# The Greenshades Center

## 941 E-File Creation Guide

GREENSHADES
Let Us Handle That

Greenshades Software Support Team
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# General Overview

## *About the Greenshades Center*

The Greenshades Center serves as a single point of access to all of Greenshades' tax filing products. By assembling our E-Filing, Forms, and Archive capabilities into a single application we can provide easier access for our clients and better communication between our services.

## *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 of this software to be installed.

While a user will not need to be a computer administrator or logged into their accounting package as system administrator, they will need to have permission to write to the file system and the registry and may need to have an authorized user provide a database password when performing some updates.

## *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:**
The Greenshades Center can be accessed in Dynamics SL by navigating through: Modules > Payroll > Greenshades Center. With newer versions of SL, you will 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.

## *Filing your 941's*

### Preparation: E-File Wizard.

Once you have the Greenshades Center open, you will notice several options listed. Specifically, to create and electronically submit an E-file, you will select the E-file Wizard.

### Step 1 – Starting the E-File Wizard

When you are ready to create an electronic file to be submitted to the IRS, click the E-File Wizard.


At any time you can access in-product help by clicking the icon in the bottom left corner of the wizard.

### Step 2 – Company Name and Period Selection

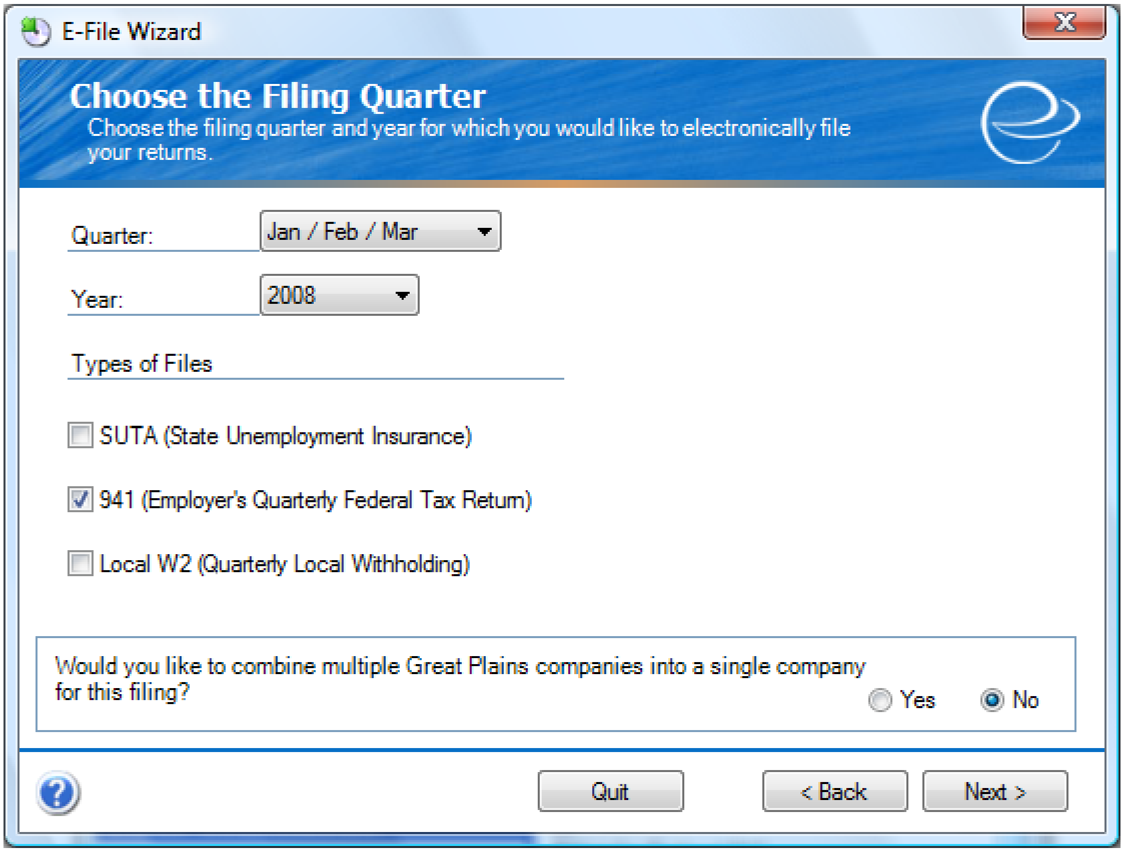
As 941's need to be filed quarterly, you will want to select the radio button next to 'Quarterly Filing'.


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 941 E-File. The company name in your 941 E-File should match the name your company used to register with the IRS for your EIN.

Once you are satisfied with your selections, click 'Next'.

## Step 3 – Choosing your file type and reporting period

Select the tax year that you wish to create your report for. This is the year that payments were made, not the year you are currently reporting in.



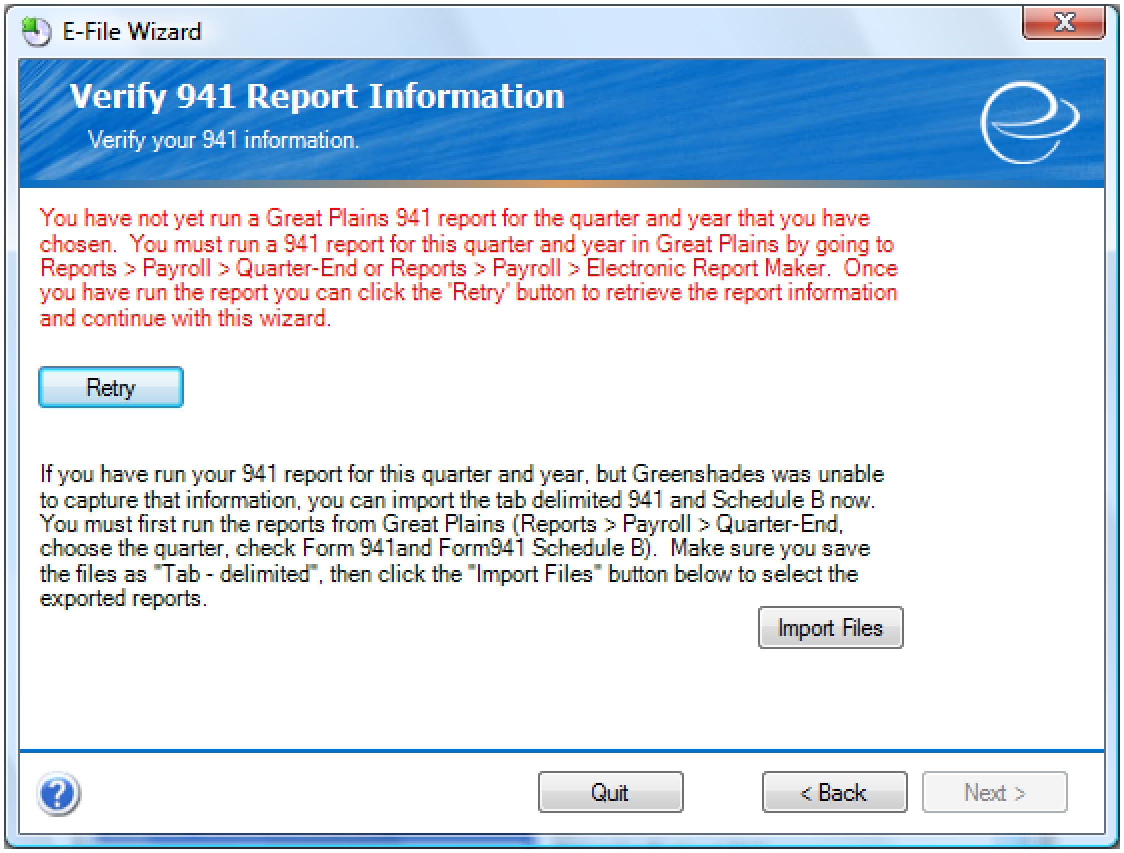

Now select the types of files you wish to build. While you may select options other than 941, this guide only deals with the 941 E-File creation process.

The third option is for combining multiple companies into a single file. This is an additional option for the Greenshades Center and must be purchased for it to be activated. If you have not purchased the combined companies option, this question will be grayed out.

Once you are satisfied with your selections, click 'Next'.

### Step 4a – Verify 941 Report Information (No 941 Data Found)

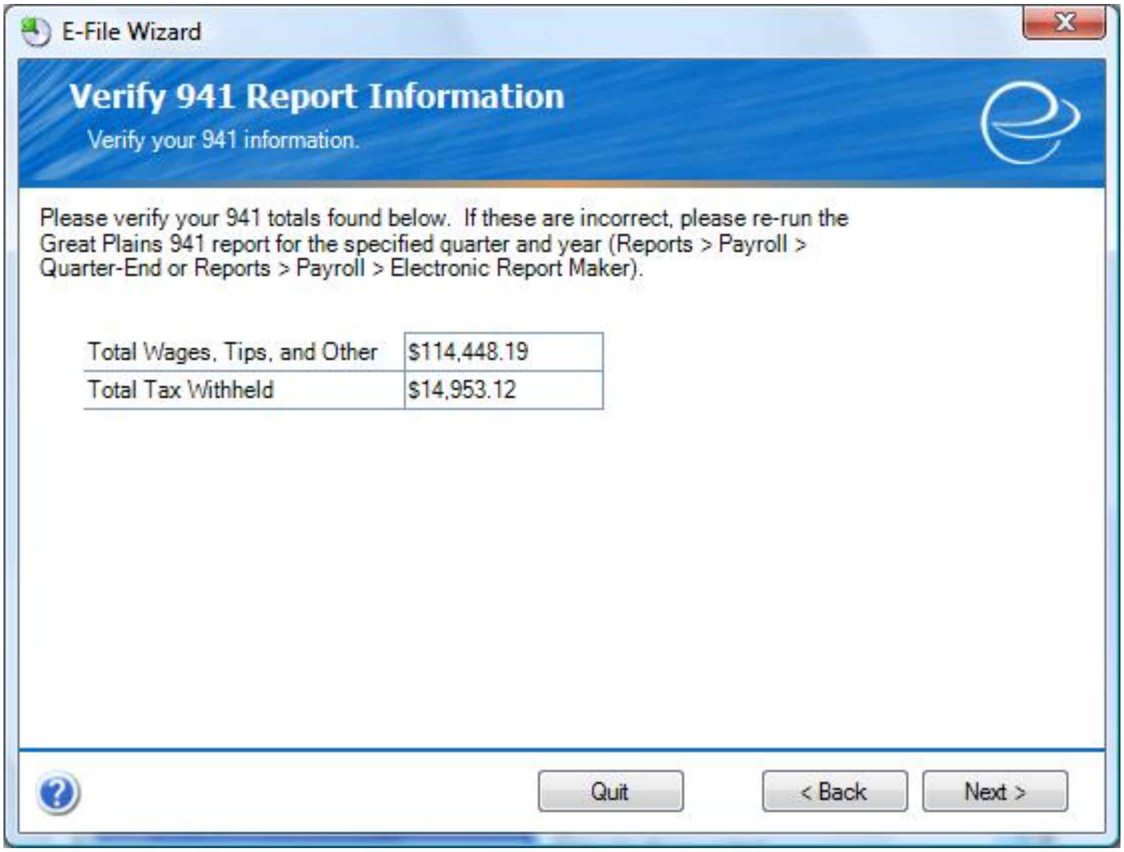
If the 941 report has not yet been run within your accounting software, you will see the message displayed below. At this point you should run the 941 report in your accounting software, as the on screen instructions suggest.




If you have re-run your 941 report while leaving the Greenshades Center open, click ‘Retry’ and your totals should then be displayed. If the Greenshades Center still does not reflect those totals, you still have the option of importing your 941 information. To do this, you will run your 941 report, ensuring that you select both the 941 and 941 Schedule B, and save the file as Tab-delimited. Select the ‘Import Files’ button (shown on the screen above), locate the file you just saved, and click OK.

### Step 4b – Verify 941 Report Information

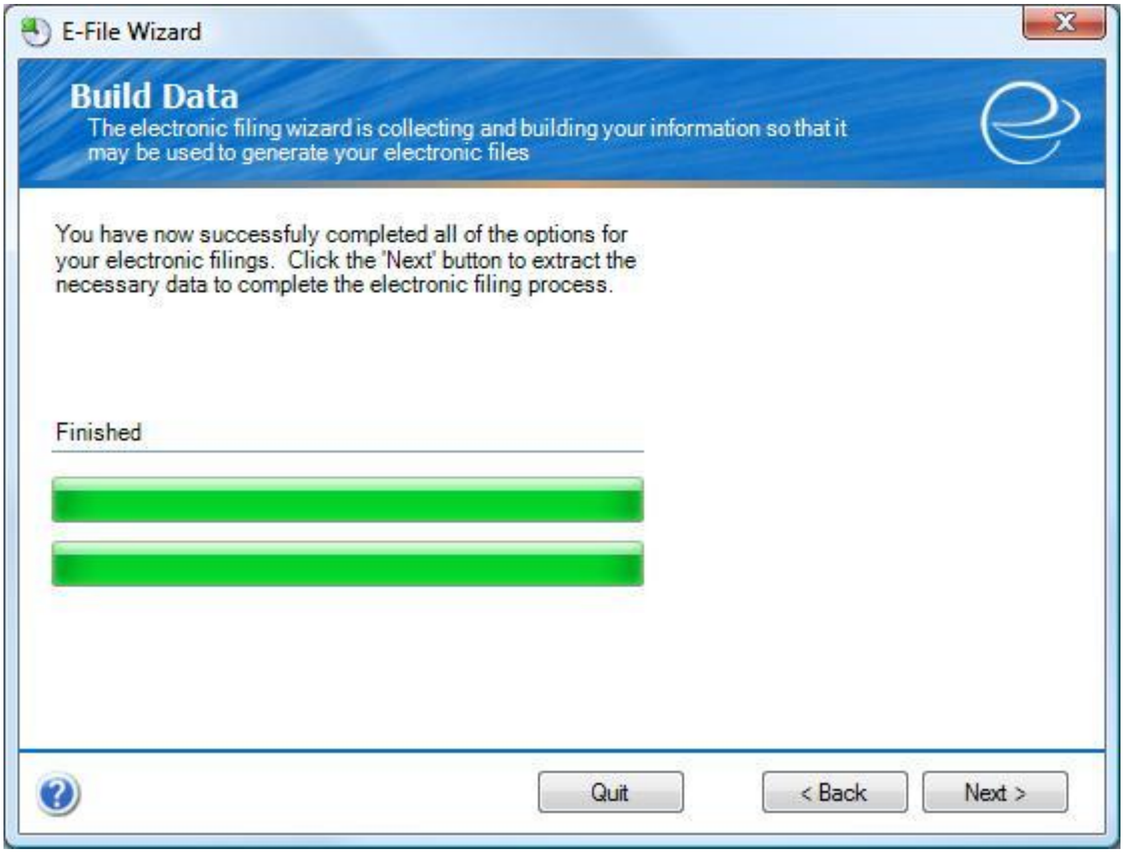
If the 941 report has been run from your accounting software, the Greenshades Center will display the 941 totals, as shown on the screen below. If those totals are not correct, try re-running the 941 report, then quit and restart the E-file Wizard, as this will ensure the Greenshades Center reflects the most recent totals.




Once you are satisfied with the totals, click ‘Next’.

### Step 5 – Build Data

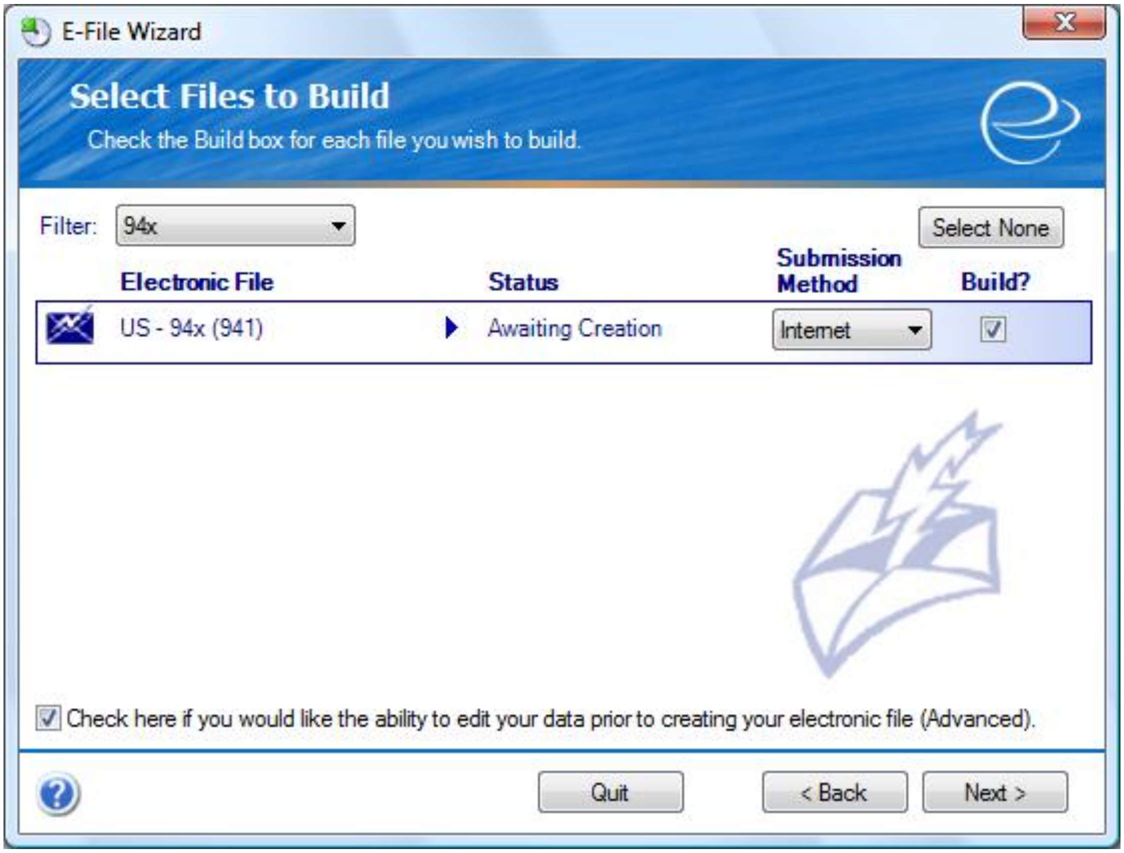
The Build Data extracts your 941 data from your accounting package with the settings you selected in the E-File wizard. When you are ready to export your data, click ‘Next’ to begin the export process. This process may take a few minutes.




**Please note this does not electronically file your data.**

## Step 6 – Select Files to Build

The 'Select Files to Build' screen lets you choose which files you would like create and E-File at this time. Simply place a check in the box shown under 'Build?' next to the file you would like to create.

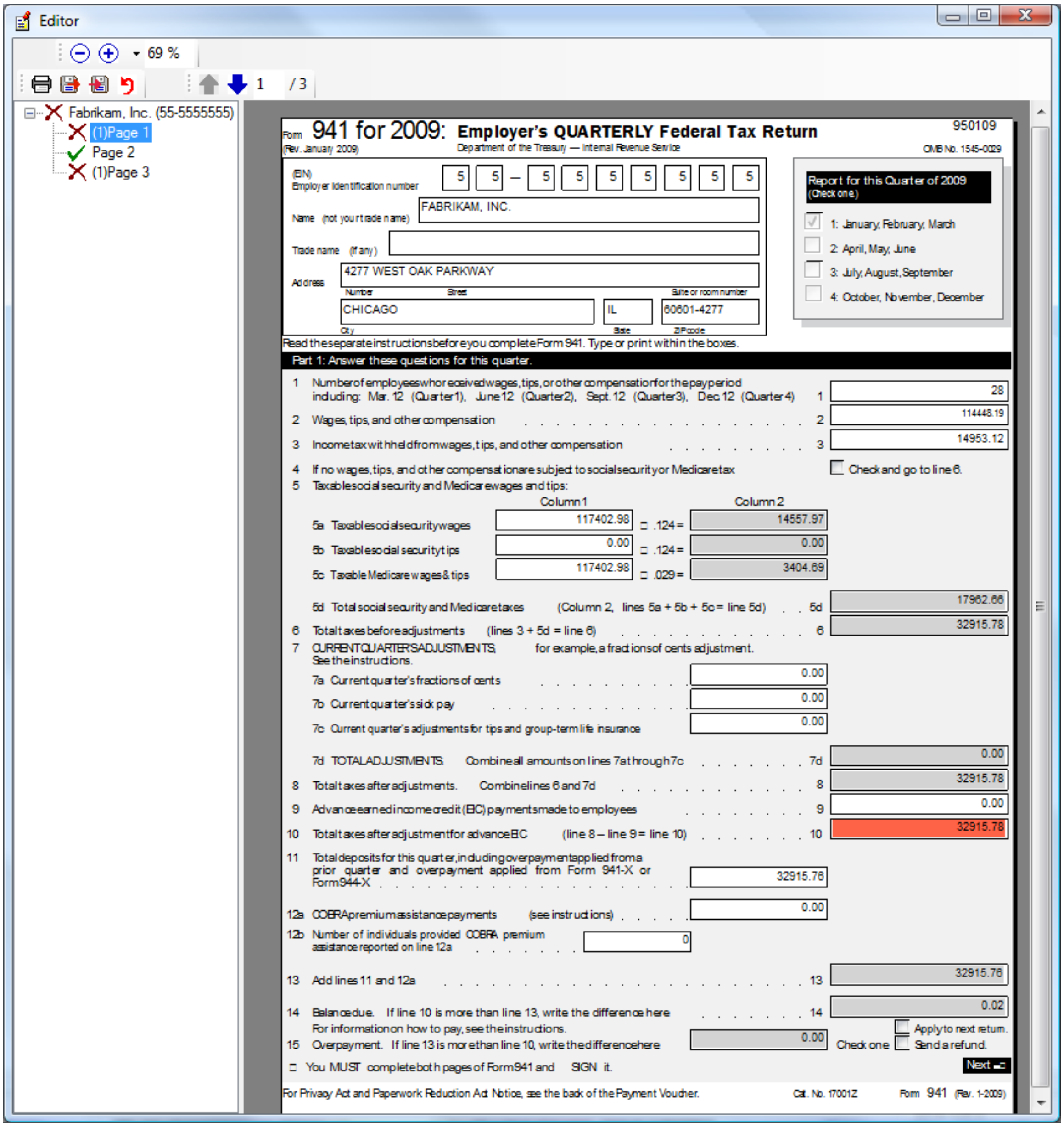



At the bottom of the screen there is an option that will allow you to edit your data during the build process. While this functionality is available to you, it is recommended that 941 edits be made in Dynamics.

Once you are satisfied with your selections, click 'Next'.

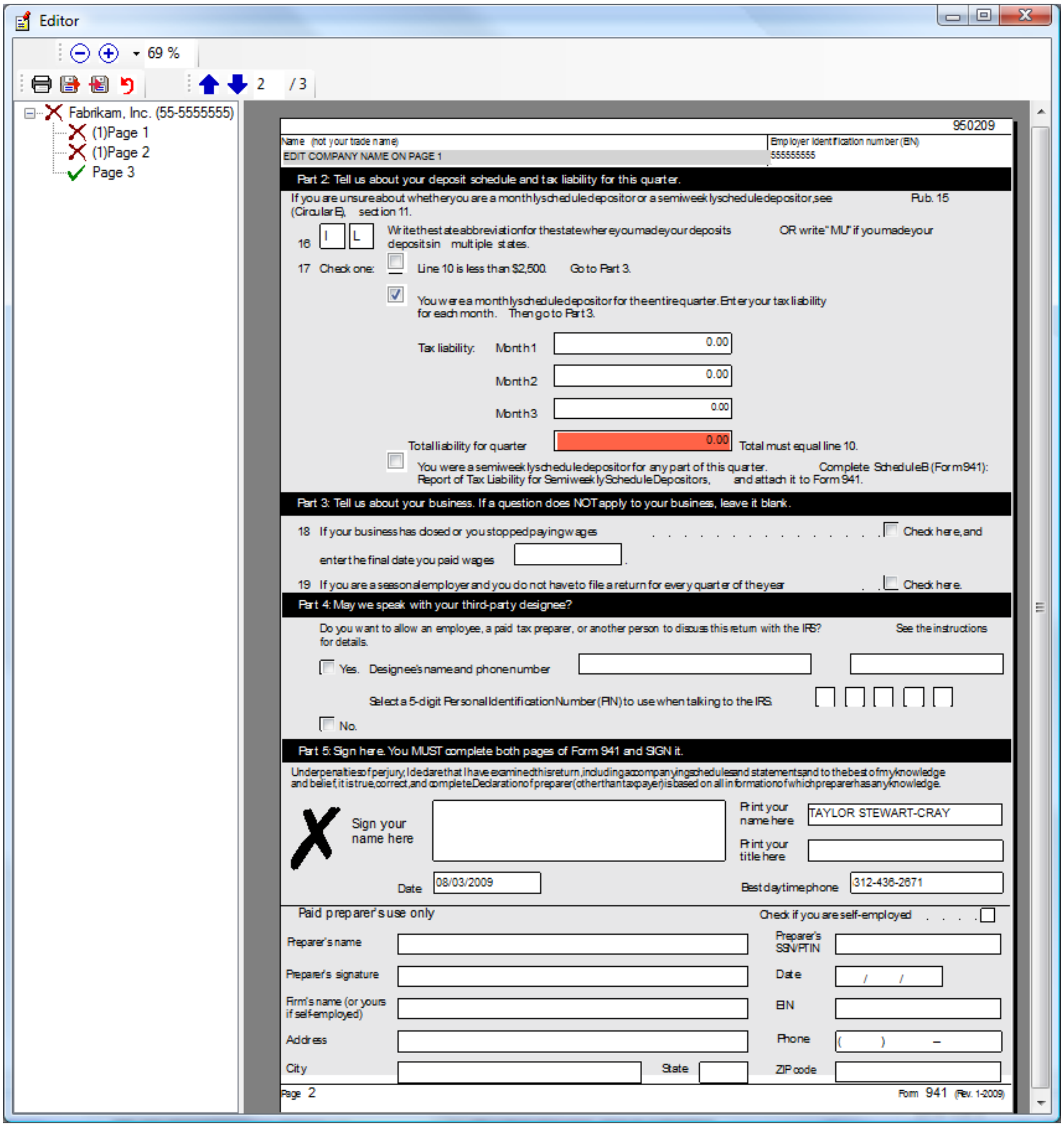
## Step 7a – Using the Advanced Editor to Edit Your 941, Page 1

The screen shown below is the 1st page of the 941 Advanced Editor, as mentioned in step 6. You will notice that the layout mirrors that of an actual 941 form. The fields shown will be populated with your 941 data, which was loaded from the 941 report you ran from Dynamics. As you can see a red "X" may appear which indicates that adjustments will need to be made. Each of the fields in white can be edited, and the fields in gray will be auto-sum accordingly, allowing for any final adjustments before E-filing. However, as stated previously, while this functionality is available to you, it is recommended that 941 edits be made in Dynamics, as editing these fields will not update your Dynamics data.



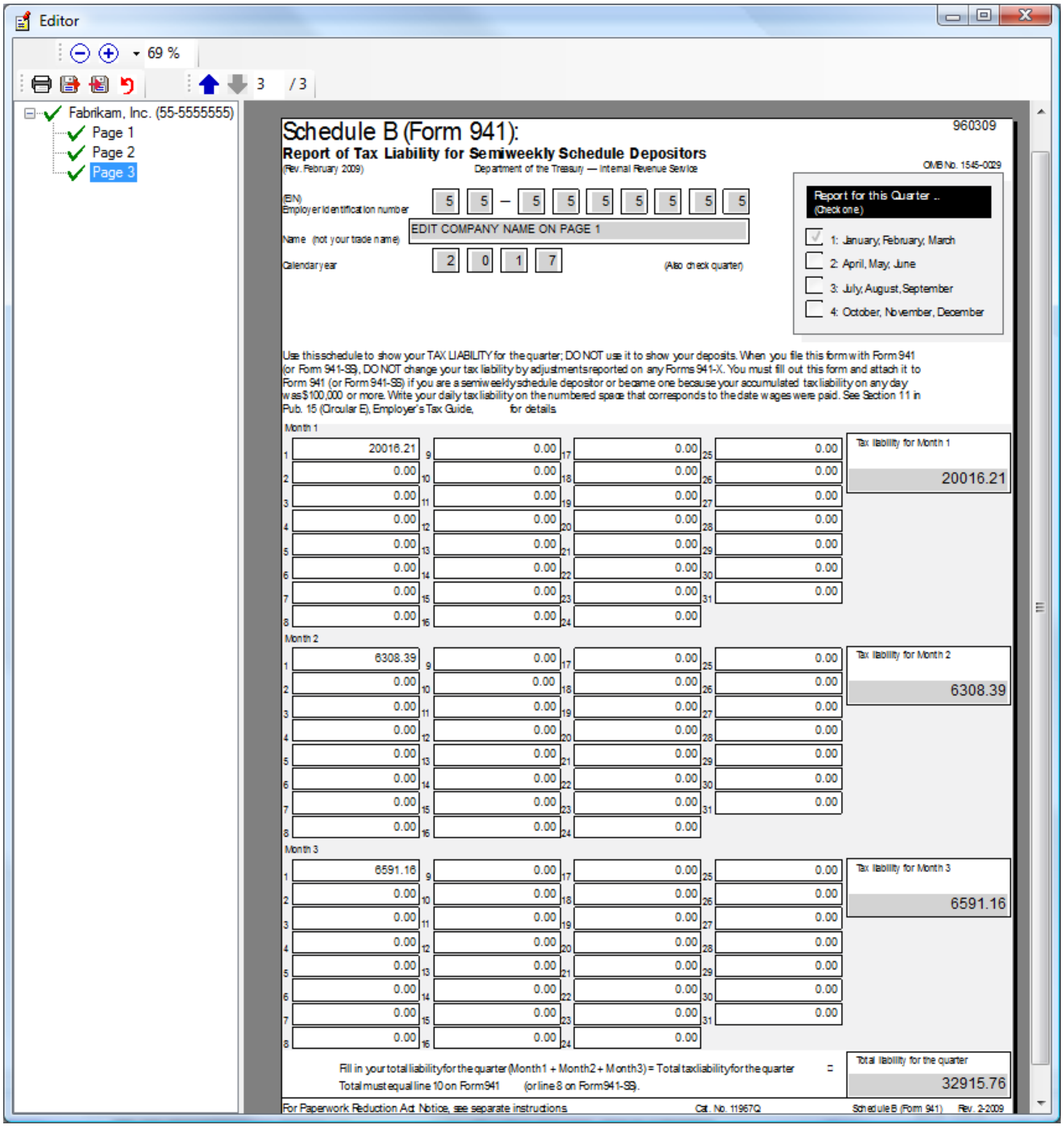
## Step 7b – 941 Advanced Editor, Page 2

Page 2 of the 941 Advanced Editor. As with page 1, all fields can be edited, allowing for any last minute changes before filing to the IRS. Depending on if you are a monthly or a semiweekly depositor make sure it is checked correctly on page 2.



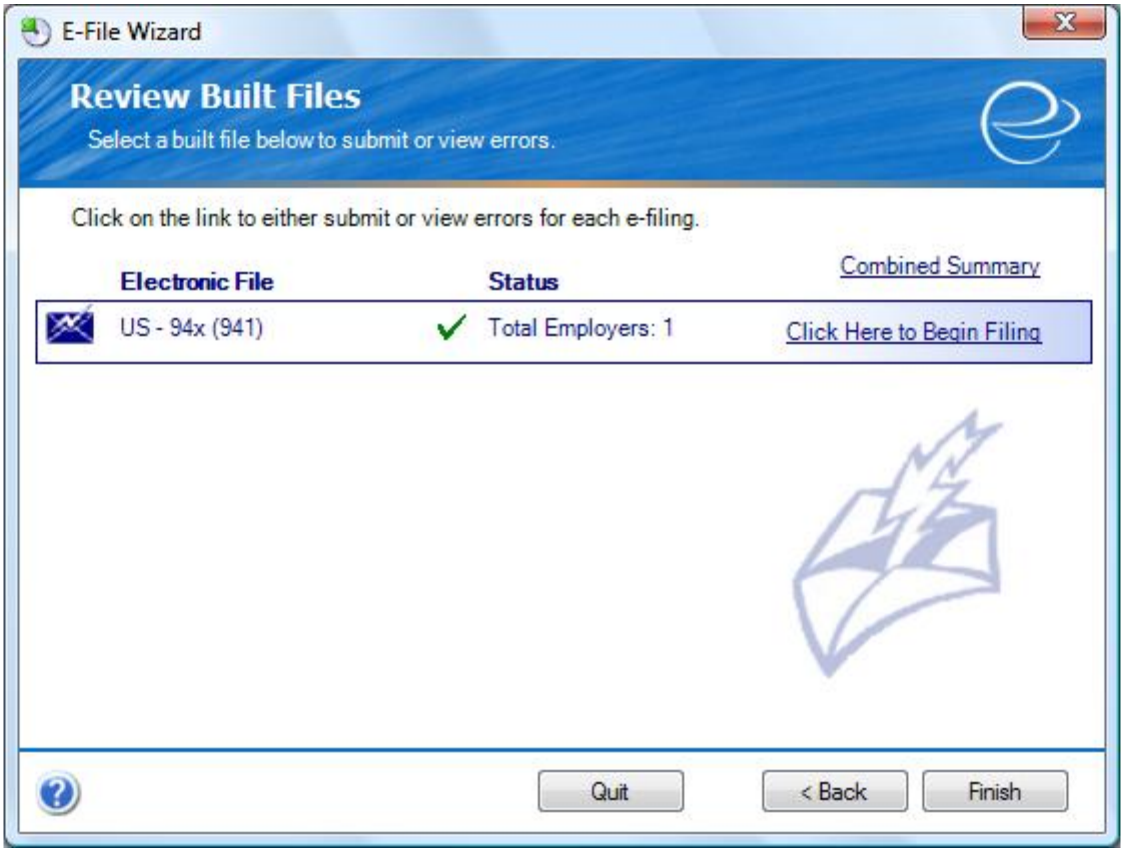
### Step 7c – 941 Advanced Editor, Page 3

Page 3 of the 941 Advanced Editor refers to the Schedule B form. If you are not presented with the Schedule B editor, please ensure that when running your quarter-end payroll report from Dynamics you are selecting the Form 941 Schedule B option in addition to Form 941. If you have not done so, close and quit the Greenshades Center, re-run the quarter-end payroll report from Dynamics and once completed, return to the Greenshades Center and restart the 941 E-file creation, beginning with the E-file Wizard. Once all your data is correct you will appear all green check marks you can print, save a copy of your data, or click the windows red "X" box to save and continue.



### Step 8 – Review Built Files

Your final totals have been calculated and your E-File has been created but not submitted. If your file has successfully been created and your Total Vendors count matches what you expect, you may continue to Step 13 by clicking the link titled "Click Here to Begin Filing".




If your file failed to build you will receive see a link with the option of either "Click Here to Provide Information" or "Click Here to View Errors." Please enter in the required information or make any necessary corrections within Dynamics and rebuild your file.

## Step 9 – View Totals

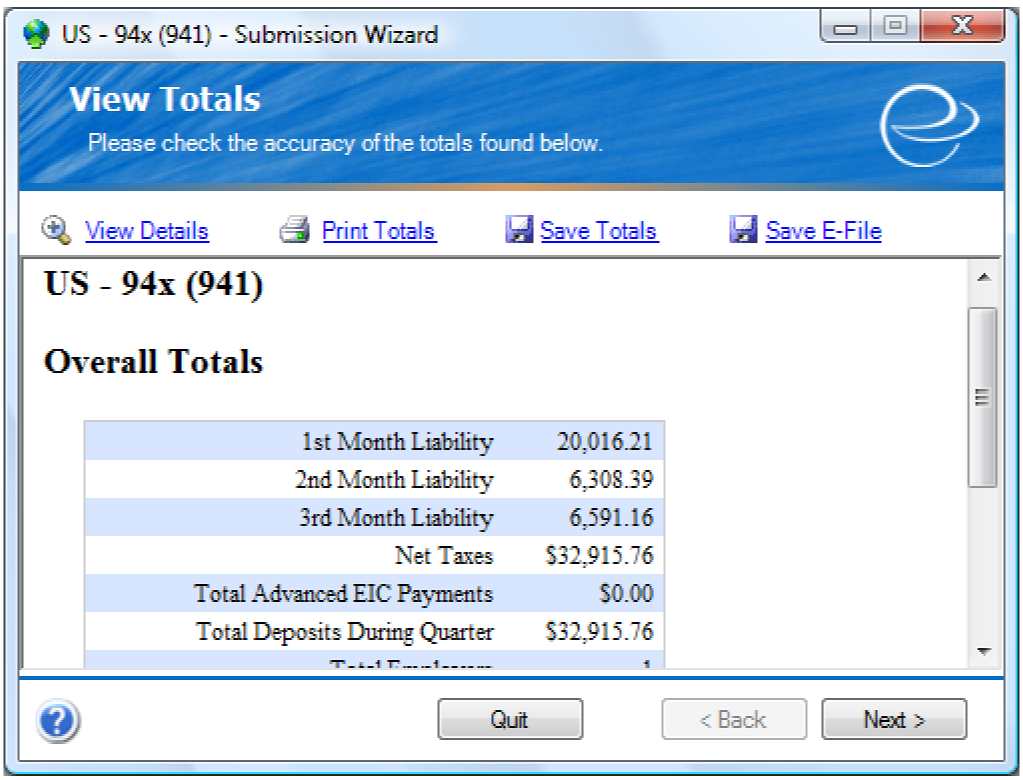
View Totals is an assessment screen providing you with detailed totals for final review before submission. You will notice 4 seperate options displayed above the listed totals. The details for each are listed below:

View Details. With View Details, you can export your 941 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.

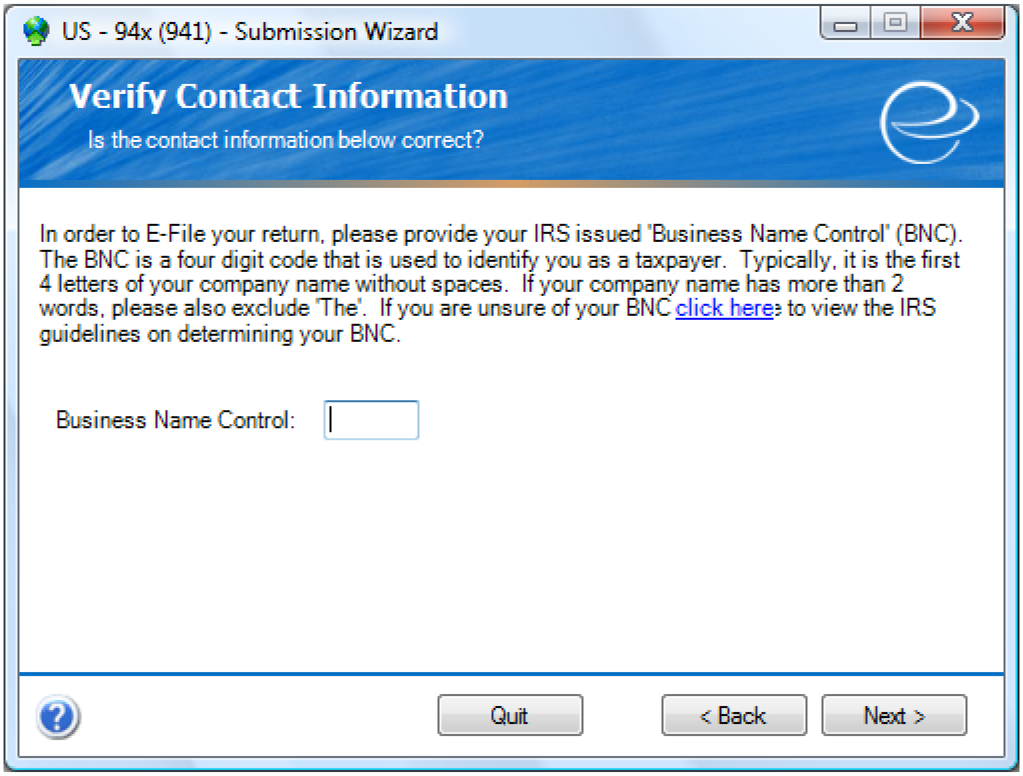
Save E-File. Save E-File allows you to save a copy of the exact electronic file that is going to be submitted to the IRS.




Once you are satisfied your totals are correct, click ‘Next’.

## Step 10 – Business Name Control

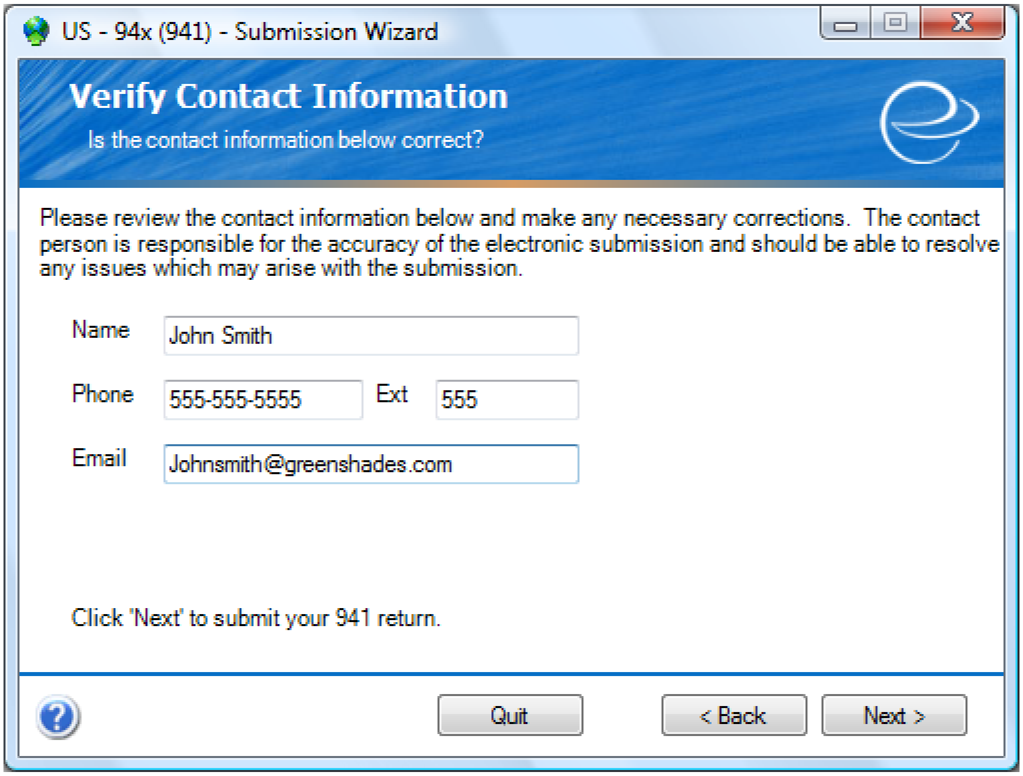
When e-filing, the Employer Identification Number (EIN) and Business Name Control must match the data in the IRS e-file database. Your BNC is usually the 1st four letters of your business name. For example, Greenshades Business Name Control would be GREE. On this screen, you can access the IRS's guidelines on determining your BNC by clicking the 'click here' link. If you have unsure, or have any questions concerning the BNC, please contact the IRS at 1 (800) 829-4933.




Once you are satisfied with your selections, click 'Next'

### Step 11 – Verify Contact Info

The listed fields will need to be completed with the contact information of the person best suited to answer questions concerning the data within the 941 E-file. Please ensure the accuracy of the contact information entered.




At this point, clicking ‘Next’ will submit your 941 E-file to the IRS. If you are ready to submit your 941 E-file, click ‘Next’.

## Step 12 – E-Filing Your File

You have almost completed the E-File process. At this point, your file is being transferred to the IRS and could take several minutes.

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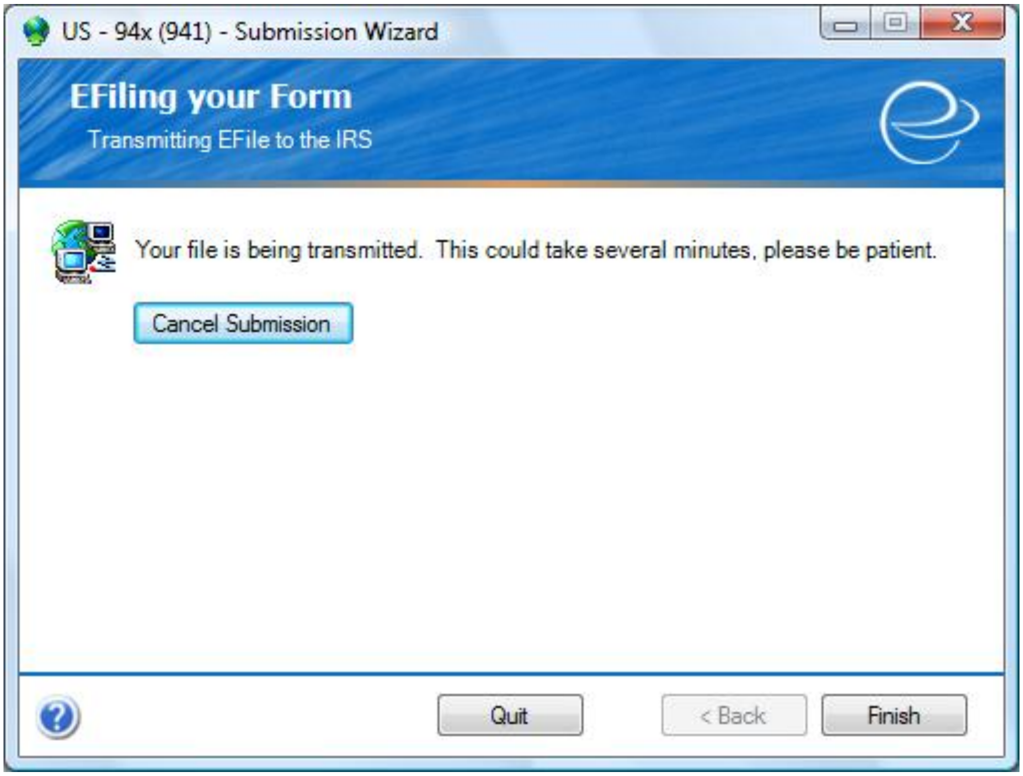
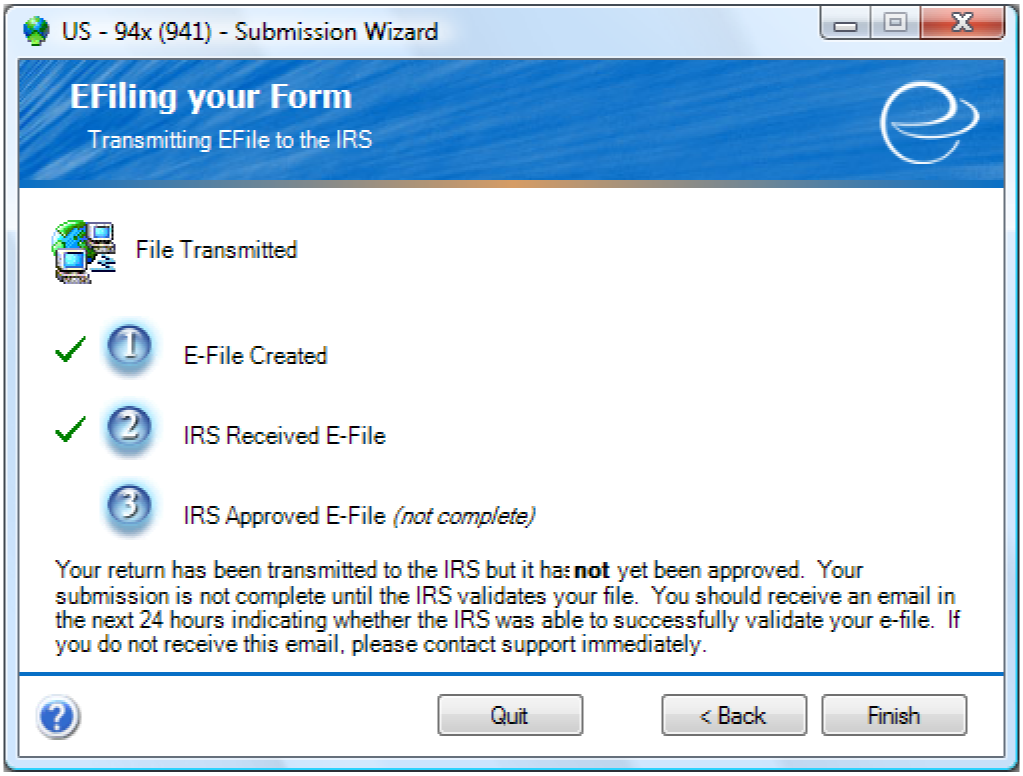



Do not click ‘Finish’ until you see the confirmation screen, stating that your E-file has been transmitted.

## Step 13 – Submission Confirmation

Congratulations! You have successfully created and E-Filed your 941 data to the IRS. The final step in this process will be when the IRS approves of your file.




Click 'Finish', and that completes the 941 E-file creation and submission.

# Frequently Asked Questions

Here we have provided some of our most commonly asked questions. Many of these are problems that people have encountered while running the Greenshades Center and possible workarounds to those problems.

## *How can I get live support?*

Simply call us at (888) 255-3815 ext. 700 or by email us at support@greenshades.com.

## *How can I review my 941 totals after I've submitted them?*

Any time you create a report or produce forms in the Greenshades Center, the final report is stored so that it can be accessed later. By clicking on the 'View Previous Filings' button, you will be presented with a list of media you have previous produced in the Center. Simply double click any report you would like to view and you will be presented with the Totals, Transmittal Information and File that was created originally.

## *How can I verify my file has been successfully filed to the IRS?*

If you used the automatic website submission method, you will receive a confirmation email from Greenshades Software. This email contains your E-File ID which you can use to track your submission status.

If you used the manual website submission method Greenshades is unable to track your submission. When you submit your file to the IRS FIRE site you will receive a confirmation number from their website.

## *Can I submit my 941 file on diskette?*

No, the IRS is no longer accepting E-Files submitted on diskette. If you submit the file Greenshades Center creates for you on diskette or CD your file will be rejected by the IRS.

## *Client feedback:*

Was this guide helpful to you? We would love to hear your feedback. Make our day and let us know! Please send all feedback to support@greenshades.com.