Step-by-Step Guide

2018 Year-End Update for Microsoft Dynamics GP

Step 1: Determine whether you need to install the year-end update.

Installing the year-end update is required if you are:

- Using GP HR features for Affordable Care Act (ACA) & producing 1095-C reports from GP.
- Using Canadian Payroll. *(Wait for the Canadian Payroll year-end update to be released mid-to-late December, which is all inclusive of U.S. changes as well.)*
- Using 1099-DIV, 1096, or 1099-R form.

If not using features listed above, it is optional to install this service pack.

Changes in the year-end update are all-inclusive of all prior releases of Microsoft Dynamics GP. The year-end update addresses:

1. Affordable Care Act updates and Form 1095-C changes
2. Product Quality Fixes around Payroll Year-End and all Microsoft Dynamics GP modules
3. No W-2 or W-3 Form changes
4. 1099-DIV, 1096, and 1099-R form and application changes

For more complete information of changes included in the year-end updates, click here.

Step 2: Download the appropriate service pack from CustomerSource, if needed:

- YE Update for GP2018
- YE Update for GP2016
- YE Update for GP2015

Step 3: Please carefully review the information found in these links for valuable tips about how to prepare for and ensure a smooth payroll year-end:

- 2018 Payroll Year-End Prep Guide and Hints
- Quarter-End or Year-End Wage Reconciliation spreadsheet
- Recording Taxable Benefit Wages for GP Dynamics
- Microsoft Instructions for Year-End Update
- W-2 Data Sources
- 2018 Year-End Update and Tax Tables FAQs
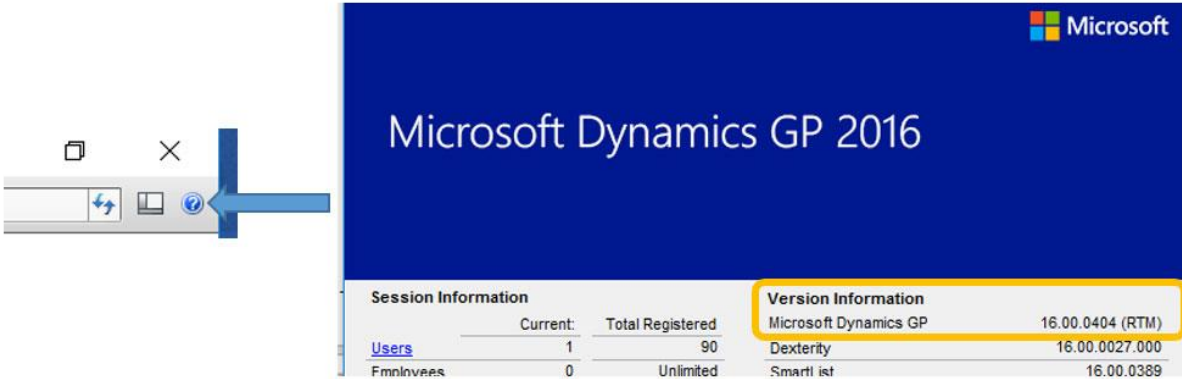
Step 4: Learn from the available blogs in the GP Community:

- Microsoft Dynamics GP – 2018 Year-End Blog Series

The Microsoft Dynamics Community blog is a great resource for all things surrounding GP.
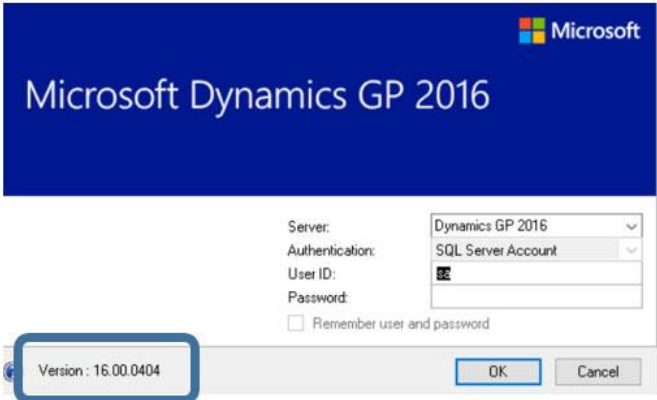
You can also turn on 'Connect' within Dynamics GP on your Home Page where you will find a wealth of year-end information.

Checking Your GP Version

If you are not sure of your Dynamics GP version, you can check the version under Help (blue question mark in the upper right-hand corner of the GP system). Go to the About Microsoft Dynamics GP option. Your version number will be listed on the right, middle section of the window.

Your version will also appear in the lower left corner of your main login screen when GP is launched.

Please let us know how we can assist in making your year-end processes easier.

Contact Us ➤