

The Greenshades Tax Filing Center

Basic Product Guide



GREENSHADES
— *Let Us Handle That* —

Greenshades Software Support Team

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ABOUT THE GREENSHADES TAX FILING CENTER

The Greenshades Tax Filing Center is a software solution that creates and files electronic returns and payments to a variety of government and non-government agencies. The Greenshades Tax Filing Center also reports recent tax and accounting compliance information, keeps an archive of previous filings, and can upload Year-End Form information (W-2s, 1099s, etc.) to the GreenshadesOnline web portal where it may be distributed to your employees and vendors.

This guide will provide you with a brief overview of the Greenshades Center and its functionality.

REQUIREMENTS FOR THE GREENSHADES TAX FILING CENTER

The system requirements for the Greenshades Center may be found on the [Greenshades Center Download Page](#) and also in the Greenshades Center Installation Guide.

INSTALLING THE GREENSHADES TAX FILING CENTER

Since the Greenshades Center is used with various accounting packages, the exact installation steps will vary slightly. Information and assistance installing the Greenshades Center can be found within our Installation Guide at:

<http://www.greenshades.com/support/Gschelp2.aspx>

STARTING THE GREENSHADES TAX FILING CENTER

After installation, most versions of the Greenshades Tax Filing Center will display a webpage with quick-start information that includes instructions to launch and reports that should be run within your accounting system.

USING THE GREENSHADES TAX FILING CENTER

The homepage of the Greenshades Center contains a set of buttons in the upper left, an active content section to the bottom left, and a deadline calendar in the main area on the right side. The deadline calendar shows due-dates for tax returns and payments and may look slightly different depending on which accounting package you're using. The two most common homepages are shown below:

Greenshades Filing Center

Your Upcoming Tax Deadlines
Review the deadlines for upcoming tax reports and payments. (Experimental Feature)

You are currently tracking deadlines for 5 returns and 3 payments. [\(Change\)](#)

	Jurisdiction	Payments>Returns	Due
E-File Return	Michigan	Quarterly Unemployment Report	4/25/2013
E-File Return	United States	Withholding Form 941 with Schedule B	4/30/2013
File and Pay	Michigan	Withholding Report	5/20/2013
E-File Form	Illinois	Withholding Form IL-941	7/31/2013
Pay Tax	United States	Withholding Liability of \$9,772.02	1/7/2014
E-File Return	Michigan	W-2 E-File	2/28/2014
E-File Return	United States	W-2 Forms	3/31/2014
E-File Return	Illinois	Annual W-2 Report	3/31/2014
Pay Tax	Illinois	Withholding Liability of \$422.37 (IL-501)	3/5/2015
E-File Return	Illinois	Unemployment Report	5/31/2017

[Settings](#) [Show Classic Calendar](#)

Greenshades Filing Center

View Your Upcoming Deadlines
Review the reminders you have set for upcoming tax filings.

Filter:

Pending Completed [Edit Reminders](#)

Past Due

- Due: 2/28/2013 Return for Federal Year End W-2

Due within 3 Months

- Due: 4/30/2013 Return for State Unemployment
- Due: 4/30/2013 Return for Federal 941

Due within a Year

- Due: 7/31/2013 Return for Federal 941
- Due: 7/31/2013 Return for State Unemployment
- Due: 10/31/2013 Return for State Unemployment
- Due: 10/31/2013 Return for Federal 941
- Due: 1/31/2014 Return for Federal 941

[Settings](#) [Show Intelligent Calendar](#)

BASIC NAVIGATION

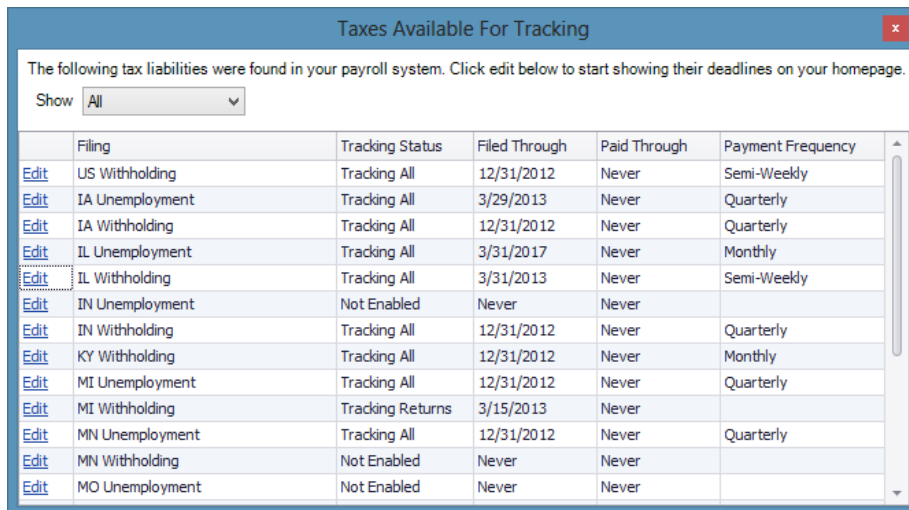
The buttons in the top left of the application are the main navigation options:

Navigation Button Text	Description
Your Upcoming Deadlines	Shows a calendar of upcoming tax deadlines
Create E-File Returns	A wizard that creates electronic tax returns for E-Filing
View Filing History	Shows a history of previously filed payments/returns
View Recent Tax Changes	A reference of tax rules/changes for United States payroll
Create Year-End Forms	A wizard that creates W-2s, 1099s, 1098s, 1042s, T4s, etc. for employee/vendor distribution and then E-Filing.

USING THE INTELLIGENT TAX CALENDAR

The Intelligent Tax Calendar is currently an experimental feature that automatically calculates upcoming reporting and payment deadlines for the taxes found within your accounting system. The calendar will either show the number of taxes being tracked at the top or else will show a message asking the user to begin tracking taxes. We appreciate all feedback about this experimental feature.

Clicking the “Change” link will change how many taxes the Greenshades Center is tracking on its calendar. The Greenshades Center will automatically detect payroll liabilities within your system and track deadlines for any liabilities found. Simply follow on-screen prompts to activate/deactivate items from your calendar. Deadlines are calculated instantly and take into account weekends, state holidays, next-day deposit rules and other tax rules.



The following tax liabilities were found in your payroll system. Click edit below to start showing their deadlines on your homepage.

Show

	Filing	Tracking Status	Filed Through	Paid Through	Payment Frequency
Edit	US Withholding	Tracking All	12/31/2012	Never	Semi-Weekly
Edit	IA Unemployment	Tracking All	3/29/2013	Never	Quarterly
Edit	IA Withholding	Tracking All	12/31/2012	Never	Quarterly
Edit	IL Unemployment	Tracking All	3/31/2017	Never	Monthly
Edit	IL Withholding	Tracking All	3/31/2013	Never	Semi-Weekly
Edit	IN Unemployment	Not Enabled	Never	Never	
Edit	IN Withholding	Tracking All	12/31/2012	Never	Quarterly
Edit	KY Withholding	Tracking All	12/31/2012	Never	Monthly
Edit	MI Unemployment	Tracking All	12/31/2012	Never	Quarterly
Edit	MI Withholding	Tracking Returns	3/15/2013	Never	
Edit	MN Unemployment	Tracking All	12/31/2012	Never	Quarterly
Edit	MN Withholding	Not Enabled	Never	Never	
Edit	MO Unemployment	Not Enabled	Never	Never	

There five different types of deadlines that may appear on the calendar, each with their own icon and text. “E-File Return” will create an electronic tax return file ready for electronic filing to the appropriate government agency (such as a quarterly state unemployment return or a federal W-2 E-File). “E-File Form” will complete a company tax form hosted on a government web portal (such as a 941 form). “Pay Tax” will walk you through the process of paying a tax via the EFT Credit on a state or federal agency’s website. “File and Pay” will walk you through a combination of making a tax payment and either completing a form or submitting an electronic return file.

	Jurisdiction	Payments>Returns	Due
E-File Return	Michigan	Quarterly Unemployment Report	4/25/2013
E-File Return	United States	Withholding Form 941 with Schedule B	4/30/2013
File and Pay	Michigan	Withholding Report	5/20/2013
E-File Form	Illinois	Withholding Form IL-941	7/31/2013
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E-File Return	Michigan	W-2 E-File	2/28/2014
E-File Return	United States	W-2 Forms	3/31/2014
E-File Return	Illinois	Annual W-2 Report	3/31/2014
Pay Tax	Illinois	Withholding Liability of \$422.37 (IL-501)	3/5/2015
E-File Return	Illinois	Unemployment Report	5/31/2017

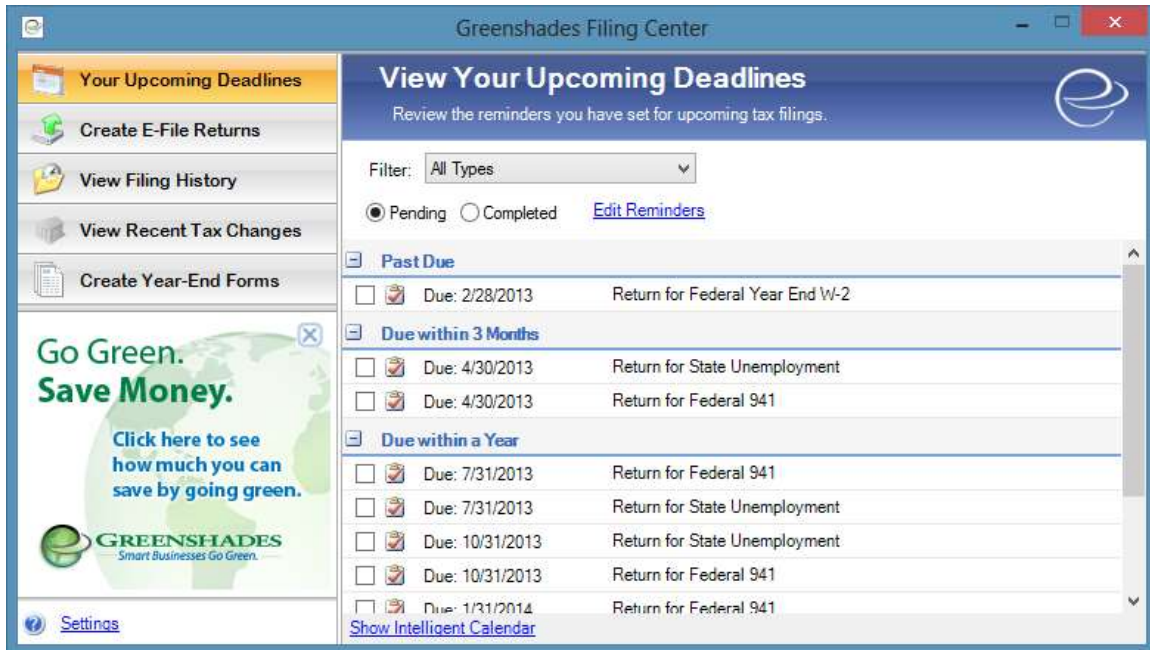
To complete the process, simply click on the link on the calendar and follow on-screen instructions.

Federal Income Tax	\$7,376.03
Social Security	\$1,941.84
Employer Social Security	\$0.00
Medicare	\$454.15
Employer Medicare	\$0.00
Payment Amount	\$9,772.02

The intelligent calendar will automatically update its deadlines as you complete tax reports, forms, and payments.

USING THE CLASSIC TAX CALENDAR

The classic Tax Calendar allows users to manually set recurring reminders for tax payments/returns.



Users can add additional reminders by using the “Edit Reminders” link at the top of the calendar. After completing the activity listed please manually check off the item on the calendar.

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 that is kept constantly updated by the Greenshades Compliance team.

The screenshot shows the 'Greenshades Filing Center' window. On the left is a sidebar with navigation buttons: 'Your Upcoming Deadlines', 'Create E-File Returns', 'View Filing History', 'View Recent Tax Changes' (highlighted), and 'Create Year-End Forms'. Below these is a 'Go Green. Save Money.' banner with the Greenshades logo and a 'Settings' link. The main content area is titled 'News and Recent Tax Changes' and includes a sub-header 'View recent changes and relevant information about tax filings.' There are two dropdown filters: 'Filing Type' (set to 'All') and 'Jurisdiction' (set to 'All'). A dropdown menu is open over the 'Filing Type' filter, listing 'All', 'Employment', 'Payroll', and 'SUTA'. The main article is titled 'Recent Employment' with a sub-headline 'E-Verify ear... by employers, USCIS reports'. The article text reads: 'Users of E-Verify have given the federal government's free, Internet-based employment eligibility verification system high marks in a recent [customer survey](#), according to USCIS director Alejandro Mayorkas. More than 1,300 randomly selected employers across the nation who use E-Verify evaluated key program aspects, including registration, the online tutorial, ease of use, technical assistance, and customer service. They rated the program as exceptionally high in overall customer satisfaction, with an average score of 86 out of 100 on the American Customer Satisfaction Index (ACSI) scale. Other key survey findings revealed that the overwhelming majority of users were likely to recommend E-Verify to other employers, confident in E-Verify's accuracy, and likely to continue using the program. With E-Verify, more than 99 percent of work-authorized employees are automatically confirmed as employment authorized. Employer enrollment in E-Verify has more than doubled since January 2009, with more than 432,000 participating'.

CREATE E-FILE RETURNS

To create an electronic file to be submitted to a reporting agency, either click an “E-File Return” link on the intelligent tax calendar or else click “Create E-File Returns” from the navigation options on the left side of the Greenshades Center. The resulting wizard will walk you through the process of creating the electronic report that will be submitted to a local, state, or federal government agency. Simply follow On-Screen prompts. These screens will have drastically different options depending on which accounting package you are using since the E-File Wizard may need to ask for different pieces of information.

The E-File wizard will often use information from tax reports or tax worksheets generated within your accounting package. This is particularly true for Federal Unemployment (940) reports, State Unemployment (SUI/SUTA) Reports, and Federal Withholding (941) reports. If the E-File wizard does intend to gather information from your accounting package’s tax reports then it will inform you during the wizard process and request that you return to your accounting package to create the report or worksheet in question. If you know of a 940, 941, or state unemployment report/worksheet that is built into your accounting package then you may wish to run that report before launching the E-File wizard: it may eliminate the need to return to your accounting package and to run the report later and can always be used to verify the totals that the E-File wizard will show before creating your tax return.

The first few screens are used to determine what type of E-File you need to create. If you started the E-File process from the intelligent tax calendar than you will not see these screens (since the Greenshades Center already knows what you intend to create).



The screenshot shows the "E-File Wizard" window in the "Greenshades Filing Center". The window title bar includes the application name and standard Windows window controls. On the left, a navigation pane lists several options: "Your Upcoming Deadlines", "Create E-File Returns" (highlighted in orange), "View Filing History", "View Recent Tax Changes", and "Create Year-End Forms". Below this is a promotional banner for "Go Green. Save Money." with a "Settings" link at the bottom left. The main content area is titled "E-File Wizard" and contains the instruction: "Select the type of filing you would like to create from the list below." Below this is a graphic of a CD with binary code. To the right of the graphic, a text box explains the wizard's purpose. Below the text are four radio button options: "Annual Return" (selected), "Quarterly Return", "Monthly Return", and "Other Return". Underneath is a text input field labeled "Enter the Company Name as it should appear on your e-file" with the text "Fabrikam Company Inc." entered. At the bottom right, there are three buttons: "Quit", "< Back", and "Next >".

The exact E-Files supported vary per accounting package but the following are commonly supported:

Annual Return:

- Federal, State, and Local Annual Withholding Returns (W-2s)
- Federal 940 Returns
- 1099 (almost all types), 1098, and 1042 Returns

Quarterly Filing:

- State Unemployment Returns (SUTA/SUI)
- Federal 941 Returns
- Local Quarterly Withholding Returns

Monthly Returns:

- Pennsylvania Act32 Returns (Local Tax Liability)
- Illinois Monthly Unemployment Return

Other Returns:

- State New Hire Reports
- 401(k) Reports
- EEO-1 Survey
- Current Employee Statistics (CES)

Once you have selected the type of E-File you want to make, simply follow on-screen instructions to complete the return. The wizard is user friendly and will pull most information directly out of your accounting package.

Greenshades Filing Center

Your Upcoming Deadlines

Create E-File Returns

View Filing History

View Recent Tax Changes

Create Year-End Forms

Go Green. Save Money.

Click here to see how much you can save by going green.

GREENSHADES Smart Businesses Go Green.

Settings

Work Location PSDs

Choose Political SubDivisions for each of your work locations

You must choose a Political SubDivision for each of your Pennsylvania worksites listed below:

Work Location: Philly Warehousing

Work Location Details

3334 Morrell Avenue
Philadelphia, PA 19114

Adamsburg Boro (Westmoreland County) (650701)

Quit < Back Next >

Greenshades Filing Center

Indiana Withholding Form WH-1
 Review the totals found from your payroll package and click 'E-File Form' when ready.

This form has a reporting period of 10/1/2012 to 10/31/2012 and must be submitted to Indiana Department of Revenue by 11/30/2012.

Indiana State Tax Withheld	\$1,108.24
Indiana County Tax Withheld	\$389.96
Subtotal Tax Withheld	\$1,498.20
Pre-paid EFT Payments	\$0.00
Penalty and interest (if late)	\$0.00
Total Amount Due	\$1,498.20
Adams County Tax Withheld	\$59.11
Hamilton County Tax Withheld	\$37.80
Howard County Tax Withheld	\$100.24
Marion County Tax Withheld	\$192.81

[E-File Form](#)

[Out](#)

GREENSHADES
 Smart Businesses Go Green.

**Go Green.
 Save Money.**

Click here to see how much you can save by going green.

[Settings](#)

If you have any questions about a specific filing type, please refer to the in-product help for more details or visit our [Greenshades Center Help](#) section online.

VIEW PREVIOUS FILINGS

The Greenshades Center keeps an archive of all electronic returns and payments you have filed. To view this history at a later time simply click 'View Filing History' from the buttons in the top left.

View Previous Filings
View history of the filings you have previously created.

Company	Type	Filed To	Created On	Reporting Date
Created in the past week:				
Fabrikam, Inc	Withholding	KY	03/29/2013	03/31/2013
Fabrikam, Inc	Withholding	IL	03/28/2013	06/30/2013
Fabrikam, Inc	Withholding	US	03/29/2013	01/03/2014
Fabrikam, Inc	Withholding	IL	03/29/2013	06/03/2014
Fabrikam, Inc	MultipleWorksite	BLS	03/29/2013	12/31/2013
Fabrikam, Inc	MultipleWorksite	BLS	03/29/2013	12/31/2013
Fabrikam, Inc	EEO	US	03/29/2013	12/31/2013

View Report
Rebuild Electronic Media

Right-click on any of the items in the View Previous Filing list to access options. You can always view the form totals or payment amounts for historical filings. You may also edit previously built return files for resubmission.

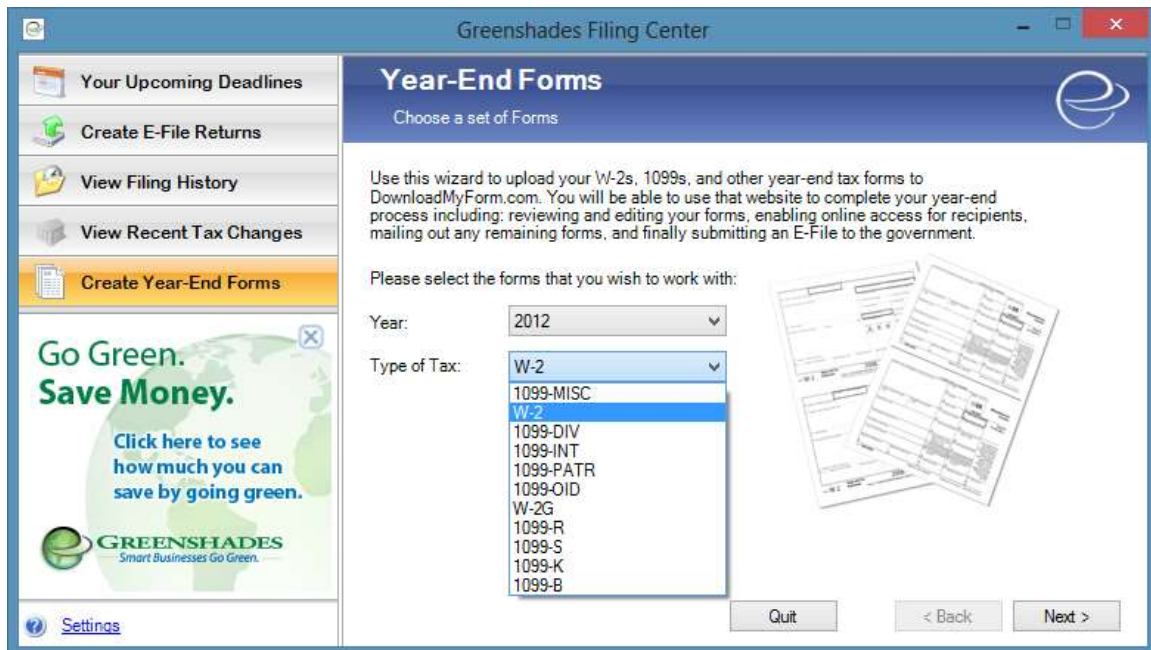
CREATE YEAR-END FORMS

The Year-End forms wizard will create digital year-end tax forms (W-2s, 1099s, 1098s, T4s, and many more) from your accounting system and then upload them to the GreenshadesOnline.com web portal. Greenshades Online will then walk you through the process of performing edits, verifying the forms, distributing them to your employees or vendors, and also filing final copies to the government. The Greenshades Tax Filing Center partners with GreenshadesOnline to provide a complete solution for your year-end form needs.

The Year-End Form process is comprised of several steps including:

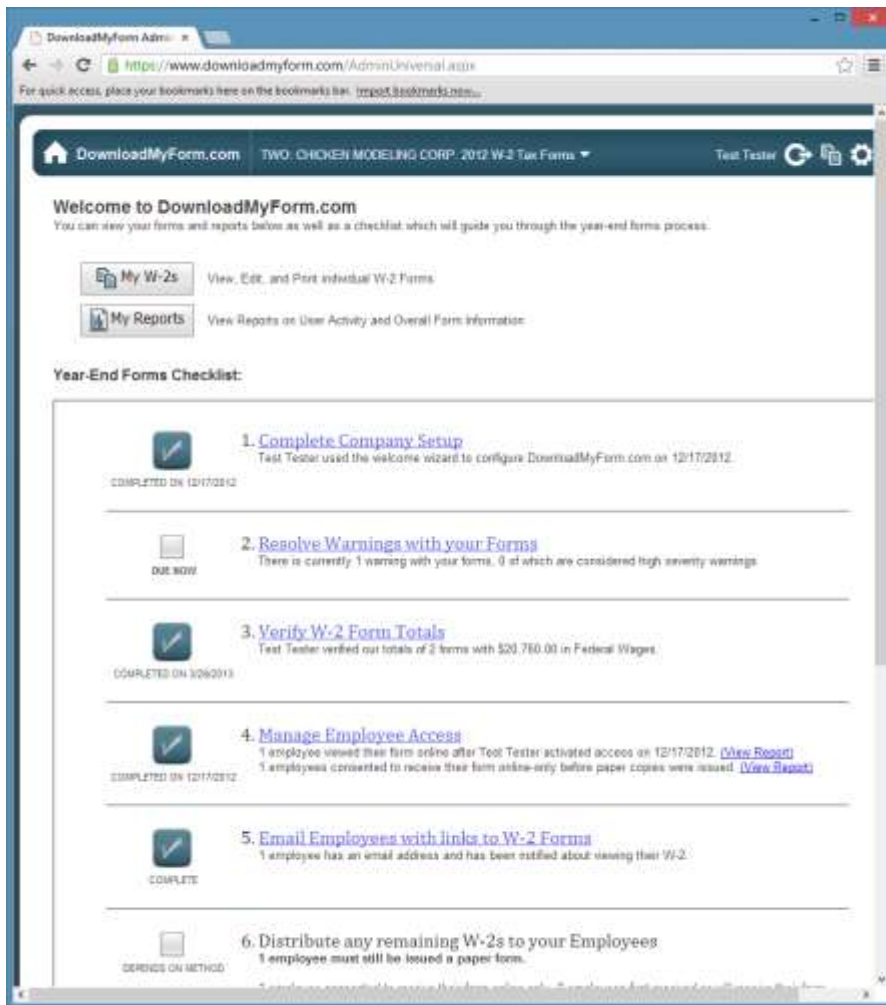
1. The Greenshades Tax Filing Center will read Payroll and Accounts Receivable information directly from your Accounting Package and create digital tax forms
2. Those digital tax forms will be uploaded to the GreenshadesOnline web portal
3. You will be directed to a GreenshadesOnline website where you will review your tax forms and have the opportunity to edit them individually or in bulk
4. (For W-2s and T4s only): You may choose to allow your employees to retrieve their forms online (reducing the amount of forms that must be printed and mailed). If so, then you may also use GreenshadesOnline to email your employees a link to their tax forms
5. You will use GreenshadesOnline then print and mail the remaining tax forms (either yourself or through a mailing service)
6. Finally, you will use GreenshadesOnline to E-File your forms to federal/state/provincial tax agencies

To begin, select the “Create Year-End Forms” option from the File and Pay Shortcuts menu and then follow on-screen instructions.



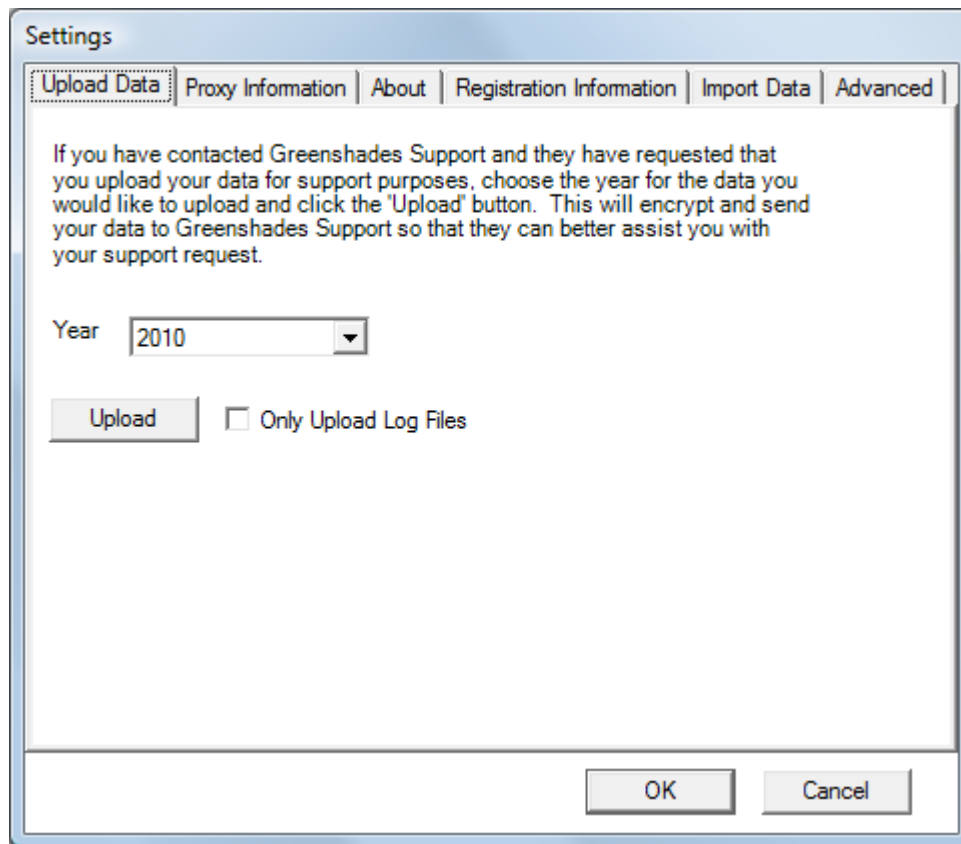
Once you have used the Greenshades Tax Filing Center to upload your digital tax forms to the GreenshadesOnline portal, you will be using that portal for all additional work with those forms. If you return to the Tax Filing Center and run the “Create Year-End Forms” wizard for the same year and type of forms that you have previously uploaded then you will be presented with an option to simply work with those previous forms online or else given the chance to re-create your digital forms from the accounting package data and overwrite the forms that were previously uploaded.

There is a complete set of documentation for using the year-end form functionality within GreenshadesOnline will located at <http://www.greenshades.com/products/dmf.aspx>.



SETTINGS

In the lower left-hand corner of the Greenshades Center you will see a Settings link. Generally, you will not need to enter this area unless you are registering the Greenshades Center, or have been otherwise directed by our support staff. We will briefly cover the different areas of the Greenshades Center Settings over the next few pages.



UPLOAD DATA

The Upload Data tab in Settings is used strictly for support issues. This option gathers and encrypts various pieces of data from the Greenshades Center, and uploads it directly to a company and date specific folder, which our technicians can then access to help in determining the root of the issue.

Settings

Upload Data | Proxy Information | About | Registration Information | Import Data | Advanced

Use a proxy server for my internet connection

Address:

Port:

Post-String (may be blank):

Fill out the following fields if your proxy server requires Authentication Information:

Domain (Optional):

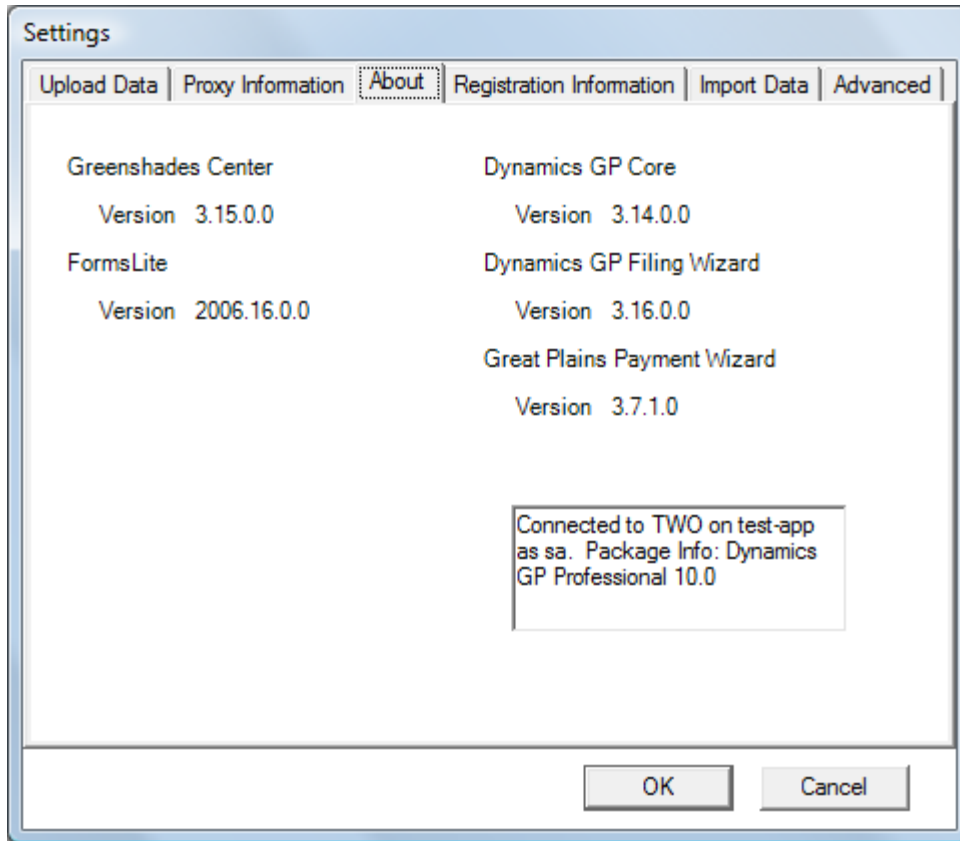
UserName:

Password:

OK Cancel

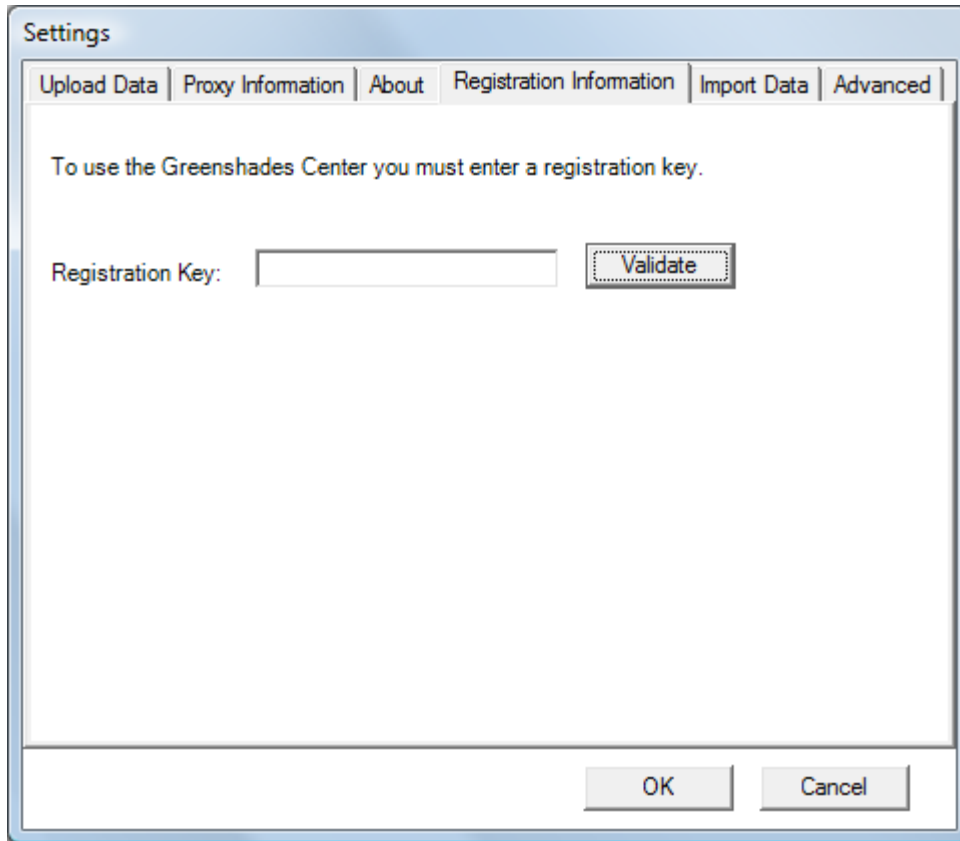
PROXY INFORMATION

The Proxy Information tab is to be used by your company IT department when proxy settings are required for an internet connection.



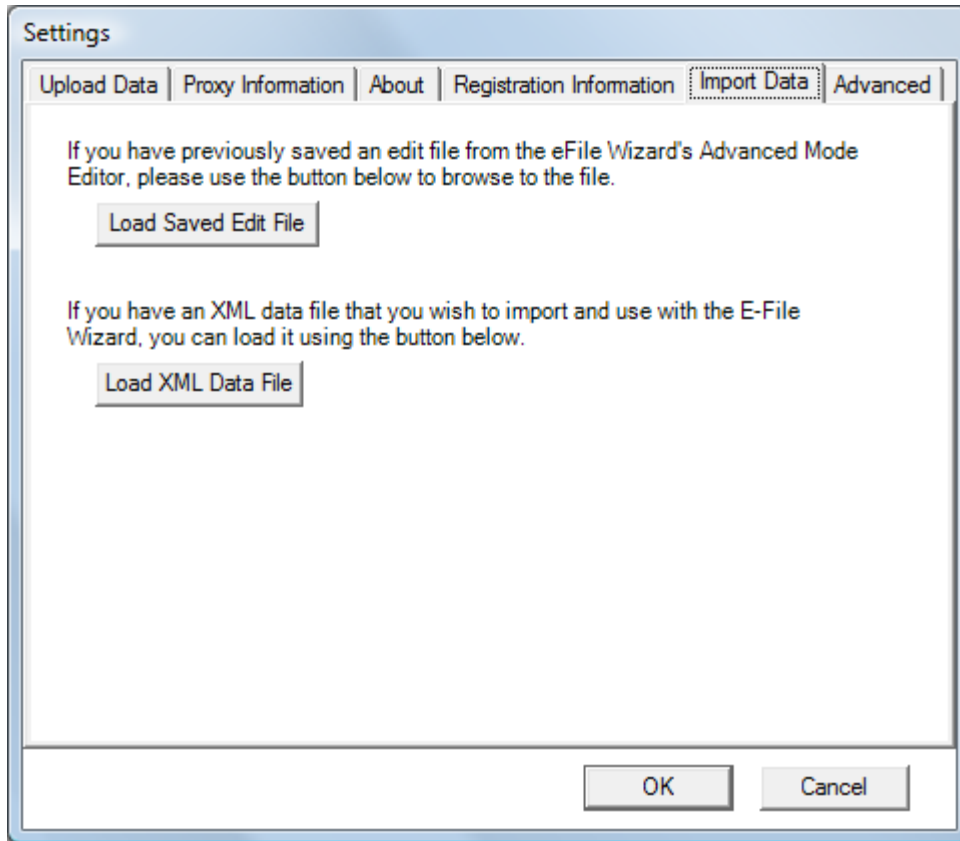
ABOUT

The About tab is also primarily used by our support staff, in determining if the software is up-to-date or not. Many problems can be avoided or fixed by simply making sure that the Greenshades Center being used is the most current version.



REGISTRATION INFORMATION

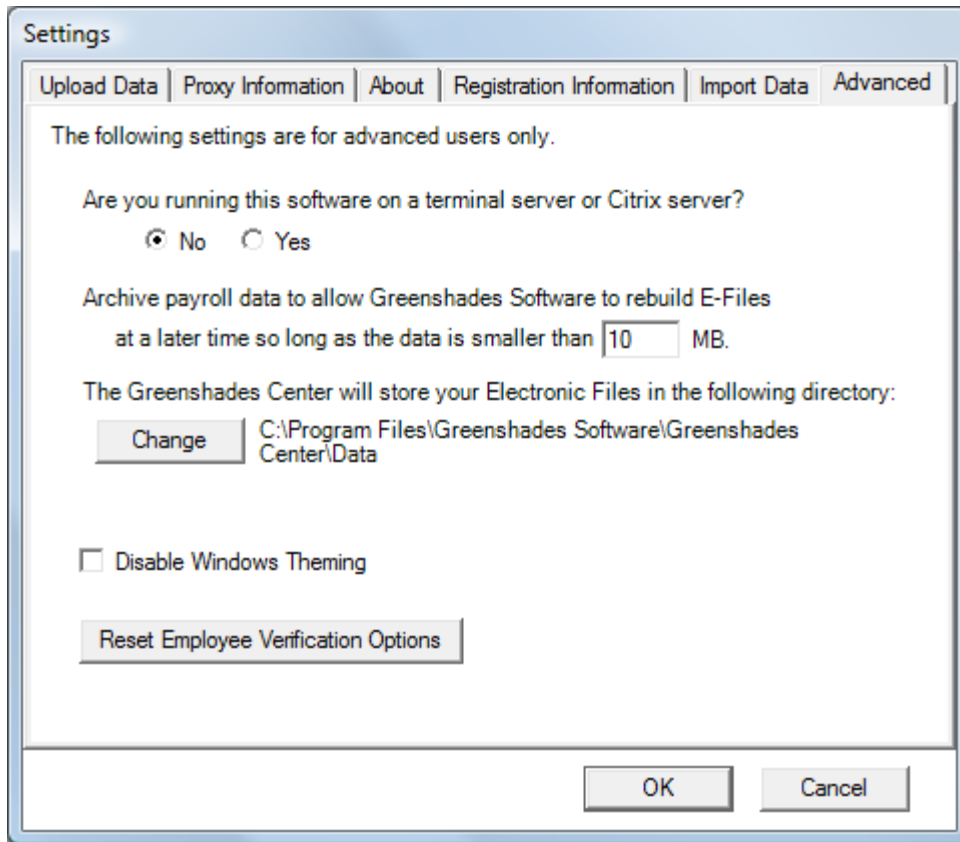
Crucial to the Greenshades Center functionality, is the Registration Key. The Registration Key is actually entered immediately after the initial installation, so chances are you may never need to use this tab, if only to view the Registration Key or to view the registration expiration date.



IMPORT DATA

Occasionally you may need to import and edit file, or an xml file into the Greenshades Center. The Import Data tab allows you to do just that. Bear in mind that these are used for very specific actions within the Greenshades Center. If you are unsure if you need to use them, chances are you don't.

- **Load Saved Edit File**
If you were previously using the advanced editor when building your electronic file and saved a copy of the changes you were making to be imported at a later time, clicking the 'Load Saved Edit File' button will allow you to navigate to that saved ".mgd" file to be re-imported.
- **Load XML Data File**
Used to manually import a .xml file containing payroll reporting data.



ADVANCED

The Advance tab is the last tab in the Settings section of the Greenshades Center. Generally, you will not need to modify any of the settings contained in this section from their defaults.

- **Are you running this software on a terminal server or a Citrix server?**
Set this option to 'Yes' if you are, and 'No' if you are not to help the Greenshades Center run more efficiently.
- **Archive payroll data to allow Greenshades Software to rebuild E-files at a later time so long as the data is smaller than ___ MB.**
This setting is directly related to the View Previous Filings section of the Greenshades Center. Files over the specified file size will not be archived.
- **The Greenshades Center will store your Electronic Files in the following directory**
This setting is related to 'View Previous Filings'. Archived files will always be stored in the default directory (as shown above). If you would like to specify a different directory, click the 'Change' button, navigate to the desired folder, and click the 'OK' button.
- **Disable Windows Theming**

Certain font styles and sizes within Windows will not display correctly within the Greenshades Center. Select this option to disable Windows theming, and retain font integrity.

- **Reset Employee Verification Options**

If the SSN Verification has been disabled when using the E-file Wizard, you may re-enable it by clicking 'Reset Employee Verification Options'.

FREQUENTLY ASKED QUESTIONS

HOW CAN I GET LIVE SUPPORT?

Simple! Call us at (888) 255-3815 ext. 700 or by email us at support@greenshades.com. Our support staff is located at our corporate headquarters in sunny Jacksonville, FL and we would love to hear from you.

HOW MUCH DOES THIS SUPPORT COST?

Greenshades stands behind our products. We provide **completely free** product training/re-training (see below) and completely free technical support. You can call us when you're having problems or schedule an appointment in advance and we'll dedicate support resources to walk you through whatever process you're trying to complete.

HOW CAN I REVIEW MY SUTA / W2 / 941, ETC. TOTALS AFTER I'VE SUBMITTED THEM?

By clicking on the 'View Previous Filings' button from the opening screen of the Greenshades Center you will be presented with a list of media you previously filed using the Greenshades Center. Simply double click any report you would like to view and you will be presented with the details of file as it was originally created.

I AM NOT FAMILIAR WITH GREENSHADES, MAY I SCHEDULE A WALKTHROUGH?

Yes! Greenshades support provides completely free training/retraining appointments. We call these "OnRamp Sessions". The number of OnRamp sessions is limited during support heavy times (like close to most filing deadlines), so please call us early to reserve a spot. To schedule an OnRamp session, please contact Greenshades Support via email at support@greenshades.com or by calling 888-255-3815 extension 700.