



GREENSHADES

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Dynamics Payroll Inspector Basic User Guide

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1. Introduction

Dynamics Payroll Inspector is designed to scan your payroll and human resources data and alert you to any potential issues within minutes of a change. It can be used to ensure that your employees have a valid mailing address, have an accurate Social Security Number, are being offered health insurance according to the Affordable Care Act, and that they have the correct withholding taxes mapped to them at the correct rates.

Because Dynamics Payroll Inspector is modular, new modules can be added or enabled to scan only what matters to your company. In addition to this, each module can be configured with settings to match your needs.

When you purchase Dynamics Payroll Inspector, the standard modules are included. These are Employee Address Verification and Employee Identity (SSN) Verification.

Additional modules are purchased separately and include:

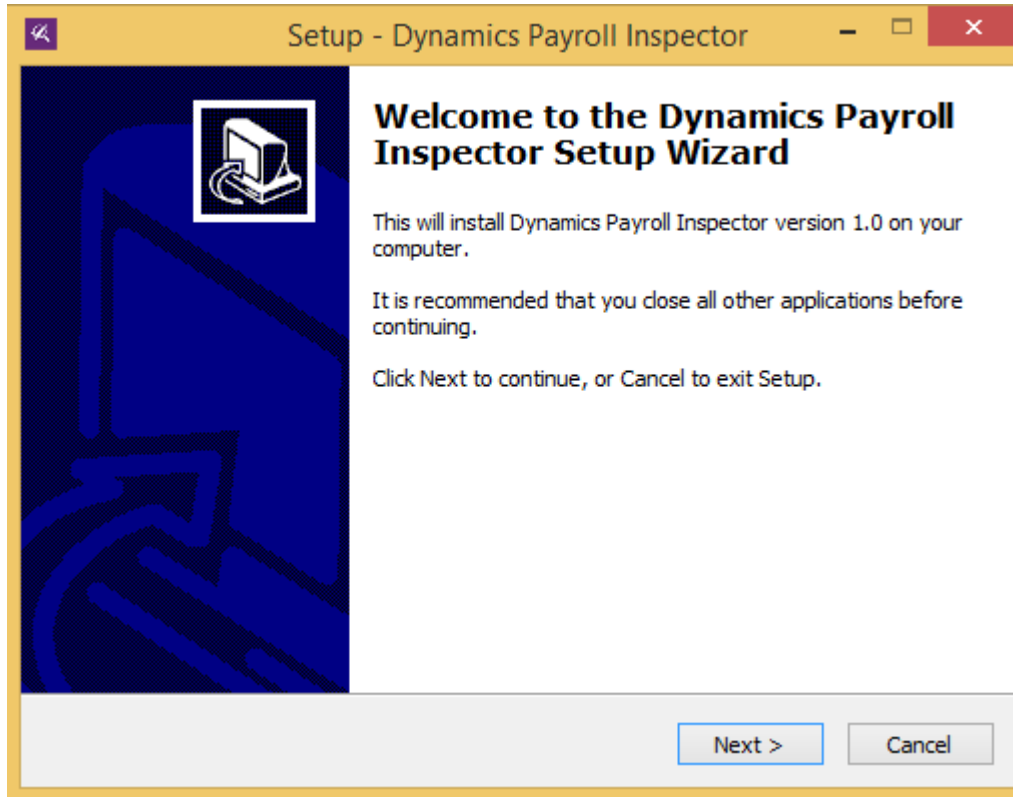
- Affordable Care Act Employee Full-time Status and Coverage Verification
- Employee Tax Code Verification and Local Tax Rate Verification
- Employee Sick Leave Amount Verification

This guide covers the basic usage of Dynamics Payroll Inspector (DPI) and the standard modules.

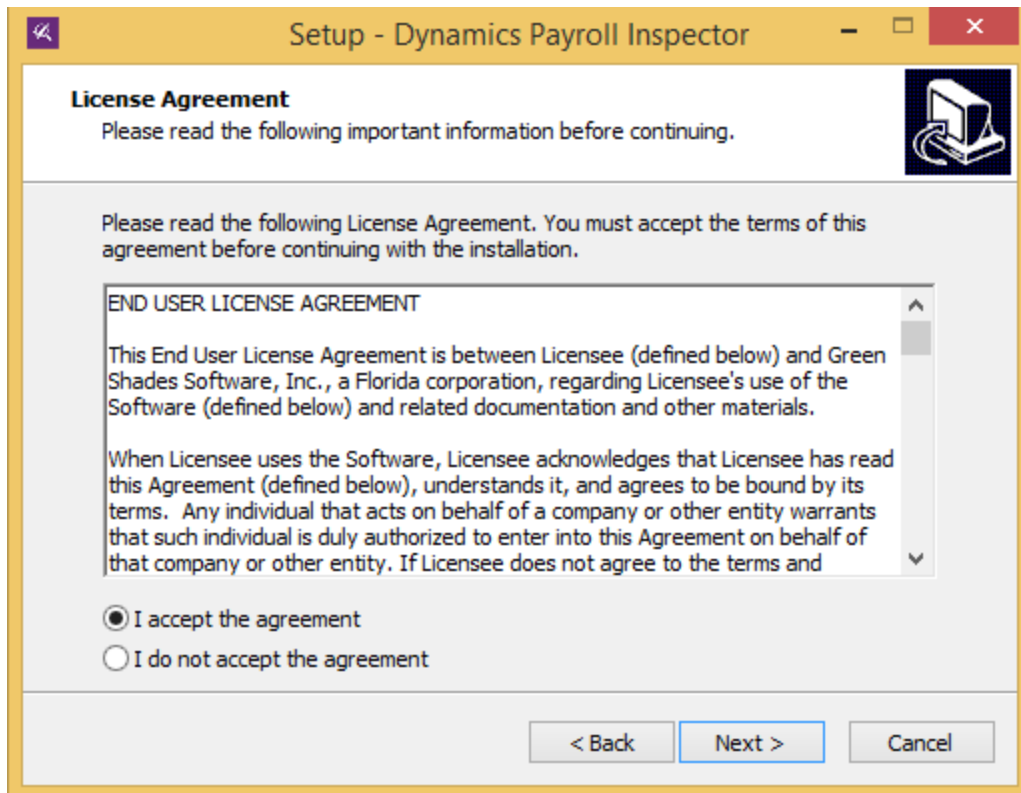
2. Installation and Setup

2.1. Installation

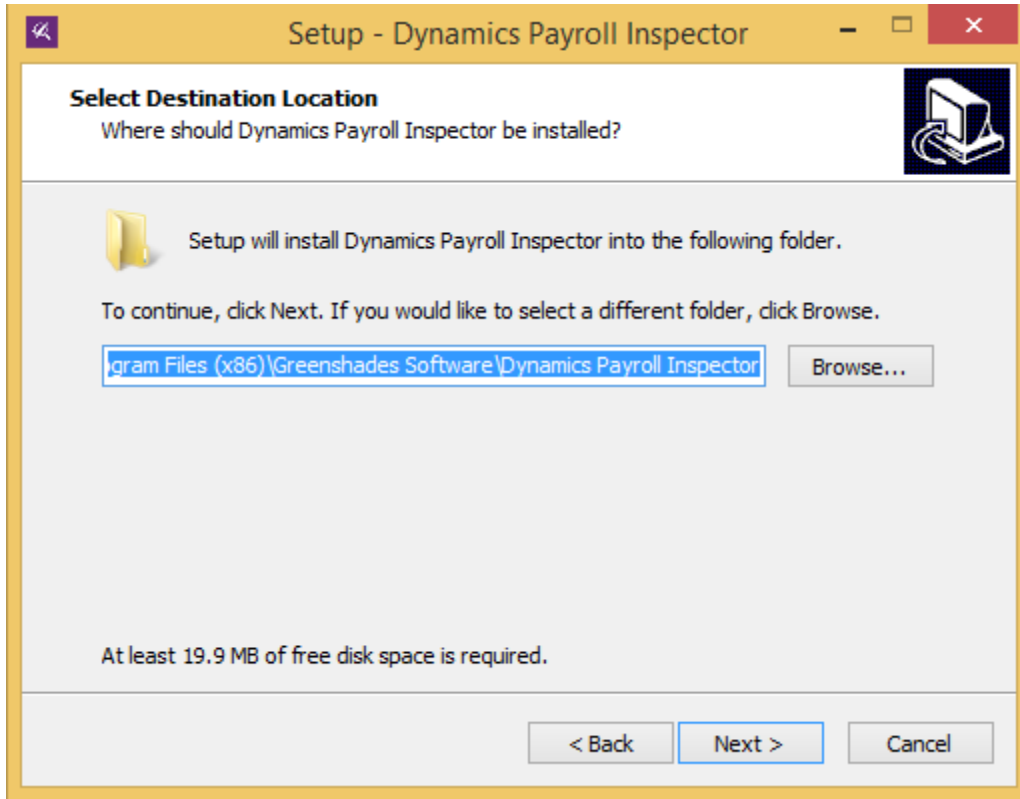
The Dynamics Payroll Inspector is available for download from [Greenshades.com](https://www.greenshades.com). Once you download the installer, follow the installation prompts shown below.



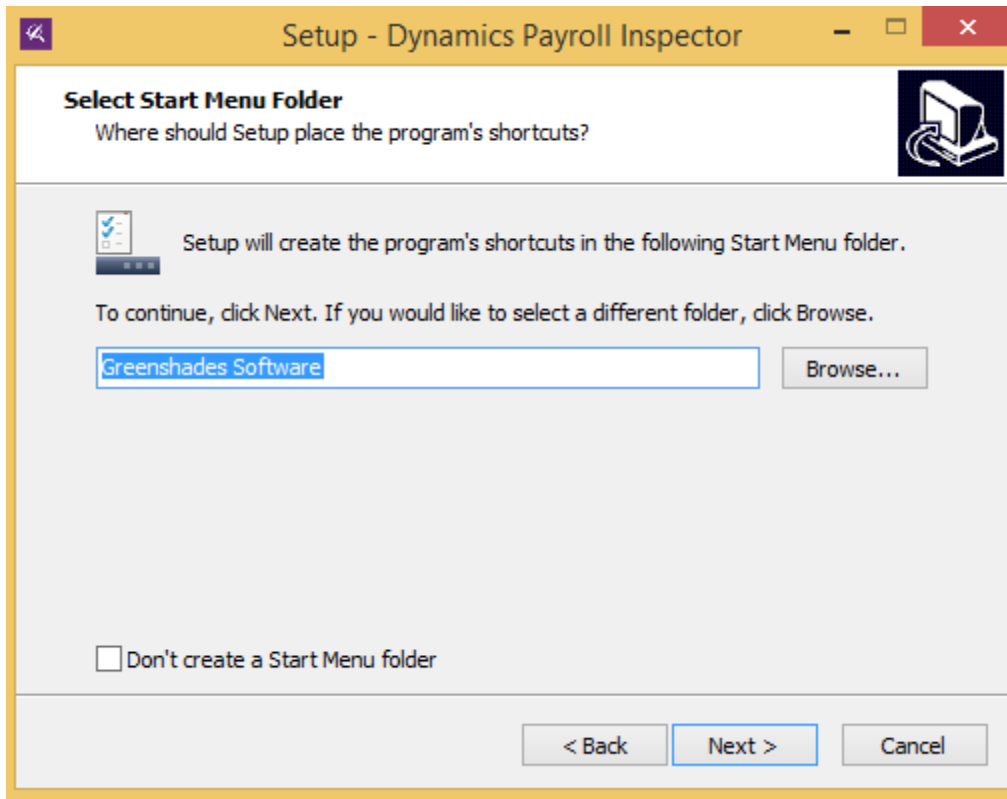
Click Next on this screen to proceed.



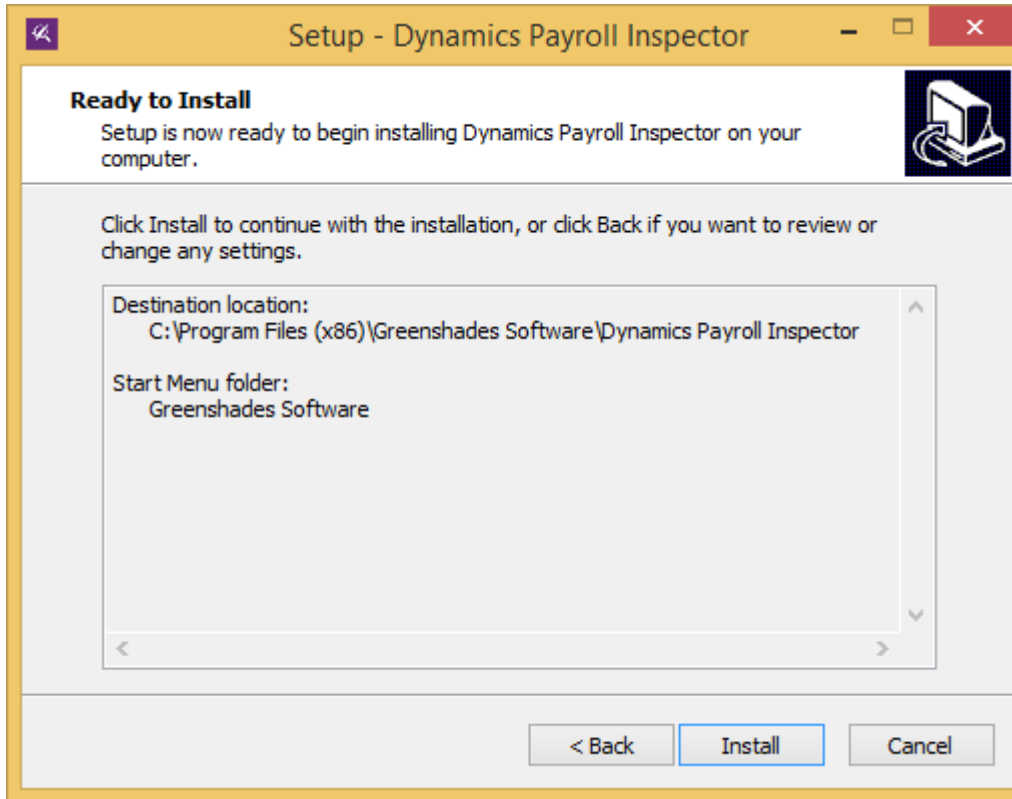
Review the End User License Agreement. Click that you accept the agreement, then click Next to proceed.



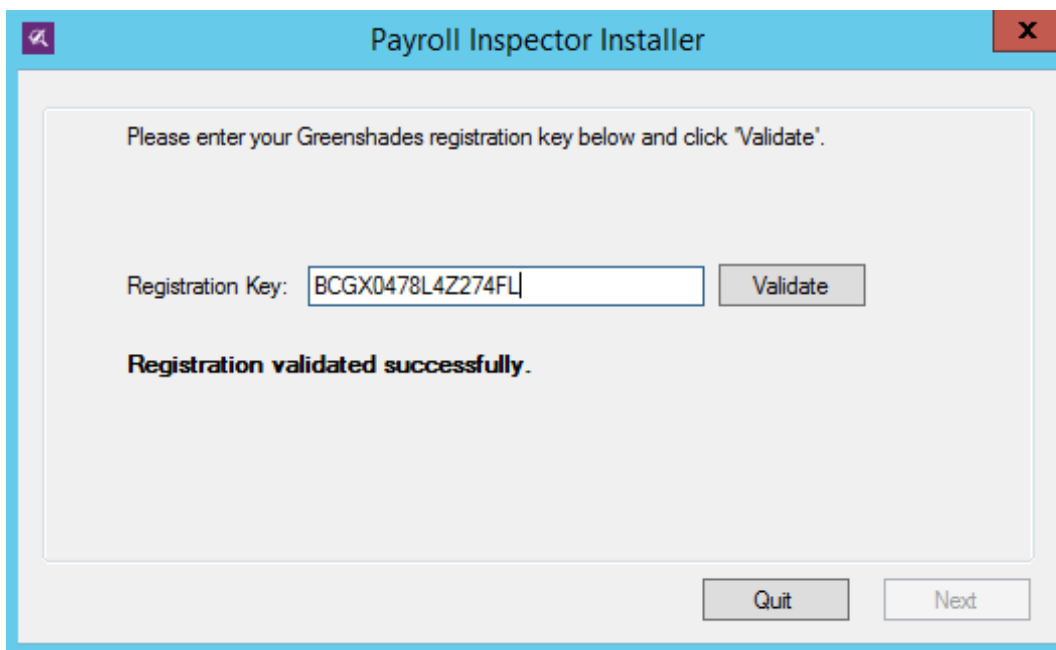
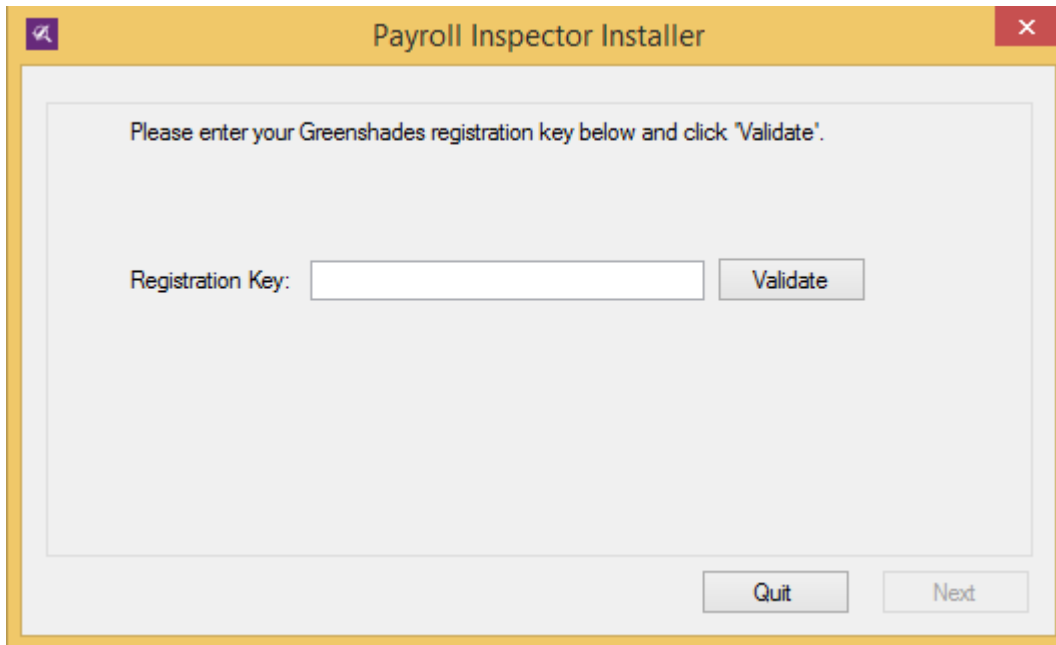
Select the installation directory for Dynamics Payroll Inspector. Unless you have a specific reason, leaving the default path is recommended. Click Next to proceed.



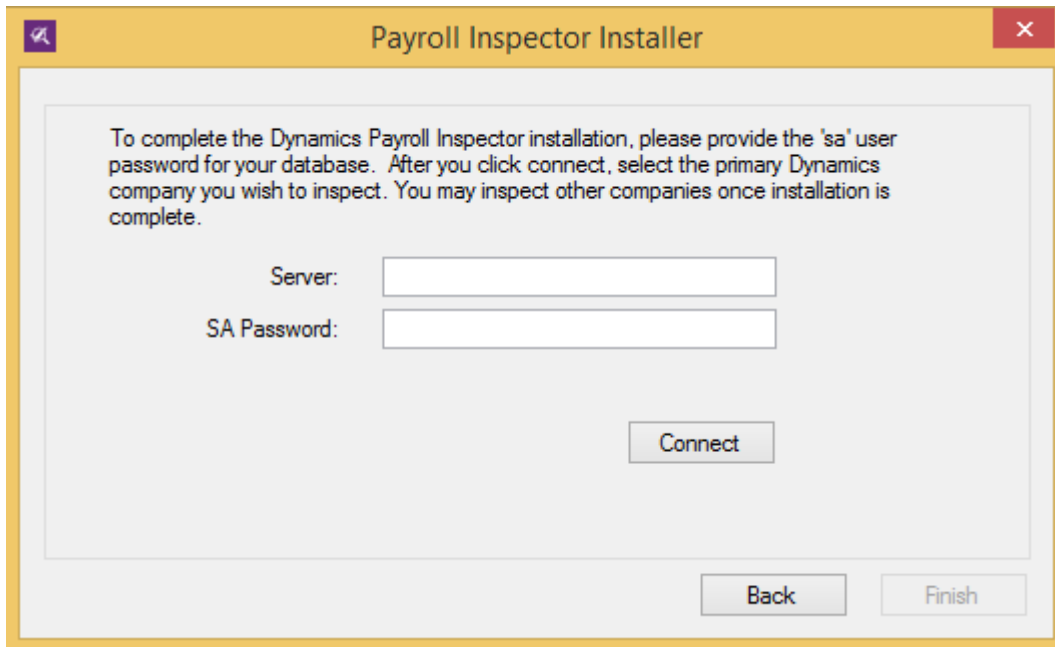
If you would like, select the Start menu folder. Click Next to proceed.



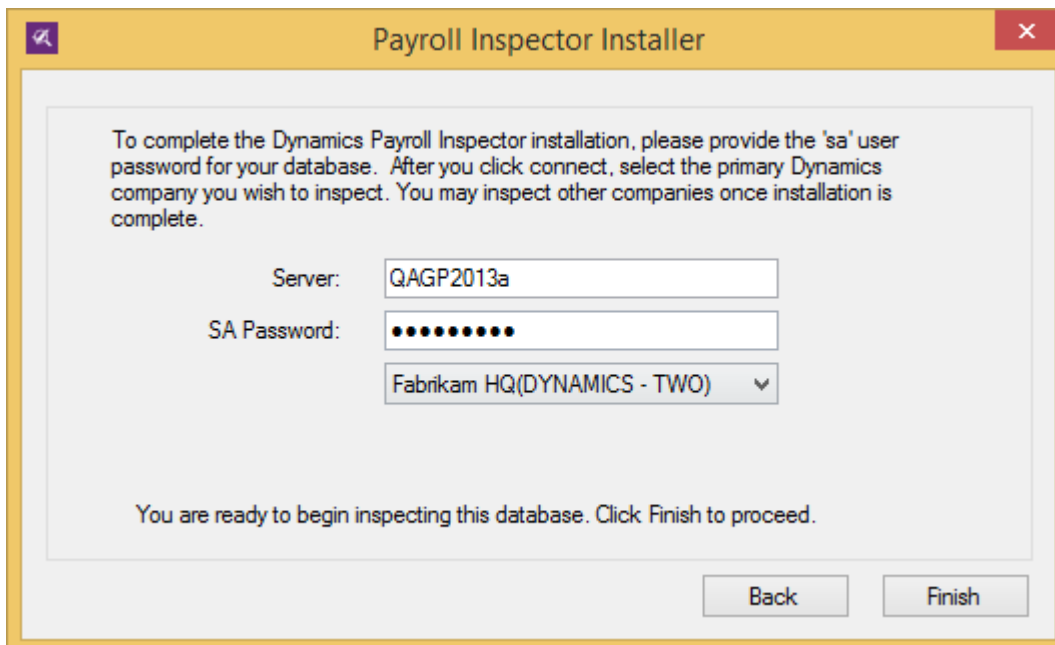
Review the information and click Install to proceed.



During the installation, you will be prompted to enter your Registration Key. This is a company specific key that will be given to you after you have purchased Dynamics Payroll Inspector. If you own other Greenshades products, the registration key is the same one that you use for those as well.



The screenshot shows the 'Payroll Inspector Installer' dialog box. It has a yellow title bar with a search icon on the left and a close button on the right. The main content area contains the following text: 'To complete the Dynamics Payroll Inspector installation, please provide the 'sa' user password for your database. After you click connect, select the primary Dynamics company you wish to inspect. You may inspect other companies once installation is complete.' Below this text are two input fields: 'Server:' and 'SA Password:'. A 'Connect' button is positioned below the 'SA Password' field. At the bottom of the dialog, there are 'Back' and 'Finish' buttons.



The screenshot shows the 'Payroll Inspector Installer' dialog box with the fields filled. The 'Server:' field contains 'QAGP2013a'. The 'SA Password:' field contains a series of black dots. Below the password field is a dropdown menu showing 'Fabrikam HQ(DYNAMICS - TWO)'. The text at the bottom of the dialog now reads: 'You are ready to begin inspecting this database. Click Finish to proceed.' The 'Back' and 'Finish' buttons are still present at the bottom.

To complete the installation, Dynamics Payroll Inspector needs to connect to your Dynamics GP database. This must be done initially as the system administrator account. The accounts used to run Dynamics Payroll Inspector can be changed later to a different account. You will not be asked to enter the SA password again.



Click Finish to finalize the installation and launch Dynamics Payroll Inspector.

2.2. Setting Folder Permissions

In order for Dynamics Payroll Inspector to function properly, it is essential to ensure that Windows users have the correct folder permissions setup. In general, you can apply the proper permissions to the entire Greenshades Software folder and let the settings cascade into any of the product sub-folders.

To do this, navigate to C:\Program Files (x86)\ and find the Greenshades Software folder then right click on the Greenshades Software folder and click Properties.

Go to the Security tab and click the “Edit...” button.

Note: There may be a Windows UAC prompt, and you may be prompted to enter an Administrator password.

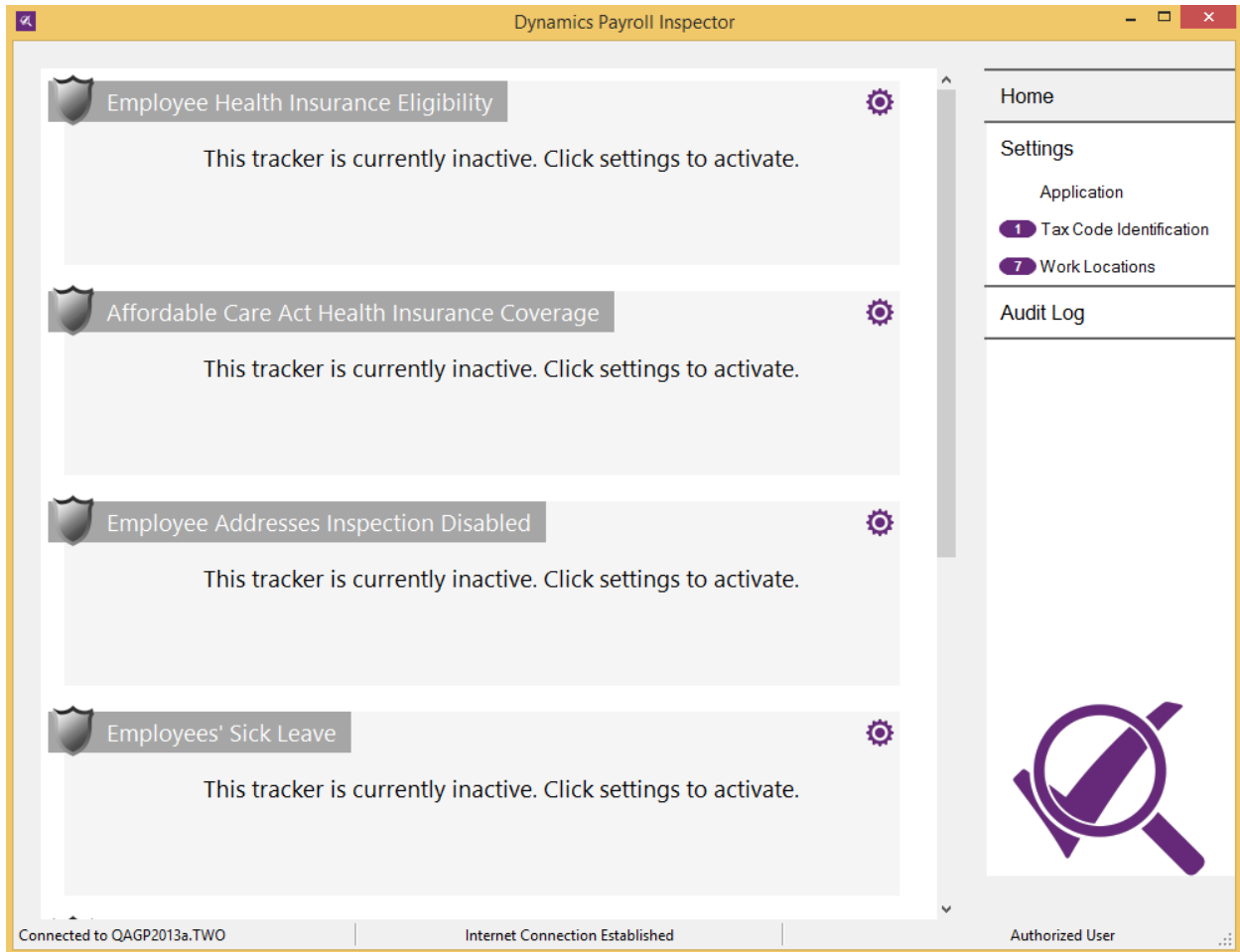
Select the User group you would like to modify and then click the “Allow” checkbox for Full Control. Click OK to close the window and then click OK once more to close the Properties window.

You should now have proper permissions set to use Dynamics Payroll Inspector as well as other Greenshades Software applications.

3. Using Dynamics Payroll Inspector

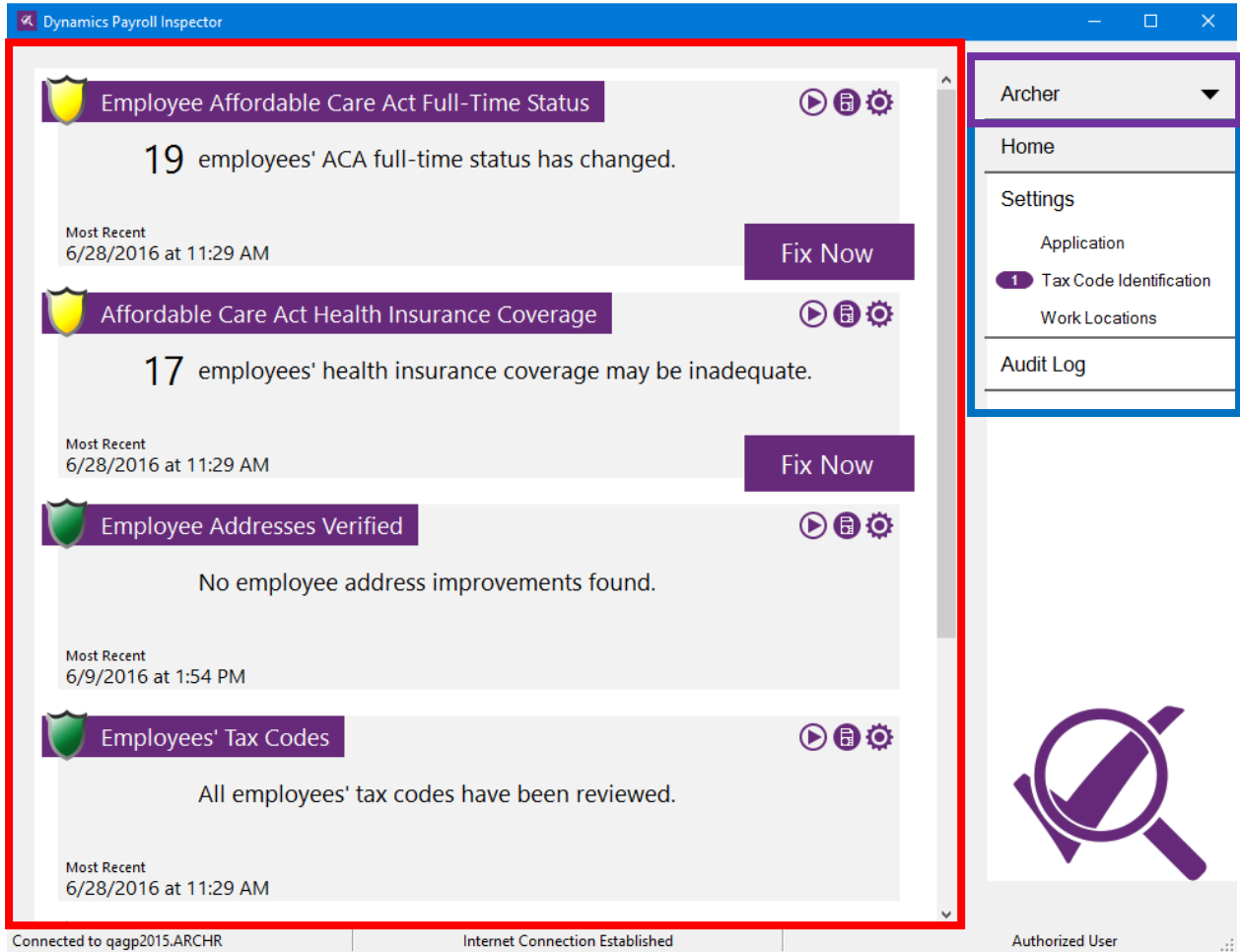
When you first launch Dynamics Payroll Inspector, all of your widgets will be disabled as shown below. As you enable each widget, they will automatically begin to scan.

Note: If you are using the Local Tax functionality, it is important that you identify your tax codes and geocode your work locations first. This will ensure that Dynamics Payroll Inspector doesn't create new tax codes for employees who are already properly mapped.



3.1. Home Screen and layout

The following is an example of the Dynamics Payroll Inspector home screen.



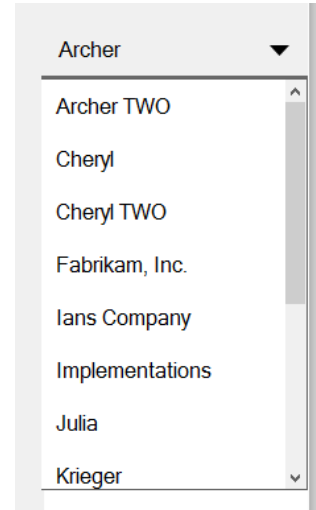
Dynamics Payroll Inspector has been designed so that you can access your widgets and settings all within a couple of clicks. The widgets are displayed in the main section, which is surrounded by a red box in the image above. The main navigation is surrounded by a blue box. The purple box is highlighted where you are find which company you are currently inspecting.

3.2. Switching Companies

In the top right corner of the Dynamics Payroll Inspector window, you can find a drop-down menu that lists companies within your Dynamics GP database. Click this drop-down menu and select a company to switch companies.

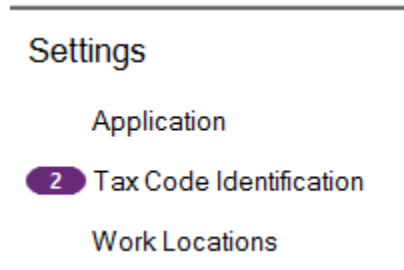
You will be presented with a prompt confirming your selection and, if any trackers are running, notifying you that they will be canceled before switching companies.

! Note: If you have opted to use non-sa users with Dynamics Payroll Inspector, this drop-down menu will only show you companies to which you have permission to access.



3.3. Main Settings

The Settings panels can be found on the right-hand side of the main Dynamics Payroll Inspector window. You can click on any of the sub-items to access the corresponding settings panel and click “Home” to return back to the main screen. The Application settings allow you to switch company databases. The Tax Code Identification and Work Locations settings are used if you own the Tax Assignment and Local Tax Rate widgets.



3.4. Widget Basics

3.4.1. Widget Menu



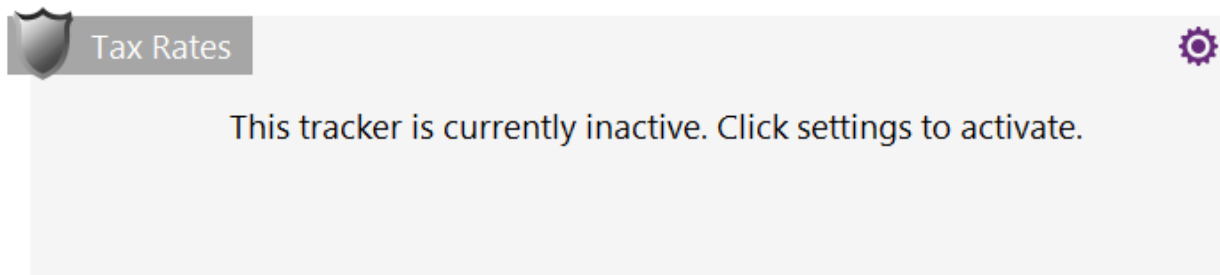
Each widget has its own menu, which is in the top right hand corner. This menu has three options: Run, Reports, and Settings (in that order). The Run button will trigger the widget to inspect your data and produce fresh results for you. The Reports button will show you which reports are available for that widget and allow you to

download them. The Settings button will take you to that widget's settings menu. Each widget's settings are a little different.

3.4.2. Widget States

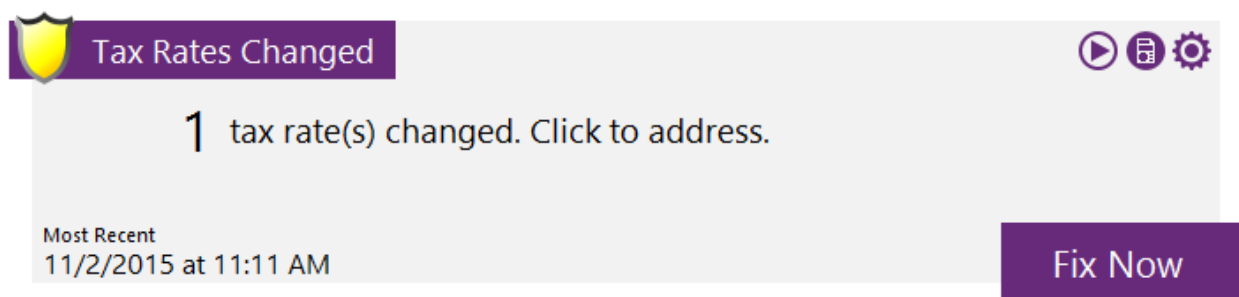
The widgets are in different states based on whether it is disabled, running, alerting you to something, found nothing, etc. Depending on the state, you will have different options.

3.4.2.1. Disabled



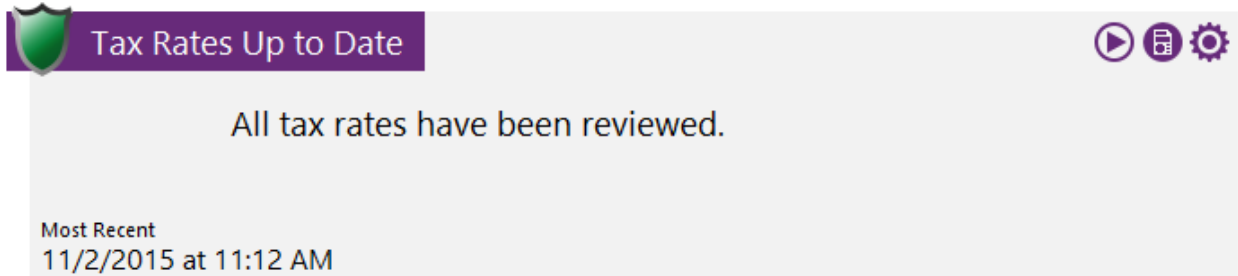
In the disabled state, the widget is not currently inspecting your data. If you wish to enable it, click on the Settings menu and check the box which says "Tracker is Active?".

3.4.2.2. Alerting



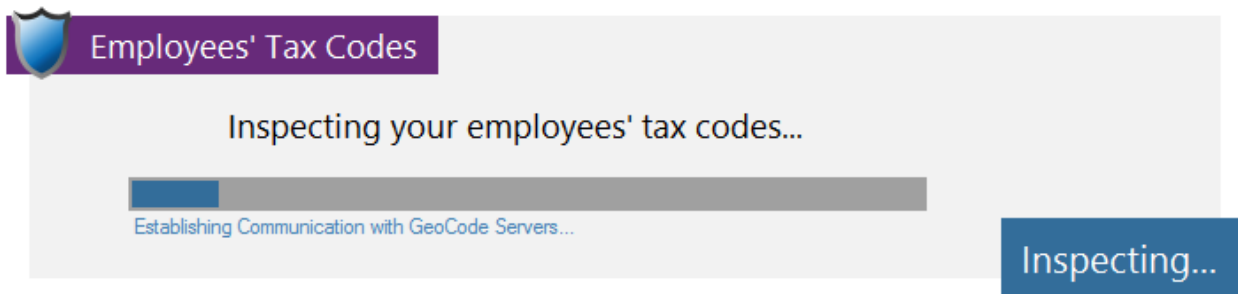
The widget is in the Alerting state when it has found something that needs your attention. The widget believes something is wrong that you may want to fix. Clicking Fix Now will launch that widget's Resolution Wizard. This widget will explain the results and give you options to resolve the problem.

3.4.2.3. OK



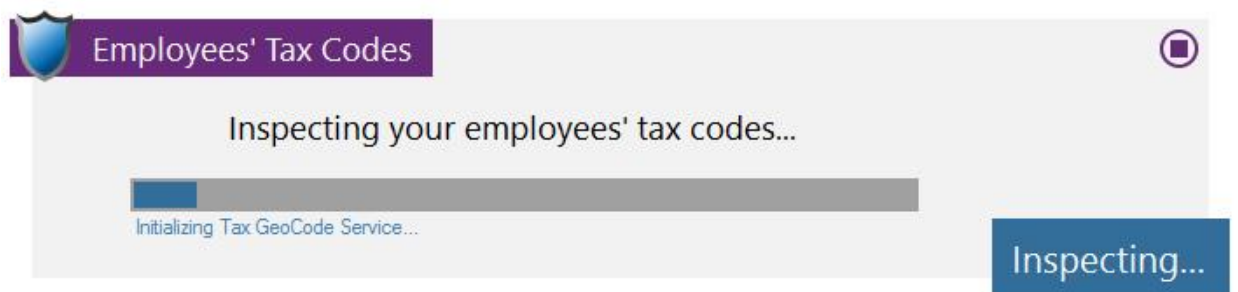
The OK state means that the widget did not find any issues during its last run. If the timestamp in the lower left corner is from a long time ago, you may wish to rerun the widget by clicking the Run button.

3.4.2.4. Inspecting



The Inspecting state tells you that the widget is currently inspecting your data and will be done shortly to report to you its results. There is nothing for you to do when the widget is inspecting.

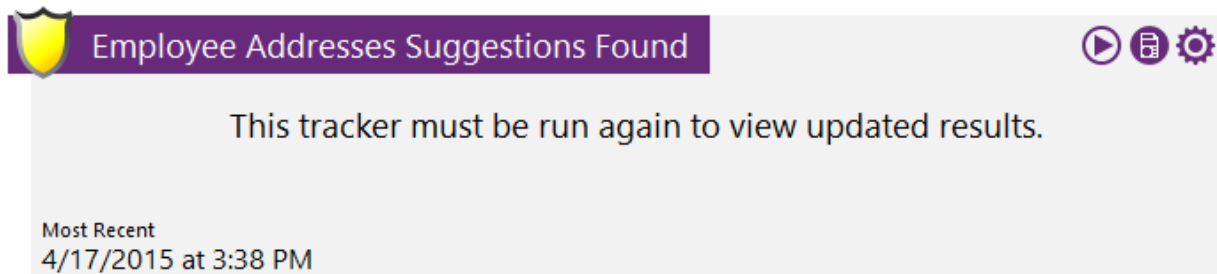
3.4.2.5. Cancelling



Widgets that are in the inspecting state can be cancelled. Once a widget begins inspection, you will see a stop button appear in the top right corner of the widget. If you click the stop button, the tracker will begin the cancellation process. This may take a few seconds, but will return the tracker to the most recent fully scanned results.

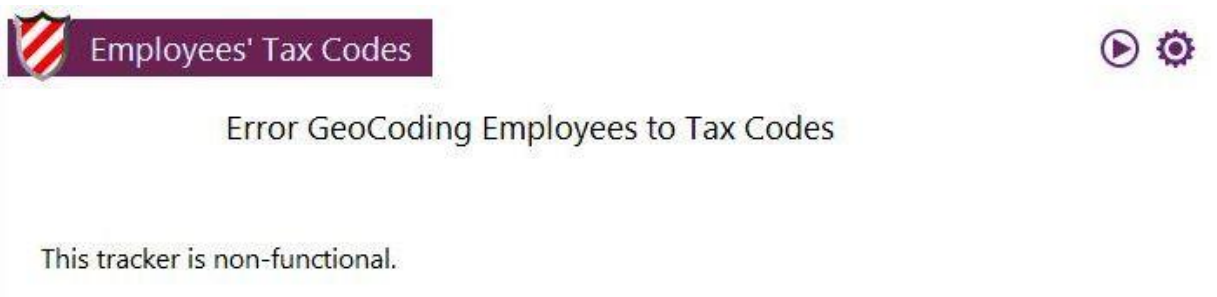
Cancellation will automatically occur for all widgets if you choose to change companies or close Dynamics Payroll Inspector while inspections are occurring.

3.4.2.6. Out of Date



The Out of Date state is telling you that the latest results are old and no longer valid. Click Run to re-inspect your data.

3.4.2.7. Errored



The Errored state means something went wrong when the widget was inspecting your data. When this happens, first try to reset the widget. Click on the Settings button and reactivate the widget to run it again. If it doesn't run automatically, click on the Run button to have it try and inspect again. If the error persists, see the [Troubleshooting](#) section for more steps.

3.5. Basic Behaviors

3.5.1. Updates

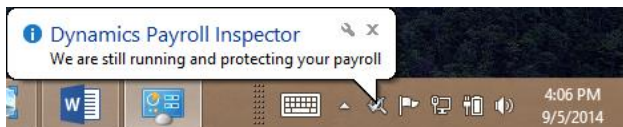
The Dynamics Payroll Inspector is designed to automatically update as it sees new files are released. It will only download updates when the application is minimized to the system tray for at least 5 minutes. This is done so that it won't interrupt any scans or results you may be working with.

Upon update, Dynamics Payroll Inspector will download the necessary files, close itself, and automatically relaunch. No action is necessary on your part.

If you would like to manually check for updates, you can do so by right clicking on the Dynamics Payroll Inspector system tray icon and then clicking on "Check for Updates". A new window will pop up and look to see if there are any updates needed. If there are, it will notify you and ask if you would like to apply them. If you tell it to apply updates, it will download these updates, close Dynamics Payroll Inspector, apply them, and restart the application. Finally, after the application has launched, you will see a window confirming successful application of the updates with a link to view a changelist.

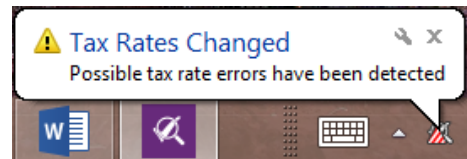
3.5.2. Always Running

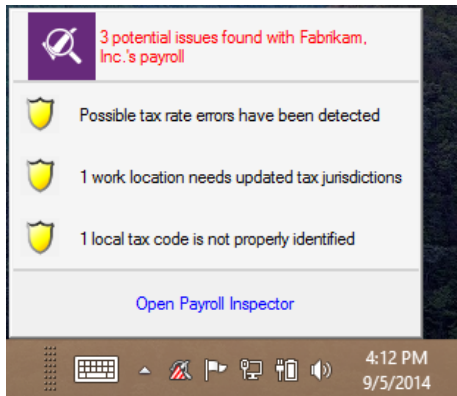
Dynamics Payroll Inspector is designed to always stay open on your workstation. Because of this, it can stay out of your way until you need to make any corrections. When you close the main window, the application will simply hide in your Windows System Tray (bottom right corner of your screen, near the clock).



3.5.3. System Tray Interaction

If any widgets find an issue within your payroll data, a bubble will pop up to notify you. In addition to this, the icon will change to include an alert symbol in case you miss the pop up bubble.






A single left-click on the icon will bring up a context menu that lists the various alerts that have been found.

From here, you can see a summary of the issues and click a link to open Dynamics Payroll Inspector. Note that you can bypass this menu by simply double-clicking on the icon.

Finally, right-clicking on the icon will bring up a different menu that allows you to open the main window, upload data (should request assistance from Greenshades Support), and Exit the application altogether.

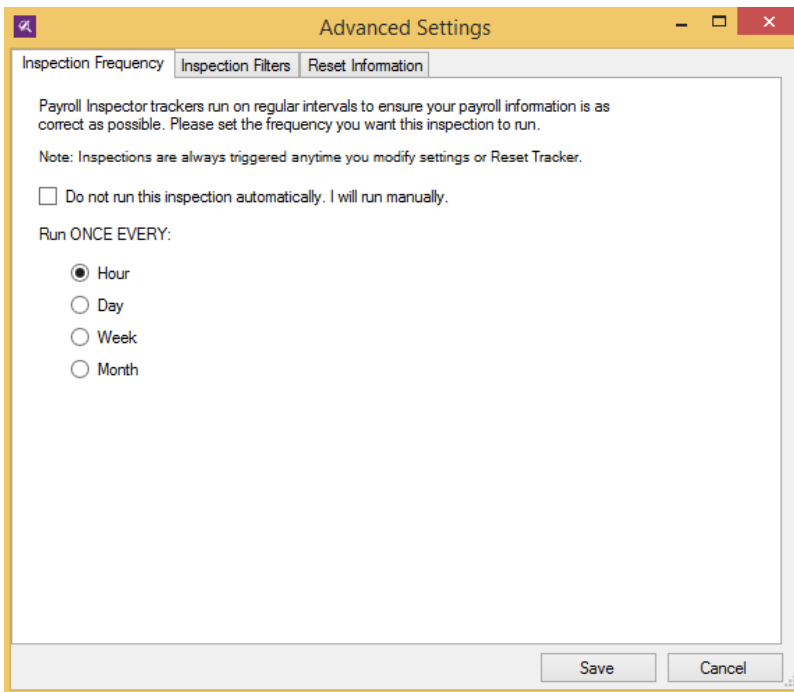
4. Using Widgets

4.1. Basic Settings

 You will first need to go into the settings for each widget by clicking the Settings icon in the top right corner of each widget. Each widget has its own settings area, but there are some consistent settings that are described below.

Tracker is Active? Within the widget, you will need to check the box for “Tracker is Active?” to enable it.

To the right, you will find the Advanced Settings. There are three advanced settings: Inspection Frequency, Inspection Filters, and Reset Information.



The Inspection Frequency allows you to setup automatic inspections based on an interval of your choosing.

The Inspection Filters allows you to modify who is inspected when the widget runs. If you find yourself ignoring certain results or annoyed by the number of results, you may wish to use this feature to filter which employees are inspected.

The Reset Information tab allows you to clear Cache Results and/or Un-ignore ignored results. Both of these should be used carefully.

4.2. Resolution Wizards

Once the widget has been activated and set up, it will begin to scan your data. When it finds a potential issue, it will alert you and allow you to review the results. This means the widget will go into the Alert state and the Fix Now button will appear. It will also notify you in the system tray. When you click Fix Now, it will launch that widget's resolution wizard.

A purple rectangular button with the text "Fix Now" in white, sans-serif font.

As you review suggestions made by Dynamics Payroll Inspector, you will be able to edit the suggestions and force a change in Dynamics GP, have the widget remind you again later, or ignore the suggestion altogether. These options are available for each result in each widget.

Remind Me Later Clicking “Remind Me Later” will cause the widget to continually remind you of an issue every time the widget scans. This is particularly useful if you're not sure what should be considered correct. For example, you can verify the address with an employee to ensure validity.

Ignore (don't remind me again) Clicking “Ignore” will tell the widget to no longer remind you of this issue. This is useful if you've verified that the data is currently correct and you want to leave the entry as-is in Dynamics GP. Note that an employee will no longer be ignored if you use “Reset Information” in the widget advanced settings.

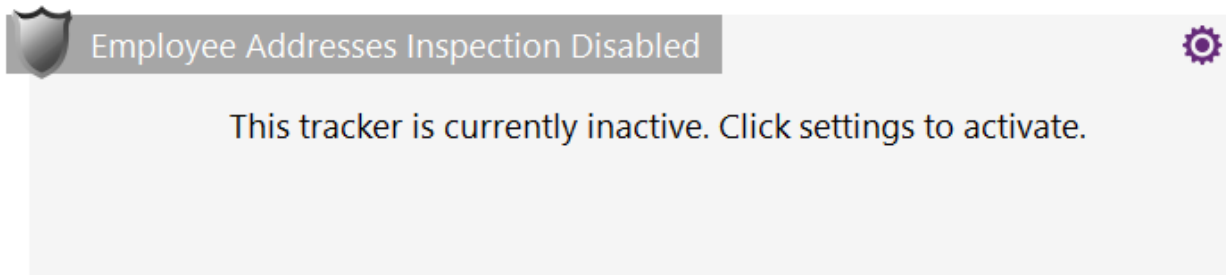
Update Dynamics with Suggestion Finally, selecting “Update Dynamics with Suggestion” will tell Dynamics Payroll Inspector to push the suggestion over to Dynamics GP. Note that you can edit a suggestion by typing in the various boxes before telling it to update.

5. Employee Address Verification Widget

The employee address verification widget takes your employee home addresses from Dynamics GP and runs them through a USPS address verification system. This does CASS certification and Delivery Point Validation. Coding Accuracy Support System (CASS) is a certification system from the United States Postal Service (USPS) for address validation. A CASS-certified address validation standardizes your mailing list and verifies that addresses are valid and complete. Delivery Point Validation™ (DPV®) is the process of verifying that an address is actually deliverable, meaning that mail can be sent to that address.

5.1. Settings

To enable and configure the employee address verification widget, click on the gear on the widget. The screen below will appear.



Employee Addresses Settings

Close

This tracker will look through each of your employee's addresses and verify they are correct. This tracker is set to inspect your payroll data every hour.

0 Employee Addresses have been verified and 0 have been ignored

Tracker is Active?

[Advanced Settings](#)

Should addresses be checked for USPS move updates?

- Return suggestions if employee has notified USPS of a move
 Do not check for move updates

Do you prefer full state names or abbreviations?

- Use full state name ("Florida")
 Use state abbreviation ("FL")

Which address casing option is preferred?

- Normal Casing ("123 Main Street, Miami FL 32202")
 Upper Casing ("123 MAIN STREET, MIAMI FL 32202")

Do you prefer full city names or abbreviations?

- Use full city name
 Use the abbreviated city names in the USPS Database (13 characters)

Do you prefer full names or abbreviations for streets, avenues, etc...?

- Full names ("123 Main Street")
 Abbreviations ("123 Main St")

Should USPS preferred city name be used?

- Use the USPS preferred city name ("Los Angeles")
 Use the alternative city name if provided ("West Hollywood")

If there is no +4 associated with an employee's ZIP code, would you like to be alerted to add it?

- Yes, return suggestions to add +4 to an employee's ZIP code ("32202-1234")
 No, do not alert to add +4 to a 5-digit only ZIP code ("32202- ")

Note: If you change this setting from "No" to "Yes", the cache will be reset to alert on all previously disabled +4 ZIP suggestions.

Setting Options:

Checking for USPS Move Updates – enable this option if you wish to see if employees have moved from the address you have on record. This search will be able to tell you where they moved to and allow you to update your records

Address Casing Option Preference – select the casing preference you would like DPI to use

Full Name or Abbreviations for Address Components – select whether you would like for the street address components to be abbreviated or spelled out

Full State Names or Abbreviations – select the use of state abbreviation, as this is the expectation of other Greenshades products you may be using

Full City Name or Abbreviation Preference – select whether or not you would like for your city names to be abbreviated to the USPS abbreviated city names

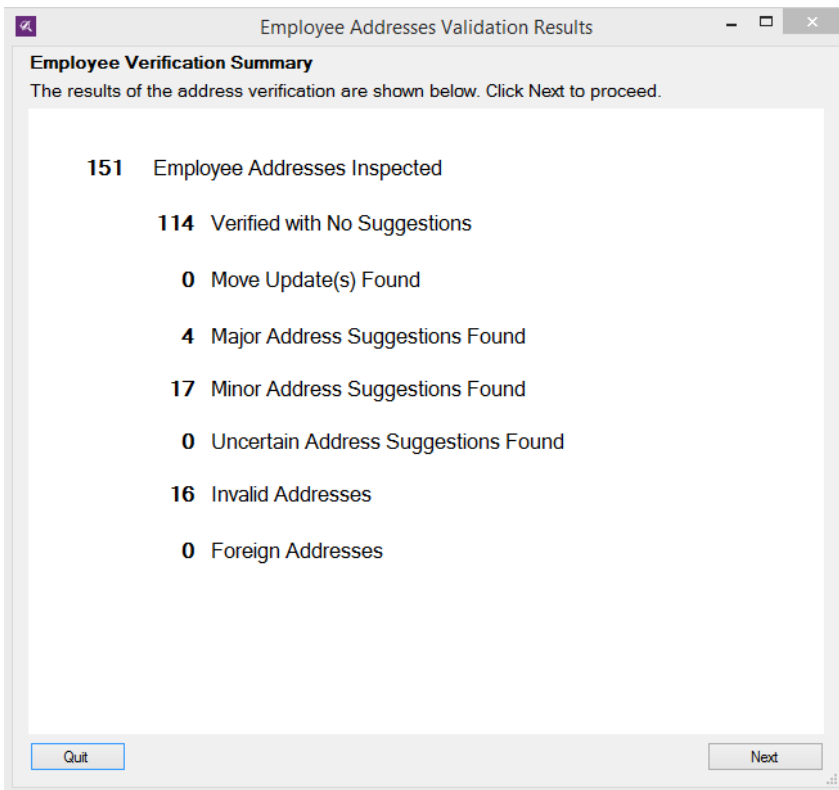
USPS Preferred City Name – select whether you would like to use the USPS preferred city name or the alternative name

If there is no +4 associated with an employee's ZIP code, would you like to be alerted to add it? – select whether or not you would like to receive alerts if employee addresses are found to be missing the +4 ZIP extension. The tracker

will still verify +4 extensions that exist on employee records, but will not notify you if any are missing.

5.2. Resolution Wizard

Once you run the employee address widget and click Fix Now, the first screen will show you a breakdown of the results.



Clicking Next will show you each result and allow you to filter the results to certain types of findings or certain employees.

Employee Addresses Validation Results

Employee Address Suggestions Show: Addresses With Suggestions ▼

Review the suggestions below. Click Finish to apply changes. [Update All](#)

Aaron Beasley address

A major address correction was found for this address.

Original:

Address1: 1908 Jerico Rd
 Address2: Apt D4
 City: LaGrange State: KY
 Zip: 40031 County: Country Code:

Update:

Address1: **1908 Jericho Rd Unit D4**
 City: **La Grange** State: KY
 Zip: 40031 - **9186** County: [Country Code:](#)

Remind Me Later Ignore (don't remind me again) Update Dynamics with Suggestion

Luis Bonifaz address

A major address correction was found for this address.

Original:

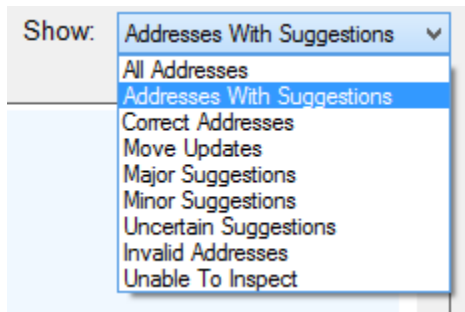
Address1: 401 Palm Blvd
 Address2: Second line
 City: Isle of Palms State: TN
 Zip: 29451 County: Country Code: US

Quit Results 1 - 20 [Next \(21-21\)>](#) >> Back Finish

For each result, you are shown the original address submitted and the update that Dynamics Payroll Inspector is recommending. The elements in bold are the ones that Dynamics Payroll Inspector is recommending be changed from the original. If you wish, you may update the suggested address as well.

Use the Update All option in the top right if you wish to update Dynamics with the DPI suggested changes for each address.

Use the Show filter in the top left to filter the results down to the category of results you would like to review.



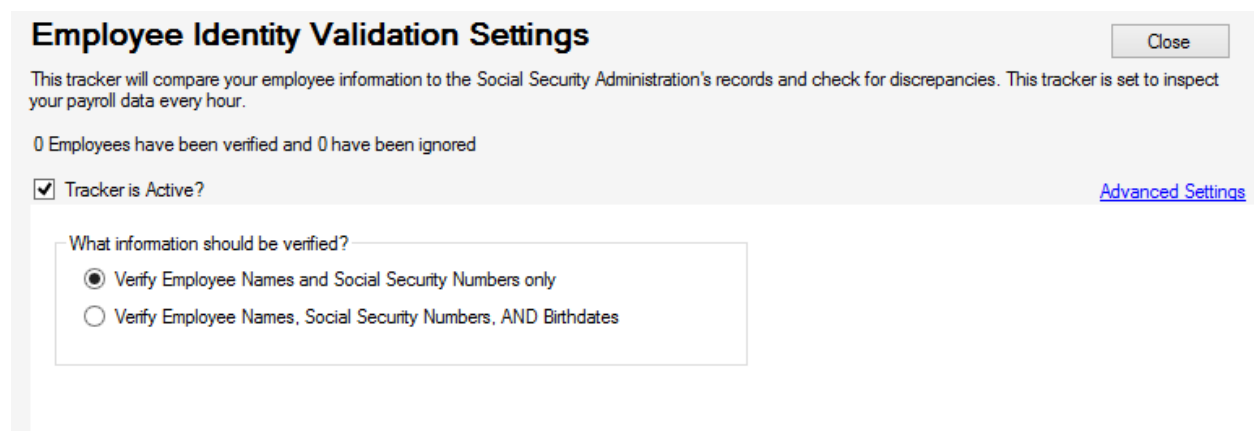
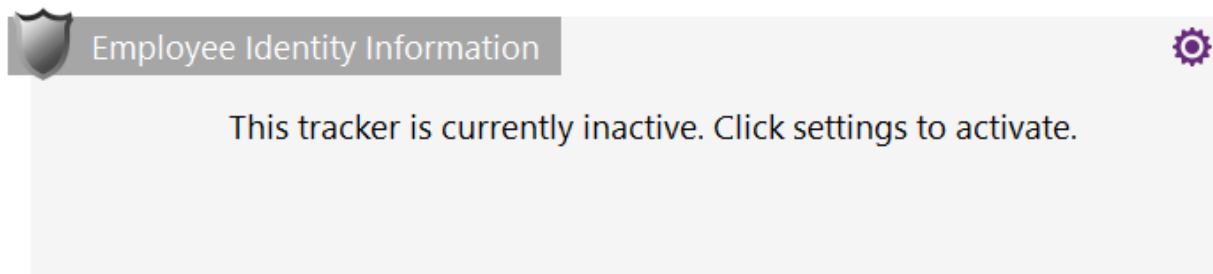
After you have reviewed the results and chosen how to respond to each one, click Finish to apply your selections.

6. Employee Identity (SSN) Verification Widget

The Employee Identity (SSN) Verification widget uses the Social Security Administration's (SSA) social security number validation system to inspect your employee's social security numbers. This service can optionally inspect birth dates as well. This service cannot suggest changes. It can only alert you when an employee name and social security number combination is not found in the government's database.

6.1. Settings

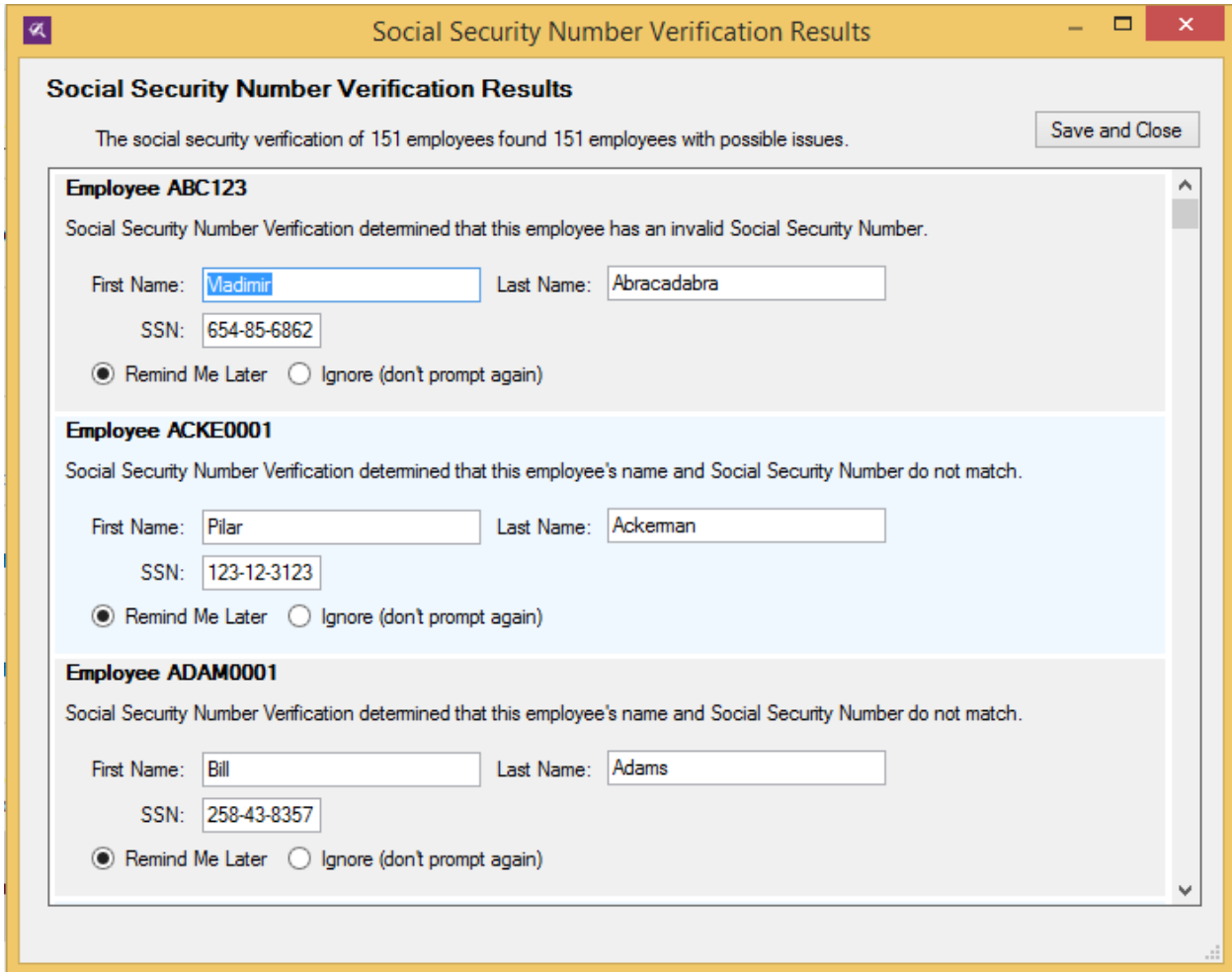
To enable this widget, select the gear for the Employee Identity Verification widget. This will display the settings below.



The only available setting for this widget is whether or not to inspect birthdates or just inspect names and social security numbers. The birthdates are only changed by the Social Security Administrator for the correct year. It does not check the month and day of the birthdate.

6.2. Resolution Wizard

Once you run the employee identity verification widget and click Fix Now, the resolution wizard will show you each employee where the social security number was invalid or not a correct match.



Social Security Number Verification Results

The social security verification of 151 employees found 151 employees with possible issues. Save and Close

Employee ABC123
 Social Security Number Verification determined that this employee has an invalid Social Security Number.
 First Name: Last Name:
 SSN:
 Remind Me Later Ignore (don't prompt again)

Employee ACKE0001
 Social Security Number Verification determined that this employee's name and Social Security Number do not match.
 First Name: Last Name:
 SSN:
 Remind Me Later Ignore (don't prompt again)

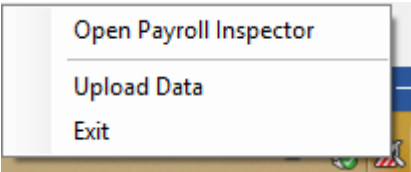
Employee ADAM0001
 Social Security Number Verification determined that this employee's name and Social Security Number do not match.
 First Name: Last Name:
 SSN:
 Remind Me Later Ignore (don't prompt again)

In order to resolve the issue, please correct either the name or the social security number. When you make an edit, the Update Dynamics option will appear and allow you to apply the change to Dynamics GP. The next time the widget is run, the employee will be re-inspected to see if the change results in a correct combination.

7. Troubleshooting

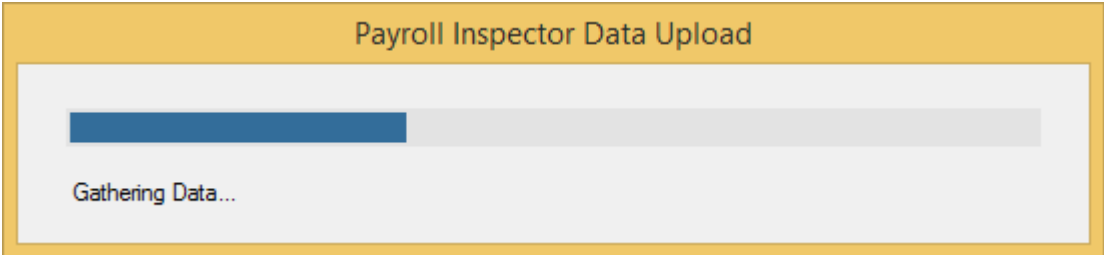
From time to time, you may run into an issue that needs Greenshades assistance. When this happens, contact support@greeshades.com. The support technician will probably ask you to assist by providing a data upload or reset data.

7.1. Upload Data



If you are asked to upload data, make sure to have Dynamics Payroll Inspector running and find the DPI icon in the system tray. Right click on the icon and click Upload Data. You will be presented with the option to upload all employees or just individual/selected employees. Please

refer to Greenshades Support’s request as to which type of upload is needed to help diagnose any issues.



7.2. Reset Information

To reset data, click on the setting gear for the widget that is experiencing the issue. Find the Advanced Settings link and click on it. Navigate to the Reset Information tab and check the data you wish to reset. Be careful when resetting Ignored Results. This will make all ignored results reappear in your current results.

