

The Greenshades Center

401(k) E-file Creation Guide



GREENSHADES
— *Let Us Handle That* —

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About the Greenshades Center

The Greenshades Center is the flagship electronic reporting solution by Greenshades Software. The Greenshades Center serves as a single point of access to many of Greenshades' services, including E-Filing, Forms, and Report Archiving functionality.

This guide will provide you with a brief overview of the Greenshades Center and its' related functions.

Requirements for the Greenshades Center

The Greenshades Center has some basic requirements that must be met in order to function properly. First, the Greenshades Center requires an active internet connection. We require this so that we can ensure that the files we create comply with the very latest government regulations. Greenshades does not offer an offline mode or any way to operate without an active internet connection. The Greenshades Center can be configured to authenticate with a corporate proxy server, but the responsibility is on the client to ensure that adequate internet access is provided to the Greenshades Center.

Secondly, the Greenshades Center requires an update to Microsoft Windows called the 'Microsoft .NET Framework'. Specifically, the center requires version 2.0 or newer to be installed.

Installing and Running the Greenshades Center

Since the Greenshades Center is used with various accounting packages, the exact installation steps will vary slightly. Information and assistance installing the Greenshades Center can be found within our Installation Guide at:

<http://www.greenshades.com/pub/downloads/documentation/FilingCenterInstallation.pdf>

Starting the Greenshades Center

To run the Greenshades Center from Dynamics GP:


The Greenshades Center can be accessed in Dynamics GP version 8.0 and newer by navigating from the top bar menu through: Tools > Routines > Payroll > Greenshades Center. In version 7.5 or older, the Greenshades Center can be started by navigating to either: Routines > Greenshades, or: Routines > Payroll > File and Pay Center.

To run the Greenshades Center from Dynamics SL:

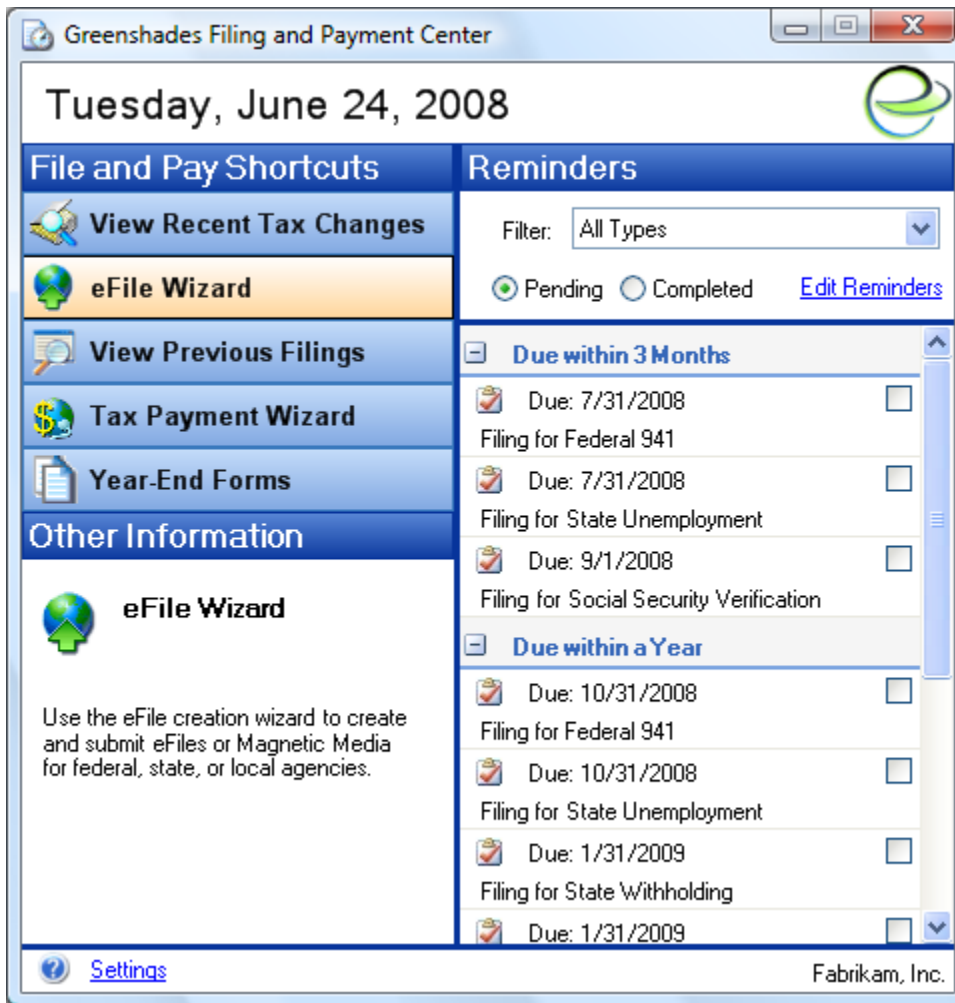
Open Greenshades using the desktop icon placed on your desktop after installation.

To run the Greenshades Center from Thinkware Darwin:

The Greenshades Center can be accessed in Thinkware Darwin by navigating from the top bar menu by selecting: Routines > Greenshades Center.

Note: At any time when using the Greenshades Center, you can access in-product help by clicking the  icon in the bottom left corner.

Creating your 401(k) eFile



Step 1 – Starting the eFile Wizard

The menu listed under ‘File and Pay Shortcuts’ will be your main point of navigation when using the Greenshades Center. Clicking on any of the menu selections will provide access to additional Greenshades features and options related to that category.

To begin your 401(k) eFile creation, select eFile Wizard from the File and Pay Shortcuts menu.



Step 2 – Filing Type and Company Name

To begin creating your 401(k) eFile, select ‘Other Filing’. You will also notice that there is a ‘Company Name’ field. This defaults to the company name retrieved from your accounting package but you can modify it to match the company name you wish to appear in your 401(k) eFile.

E-File Wizard

Choose a Date Range and Filing Types

Choose the date range and filing types for which you would like to create the electronic files.

Start Date: 11/ 6/2008

End Date: 11/20/2008

Types of Files

- New Hire
- 401(k)
- EEO-1 Survey
- Current Employee Statistics (CES)

Choose Preset Filing Periods

- Last Pay Period
- Last Two Pay Periods
- Last Quarter
- This Quarter

Would you like to combine multiple Great Plains companies into a single company for this filing?

Yes No

Quit < Back Next >

Step 3 - Choose a Date Range and Specific File Type

Next, you will select the start and end date for your eFile, then place a check in the 401(k) file type box, and click Next to continue.

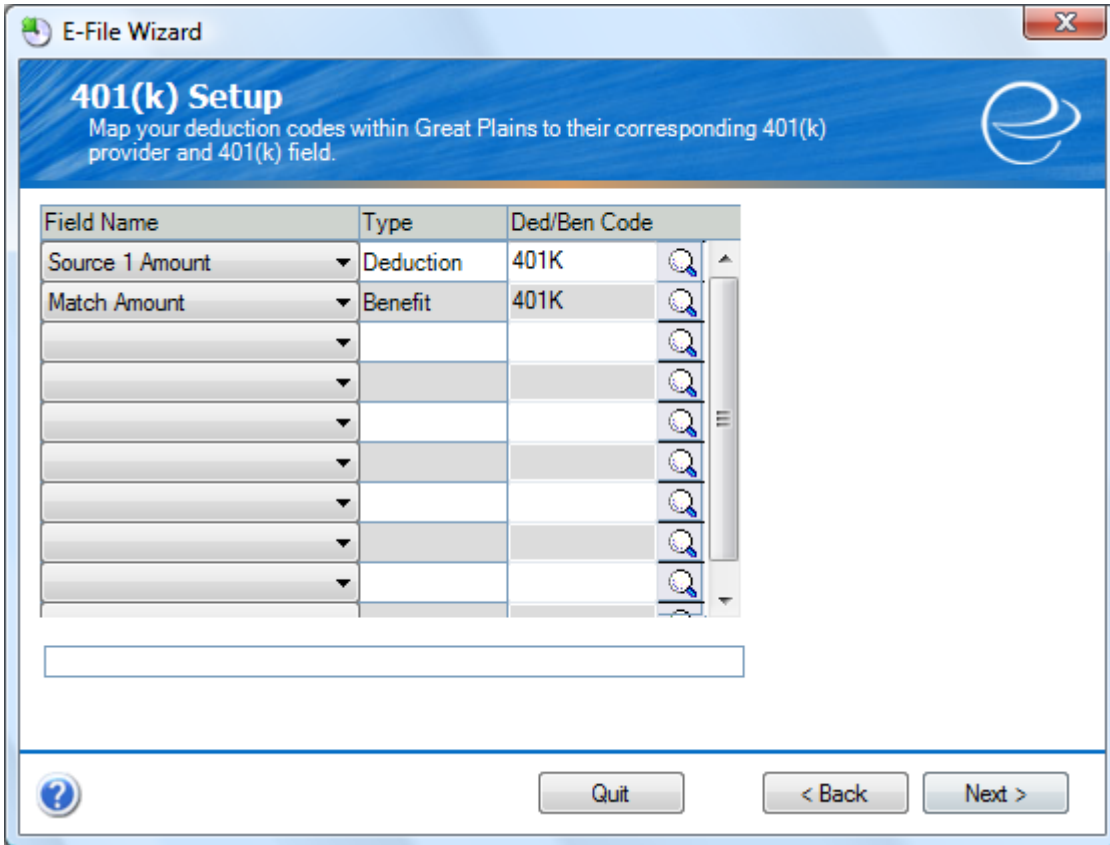
Step 4 – Choosing Your 401(k) Options

Select your 401(k) provider using the drop down list. Enter the 401(k) plan number in the space provided. If your company’s particular 401(k) specification does not require a plan number you may leave this information blank.

Selecting “Yes” to calculate hours for salary paytypes means that Salary paycodes will have hours calculated based on a 40 hour work week. The actual value of hours will be determined by the pay frequency. Selecting “No” will mean the hours are based only on the hours associated with the Salary paycode transactions for each employee.

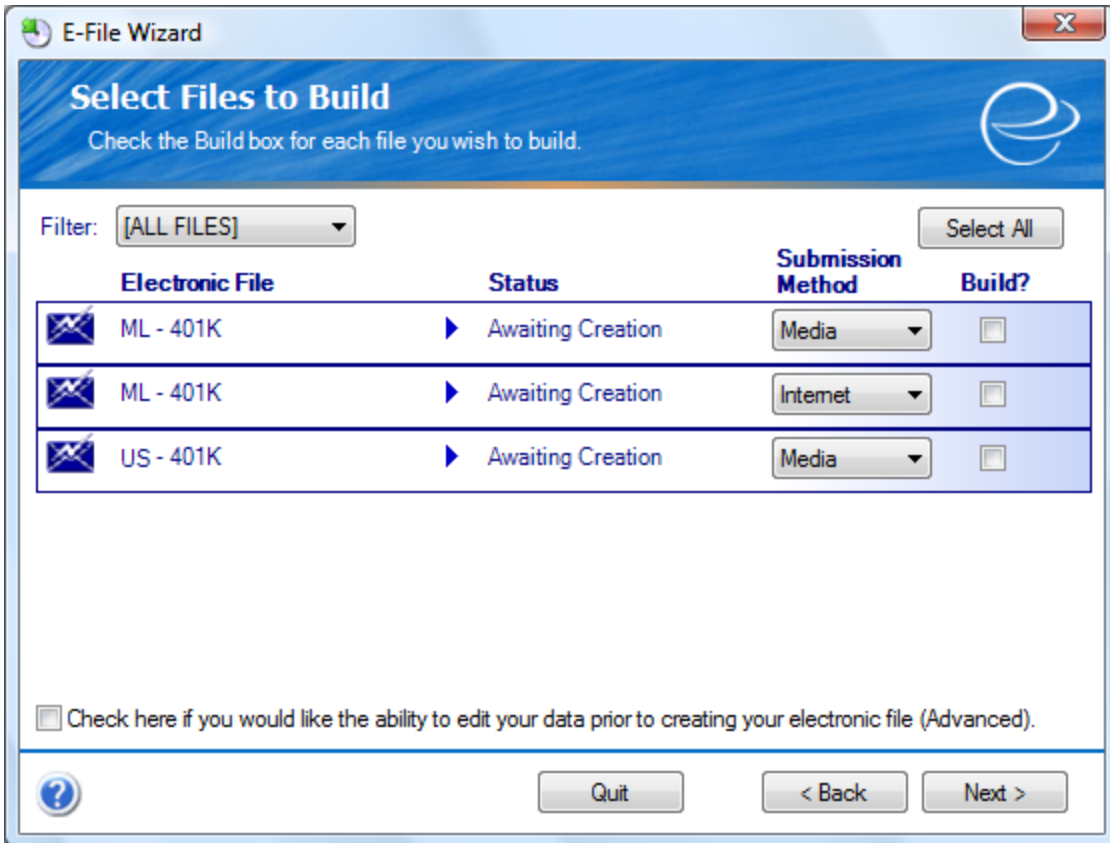
Selecting “Yes” to “include ONLY employees who have been assigned 401(k) codes” means that employee information for employees that are not assigned deduction/benefit codes, which are mapped in the 401(k) mapping screen, will NOT be extracted from the payroll information. Consequently these employees will not be included in any subsequently created 401(k) file. Selecting “No” for this option will not exclude employees based on the mapped 401(k) Deduction and Benefit codes.

Selecting “Yes” to “include ONLY active employees” will only extract active employees. However, some 401(k) plans/providers require all employees who have contributed in the current plan year to appear on the contribution file until the end of the plan year, even if they are terminated/no longer contributing. Please consult your plan documentation/provider for more information on your specific requirements.



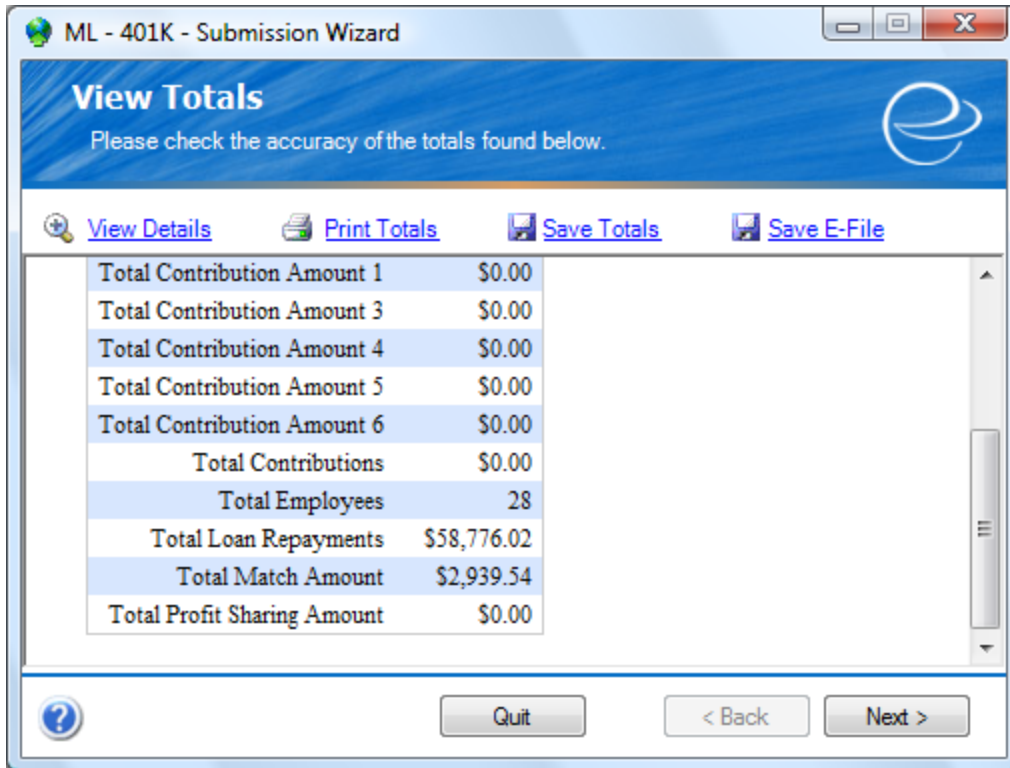
Step 5 – 401(k) Setup

The mapping setup allows the Filing Center to map payroll deduction and benefit information to the appropriate fields in the final 401(k) file to be built. You should receive instructions on how to map your 401(k) fields when your 401(k) product is delivered. The fields should not have to be changed once they are set up properly. If the wage and contribution numbers in your 401(k) file do not match up with your payroll numbers, then the likely cause is your mapping information is incorrect.



Step 6 – Select Files to Build

This screen shows you all the files currently available for you to build with the data that was just extracted. Place a check in the “Build?” box to the right for each file you wish to build. If there are many files listed, use the Filter drop down in the Upper left corner to find what you need. When you have selected all the files you wish to build, click the “Next” button.



Step 7 – View Totals

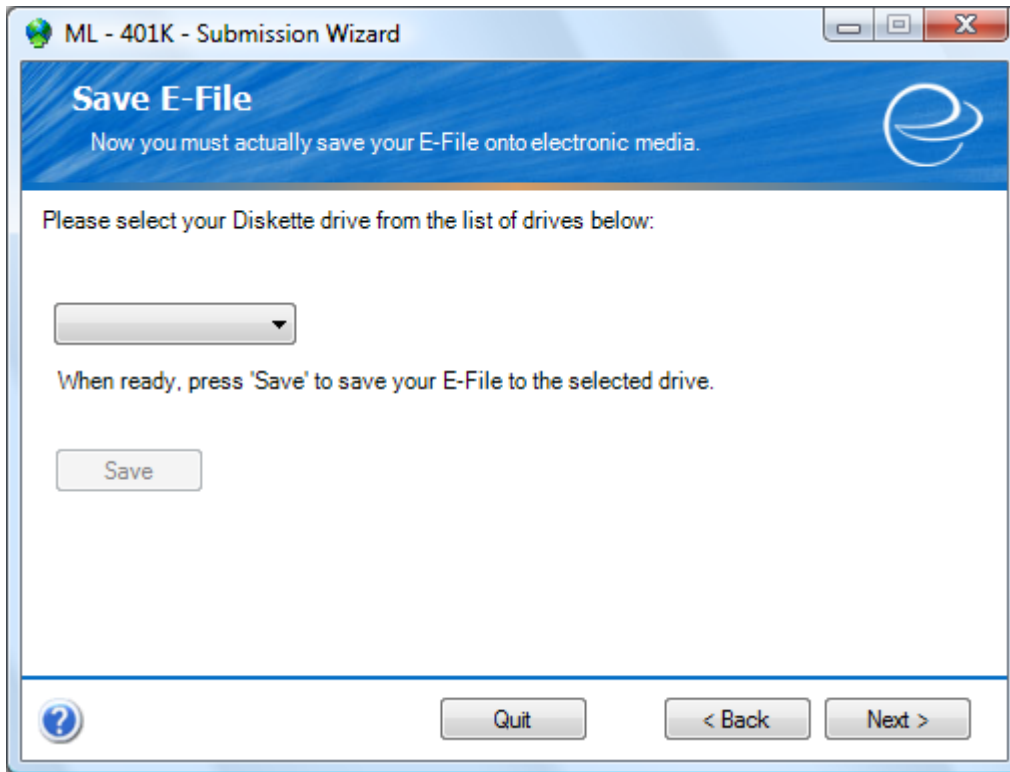
View Totals is an assessment screen providing you with detailed totals for final review before submission. You will notice 4 separate options displayed above the listed totals. The details for each are listed below:

[View Details](#). With View Details, you can export your 401(k) data to an Excel file for an even more detailed review. This is to be read or printed only, and not to be E-filed.

[Print Totals](#). Print Totals prints the total screen you are currently viewing.

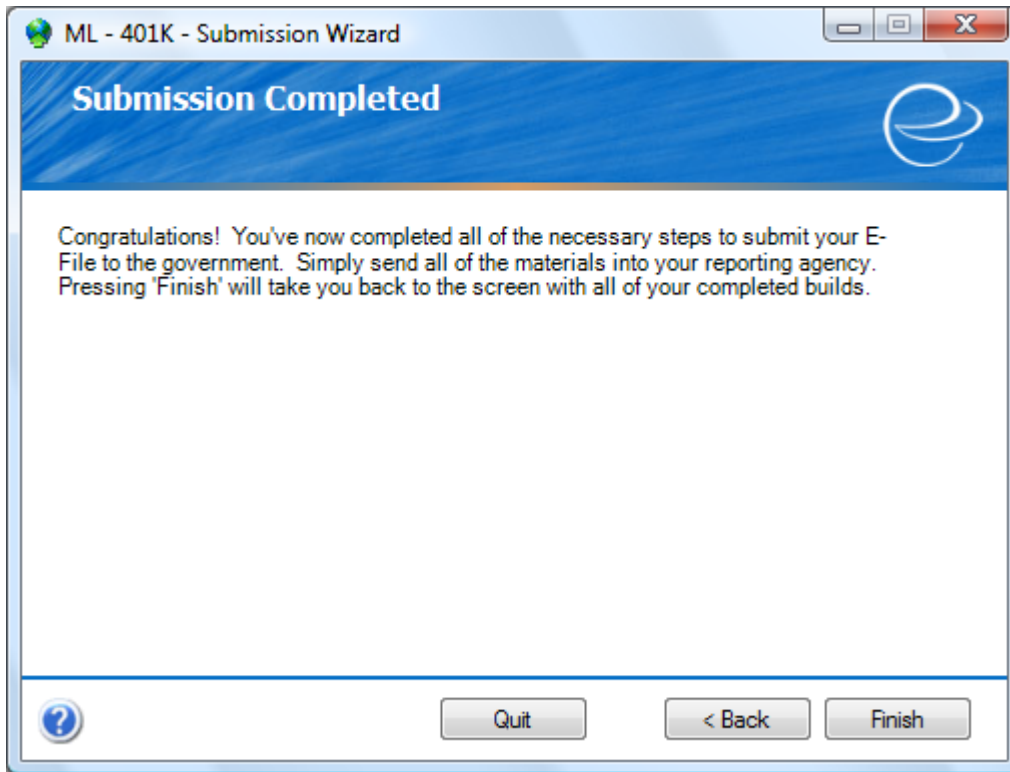
[Save Totals](#). Save Totals will save the total screen you are viewing in an HTML format that can be viewed at a later date in Internet Explorer.

[Save E-File](#). Save E-File allows you to save a copy of the exact electronic file which will be submitted.



Step 8 – Save E-file

Next, you will need to save your eFile to disc or diskette. The Greenshades Center will automatically detect any drives installed on your computer, which you can then select using the drop-down menu, assuming you have more than one drive available. Once you have selected the drive you wish to use, click the 'Save' button. If you do not have a CD or diskette drive, contact your network administrator for assistance with saving your 401(k) file to computer with one of these drives via the network, or possibly to connect an external diskette or CD drive to your computer.



Submission Completed

Congratulations! You have successfully created and saved your 401(k) data to media. You have now completed all the steps in creating your 401(k) E-File. Make sure it is properly labeled and packaged before mailing.

Client feedback:

Was this guide helpful to you? We would love to hear your feedback. Was there something else that you feel should have been included? We will do our best to accommodate you! Did this guide make your task easier? Make our day and let us know! Please send all feedback to support@greenshades.com.