

# The Greenshades Center

## Product Guide and FAQ



**GREENSHADES**  
— *Smart Businesses Go Green.* —

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## **General Overview**

### ***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 all of Greenshades' services, including E-Filing, Forms, Tax Calendar, Recent Changes and Report Archiving functionality

### ***Requirements for the Greenshades Center***

The Greenshades Center does have prerequisite requirements 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 it is our client's responsibility to ensure that adequate internet access is provided to the Greenshades Center. For information on setting up Greenshades with your Proxy Server or Firewall, please see our Firewall Guide available at:

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

Also, the Greenshades Center requires an update to Microsoft Windows called the 'Microsoft .NET Framework.' Please install version 2.0 or later of this component. 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 an administrative database password when performing some updates.

### ***Installing and Running the Greenshades Center***

Since the Greenshades Center is used with various accounting packages, the exact installation steps will vary slightly. Simply download and run the "Greenshades Center.msi." This is a Microsoft Installer and will ask you to choose a location for the product and choose the installation directory of your accounting package. Once it has completed, the Greenshades Center will be installed on your machine along with all of its modules.

Further 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 MBS Great Plains:**

The Greenshades Center can be accessed in Dynamics GP version 8.0 and above by navigating from the top bar menu through Tools > Routines > Payroll > Greenshades Center. In version 7.5 or below of Dynamics GP, 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 MBS Solomon:**

The Greenshades Center can be found in the Payroll module in Dynamics SL. To get there from the menu, select Modules -> Payroll -> Greenshades Center. You will then be prompted to enter your Solomon database name, username, and password. After entering the information, click “Get Companies”, select your company from the list and click “Select Company” to launch the Greenshades Center for that company.

**To run the Greenshades Center from Thinkware Darwin:**

The Greenshades Center can be accessed in Darwin by navigating from the top bar menu through Routines > Payroll > Greenshades Center.

**To run the Greenshades Center from eEmpAct Express:**

Click 'Menu' from shortcuts and then 'Express Control Center' from the 'Payroll and Invoicing' section. Under the Payroll section of that screen, select 'Tax Reporting'. This should launch the Greenshades Screen where you can enter a date range and navigate to the installation directory of the Greenshades Center.

***Basic Navigation within the Greenshades Center***

Along the left side of the Greenshades Center are shortcuts to our main branches of functionality. Clicking on any of the shortcuts will launch a new window with the desired functionality.

Along the right side of the center are reminders for upcoming tax deadlines. You can edit these reminders by clicking the ‘Edit Reminders’ link. You can also add these reminders to your Microsoft Outlook calendar by selecting the reminder you wish to add, right clicking, and selecting ‘Add to Outlook.’



## Help

Each window within the Greenshades Center, including the main form, has a white and blue '?' question mark icon located either in the bottom left or top right corner. Clicking on these will bring up help that is related specifically to the screen you are currently viewing.

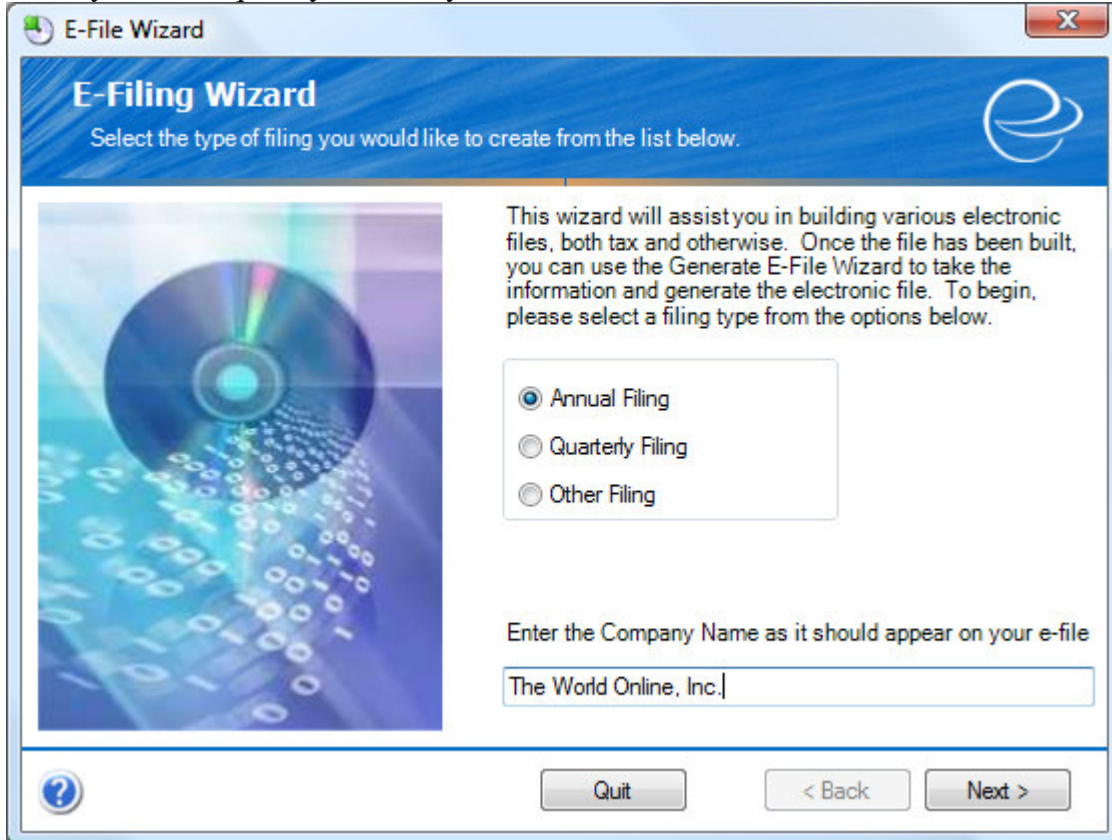
## View Recent Tax Changes

Greenshades keeps up to date with recent Tax Changes and Updates and provides this information to our clients. Accessing this screen will present you with our most up to date information. You can filter the news selections, viewing only updates that apply to you. This feature connects to the Greenshades News Database and is updated each time you log into the Greenshades Center.

## eFile Wizard

When you are ready to produce media to be submitted to a reporting agency, click the eFile Wizard. Launching the eFile Wizard will start you on the process to create the electronic report that will be submitted to a local, state, or federal government agency. You will be asked a series of questions and presented with various options depending on

the type of report you are producing. Following the onscreen prompts will aid you to create your eFile quickly and easily.



The following reports are currently supported by the eFile wizard

**Annual Filing:**

- Federal and State Withholding (W2s)
- Most Local Withholding Reports
- 940s (Federal unemployment)
- 1099s

**Quarterly Filing:**

- State Unemployment (SUTA)
- Some Local Withholding Reports
- 941s

**Other Filing:**

- State New Hire Reports
- 401(k) Reports

If you have any questions about a specific screen, filing or option, please refer to the in-product help for more detail or contact Greenshades Support.

**View Previous Filings**

After you have successfully created an electronic file to be submitted, Greenshades will save this information for you to view later. Upon entering the View Previous Filings

screen, you will be presented with all filings that have been created since the Greenshades Center was installed. Electronic reports generated from formsets will be available here as well, but the forms themselves must be accessed from the Year-End Forms shortcut.



The screenshot shows a window titled "View Previous Filings" with a sub-header "View Previous Filing". It contains a table with the following columns: Company, Type, Filed To, Created On, and Reporting Date. The table is divided into two sections: "Created in the past week" and "Created within the past month".

Company	Type	Filed To	Created On	Reporting Date
<b>Created in the past week</b>				
The World Online, Inc	W2	CT	02/09/2007	03/31/2002
The World Online, Inc	Suta	FL	02/09/2007	03/31/2002
The World Online, Inc	W2	US	02/09/2007	03/31/2002
The World Online, Inc	94x 941	US	02/08/2007	12/31/2003
The World Online, Inc	W2	US	02/06/2007	12/31/2006
<b>Created within the past month</b>				
The World Online, Inc	Suta	FL	01/30/2007	09/30/1997
The World Online, Inc	Suta	NV	01/19/2007	12/31/2002
The World Online, Inc	94x 941	US	01/25/2007	03/31/2006
The World Online, Inc	Suta	PA	02/02/2007	09/30/2006
The World Online, Inc	Suta	CA	01/31/2007	12/31/2006
The World Online, Inc	Suta	PA	02/01/2007	12/31/2006

The Greenshades Center automatically archives the data used to create your files for later use. If you need to recreate a historical file, you may do so here. The benefit to this is being able to create files with new or updated specifications while still using historical data. To access the option to rebuild a file, simply right click the report and select the option to Rebuild Electronic Media.

If you have any questions about a specific screen, filing or option, please refer to the in-product help for more detail or contact Greenshades Support.

## Year-End Forms

You can access the Greenshades Forms module (purchased annually) through the *Year-End Forms* shortcut. Once you enter the Year-End Forms wizard, you will be able to Create a New Formset, Work with a Previously Created Formset, or eFile a Formset.

Forms currently supported by Greenshades for printing are:

- 1099 MISC, INT DIV AND PATR
- W2

If you have any questions about the Year-End Forms module, please refer to the [Year-End Forms Guide](#) available on our website or contact Greenshades Support.

## Performing Common Tasks

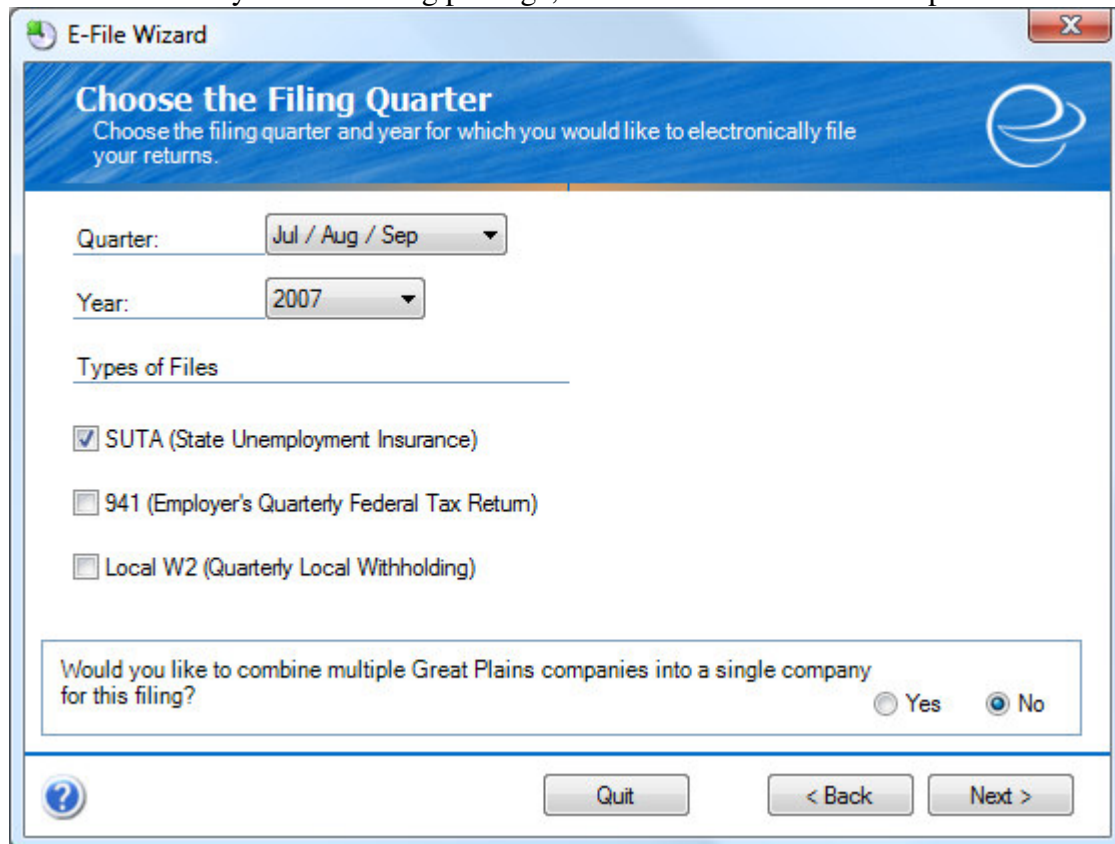
While the Greenshades Center offers a large amount of functionality, we are aware that most of our clients generally only use our product to do a few very specific tasks. We don't want the Greenshades Center to be overwhelming or confusing to our clients who are just trying to get their specific task accomplished. Accordingly, we have provided overall instructions for performing some of those tasks within the Greenshades Center.

### ***Create a Quarterly SUTA report***

One of the most common tasks that our clients utilize Greenshades for is creating and submitting an Unemployment Tax or Wage report (SUTA). Greenshades strives to make this task as simple as possible by walking our clients through the eFile wizard.

The first step in creating this report is clicking this eFile Wizard button. This will begin the series of questions and options that you can select to successfully create the file required by your state's reporting agency. You can find SUTA by selecting the Quarterly Filing option. Please be sure that the Company Name that appears in the corresponding field matches that which you have registered with Greenshades. Click 'Next' to begin the eFile Wizard.

You will be able to specify the quarter and year you would like to produce. As long as the data exists in your accounting package, Greenshades will be able to produce an eFile.



The screenshot shows a window titled "E-File Wizard" with a blue header. The main heading is "Choose the Filing Quarter" with the instruction "Choose the filing quarter and year for which you would like to electronically file your returns." Below this, there are two dropdown menus: "Quarter:" set to "Jul / Aug / Sep" and "Year:" set to "2007". A section titled "Types of Files" contains three checkboxes: "SUTA (State Unemployment Insurance)" which is checked, "941 (Employer's Quarterly Federal Tax Return)", and "Local W2 (Quarterly Local Withholding)". At the bottom, a question asks "Would you like to combine multiple Great Plains companies into a single company for this filing?" with radio buttons for "Yes" and "No", where "No" is selected. Navigation buttons at the bottom include a help icon, "Quit", "< Back", and "Next >".



Greenshades does not make any calculations to produce the electronic file but instead uses the wage information directly from your accounting package.

There are some things to note about the eFile that is being created. State reporting agencies do not accept negative values in the electronic files. If you have negative wages to report and need to submit a request for a credit, this must be done separately from the e-file. The e-file will zero out any negative wages found.

Also, the ability to file online or on diskette is limited by the state in question. If the reporting agency accepts both Media and Internet we will provide you with a choice. If you only see an option to file by media (on disk or CD), then your state does not currently accept filing online. Greenshades encourages online filing whenever available. If you would like to submit your file on diskette, please make sure you select the Media option. Some filing specifications vary based on whether or not the file is submitted on media or via the internet.

If you have any additional questions about SUTA filing, please refer to the [Quarterly Unemployment Guide](#) available on our website or contact Greenshades Support.

### ***Create a 940 or 941 E-File***

With Greenshades you can automatically submit your 940/941 to the IRS electronically. You will create your 940/941 through the eFile Wizard. To create your 941 select the Quarterly Filing option. To create your 940 select the Annual Filing option. Please be sure that the Company Name that appears in the corresponding field matches that which you have registered with Greenshades.

E-File Wizard

## 940 Report Totals

Please Verify your 940 Totals.

Verify that the FUTA totals below are correct. If they are not, please re-run the Great Plains FUTA report for this year from Reports > Payroll > Period End.

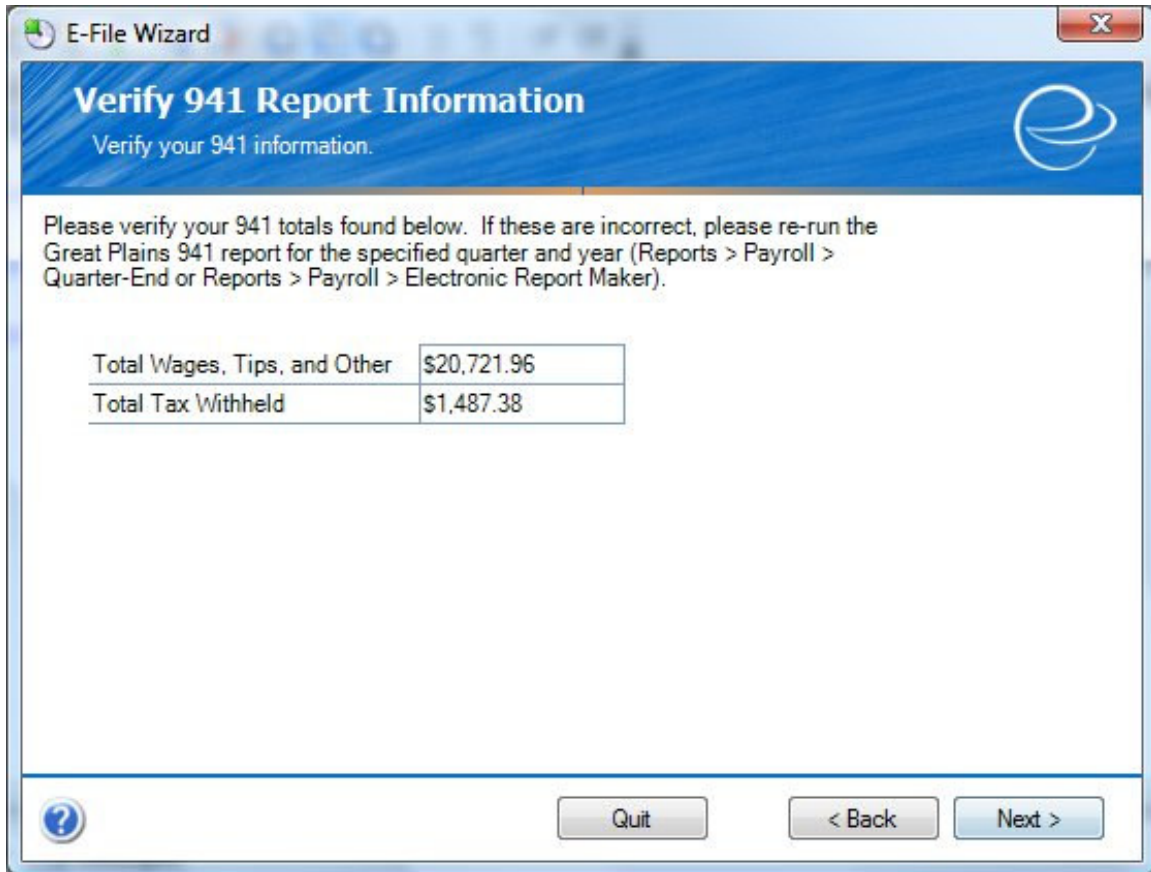
Total Wages (940 Box 1)	\$62,395.91
Total Wages over Wage Base (940 Box 3)	\$0.00

?

Quit < Back Next >

Greenshades does not make any calculations to produce the electronic file but instead relies on the data being pulled from your accounting package. As long as the data exists in your accounting package, Greenshades will be able to produce an eFile. It is important that you review the data being extracted for validity before submitting your eFile.

If you are a Schedule B filer, you need to run the 941 report and the Schedule B within Dynamics GP.



Before submitting your 940 or 941 you need to edit your file. To launch the Greenshades Center Edit feature you need to select the 940/941 build box and the box that says 'Click here if you would like the ability to edit your data prior to creating your electronic file.' and click Next. This will bring up our editor where you can make any edits to your file. The Editor will look like a 940 or 941 you would submit on paper.

After you have made all the necessary edits to your file, you will need to continue through the eFile wizard to submit your file by clicking on File > Save and Exit.

### **Create a 1099 or W2 E-File**

There are two different paths you can take through the Greenshades Center in order to create W2 or 1099 reports for the government. If you printed your 1099 or W2 forms with Greenshades you should submit your E-File through the E-File a Formset option within the Year-End Forms Wizard.

If you printed your 1099s or W2s independently of Greenshades, you will need to use the eFile Wizard to create your file. To create your e-file, select the Annual Filing option. Please be sure that the Company Name that appears in the corresponding field matches that which you have registered with Greenshades.

E-File Wizard

## Choose Annual Filings

Choose which types of file you wish to electronically file as well as the reporting year.

Reporting Year: 2007

Types of Files

- Federal Withholding
- State Withholding
- Local Withholding
- 940 (Federal Unemployment)
- 1099

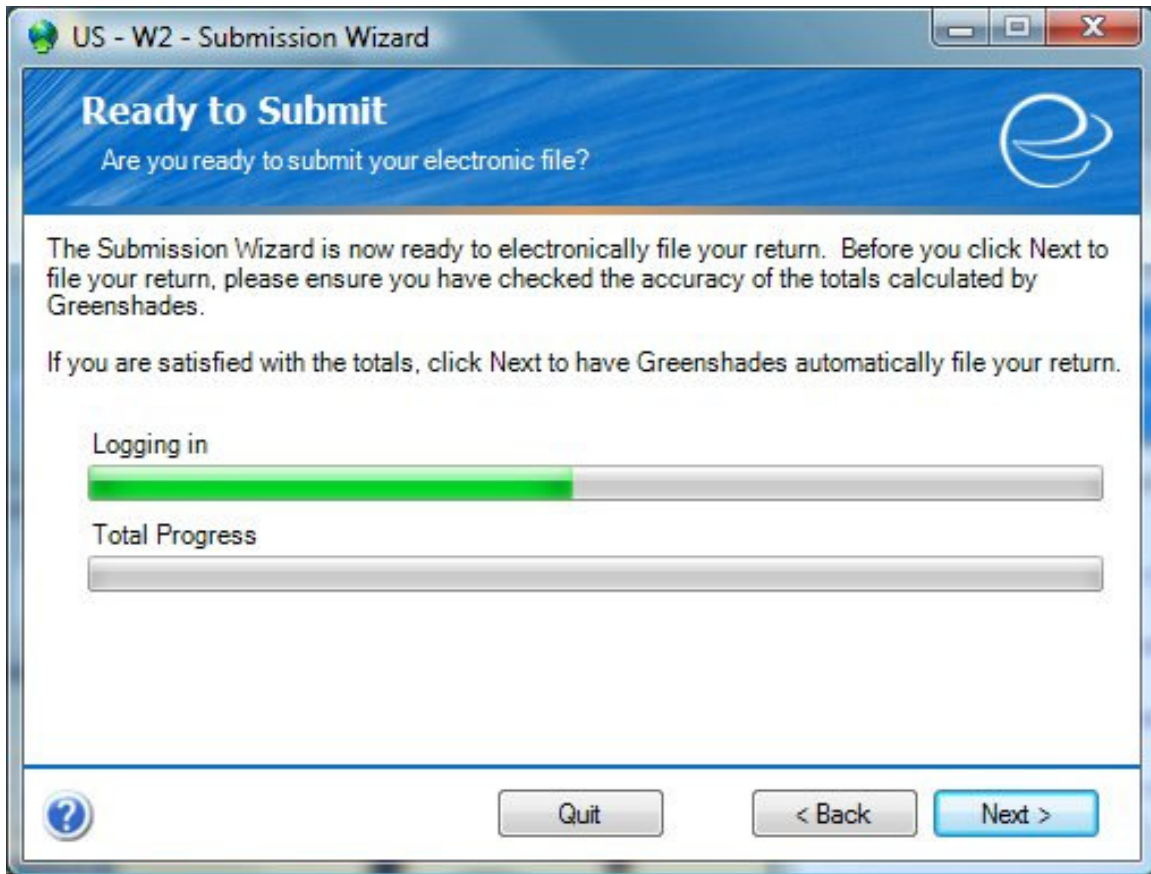
Would you like to combine multiple Great Plains companies into a single company for this filing?

Yes  No

Quit < Back Next >

Greenshades does not make any calculations to produce the electronic file but instead relies on the data being pulled from your accounting package. As long as the data exists in your accounting package, Greenshades will be able to produce an e-file. It is important that you review the data being extracted for validity before submitting your e-file. In order for Greenshades to create your W2 e-file you must have your closed out your filing year by creating your year end wage report within your accounting package.

The Federal government no longer accepts files submitted on diskette or CD. If you are submitting a Federal W2 or 1099 e-file these files must be submitted via the internet. Greenshades will automatically submit your federal files for you.



We recommend you choose the Website Upload (Automatic) option when submitting these files because Greenshades will be able to track your submission, provide you with status updates, and notify you of any problems with your submission.

If you have any questions about creating your 1099s, please refer to the [1099 Guide](#) available on our website or contact Greenshades Support.

### ***Print 1099s or W2s Forms***

Any work you do with the actual recipient copies of your 1099/W2 Forms will be done using the bottom shortcut on the Greenshades Center, the Year-End Forms shortcut. Note that this is for our clients who wish to print out their recipient forms—if you are simply trying to eFile 1099s or W2s to the federal government, you should use the E-File Wizard.



The first screen of the forms wizard gives you three options: “Create a New Formset”, “Work with a Current Formset”, and “E-File a Formset”. A Formset is simply the collection of all of your forms of a specific type for a specific year (i.e. 2004 1099-MISCs, 2005 W2s, etc.). Once you’ve closed your year, you will start by creating a formset. The wizard will ask you a series of questions and provide you with on-screen help through each step. Once completed, it will show you each of your forms in the Greenshades Forms Viewer. You will be able to view any of the forms and make changes. You will be able to look at this formset along with any edits you’ve made in the future by running the forms wizard and selecting to “Work with a Current Formset”.

When you're ready to distribute your forms to your employees or vendors, simply select "Work with a Current Formset" and load your forms. You can then either print these forms onto plain, blank printer paper or AutoMail them. When you AutoMail your forms, they are sent digitally to our mailhouse where they are printed, stuffed, stamped, and sent to their recipients. There is a per-form cost for AutoMailing.

As employees or vendors come back with corrections, simply "Work with a Current Formset", load the formset, find the form in question, and make the edits. You can print out just the form(s) you changed at that time.

When it's finally time to submit your forms to the IRS or SSA, go back to the Forms Wizard and select to "eFile a Formset". Choose the formset in question and follow the on screen prompts. Your forms, along with any edits you've made, will be submitted to the government over the Internet.

If you have any questions about the Year-End Forms module, please refer to the [Year-End Forms Guide](#) available on our website or contact Greenshades Support.

### ***Automail 1099s or W2s***

When you're ready to distribute your forms to your employees or vendors, simply select "Work with a Current Formset" and load your forms. Once your forms are loaded you will be able to AutoMail your forms by clicking on Distribute Forms > Automail Forms.

When you AutoMail your forms, they are sent digitally to our mailhouse where they are printed, stuffed, stamped, and sent to their recipients.

Once you have submitted your via AutoMail you will receive two confirmation emails. The first email will notify you that your forms have been received by our mailhouse. Then you will receive a second email within 24 hours requesting your approval of the forms.

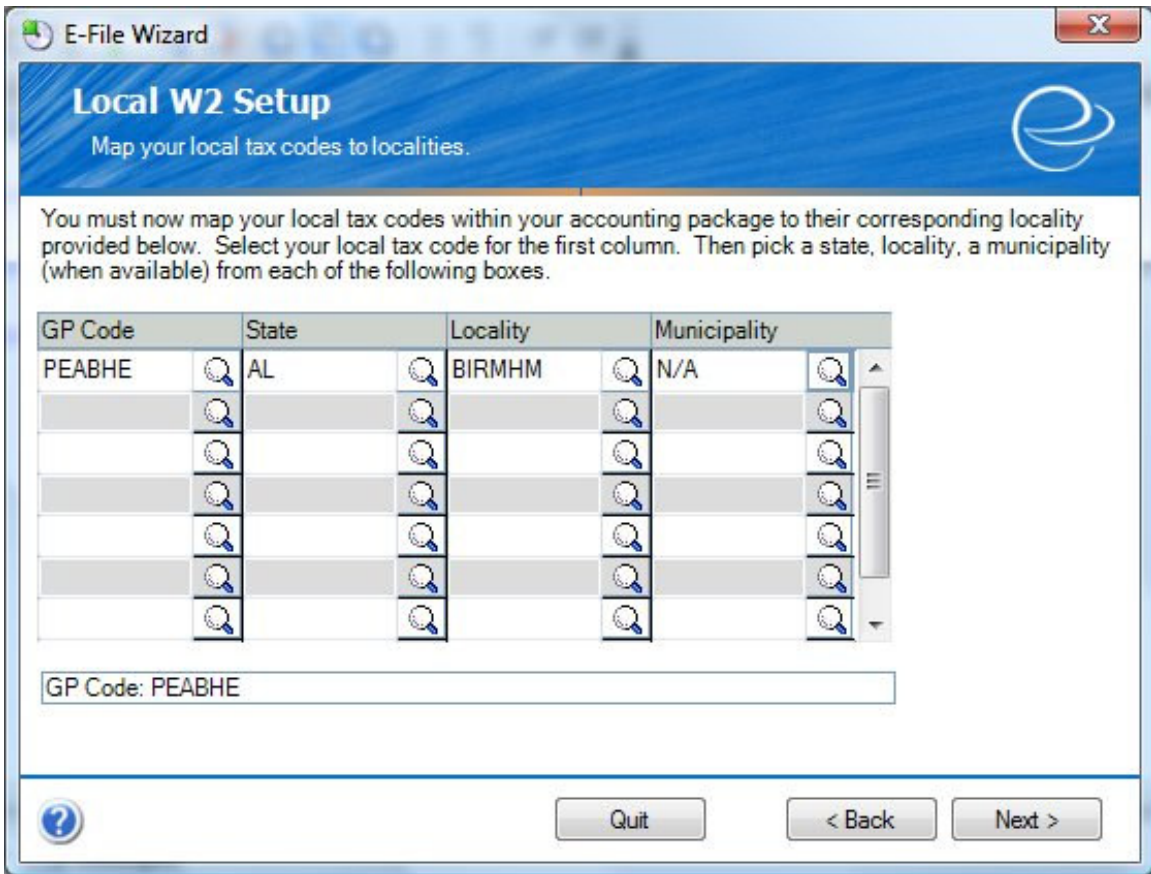
To approve your forms on our AutoMail site, you will choose a batch of forms and review it. You should review your totals and some samples of the forms themselves. You may either approve or deny the batch for mailing. To deny, click the 'I had problems' checkbox. If the batch is denied, they will have to re-upload all of the EINs and repeat the process. To approve, they check the 'samples looked great' and 'totals looked great' checkboxes and submit. If the batch is approved, it will be mailed and the batch status will be updated on the website.

### ***Create a Local W2s E-File***

Some States have local withholding that must be reported either annually or quarterly. Greenshades provides support for creating electronic files for many of these localities. To be able to create Local W2 files, select the eFile Wizard and follow the onscreen prompts.

In order for Greenshades to build data for Local Withholding Reporting, you will need to map your Local Tax Codes to a Greenshades Locality Code and (when appropriate) a Greenshades Municipality. You should ensure that you map all Local Tax Codes for all employees living in localities requiring local reporting.





Once you have completed your local mappings and entered a Local W2 ID, Greenshades will be able to associate previous payments and deductions with various local taxing agencies. Greenshades will save the mappings and IDs for future use. When Greenshades does create your electronic files, you will only be presented with localities you have previously mapped on the Local Mapping screen.

State	Locality	Local W2 ID
AL	BIRMHM	1234567

State: AL

? Quit < Back Next >

### ***Create an Electronic 401(k) Report***

Greenshades offers 401(k) reporting. You can access this option through the e-file wizard button. You will be asked for a variety of relevant information, including the starting and ending date range for your 401(k) report. Please make sure you choose the correct date range. One of the most common problems our clients encounter is accidentally selecting the wrong filing period.

E-File Wizard

### Choose 401(k) Options

Answer the following questions to correctly configure your 401(k) options.

Please select a 401(k) bank from the drop down list below and specify any other options applicable to your bank.

Choose your 401(k) provider

What is your bank designated 401(k) plan number?

Would you like to calculate hours for salary paytypes?  Yes  No

Would you like to include ONLY employees who have been assigned 401k codes?  Yes  No

Would you like to include ONLY employees who are active (not terminated)?  Yes  No

? Quit < Back Next >

You will also be asked to select your 401(k) provider. You should be able to choose your provider from a list in-product. If your 401(k) provider is not listed, contact Greenshades Software to inquire about having it added to the list.

Greenshades creates your 401(k) file by mapping your accounting package's deduction codes to the various pieces of information required by your provider. Once mapped, Greenshades will be able to look through your previous payments and associate deductions with fields required on your 401(k) report.

### ***Create an Electronic New Hire Report***

You can create an electronic New Hire report through the eFile Wizard by selecting the Other Filing option. Please be sure that the Company Name that appears in the corresponding field matches that which you have registered with Greenshades. Click 'Next' to begin the eFile Wizard. You will be able to specify the date range for the file you would like to produce as you continue through the wizard.

E-File Wizard

## Choose New Hire Options

Answer the questions below and complete the additional new hire options.


Does your company offer health insurance to newly hired employees?  Yes  No

Does your company offer health insurance to dependents of newly hired employees?  Yes  No

What is the waiting period (in days) before a newly hired employee is eligible for health insurance?

Are you filing your New Hires to Iowa? If Yes, enter Iowa EIN Suffix below.  Yes  No

Iowa EIN Suffix



### ***Verify Employee Identity***

Greenshades offers you the opportunity to electronically verify your employee identification each time you create a file using the E-File Wizard. The electronic employee verification service is provided to prevent any potential filing penalties associated with submitting incorrect employee information to government agencies.


E-File Wizard

## Employee Identity Verification

Read the information below to decide if you wish to verify the identity of your employees.

Would you like to take this opportunity to verify the identity of your employees by having them cross-referenced with the Social Security Administration's records?

The process of verifying names and SSNs is performed free of charge. If inconsistencies are found, you will later be given the option to pay a small, per-employee fee for the detailed report.



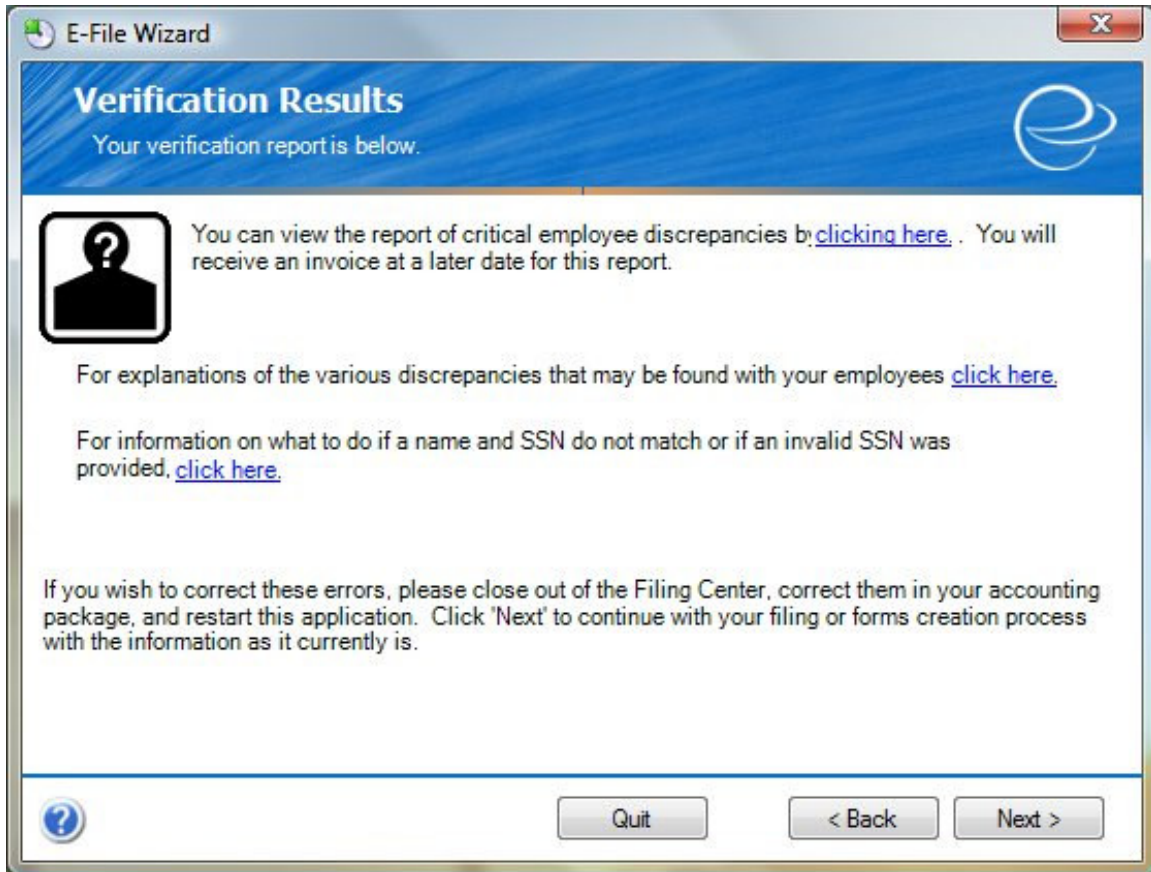
Yes, please verify my employee information. I agree to the [Terms of Use](#).

No, do not verify my employee information at this time.

No, do not verify my employee information now and never ask me again.

? Quit < Back Next >

If you would like Greenshades to verify your employee identification, you will be informed of the number of discrepancies found. Greenshades will process the employees you selected and then show you how many employees were found to be incorrect. Once presented with that information, you can choose whether or not to purchase a report listing the problems. You are not obligated to purchase this report.



If you would like Greenshades to verify your employee identification, you will be informed of the number of discrepancies found. To view a detailed report, there is a charge of \$1.99 per discrepancies. You are not obligated to purchase this report.

## **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?***

Live support comes with Greenshades Software. You can access Greenshades Support online at: <http://www.Greenshades.com/MyGreenshades>. You can also send an email directly to support at: [support@greenshades.com](mailto:support@greenshades.com). Finally, you can also call support at 888-255-3815 extension 700.

### ***Why do my updates keep failing?***

Greenshades Software releases updates frequently to make sure our clients are able to create files according to the state and federal government specification. Whenever there are updates available, please apply the updates. If your updates are failing, please download the Greenshades Updater Patch. The updater patch is available from our website, <http://www.greenshades.com/support/gscenter.shtml>.

### ***How can I edit my file prior to submitting it?***

You can access the Greenshades Center Editor by clicking on the file you wish to edit and the box that says 'Click here if you would like the ability to edit your data prior to creating your electronic file.' and click Next. This will bring up our editor where you can make any edits to your file.

### ***How can I print 1099 and W2 forms?***

To print your forms you will need to select the Year End Forms option on the main Greenshades Filing Center page. This option will guide you through the process of creating, printing, and e-filing your forms. For more information on printing 1099s or W2s refer to our [Year End Forms Manual](#).

### ***Can I submit my payments through Greenshades?***

No, the Greenshades Center focuses only on your electronic file. Any payments that need to be submitted to the state or federal government will need to be done independently of Greenshades.

We are currently in the process of developing a payment module, if you are interested in learning more about this product or testing this product during its development please contact our sales department.

### ***How can I find out what my registration key is?***

Your registration key is available on your personalized MyGreenshades webportal at <http://www.greenshades.com/mygreenshades>. At MyGreenshades, you can retrieve registration keys, view invoices, get technical support, and much more. Once you are

issued a registration key it should never change, regardless of enhancement payments or upgrades to your accounting package.

***I am not familiar with Greenshades, can I get a walkthrough?***

Yes, Greenshades technical support has limited walkthrough appointments available. Walkthroughs are available during business hours except the week prior to any major filing deadline. To schedule a walkthrough please contact Greenshades Support via email at [support@greenshades.com](mailto:support@greenshades.com) or by calling 888-255-3815 extension 700.