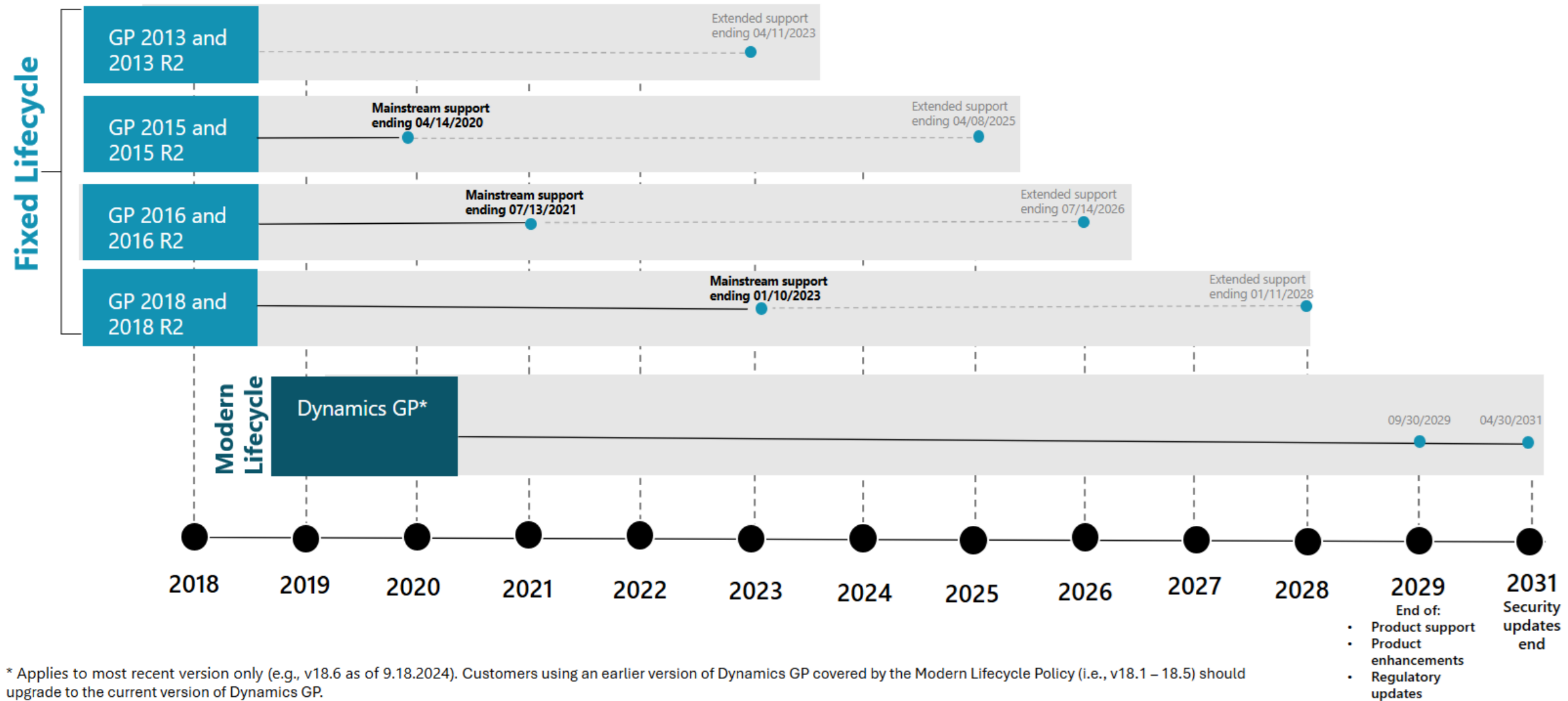
- Dynamics GP - Product Life Cycle
- ISV news
- Year-End Closing Preparation
- Year-End Closing Sequence
- Closing Procedures for Each Module:
 - Sales Order Processing
 - Purchase Order Processing
 - Inventory
 - Receivables Management
 - Payables Management
 - Fixed Assets
 - General Ledger
 - Payroll

Dynamics GP

Product Life Cycle (GP 18.8 +)

[Software lifecycle policy - Dynamics GP | Microsoft Docs](#)

Dynamics GP versions governed by Fixed and Modern Lifecycle



* Applies to most recent version only (e.g., v18.6 as of 9.18.2024). Customers using an earlier version of Dynamics GP covered by the Modern Lifecycle Policy (i.e., v18.1 – 18.5) should upgrade to the current version of Dynamics GP.

GP 2018 Year-End Update Changes – 11/02/25

If you apply the year end upgrade for GP 2018, you will be upgraded to GP October 2025 (18.8) Release and that put you on Modern Lifecycle that was updated in 2024. Understand the Lifecycle Policies: [Modern Lifecycle Blog](#). MS will support each GP release through 2029 for 2 years. Need to commit to taking an update at least every 1-2 years. More like a service pack. We are upgrading our clients to the October Release since it came out. Going well.

October 2025 Release New features:

Release blog with what is changed and links to download
[Microsoft Dynamics GP October 2025- Feature Blog Series Schedule!](#)

Modern Lifecycle Blog

GP Featured Blog Series

ISV Announcements for 2025

Integrity Data – Contact Integrity Data for 18.8 compatible Extended HR and PR as well as Payroll Extensions in Starter Pack

eOne Popdock [What's New in the April 2025 Popdock Update | eOne Solutions](#)

eOne Popdock for Dynamics GP helps you easily manage and view your Dynamics GP data in real-time without needing to code.

- Mekorma [Release Notes for Mekorma Build x98 - Mekorma Products for GP User Guide - Release Notes](#) build x98 is compatible with Microsoft Dynamics GP 18.8 US Payroll Year-End Updates ,in addition to 18.6 and 18.7 and includes automatic vendor validation and updates to invoice capture and processing. Mekorma can upgrade current GP legacy clients to a full subscription of Payment Hub Core, which includes features such as Power Approvals. See your Crestwood CSM for details.
- Mekorma offers elimination of check printing for those companies that still need it with a lower price point for Remote Payment Services
- Rockton \$10 increase per perpetual user starting January 1, 2026, along with modest increase in monthly subscription pricing

April 2025 Popdock Update

Release Notes for Mekorma Build x98

Year End Update Summary of Changes

1. 1099-INT, 1099-DIV, 1099-MISC, 1099-NEC, 1099-R, and 1096 Summary
If you still print Payables 1099 forms in Microsoft Dynamics GP, with the October 18.8 release all Payables 1099 forms (DIV, INT, MISC and NEC) will print with lines. This is similar to what we did with the 1099-NEC form in the 18.7 release. You no longer need to purchase forms at year end!!
2. No Form changes except for back of ACA instructions
3. The IRS is requires businesses to file electronically
W-2, 1099, etc. Dynamics GP does not file Payables 1099's electronically. Starting tax year 2023, if you have 10 or more information returns, you must file them electronically. This includes [Forms W-2, e-filed with the Social Security Administration](#). Find details on the [final e-file regulations](#) and [requirements for Forms W-2](#).
4. Fixed Assets - luxury auto depreciation changes



W-2 Forms



Final E-File Regulations



W-2 Form Requirements

GP 18.8 New Features

GP 18.8 New Features

[What's new in Dynamics GP in October 2025 - Dynamics GP | Microsoft Learn](#)

[Microsoft Dynamics GP October 2025- Feature Blog Series Schedule!](#)

Year End Update

[U.S. Year-End Update for Microsoft Dynamics GP | Microsoft Learn](#)

1099 Filing Dates

Forms due to recipients by January 31, 2026

Paper filing to IRS – February 28, 2026**

E-Filing to IRS – March 31, 2026

1099-NEC due January 31, 2026 to recipients and IRS

** Beginning in 2024 required electronic filing for 10 or more 1099s (down from 250)

State filing

- Check to see if your filing state is in Combined Federal/State Filing Program (NEC was added for 2021)
- Greenshades does not have filing directly with the states, but the IRS will pass it along to the states in the program

Choices to Print 1099-NEC and 1099-MISC - UPDATE

If you are on GP 18.4, you do not need to apply the year end update for 1099-NEC, but a report writer tweak to add the year is needed

If you do choose to update on GP 18.8, contact your partner ASAP because this is a very busy time – about 2-8 hours

If you are running GP 2016 or earlier (it may be too late to upgrade to GP 2018 before 1/31 filing):

- Arrange with Greenshades to use their products to pull data from your GP 2013-2018 system into their portal and print or have them print and mail your 1099s and file electronically for you – do this ASAP as they are very busy – cost varies <https://www.greenshades.com/greenshades-year-end-how-to-get-ready-for-w-2-and-1099-forms/>
- Create a SmartList Builder or Designer report to pull this information and export to Excel to import into a 1099 package – about 2-4 hours

Greenshades Resource

Year-End Closing Preparation

- Proper Planning – Schedule Appropriately
- Evaluate Procedures and Future Needs
- **BACKUP YOUR DATA** – make sure your automatic backups are working and you have storage in the cloud
- Timing and Date Sensitivity
- File Maintenance - Optional
- Perform Data Cleanup Tasks
 - Remove or Archive History
 - Inactivate or delete accounts, vendors, customers, items, employees
- Run the Reconcile Procedures in the following Order
 - Sales Order Processing
 - Purchase Order Processing
 - Inventory

Year-End Closing Sequence

- Sales Order Processing – no year-end close process
- Purchase Order Processing – no year-end close process
- Inventory Control
- Receivables Management
- Payables Management
- Fixed Assets
- General Ledger
- Payroll Calendar Year-End

Sales Order Processing

If you performed Period End Procedures, no additional steps are required

Period End Procedures

- Reconcile Sales Documents
- Remove Completed Sales Documents
- Print Reports as needed
 - SOP Document Analysis Report
 - SOP Inventory Sales Report
 - Sales Transaction History/Sales Serial/Lot History, if applicable

Purchase Order Processing

If you performed Period End Procedures, no additional steps are required

Period End Procedures

- Reconcile Purchasing Documents
- Remove Completed Purchase Orders
- Print Month-End Reports
 - Received/Not Invoiced
 - Purchase Order Status
 - Shipment/Invoice Matching Activity
 - Receivings Transaction History



Inventory Control

- Post All Transactions for the Fiscal Year
- Reconcile Inventory Quantities
- Complete a physical inventory count and post adjustments
- Print Additional Reports
 - Stock Status
 - Purchase Receipts
 - Turnover
 - Transaction History
 - Serial or Lot Number List
- Make a Backup
- Close the Inventory Fiscal Year
- Close Fiscal Periods for Inventory Series

Receivables Management

Receivables Management is date sensitive in certain areas. The Receivables Management closing process updates several tables and fields that track customer data. This is important for organizations that use any of the following items to track customer statistics:

- The SmartList objects
- The Receivables Management summary reports
- The Amounts Since Last Close view in the Customer Summary window

Therefore, to ensure the accuracy of the data displayed in the Customer SmartList objects, the Receivables Management summary reports, and the Amounts Since Last Close view in the Customer Summary Inquiry window, we recommend that you close the year prior to entering transactions for the new year.

Receivables Management

Post all Sales & Receivables Transactions for the year

Make a pre-year-end closing backup

Close the year

- Note: If Calendar year and fiscal year are the same, select 'All' in Year-End Closing window.
 - This option moves 'Year To Date' to the 'Last Year' bucket in the Inquiry > Sales > Yearly Summary Window

Close the Sales Series fiscal periods (Optional)

Close the Tax Year



Fixed Assets

- Perform Year-End Closing Procedures for Payables Management
- Enter all Fixed Asset Transactions for the current year
- Depreciate all assets through the last day of the current fiscal year
- Perform the GL Posting Routine (Optional)
- Print Fixed Asset Year-End Reports for the Current Year
- Verify the Fixed Assets Calendar Build (Optional)
- Verify the Fixed Assets Quarters Setup for all Fiscal Years
- Make a backup
- Perform the fixed assets year-end closing routine

General Ledger

- Complete the posting procedures & the closing procedures for other modules
- Post the final adjusting entries in General Ledger
- Create a SmartList to Verify the Posting Type of Each Account
- Close the last period of the fiscal year (Optional)
- Perform file maintenance on the Financial Series (Optional)
- Verify Settings for History & Retained Earnings Account in the General Ledger Setup Window
- Make a pre year end backup

General Ledger

- Print a final Detailed Trial Balance report
- Print the year-end financial statements in FRx or Management Reporter
- Set up a new fiscal year
- Close the fiscal year
- Close all the fiscal periods for all the series (Optional)
- Adjust the budget figures for the new year & print the financial statements
- Make a post year end backup



Recap of Year-End Resources

Year-End Closing Procedures – [Microsoft Dynamics GP - 2025 Year-End Blog Series Schedule!!](#)

General Ledger – November 11 - [General Ledger](#)

Receivables Management – November 12- [Receivables Management](#)

Inventory - November 13 - [Inventory](#)

Payables Management – November 26 - [Payables Management](#)

Electronic W2's- November 18 - [Electronic W-2 \(EFW2\) for Payroll](#)

Fixed Assets -November 19- [Fixed Assets](#)

Analytical Accounting – November 25 - [Analytical Accounting](#)

US Payroll - November 20 –[Payroll W-2 and W-3 information](#), December 2- [U.S. Payroll](#)

Affordable Care Act (ACA) – November 27 – [ACA](#),

PR Secure Act 2.0 Considerations - December 3 - [Payroll Secure Act 2.0 Considerations](#)

Overtime tracking considerations with OBBB Act - December 4- [Payroll Overtime Premium](#)

Canadian Payroll – December 9 – [Microsoft Dynamics GP Year-End 2025: Canadian Payroll](#)

Information from Microsoft

[Dynamics GP Resource Directory - Dynamics GP | Microsoft Docs](#)

This page offers easy access to Microsoft Dynamics GP resources. This page is intended to provide a consolidated view of relevant documentation, videos, solutions to known issues, links to related resources, as well as community sites for implementing Microsoft Dynamics GP.

CustomerSource is no longer available <https://community.dynamics.com/gp/b/dynamicsgp/posts/customersource-changes-to-dynamics-gp>

- Documentation/user guides: [Welcome to Dynamics GP - Dynamics GP | Microsoft Docs](#)
- Download and reg keys: [Product Release Downloads for Microsoft Dynamics GP | Microsoft Docs](#)
- Support: <https://support.microsoft.com/en-us/supportforbusiness/productselection?sapId=1105c7fc-eac0-d55d-839e-de6385ca1138>

Payroll Year-End

True Experts. Software that Works. No Hidden Fees.

Payroll Year-End Checklist

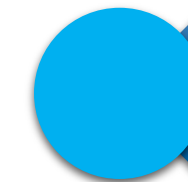
- Verify that you have installed the latest 2025 Payroll Tax Update (do now)
- **OPTIONAL for 2025** Install the 2025 Year-End Update (note – this can be installed as soon as it is released; you do not need to wait till the payroll year end close, but it must be installed prior to running the Payroll Year-End Close)
- Create the year-end file as a test
- Verify W-2 and 1099-R statement information
- Remove year-end file
- Complete all pay runs for 2025
- Complete all monthly and quarterly payroll period-end for the current year (Optional)
- Make a backup of your company data labeled Pre Year-End Wage File
- Create the year-end file using the Payroll Year-End Close
- Make a backup of your company data labeled Post Year-End Wage File
- Print the W-2 and 1099-R Validation Reports

Payroll Year-End Checklist

Print/e-mail the W-2 statements and the W-3 Transmittal form
Create an Electronic W2 file (Optional)
Print the 1095-C statements and the 1094-C Transmittal form
Print the 1099-R forms and the 1096 Transmittal form

Setup 2026 fiscal periods
Close the 2025 fiscal periods for the Payroll series
Update 2026 payroll tax tables
Start processing 2026 payrolls

Email W-2's to employees



Employee E-mail Suite from
Integrity Data

2025 Tax Table Updates

Tax table updates (subject to change)

(Round 1 release date late December 2024)

(Round 2 release date mid-January 2025)

- FICA Social Security limit is \$176,100
- EE only Medicare (extra .9%) for over \$200,000
- States changes: TBD

Don't apply this tax table update until after your last payroll of 2025!



2025 Tax Filing Dates

- January 31, 2026 – to employees and IRS/SSA
- W-2s, EFW2
- 1099s
- 1095-Cs to employees

- February 28, 2026
- ACA deadline to IRS for paper

- March 31, 2026
- ACA e-filing to deadline to IRS

New Electronic Filing Requirements

2023 – 100 W-2s to SSA – require electronic filing

2024 – 10 W-2s

** Pending IRS final regulation – currently is it 250 or more

www.irs.gov/instructions/iw2w3

Truncate/Mask ID Numbers

TINs can be truncated on recipient copies (only Copy B)

- 1095-C
- 1098 series (except Form 1098-C)
- 1099 series
- 5498 series
- **W-2 – NEW FOR 2023**

Never truncate your EIN

Types of ID numbers that can be masked (show only last 4 digits)

- Social Security number XXX-XX-1234
- Individual taxpayer identification number (TIN) XXX-XX-1234
- Employer identification number (EIN) – XX-XXX1234

Benefit Self Service Checklist

Benefit Self Service year-end process

- Create future effective benefits
- Open enrollment period
- Review enrollments
- Complete final pay of 2025
- Activate future effective benefits
- Post enrollments
- Review benefits
- Begin processing 2026 payrolls

Other Products Checklist

Other items (perform prior to first 2026 pay run)

- Employee Accounts & Splits / FTE Manager
 - Copy employee positions
- Enhanced Retirement Plans Max Contribution for 2025 - \$23,500
 - Change retirement catch-up contribution limit
 - 2025 401(k), incl. Roth 401(k): \$7,500 on amounts over \$23,500
 - 2023 SIMPLE IRA: \$3,500 on amounts over \$16,500
 - 2023 Roth IRA: \$1,000 on amounts over \$7,000
 - 2023 403(b): \$7,500 on compensation over \$23,500
 - Change retirement catch-up contribution limit 60-63 – Check eligibility
 - 2025 401(k), incl. Roth 401(k): \$11,250 on amounts over \$23,500
 - 2023 SIMPLE IRA: \$5,250 on amounts over \$16,500
 - 2023 403(b): \$11,250 on compensation over \$23,500

Review Imputed Income

- Group-term life insurance coverage in excess of \$50,000 (or \$2,000 for dependents)
- Educational assistance over \$5,250 per year
- Dependent Care assistance in excess of \$5,000 increases to \$7,500 in 2026
- Adoption assistance (is exempt from income tax withholding but not Social Security or Medicare)

Special Attention to highly compensated employees who may not be eligible for the tax-exempt fringe benefit:

1. The employee was 5% owner at any time during the year or the preceding year
2. The employee received more than \$160,000 in pay for the preceding year.
 - You can chose to ignore test (2) in the employee wasn't also in the top 20% of employees when ranked by pay for the preceding year.

Integrity Data Products Checklist

Other Items (perform prior to first 2026 pay run)

Employee E-Mail Suite

- IF YOU ARE NOT ON AT LEAST THE MID-YEAR RELEASE – install the year-end update prior to sending out your W-2s to ensure your employees get the correct form

Comprehensive Leave Manager/PTO Manager

- Apply carry over limits
- Create lump sum posting dates (year-end wage work file)
- If upgrading to 18.8 (Oct 2025 release), ensure you upgrade Integrity Data products to Oct 2025 release)

Advanced HR and PR and Payroll Extension

- Need to get updates for these products from Integrity Data directly (not included in GP year end update)

ACA Year-End Checklist

- Determine ALE Status for 2025
- Measure Part Time/Variable Hour Employees for Eligibility
- Offer coverage to 2025 eligible employees
- Generate 1095-C for 2025 eligible employees
 - Get started early – do this in December!
 - Distribute to employees by 1/31/2026
- Generate 1094-C for each EIN
- File by mail with IRS by 2/28/2026
- E-File with IRS by 3/31/2026

Payroll Year-End Update Links

Helpful documents, numbers, sites and articles:

- Downloads and updates >> Tax updates
- U.S. Year-End Update.pdf
- W-2 Wage and Tax Statement Data Source.pdf
- Tax forms: 800-432-1281: www.microsoftbusinesschecks.com
- IRS forms and publications: <http://www.irs.gov/formspubs/index.html>
- Accuwage for electronic file verification: <http://www.ssa.gov/employer/accuwage/index.html>

Tax forms: 800-432-1281

IRS forms and publications

Accuwage for electronic file verification

Helpful Information

Key points to remember:

Year-end wage file

- Held in UPR10100-UPR10107 tables
- Year-end wage report
- Edit and print W-2s
- Create W-2 electronic file (W200005, W200006)

Prior to processing pay runs in the New Year

- Install Payroll Tax Update Round 1 – Microsoft Dynamics GP >> Maintenance >> U.S. Payroll Updates >> Check for Payroll Tax Updates
- Downloads & Updates >> Tax Updates (manual)



Q&A and Next Steps





CRESTWOOD ASSOCIATES | True Experts. Software that Works. No Hidden Fees.

MICROSOFT PERSPECTIVE: LIFECYCLE & COMPLIANCE

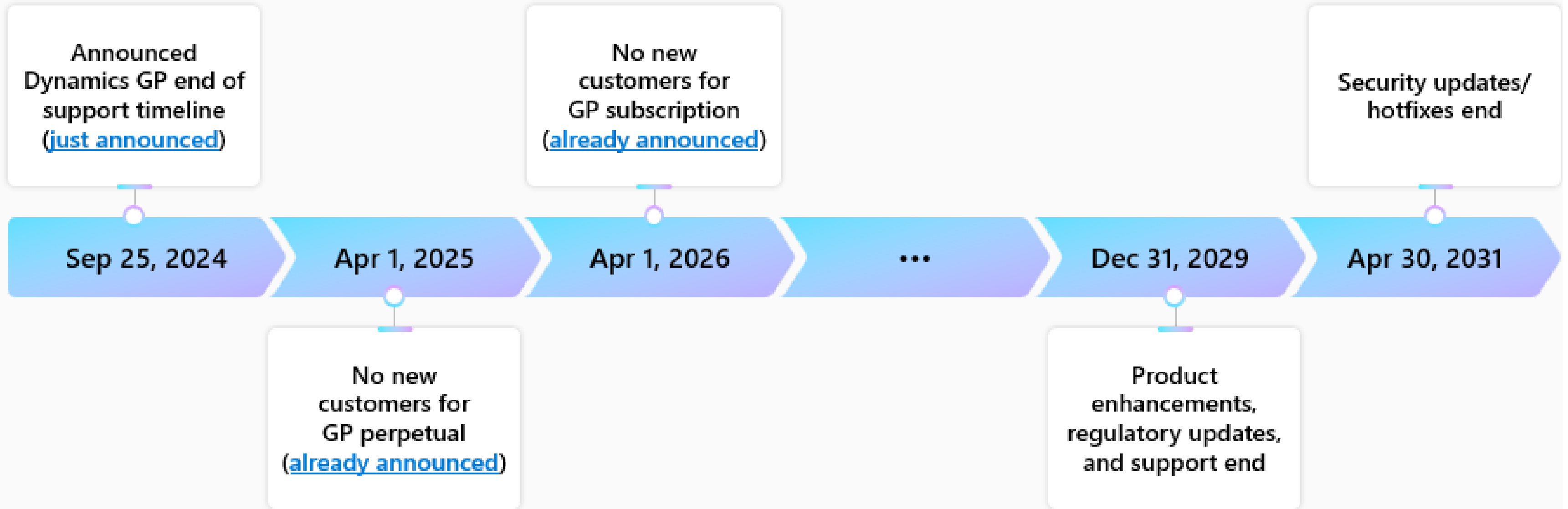
True Experts. Software that Works. No Hidden Fees.



Crestwood Associates

End of support announced for Dynamics GP

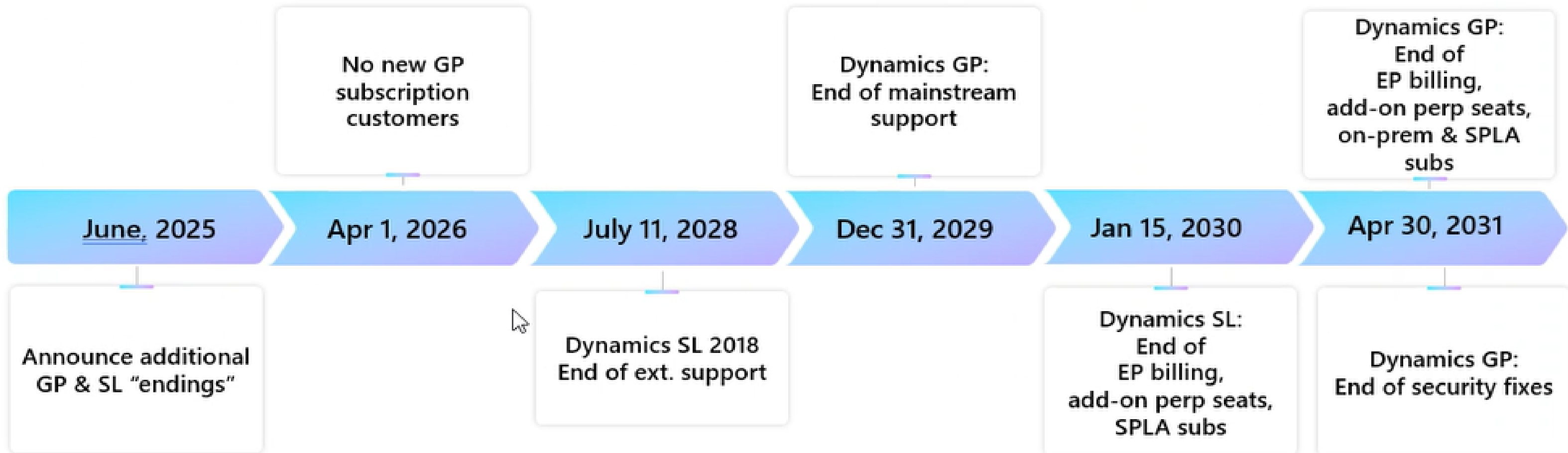
On September 25, 2024, Microsoft announced the timeline for ending support for Dynamics GP.



End of support announced for Dynamics GP Subscription & SPLA

On June 5, 2025, Microsoft announced the timeline for ending support for Dynamics GP Subscription & SPLA

GP and SL Product Availability Roadmap



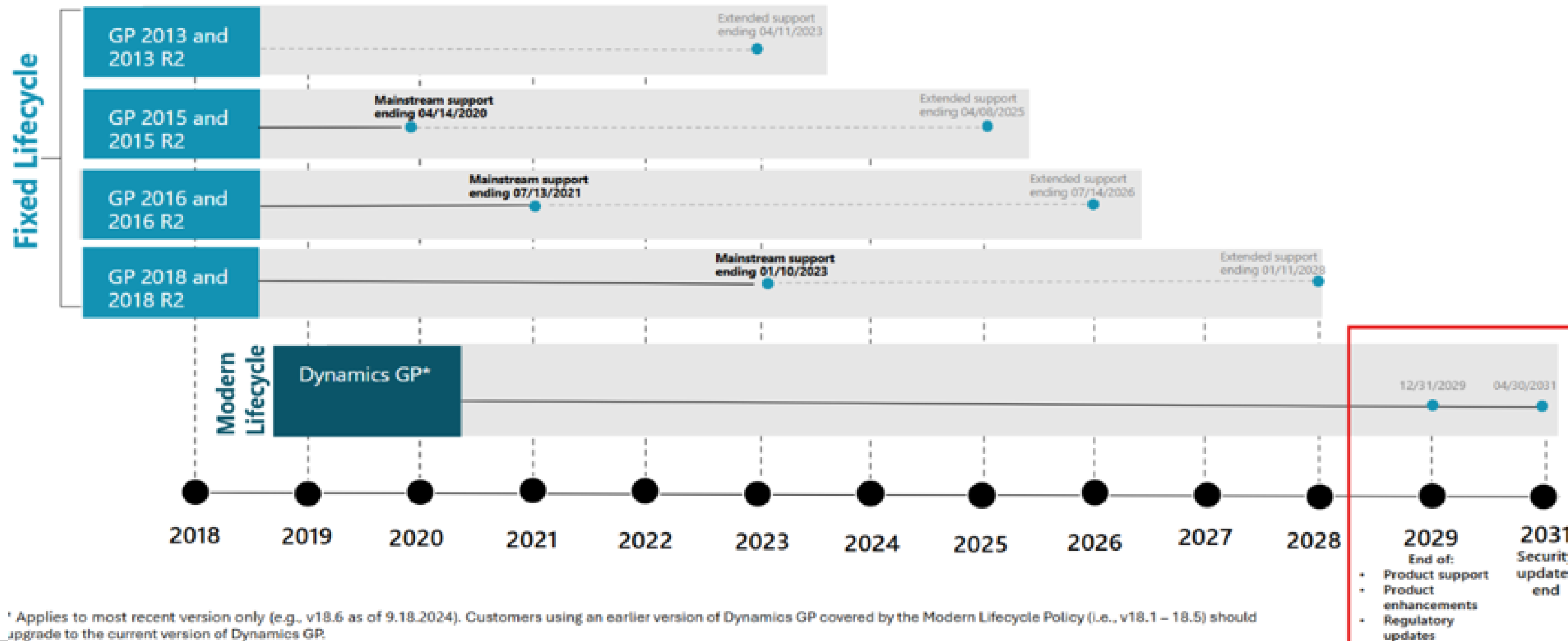
Modern Lifecycle

Lifecycle page:
[Software lifecycle policy - Dynamics GP | Microsoft Docs](#)

Modern Lifecycle

Lifecycle page:
[Software lifecycle policy - Dynamics GP | Microsoft Docs](#)

Dynamics GP versions governed by Fixed and Modern Lifecycle



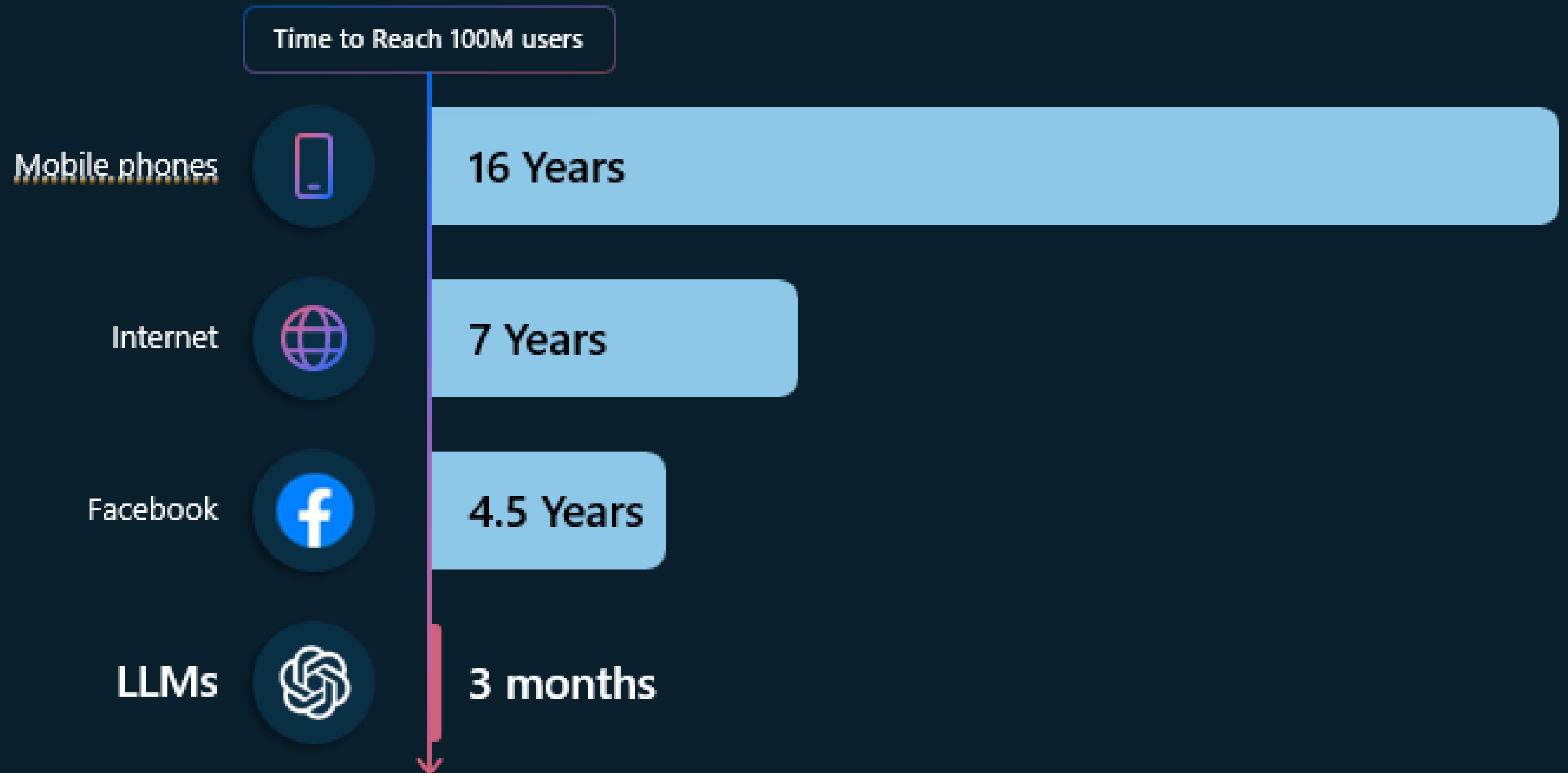
* Applies to most recent version only (e.g., v18.6 as of 9.18.2024). Customers using an earlier version of Dynamics GP covered by the Modern Lifecycle Policy (i.e., v18.1 – 18.5) should upgrade to the current version of Dynamics GP.

A black and white photograph of a man in a suit operating a vintage computer terminal in a room filled with large reel-to-reel tape drives and other early computer hardware. The man is seated at a desk, typing on a keyboard. In the foreground, a large, cylindrical reel-to-reel tape drive is prominent. The background shows several other similar tape drives and a woman standing near another workstation. The overall scene depicts a typical office environment from the mid-20th century.

**Business has functioned
the same way for 50 years...**

AI **is** disrupting
business at its core

LLMs: Fastest Adoption Rate Ever





Copilot

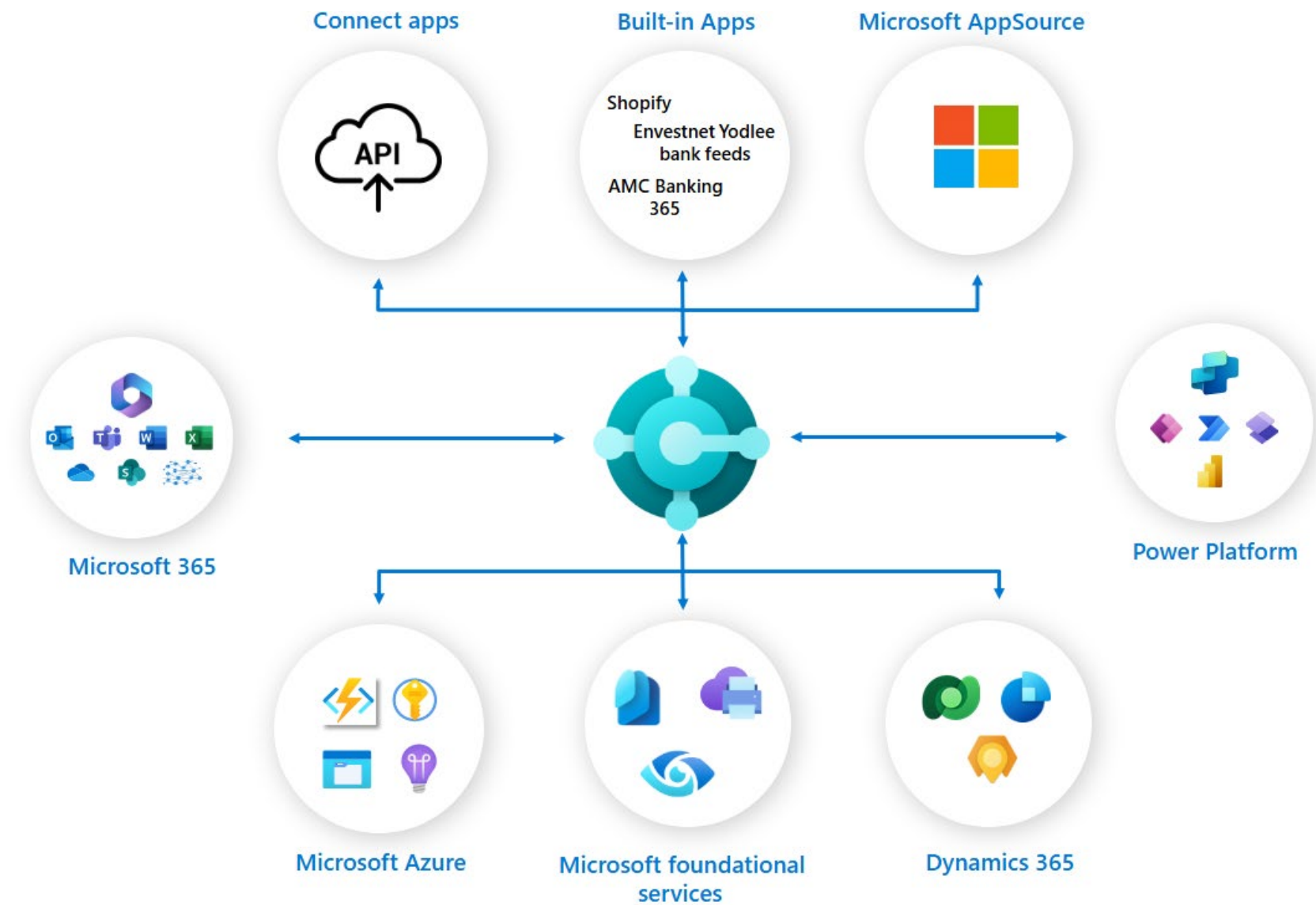
Every employee will
have a Copilot



Agents

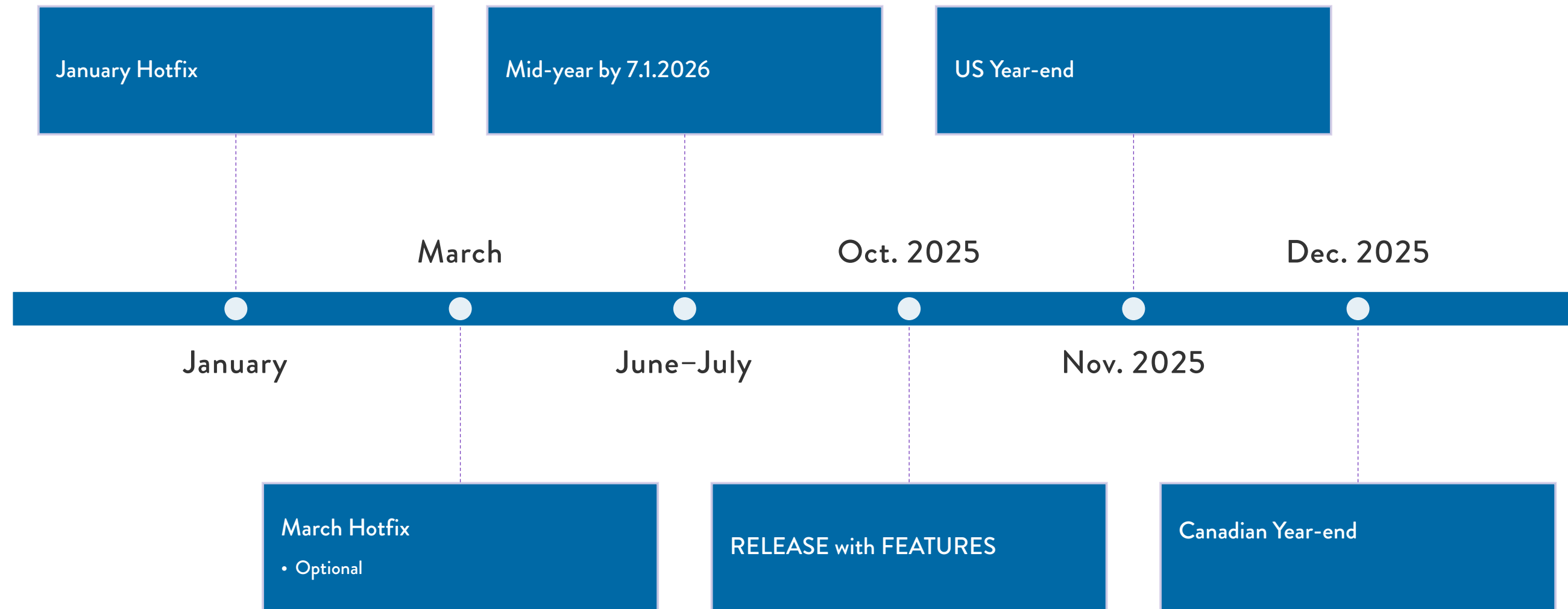
Every business process
will have an agent

Integrations to the Microsoft eco system Business Central Core



October 2025

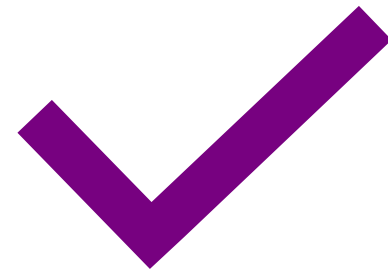
Release Plan



Release Schedule

- October 2025 Feature release
 - September ISV drop & Source Code drop
- [December 2025 US Year-End](#)
 - Fixed Assets Changes
 - Quality fixes
- [December 2025 Canada Year-End](#)
- January Hotfix

October 2025



Upgrade Blog Series



Dynamics GP 2025 Feature Blog series

- Product Release
- Service Packs
- Dynamics GP Resource

Additional Resources – Year End



2025 Year-End Close Blog series:



[Microsoft Dynamics GP - 2025 Year-End Blog Series Schedule!!](#)



'Standard' Year-End Close procedures: (Checklists/KB articles)



**In blog above

Business Central Immersion: A Modern ERP in Action

True Experts. Software that Works. No Hidden Fees.

Agenda

- Unlocking Growth with D365 Business Central
- Core Capabilities and Functionality Overview
- Integrating Microsoft 365 with Business Central
- AI in Action: Copilot and Agents
- Next Steps



Inadequate systems **inhibit growth** and make it difficult to adapt to disruptions and rapid change.

- Multiple software programs and paper-based systems complicate decision-making
- Manual work-arounds result in inefficient processes and data entry errors
- Disconnected systems make it hard to collaborate and share information

Are you ready for an AI-first cloud ERP?

Accelerate your growth with powerful core capabilities, unrivaled connectivity across applications, and cutting-edge automation



Accelerate growth

You've outgrown the software you use to manage your business, whether it's accounting software, an underpowered ERP system, or a string of bespoke or homegrown solutions, and you're ready for a **solution to manage end-to-end processes in a single source of truth.**



Modernize systems

You're ready to move to the cloud to take full advantage of the **system interoperability, security, reliability, and latest features** of a rock-solid cloud ERP.



Prepare for the future

You have directives to assess new technologies like Copilot and Agents, how they can automate cumbersome workflows, save time, simplify business close, and allow you to **scale without the restraints of your current resources.**

Business Central Supercharges SMBs with AI

A rock-solid ERP foundation

for small and medium businesses



Enhanced and extended
with more than 7,000 solutions on AppSource

Mapped to your processes
through the expertise and effort of our partners

Automated
with the power of prebuilt and custom agents

Integrated natively
through the entire Microsoft ecosystem

CASE STUDY

Advanced Plastic Corp



Challenge

- Outdated GP and proprietary systems caused data errors and manual workarounds
- Limited scalability and user licenses
- Reporting lacked real-time visibility

Solution

- Migrated to Dynamics 365 Business Central with a phased plan
- Financials modernized first to improve reporting and data access
- Crestwood delivered a tailored transition with minimal disruption

Key Results

- Advanced drill-down reporting
- Unlimited user access with improved collaboration
- Real-time financial oversight
- Scalable cloud platform ready for future modules (warehousing, scheduling, EDI)



Microsoft Dynamics 365 Business Central

Scale without compromise



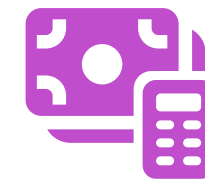
Increase financial visibility and performance

- Take control of financial data
- Forecast cash flow using AI
- Make more profitable decisions
- Accelerate financial closing and reporting



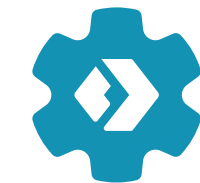
Boost sales and improve customer service

- Surface high-value opportunities
- Accelerate sales processes
- Deliver exceptional service
- Elevate your customer journey



Finish projects on time and under budget


















- Improve project costing
- Optimize resource levels
- Drive project profitability
- Enhance team productivity



Optimize inventory and supply chain management

- Get a holistic view of your inventory
- Manage manufacturing
- Align supply with demand
- Improve warehouse management

Dynamics 365 Business Central Capabilities

 <p>Finance and Accounting</p> <ul style="list-style-type: none"> • General Ledger • Unlimited Dimensions • Multiple currencies • Multiple companies 	<ul style="list-style-type: none"> • Budgets • Financial reporting • Consolidation • Intercompany postings • Statistical accounts 	<ul style="list-style-type: none"> • Cash flow forecast  • Fixed assets • Cost accounting • Deferrals • Electronic payments/direct debits 	<ul style="list-style-type: none"> • Customer payment process • Late payment prediction  • Bank account reconciliation  • Bank account management • Check writing
 <p>Sales and marketing</p> <ul style="list-style-type: none"> • Marketing text suggestions  • Contact management • Campaign management • Interaction and email logging • Opportunity management • Dynamics 365 Sales integration 	 <p>Fulfillment and delivery</p> <ul style="list-style-type: none"> • Sales invoicing  • Sales order management • Sales line and invoice discounting • Campaign pricing • Returns and exchanges • Dynamics 365 Customer Service integration 	 <p>Purchasing and payables</p> <ul style="list-style-type: none"> • Purchase invoicing • Purchase order management  • Purchase return order management • Alternative order addresses • Purchase invoice discounts 	
 <p>Inventory</p> <ul style="list-style-type: none"> • Inventory control • Item categories and attributes • Item tracking • Multiple locations • Location transfers 	 <p>Supply planning and availability</p> <ul style="list-style-type: none"> • Supply planning • Demand forecasting • Sales and inventory forecasting  • Order promising • Calendars 	 <p>Project management</p> <ul style="list-style-type: none"> • Basic resources • Capacity management • Multiple costs • Projects • Time sheets 	
 <p>Service management*</p> <ul style="list-style-type: none"> • Planning and dispatching • Service contract management • Service item management • Service order management • Service price management • Dynamics 365 Field Service integration 	 <p>Warehouse management</p> <ul style="list-style-type: none"> • Bin Tracking • Inventory picks and put-aways • Warehouse receipt • Warehouse shipment 	 <p>Manufacturing*</p> <ul style="list-style-type: none"> • Assembly management • Standard cost worksheet • Production bill of materials • Basic capacity planning • Machine centers • Version management 	

*Available in Dynamics 365 Business Central Premium  AI/Copilot in Business Central features

Dynamics 365 Business Central with Outlook

Go from quote to cash within the flow of work

Interact with customers and vendors directly from Outlook to accelerate transactions and business decisions

Promptly manage inquiries, service requests, or process payments to accelerate the sales cycle

Get insights into customer history, previous discounts, and more without leaving Outlook

The screenshot displays the Outlook interface with a Dynamics 365 Business Central window open on the right. The Outlook window shows an email from 'Wide World Importers' with the subject 'Thank you for your business! - Invoice 103073'. The email content includes a greeting, the invoice number, and a table of items. The Business Central window shows the vendor '40000 - Wide World Importers' with a summary of financial data and an 'Aged Accounts Payable' bar chart.

Item	Description	Ship Date	Qty.	Unit Price	Total
1928-S	Amsterdam Lamp	1/10/2019	50	42.80	2,140.00
2000-S	Sydney Swivel Chair	1/10/2019	42	148.10	6,220.20
Subtotal					\$8,360.20
Tax					\$501.61
Total					\$8,861.81

The Business Central window shows the following financial data:

Amount (\$)	Invoice (\$)
29,777.20	18,193.10
Total (\$)	Overdue Amounts (\$)
0.00	(\$)
0.00	194,408.51
Invoice and Prepayment Amount (\$)	Payments (\$)
2/14/2018	
Last Payment Date	

The 'Aged Accounts Payable' chart shows a period length of 2 weeks overdue, with a bar chart indicating the amount of overdue accounts payable.

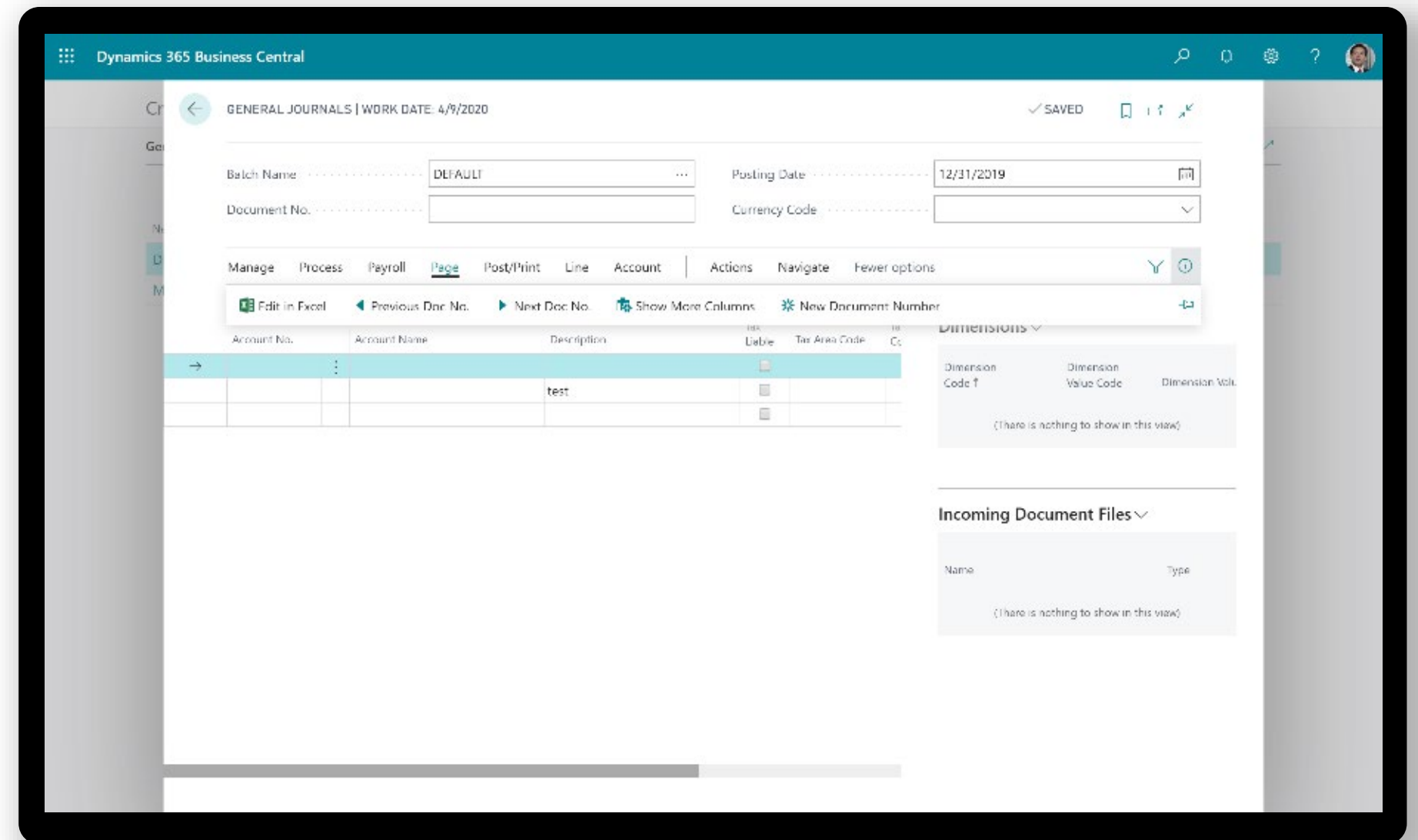
Dynamics 365 Business Central with Excel

Simplify daily tasks to free more time for strategy

Get up-to-date operational insights as Excel reports, and adapt quickly by customizing report layouts as Excel worksheets

Export data from Business Central to Excel for efficient data entry, then publish back to Business Central with business rule validation

Easily analyze transactions using familiar Excel functionality, then share with the team for review and co-authoring



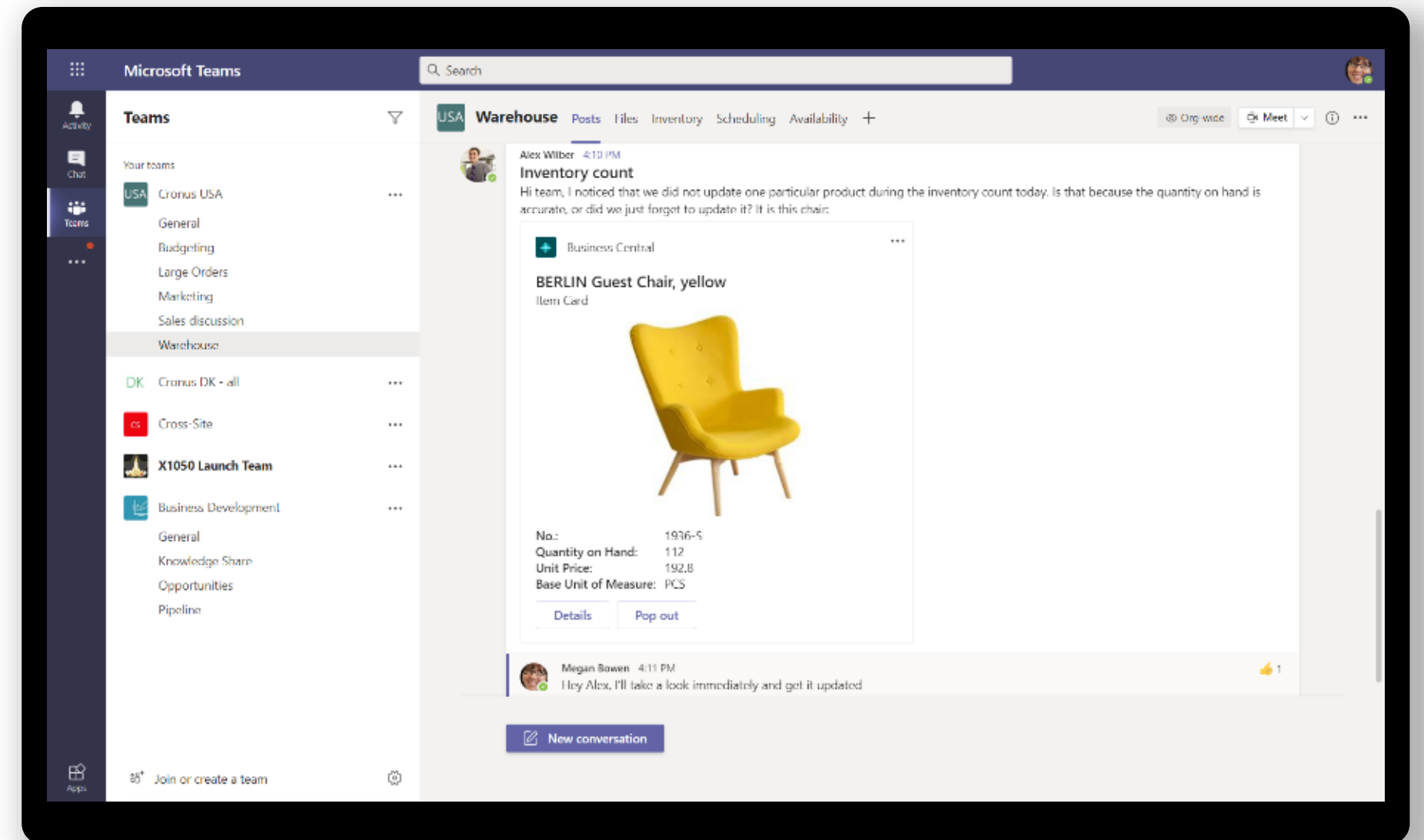
Dynamics 365 Business Central with Teams

Quickly share details so you can act faster

Make faster decisions by sharing Business Central data within Microsoft Teams chat or channel

Look up business contacts from Teams, along with insights, a history of interactions, and related records

Easily edit data and take action without switching apps

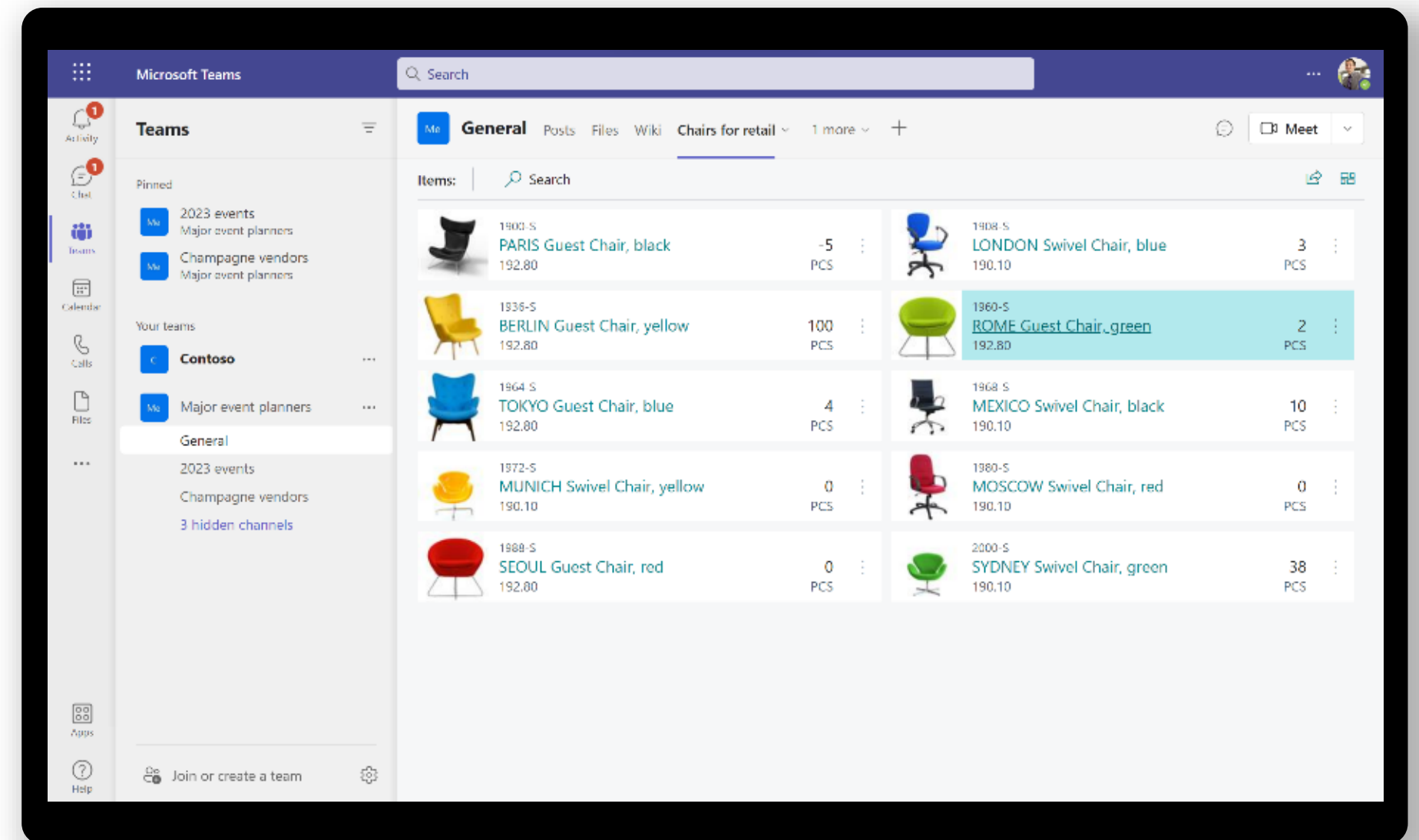


Access Business Central data with only a Microsoft 365 license **at no additional cost***

Access Business Central cards and tables that have been shared with you in Teams

Unlock data, improve collaboration, and enhance decision making without buying additional Business Central licenses

Read-only access is granted through your Microsoft 365 license as configured by your admin



*Applies to Microsoft 365 licenses that include Microsoft Teams

CASE STUDY

The Executives' Club of Chicago



Challenge

- Legacy Microsoft Dynamics Great Plains was slow and difficult to maintain
- Concerns around connectivity and cybersecurity
- Remote work needs required a modern, secure cloud ERP

Solution

- Migrated to Microsoft Dynamics 365 Business Central
- Implemented a secure cloud infrastructure with stronger reporting
- Crestwood Associates led a smooth, efficient transition

Key Results

- Reduced IT intervention thanks to a simplified cloud environment
- Project delivered on time and within budget
- Accounting team gained stronger, more flexible reporting capabilities



Tailor-made for SMBs, with the full power of Microsoft AI

Decades
of research &
development

Committed to
advancing
Responsible AI

Secure
from
the start

Reliability &
performance at scale
for large AI models

Runs on trust

Your data is your data

The power of AI in Business Central

Copilot and the agentic ecosystem

Agents (consumption-based pricing)



Sales Order agent



Payables agent



More prebuilt agents coming soon



Custom agents from Agent Builder, Copilot Studio, Azure Foundry, ISVs

Copilot in Business Central (included)



Analysis assist



Chat with Copilot



Summarize



Marketing & Sales Suggestion



Bank account reconciliation

Copilot Extended

Microsoft 365 Copilot



Copilot Studio



Power Automate



Azure AI Foundry



Power Apps



...and more

Copilot in Business Central

What can Copilot do for you?



Guide

Explains concepts and helps you learn new skills



Find

Locates records and pages, finds matching products based on natural language inquiries or similar products



Compare

Reconciles bank statements and incoming e-documents



Analyze

Organizes data to help you get to insights faster



Suggest

Drafts product descriptions, suggests numbering pattern setup for records

Your AI-powered assistant with a growing skillset

Copilot in Business Central

Get to key insights faster

Copilot simplifies analysis by transforming raw data into insightful summaries using next generation AI

Provides an interactive and versatile way to calculate, summarize, and examine data

Creates, totals, pivots, and filters to help you find the information you're looking for

The screenshot displays the Dynamics 365 Business Central interface for 'Contoso Coffee'. The main view is a table titled 'Customer Ledger Entries' with columns for Posting Date, Document Date, Document Type, Document No., Customer No., Customer Name, Description, Original Amount, Department Code, and Customer Code. A Copilot overlay is visible, indicating it is 'Preparing the analysis tab'. Two callout boxes are present: one at the top stating 'Prepares the analysis tab' and one at the bottom stating 'Adjust and iterate on your layout'. The table contains several rows of data, including invoices and payments for 'Relecloud'.

Posting Date	Document Date	Document Type	Document No.	Customer No.	Customer Name	Description	Original Amount	Department Code	Customer Code
3/31/2024	3/31/2024	Invoice	PS-INV103187	50000	Relecloud	Invoice S-INV102197	3,081.84	SALES	MEDIUM
3/23/2024	3/23/2024	Payment	PS-INV103186	50000	Relecloud	Invoice S-INV102192	-4,596.16	SALES	MEDIUM
3/23/2024	3/23/2024	Invoice	PS-INV103192	50000	Relecloud	Invoice S-INV102192	4,596.16	SALES	MEDIUM
3/19/2024	3/19/2024	Payment	PS-INV103188	50000	Relecloud	Invoice S-INV102188	-403.01	SALES	MEDIUM
3/19/2024	3/19/2024	Invoice	PS-INV103188	50000	Relecloud	Invoice S-INV102188	403.01	SALES	MEDIUM
2/28/2024	2/28/2024	Invoice	PS-INV103184	50000	Relecloud	Invoice S-INV102184	2,877.48	SALES	MEDIUM
2/21/2024	2/21/2024	Payment	PS-INV103179	50000	Relecloud	Invoice S-INV102179	-4,999.17	SALES	MEDIUM
2/21/2024	2/21/2024	Invoice	PS-INV103179	50000	Relecloud	Invoice S-INV102179	4,999.17	SALES	MEDIUM
1/31/2024	1/31/2024	Invoice	PS-INV103171	50000	Relecloud	Invoice S-INV102171	2,877.48	SALES	MEDIUM
1/24/2024	1/24/2024	Payment	PS-INV103166	50000	Relecloud	Invoice S-INV102166	-2,757.70	SALES	MEDIUM
1/24/2024	1/24/2024	Invoice	PS-INV103166	50000	Relecloud	Invoice S-INV102166	2,757.70	SALES	MEDIUM
1/20/2024	1/20/2024	Payment	PS-INV103162	50000	Relecloud	Invoice S-INV102162	-403.01	SALES	MEDIUM
1/20/2024	1/20/2024	Invoice	PS-INV103162	50000	Relecloud	Invoice S-INV102162	403.01	SALES	MEDIUM

Chat with Copilot

Use natural language to interact with Copilot

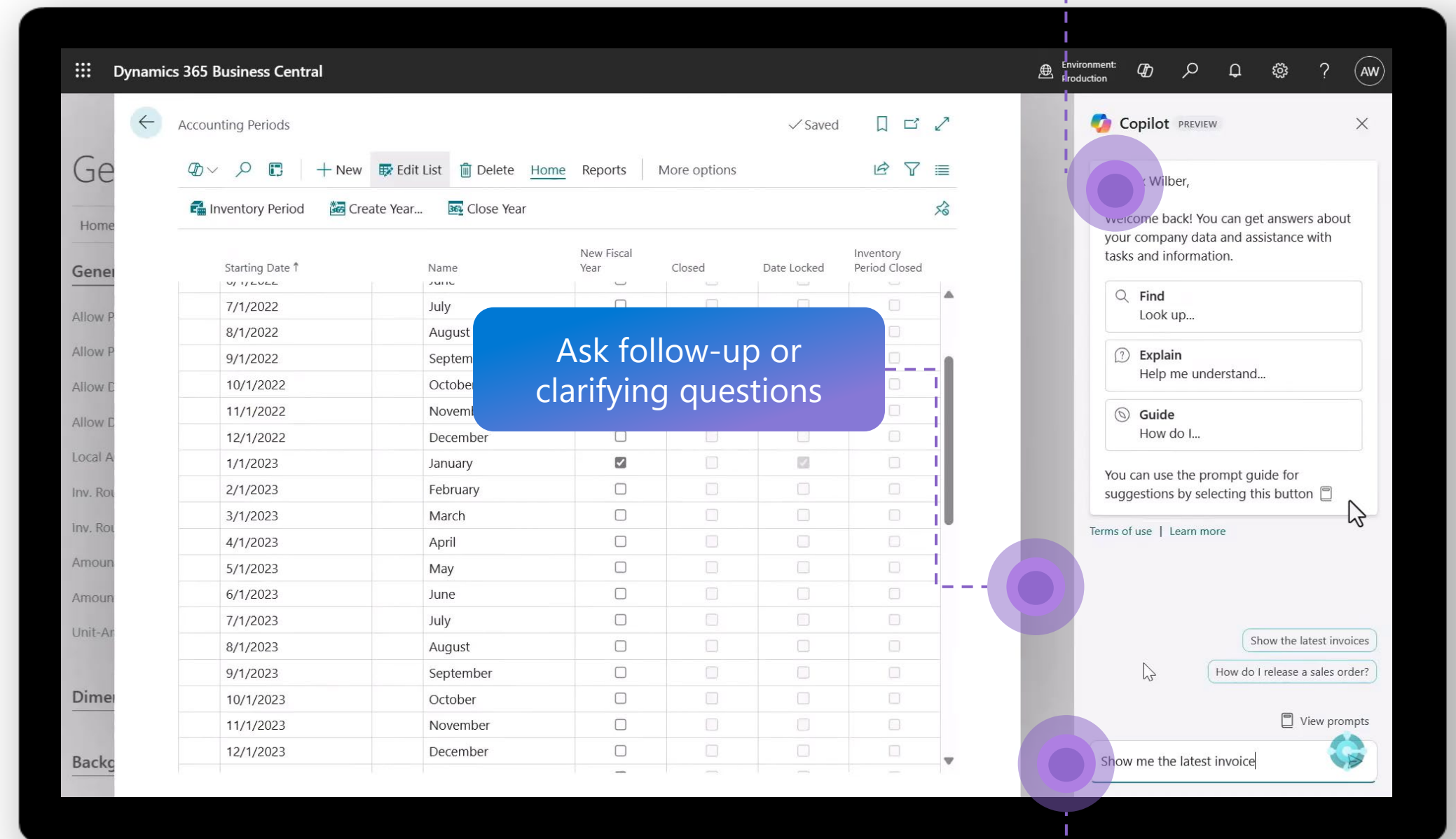
Finds records or pages, or explains how to do things

Copilot acts as a virtual assistant, helping you track down the right information at the right time

Finds business data for your company in Business Central

Gives explanations or step-by-step guidance on various tasks

Helps you understand the purpose and typical use of individual fields



Express yourself in your own words

Bank reconciliation with Copilot

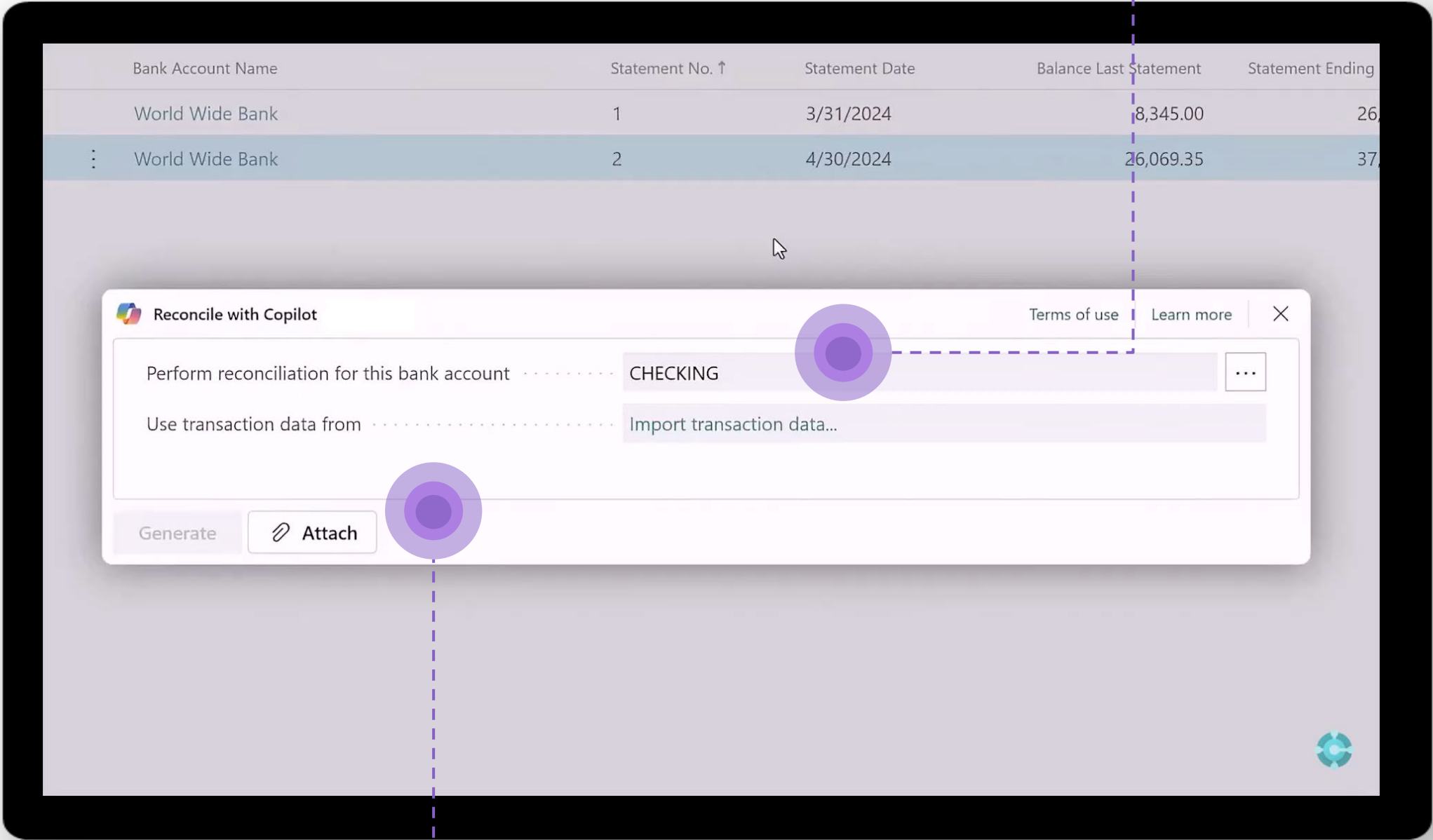
Solve the puzzle of bank reconciliation faster and easier

Finds matches

Copilot is your AI-powered bookkeeping assistant that helps you turn a tedious monthly chore into a quick review

Finds matches with your ledger entries, even when multiple charges are consolidated into a single entry

Suggests matching ledger accounts to post new transactions to.



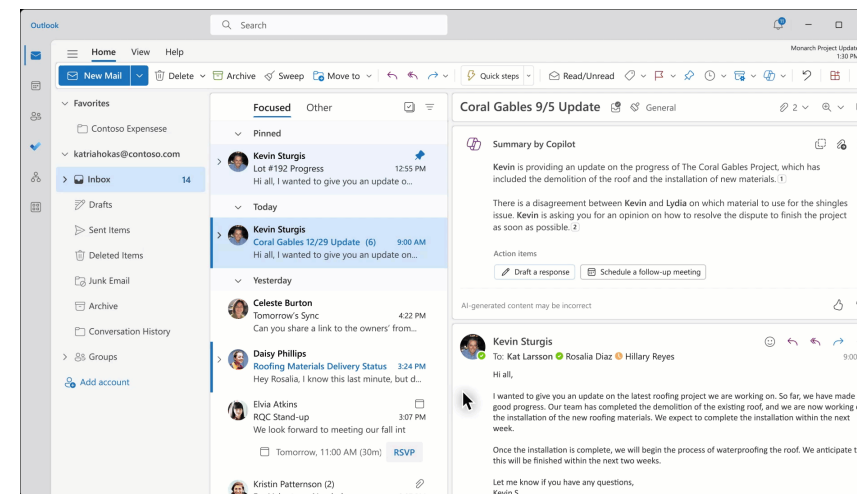
You upload or import bank data

Copilot beyond Business Central

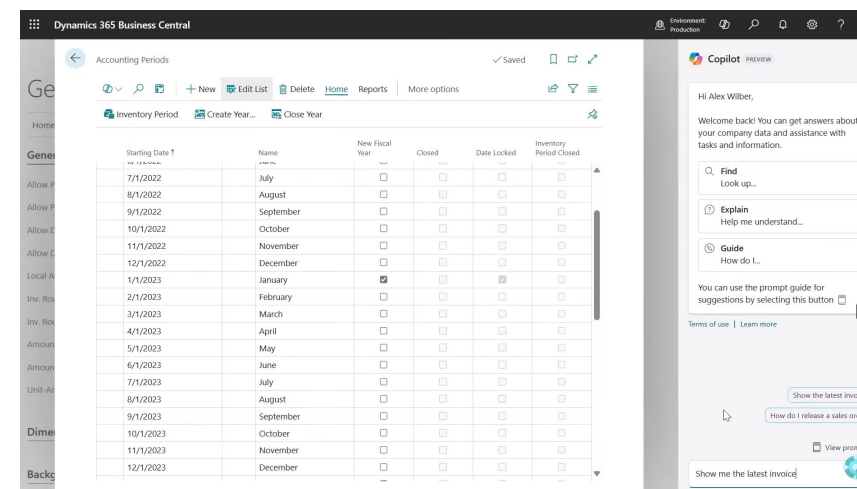
Seamless systems of record, one source of truth



Generate a new customer profile from an inbound email



Draft a purchase order and check inventory from a call transcript



Edit any Business Central field directly in excel without middleware, and generate deep financial analysis with Copilot

Posting Date	Document Date	Document Type	Document No.	Customer No.	Customer Name	Description	Original Amount	Department Code	Customer Code
3/21/2024	3/21/2024	Invoice	PS-INV103197	50000	Relecloud	Invoice S-INV102197	3,081.84	SALES	MEDIUM
3/23/2024	3/23/2024	Payment	PS-INV103192	50000	Relecloud	Invoice S-INV102192	-4,596.16	SALES	MEDIUM
3/23/2024	3/23/2024	Invoice	PS-INV103192	50000	Relecloud	Invoice S-INV102192	4,596.16	SALES	MEDIUM
3/19/2024	3/19/2024	Payment	PS-INV103188	50000	Relecloud	Invoice S-INV102188	-403.01	SALES	MEDIUM
3/19/2024	3/19/2024	Invoice	PS-INV103188	50000	Relecloud	Invoice S-INV102188	403.01	SALES	MEDIUM
2/26/2024	2/26/2024	Invoice	PS-INV103184	50000	Relecloud	Invoice S-INV102184	2,877.48	SALES	MEDIUM
2/21/2024	2/21/2024	Payment	PS-INV103179	50000	Relecloud	Invoice S-INV102179	-4,999.17	SALES	MEDIUM
2/21/2024	2/21/2024	Invoice	PS-INV103179	50000	Relecloud	Invoice S-INV102179	4,999.17	SALES	MEDIUM
1/31/2024	1/31/2024	Invoice	PS-INV103171	50000	Relecloud	Invoice S-INV102171	2,877.48	SALES	MEDIUM
1/24/2024	1/24/2024	Payment	PS-INV103166	50000	Relecloud	Invoice S-INV102166	-2,757.70	SALES	MEDIUM
1/24/2024	1/24/2024	Invoice	PS-INV103166	50000	Relecloud	Invoice S-INV102166	2,757.70	SALES	MEDIUM
1/20/2024	1/20/2024	Payment	PS-INV103162	50000	Relecloud	Invoice S-INV102162	-403.01	SALES	MEDIUM
1/20/2024	1/20/2024	Invoice	PS-INV103162	50000	Relecloud	Invoice S-INV102162	403.01	SALES	MEDIUM

Bank Account Name	Statement No.	Statement Date	Balance Last Statement	Statement Ending
World Wide Bank	1	3/31/2024	8,345.00	26
World Wide Bank	2	4/30/2024	26,069.35	37

Reconcile with Copilot

Perform reconciliation for this bank account: CHECKING

Use transaction data from: Import transaction data...

Generate Attach

Take automation further with Agents

Built for Business Central, extendable across business processes



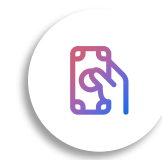
Sales Order Taker

In preview

Communicates with customers

Interprets customer request

Sends quotes



Payables Agent

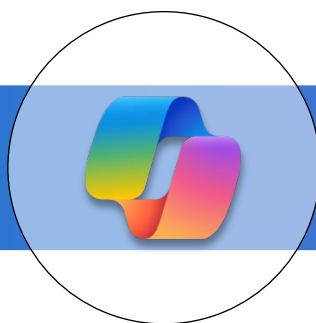
In development

Receives vendor invoices

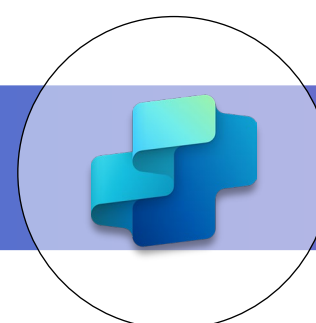
Captures invoice information

Registers invoices according to company policy, preference, and history

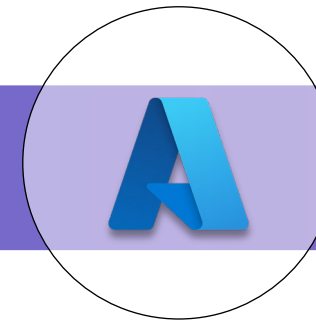
No code



Agent builder

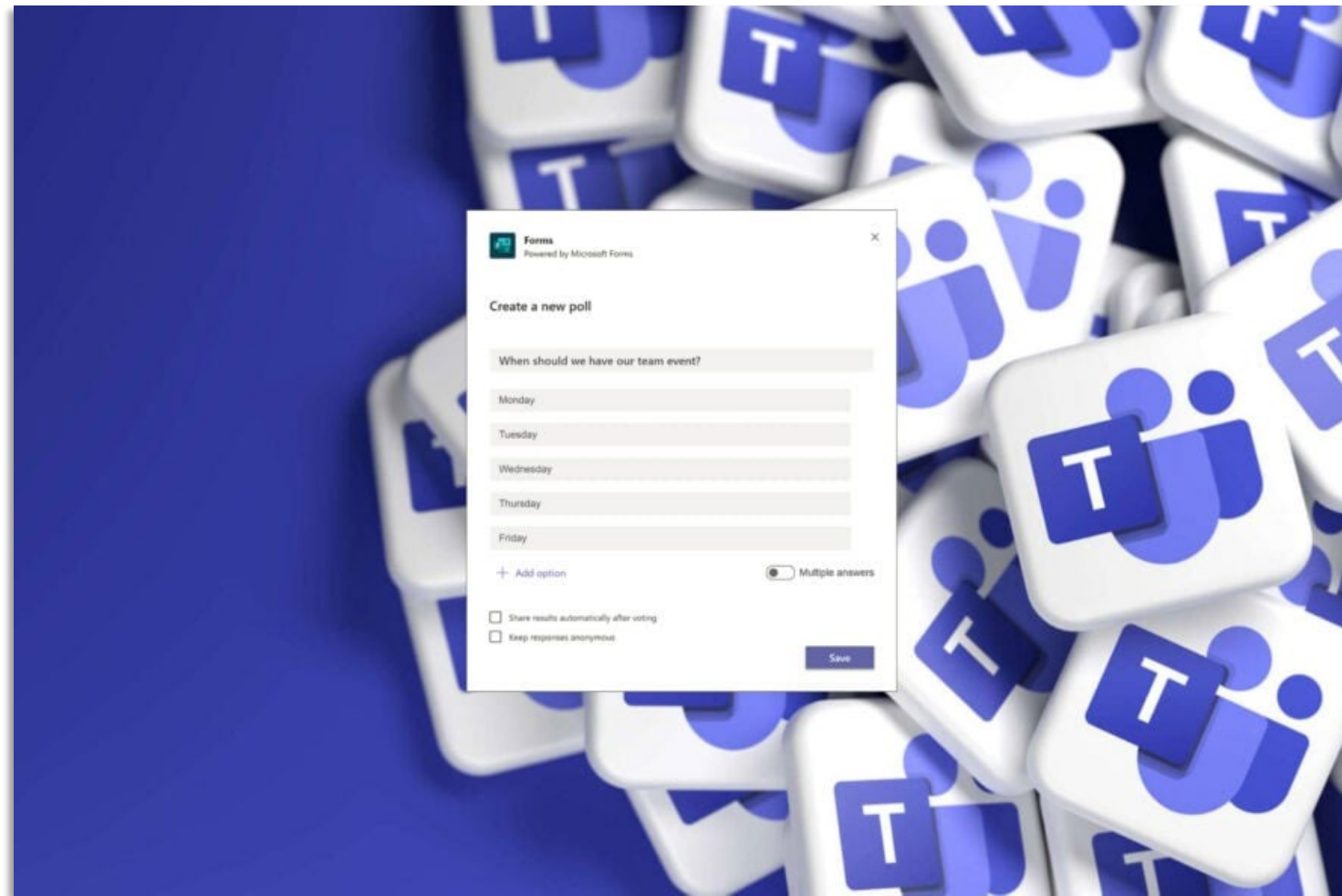


Copilot Studio



Azure AI

Pro code



When do you anticipate evaluating or making changes to your ERP system?

CONGRATULATIONS PIZZA PARTY WINNER!!!

- Delon S – Julie K



CELEBRATING OUR CLIENT COMMUNITY

YOUR FEEDBACK MATTERS!

Please complete our survey and enter our Pizza Giveaway contest.



YOU'RE INVITED!

Join our New LinkedIn Community Group



Your Customer Success Team

DO YOU HAVE MORE QUESTIONS?



Colleen Schils
Director of Customer Success
cschils@crestwood.com



Julie Kunka
Customer Success Manager
jkunka@crestwood.com



Nick Cabrera
Customer Success Manager
ncabrera@crestwood.com



Heather Contardi
Customer Success Manager
hcontardi@crestwood.com



Thank You

