



# GREENSHADES

*LET US HANDLE THAT*



## **Greenshades Online User Guide**

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# 1. Basic Overview

The Greenshades Online Connector is an essential tool that directly links your company's Accounting Package to your Greenshades Online web page. The Connector accesses information directly from your Accounting Package that is vital to building and interacting with your Greenshades Online and Green Employee services. The Connector can perform synchronizations which uploads new payroll information to Greenshades Online whenever new employee paystubs have been posted or when employee information has been changed or added.

## 2. The Installation Process

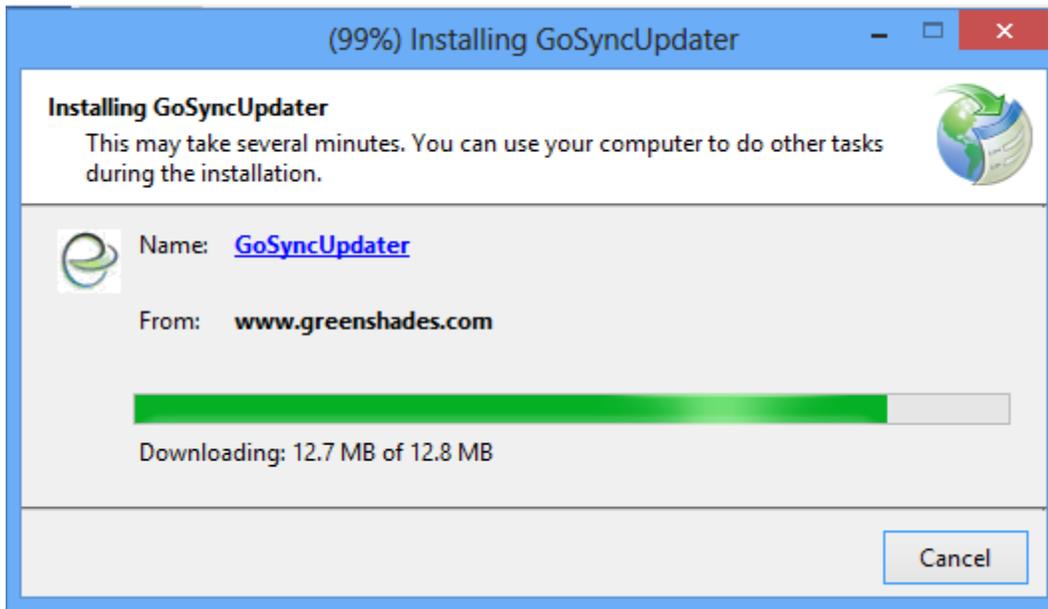
### 2.1. Prerequisites

Before you can install the Greenshades Connector, the computer environment will need to meet certain prerequisites. These are outlined below.

<i>Computer Performance</i>	Recommended 4 GB memory on the machine running the Connector
<i>Local Install Permissions</i>	Full control over Greenshades folder, by default: <u>C:\Program Files\Greenshades Software [Program Files (x86) on 64-bit]</u>
<i>.NET Framework</i>	.NET Framework 4.0 or 4.5 Full (links available on site)
<i>Windows Installer</i>	Windows Installer 3.1 or newer
<i>SQL Server</i>	SQL Server 2005 or newer
<i>Database Access</i>	sa login and password needed for Connector
<i>Internet Access</i>	Access to the internet. See <a href="#">Firewall guide</a> for more information if you are using a firewall.

### 2.2. Downloading the Greenshades Online Connector

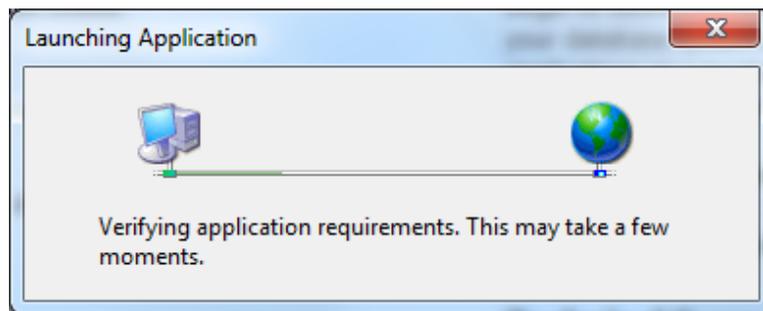
Downloading the Greenshades Online Connector is intended to be a simple and intuitive download. First, you will need to download the Connector the website by following this [download link](#).



This process will begin by downloading and installed the GoSyncUpdater. This application is used to keep the Connector always up-to-date so you will never need to download updates or patches.

## 2.3. Installing the Greenshades Online Connector

The actual installation of the Greenshades Online Connector will come next. This process will install the latest version of the Greenshades Online Connector and will create a shortcut on your desktop for easy access in the future.



## 2.4. Providing a Registration Key

To complete the installation, you will need to provide a valid registration key. You should have been given a registration key from your sales associate. If the registration key is accepted, you will see a green arrow check mark on the screen along with the company name.



## 3. Greenshades Online Connector Functionality

### 3.1. Greenshades Online Connector Home Page

Upon launching the Greenshades Online Connector, the first screen you will see is the Greenshades Support contact page. This is the first screen seen in the process of starting a manual synchronization. When using the Connector for the first time, you will need to complete an initial manual synchronization regardless of whether you decide to use Automatic, Scheduled, or Manual Synchronizations going forward. This allows you to complete all the initial setup necessary for the Connector to send data from your accounting package onto Greenshades Online. Simply click “Next” to move forward with the process.

### 3.2. Registration Verification

The next screen the Connector will ask for your registration key. This is a 16 character alphanumeric code. As a reminder, you can also retrieve this at [www.mygreenshades.com](http://www.mygreenshades.com). Once you have provided this one, it is stored into the Connector. You should not have to reenter this information the next time you are at this screen.

If the registration key is accepted, you will see a green arrow check mark on the screen along with the company name.



If you see a horizontal black bar in a red circle (see left), then the registration key is either incorrectly formatted or missing altogether.

If the registration key is expired, you will see an exclamation point along with text instructing you to go to [MyGreenshades](http://MyGreenshades) in order to extend your registration or contact

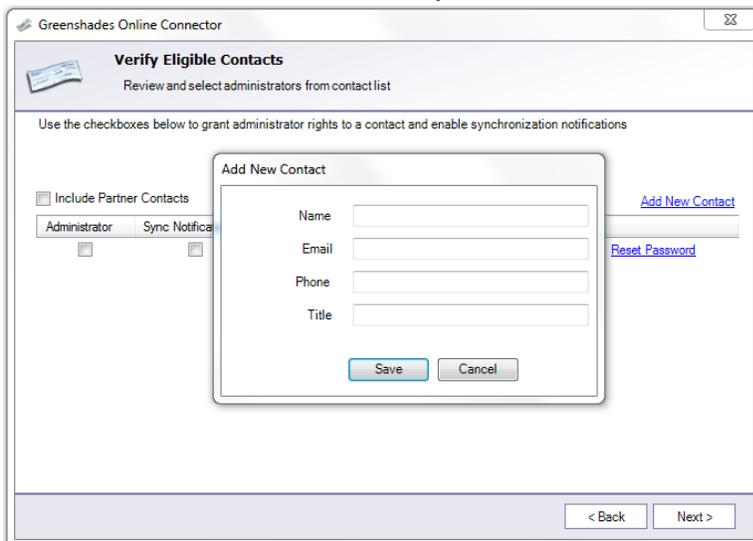
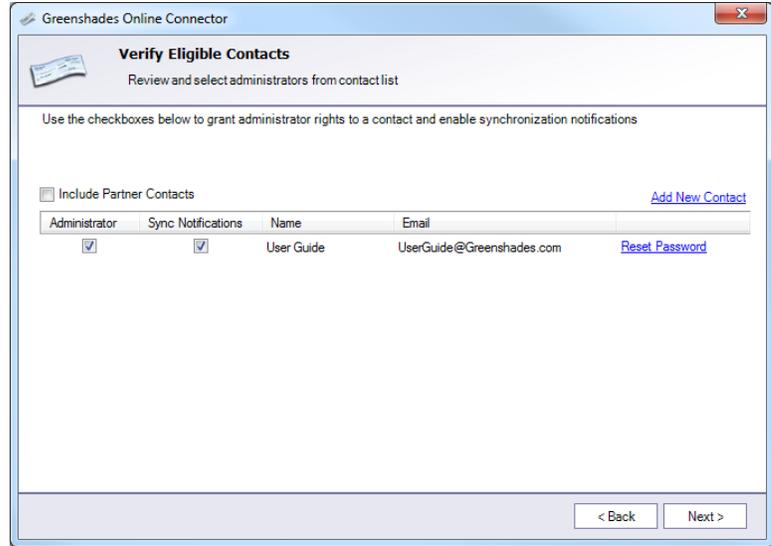
Customer Service. If it's a connection issue, you will see a Bridge Out sign. This might be caused by a proxy or firewall setup issue.

### 3.3. Verify Eligible Contacts

The next screen on the Connector will be to verify eligible contacts page. This page is used to manage the administrators on Greenshades Online.

The first checkbox you will see is to “Include Partner Contacts”. If you are wishing to include your dealer as administrators to the website you will want to check this.

In the main grid, the first asks who should be an administrator to all workspaces being uploaded to the site. At least one Administrator must be selected. Next you will select if the administrator wants Sync Notifications sent. This is an optional email that will be sent to the corresponding email address when a synchronization is completed.



The next fields are the name and email address. These fields correspond with the records we have in ‘My Greenshades’. If your contacts were not setup prior to your initial usage, you will not see their information here.

If you wish to add administrators to this list, simply click on the “Add New Contacts” link above the grid. After clicking on this link, you will enter the name and unique email for the contact that are adding. You will want to make sure the email address is unique among all Greenshades contacts. This will also be your user name when logging in as an

administrator. Once you've finished adding the contact, they should receive an email where they can setup their account.

Lastly you will see a "Reset Password" link. When clicking on this link, an email will be sent to the administrator's email address with security questions that they populated when first creating their My Greenshades accounts.

### 3.4. Choose Data Source

Now it is time to setup the data source for the Greenshades Online Connector. Currently, there are 4 data sources that the Greenshades Online Connector uses to retrieve client data.

- **Dynamics GP**
- **Sage MAS90/200**
- **Dynamics SL**
- **Microsoft Excel files**

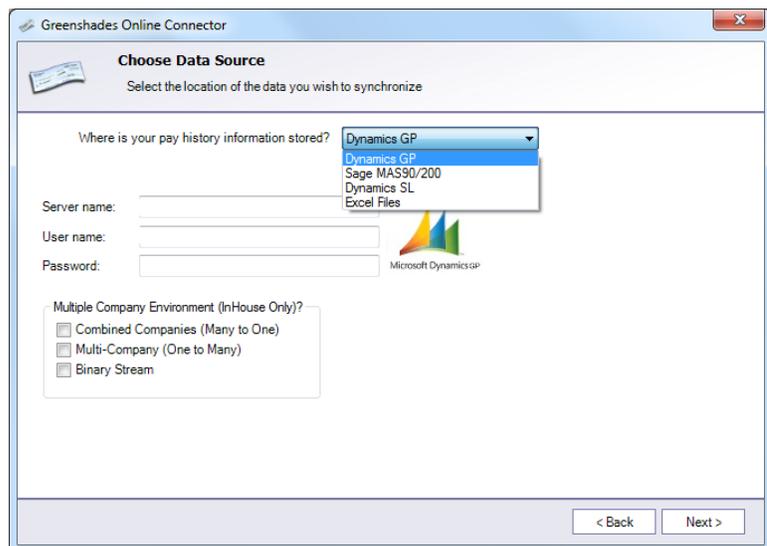
If you wish to use the Excel method, please contact Greenshades Support for a

separate guide for this process. If you do not have the information required from this page, you may need assistance from your IT department or DBA to connect properly. If you're connecting to a SQL-based accounting package, you need to enter in the database server name. The machine where the Connector is being installed will need to be able to connect to that server.

Next is the User name. It is recommended they choose 'sa' for GP and SL clients. If you wish not to do so, be sure you select a user name that has the same credentials as 'sa' that can properly connect to GP or SL. Lastly, you will then enter in the password. The password is encrypted and will not be visible on the screen. Once you have entered in these fields, the fields are stored into the Connector therefore they will not have to be entered the next time you are at this screen.

The options below the password are only visible if you have purchased these special synchronization option. Below are brief descriptions of these modules (for GP users only):

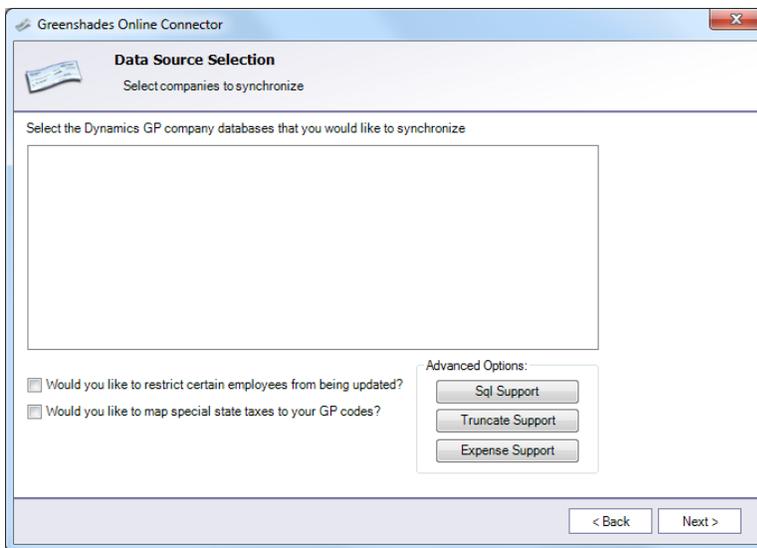
- **Combined Companies (Many to One):** In dynamics GP, the server you connect to contains multiple databases. Each database is intended for one company. The



Connector creates one company per database. With this option, you can combine multiple databases into one company on Greenshades Online.

- **Multi-Company (One to Many):** This option is intended for clients who have multiple companies contained in one database. When selecting this option, you will have the option to separate this database into multiple workspaces.
- **Binary Stream:** Binary Stream is an enterprise solution for GP users that allows them to manage multiple entities and centralize their business into one database. If you have binary stream, simply select this option.

### 3.5. Data Source Selection (non-Excel)



After you made a successful connection for the Connector, you will be taken to the “Data Source Selection” screen.

This is the screen where you will want to select which databases you want to upload. Each database you select will create its own company on Greenshades Online.

Below the company databases are advanced options. The first one, “Would you like to restrict certain employees from being

updated?” gives you the ability to only upload certain groups of employees. This can be by location, class, and among other fields.

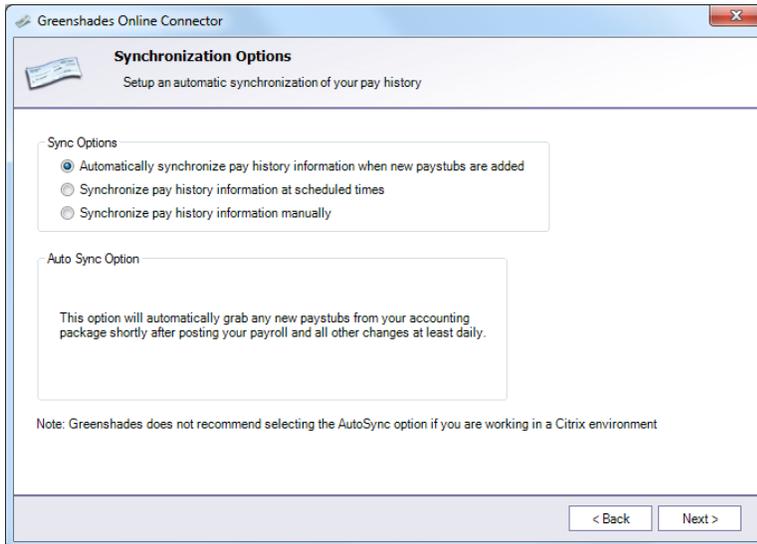
The second option, “Would you like to map special state taxes to your GP codes?” is for clients that have Payroll Tax Services. If you need this option, it’s recommended that you get assistance from your Payroll Tax Service representative in order to correctly choose the proper settings.

Lastly, there are the “Advanced Options”. These options are intended for technical support only.

## 3.6. Synchronization Options

The next screen will allow you to select the frequency and type of synchronization you wish to use.

### 3.6.1. Automatically synchronize pay history information



When selecting this option, the Greenshades Online Connector will automatically upload payroll information when a payroll is complete. If you select this option, the Connector will automatically launch a synchronization if it sees new payroll or every 24 hours (whichever is sooner). The user account must be signed onto the computer for this to work properly. If you are on a terminal server, it is not

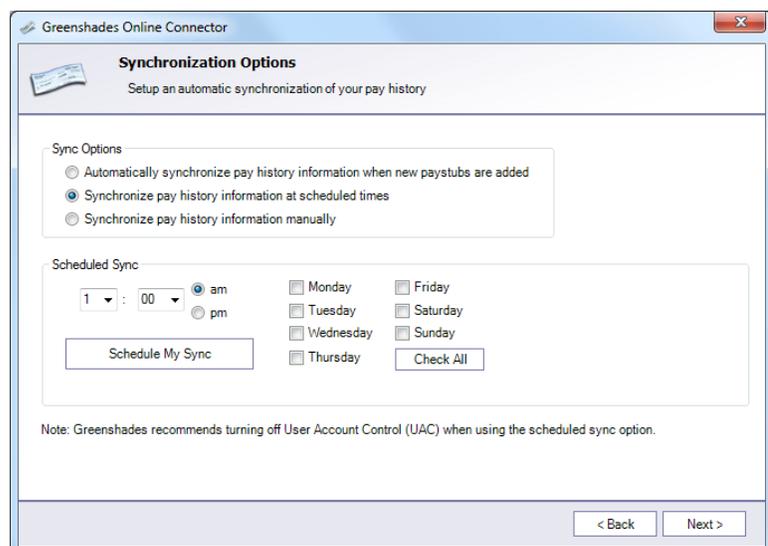
recommended to select this option.

### 3.6.2. Synchronize pay history at scheduled times

This option will allow you to set up a Windows Scheduled Task to trigger the Connector to synchronize your data. This is the better option when on a terminal server.

When this option is selected, you will see the Connector present options of times to schedule the synchronization (as shown in the image to the right).

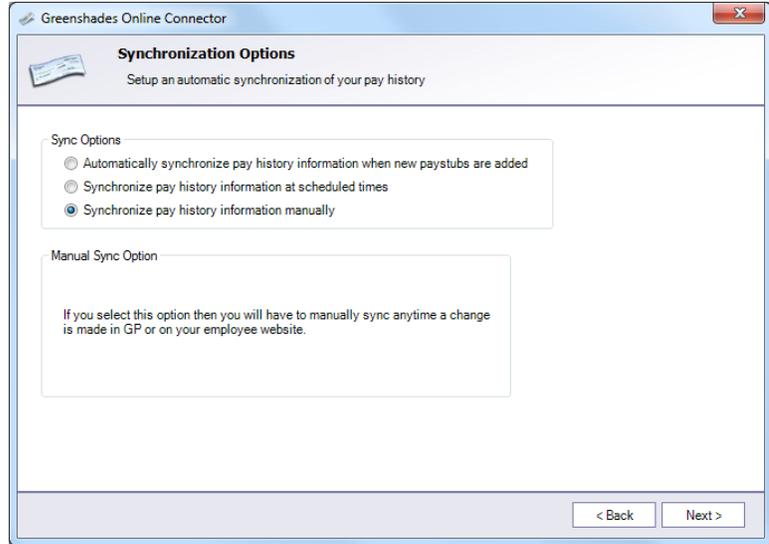
Once you find the desired time and days of the week you wish to have the Connector run, simply select the “Schedule



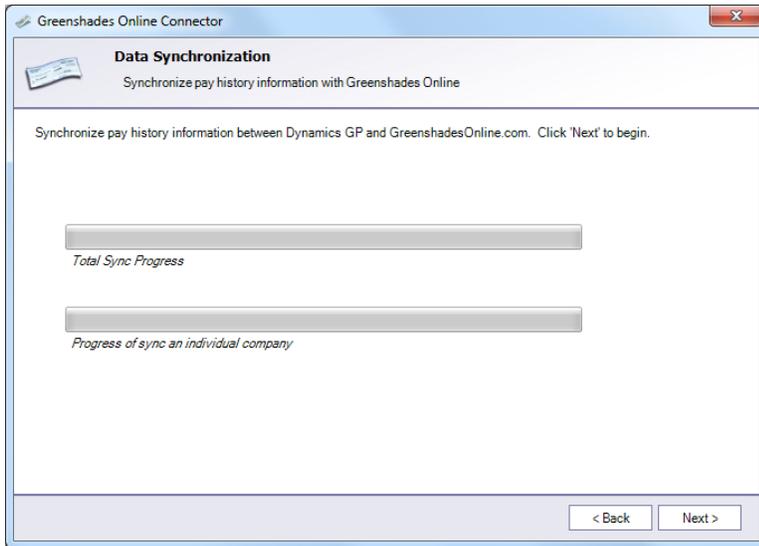
My Sync” button. When this occurs a Windows Scheduled Task will be created your machine.

### 3.6.3. Synchronize pay history information manually

This selection is to simply run the Connector without triggering any type of schedule for the Connector. When this option is selected, you will have to run a synchronization on your own when payroll is performed. This is the only option for the Excel data source.



## 3.7. Data Synchronization



Now it’s actually time for the synchronization to occur. This screen will begin the process. Simply select ‘Next’ to start the synchronization.

When doing so you will notice the two bars fill up numerous times. The initial synchronization will typically take longer than usual. The Connector is installing new tables and filling up existing tables with new data. Since the size of the company will affect

the amount of data being transmitted, synchronizations times may vary from client to client.

## 3.8. Synchronization Successful

When the Connector is finished, you will see an image saying that it is complete. You are now ready to sign onto GreenshadesOnline.com to see the new payroll information. The link to the home page will be shown on this page as well. At this point, you can exit the Connector.