



GREENSHADES

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Dynamics Payroll Inspector User Guide

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1. Introduction

Dynamics Payroll Inspector is designed to scan your payroll as you're using it and alert you to any potential issues within minutes of a change. It can be used to ensure that your employees have the correct address, have an accurate Social Security Number, 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.

1.1. Currently offered modules

1.1.1. Standard Modules

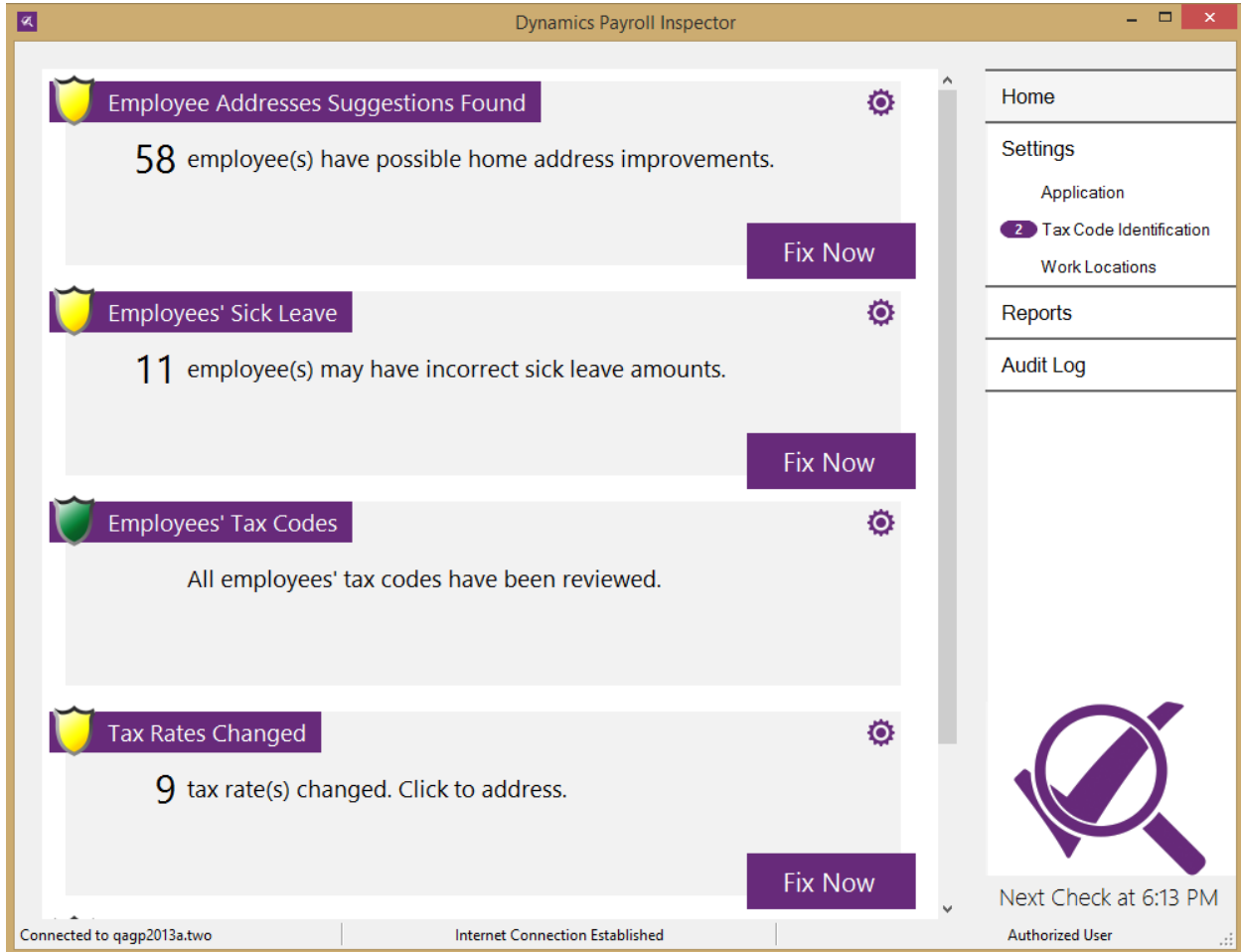
- Employee Address Verification
- Employee Identity Verification (SSN)

1.1.2. Additional Modules

- Employee Tax Code Verification
- Local Tax Rate Verification
- Employee Sick Leave Amount Verification
- Affordable Care Act Eligibility and Enrollment Verification

2. Using Dynamics Payroll Inspector

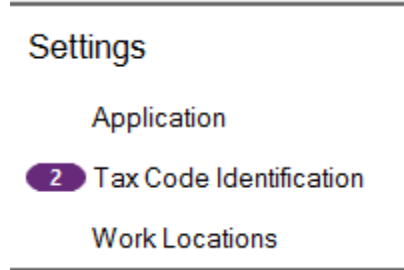
2.1. Home Screen and layout



Dynamics Payroll Inspector has been designed so that you can access your widgets and settings all within a couple of clicks. Each widget has its own settings button, and further settings can be adjusted from the right-hand column of the window. Also, as shown above, when a widget has completed running, it will notify you of any issues it has found and you can click “Fix Now” to review and make corrections.

2.1.1. 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.



2.2. Initial Setup Workflow

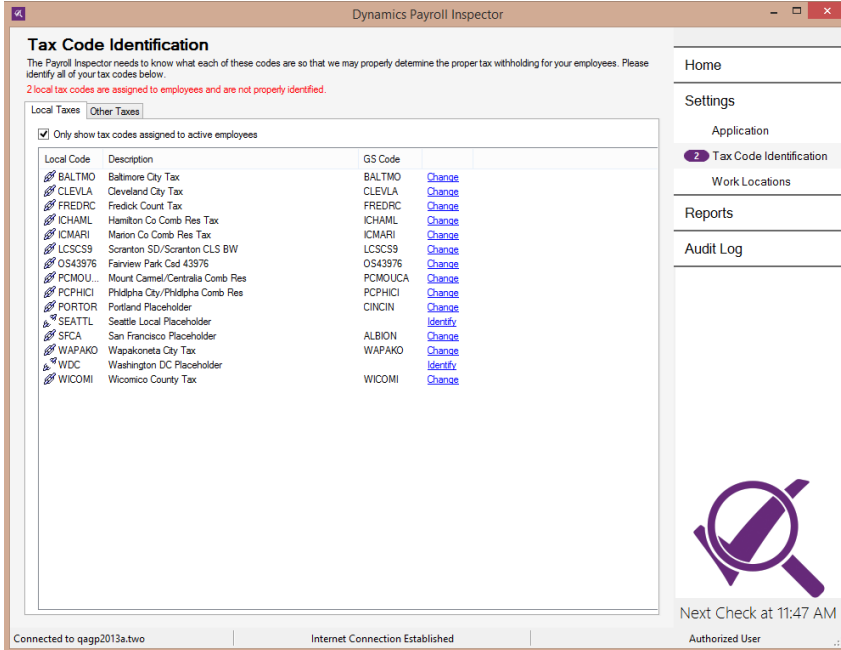
The basic workflow to setup Dynamics Payroll Inspector is as follows:

1. Map your current GP local tax codes to a jurisdiction so that we know which of your tax codes apply to what localities. This is done in the Tax Code Identification settings.
2. Geocode your work locations so that we know what jurisdiction applies to each of your company's work locations. This is done in the Work Locations settings. Ensure handle any errors as they may cause errors in the widgets if they are ignored.
3. Enable the Employee Address Verification widget.
4. Let the Employee Address Verification run through your employee data. Review the results and make sure you are comfortable with your employee addresses since these are used in other widgets.
5. Enable the Local Tax Rate Verification widget.
6. Enable the Employee Tax Code Verification widget.
7. Enable the Employee Identity Verification widget.
8. Enable any additional widgets you may have.

As you enable each widget, they will automatically begin to scan. Therefore, it is important that you map your GP local 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.

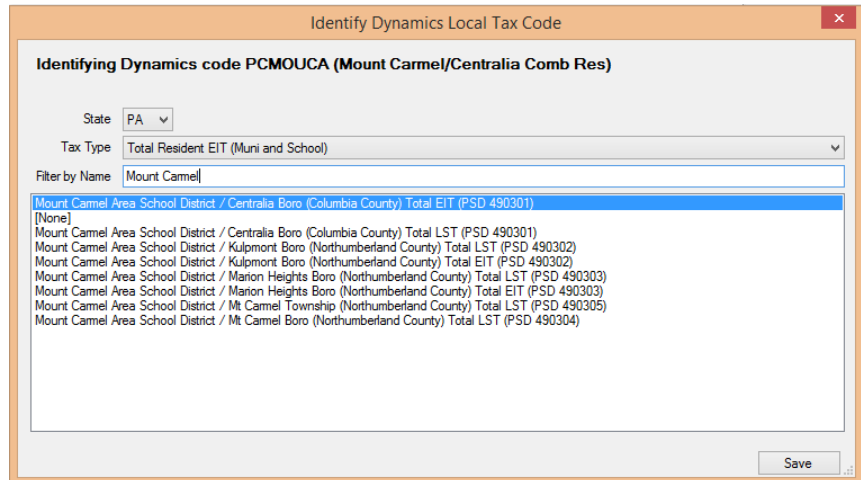
2.2.1. Tax Code Identification

When Dynamics Payroll Inspector verifies that your employees have the correct tax codes assigned to them, it will need to know what tax codes you already have setup within GP. To do this, you will use the Tax Code Identification screen.



This screen will show you what local codes you already have setup in GP and provide you with the description as well. For any that are missing a GS Code, click “Identify” to bring up a window that allows you to search for the correct jurisdiction for the given local code.

Note that you can filter jurisdictions based on the state and tax type, as well as search for a specific name or PSD code. Lastly, keep in mind that any local codes that are automatically added by Dynamics Payroll Inspector will also have the GS Code automatically assigned correctly.



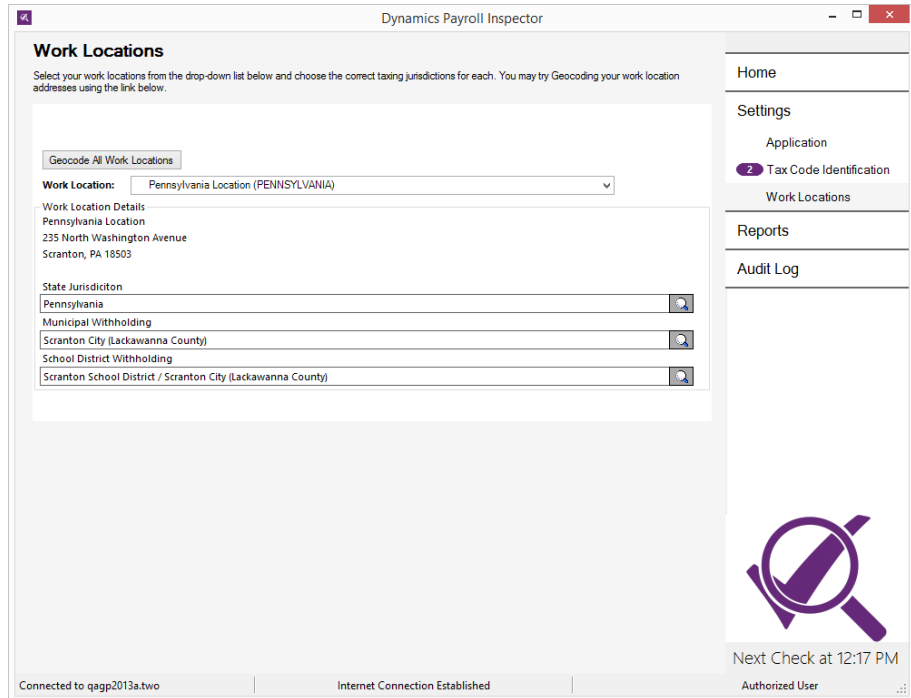
2.2.2. Work Locations

In addition to assigning jurisdictions to your GP local codes, you’ll also want to identify which jurisdictions apply to each of your work locations. This can be done

through the Work Locations screen. You will need to ensure that all work locations are mapped to a jurisdiction in order for the Employee Tax Code Verification widget to function properly.

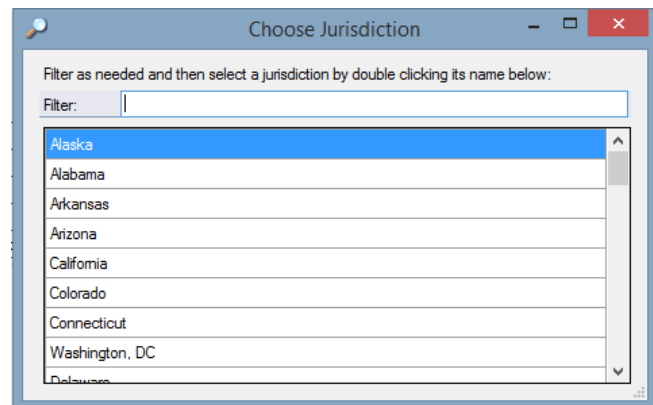
To start, you can simply click on the “Geocode All Work Locations” button. Depending on how many worksites you have, this may take a

few minutes. Any work locations that are unable to be automatically geocoded will be highlighted in purple in the “Work Location” drop-down.



To manually map a jurisdiction to a work location, select a work location from the “Work Location” drop-down and then click the magnifying glass to the right of the corresponding jurisdiction/withholding line.

Each jurisdiction window will allow you to search for a specific state, county, or locality, depending on in which state the work location resides. Once you’ve found the correct one, you can double-click on it or simply hit enter on your keyboard once it’s selected.



2.3. Using Widgets

2.3.1. Settings



You will first need to go into settings for each widget by clicking the Settings icon in the top right corner of each widget.



Tracker is Active?

Within the widget, you will need to check the box for “Tracker is Active?” to enable it. Review the rest of the settings and then click the Close button in the top right corner.

2.3.2. Using the widget to make corrections

Once the widget has been activated, it will automatically begin to scan. It will continue to do so every 15 minutes to ensure that it finds issues quickly after they occur.

Fix Now

If the widget finds any issues, it will notify you in the system tray. A “Fix Now” button will appear in the bottom right corner of the widget. To begin making corrections, click this button.

As you review suggestions made by Dynamics Payroll Inspector, you will be able to edit the suggestions and force a change over to Dynamics GP, have the widget remind you again later, or ignore the suggestion altogether.

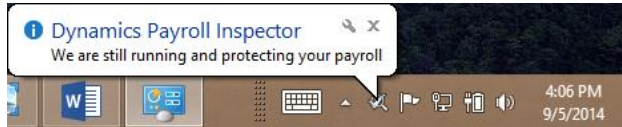
Remind Me Later Clicking “Remind Me Later” will cause the widget to continually remind you of an issue every time the widget scans. This is particularly useful if you’re not sure what should be considered correct. For example, you can verify the address with an employee to ensure validity.

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 click the “Reset tracker” link in the widget 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.

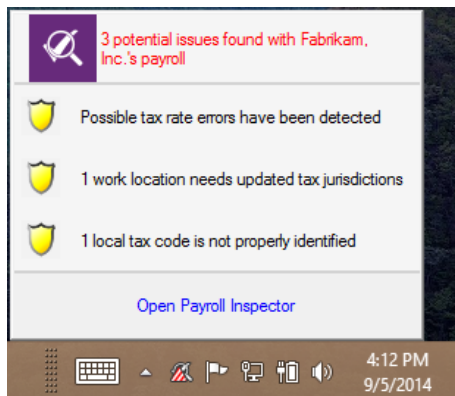
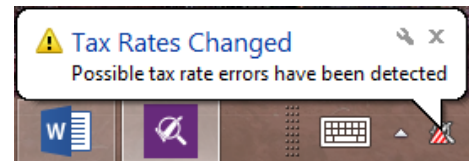
2.4. Final thoughts

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).

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.