

# Greenshades Local Tax Manager

Installation and User Guide



**GREENSHADES**  
— *Let Us Handle That* —

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## Requirements for Local Tax Manager

In order to install the Local Tax Manager, you must first install Microsoft's .NET Framework version 2.0 or newer. To download Microsoft's .NET Framework version 2.0, click [HERE](#).

Please follow the instructions provided by Microsoft if you need any assistance installing the .NET Framework.

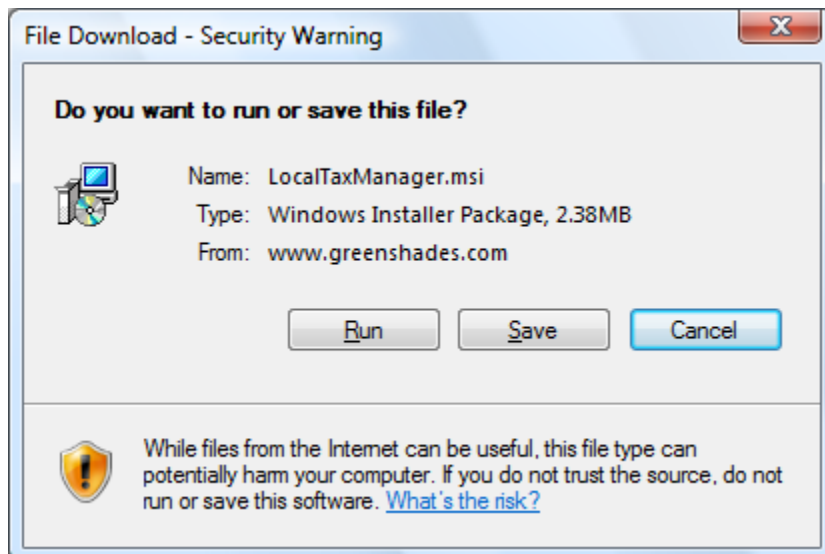
Local Tax Manager also requires a constant internet connection.

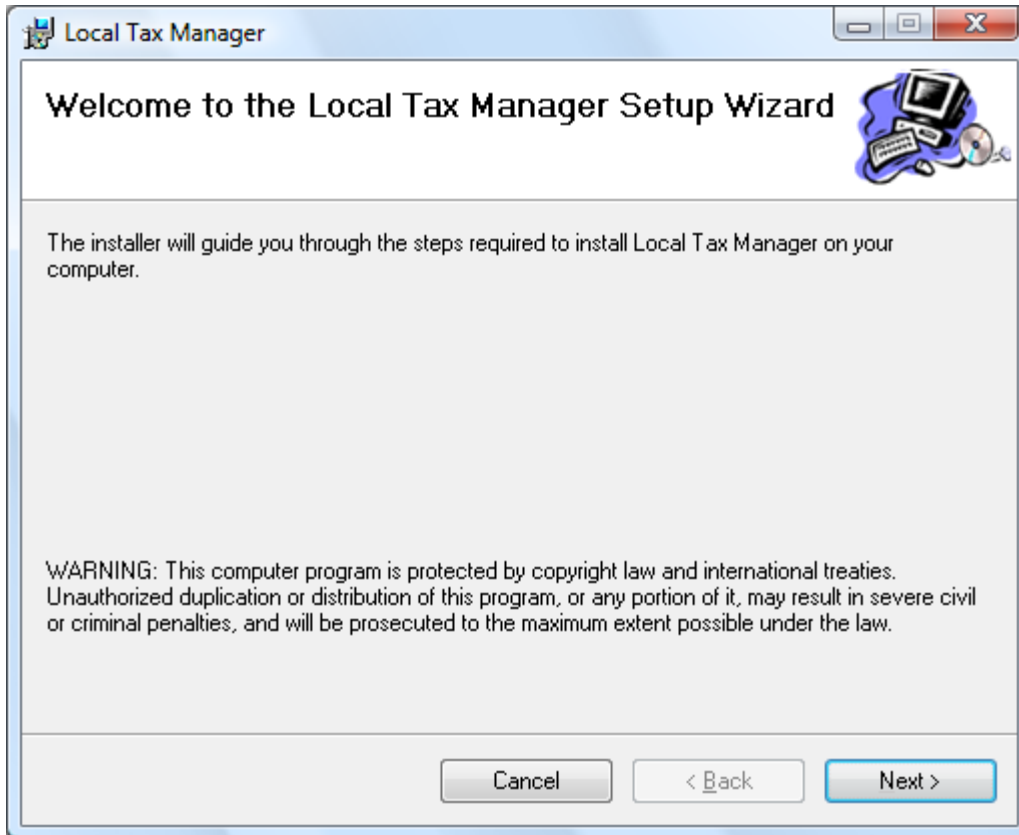
## Installing the Local Tax Manager

Installing the Local Tax Manager is a straightforward process. First, you will need to download the setup file from our website (linked below). This file contains the Setup Wizard that will guide you through the installation process.

Begin downloading Local Tax Manager by clicking the 'Download the Local Tax Manager for Dynamics GP link, located [HERE](#).

You will be prompted with a 'File Download - Security Warning' prompting you to Run, Save or Cancel. Click the Run (or Open) button.





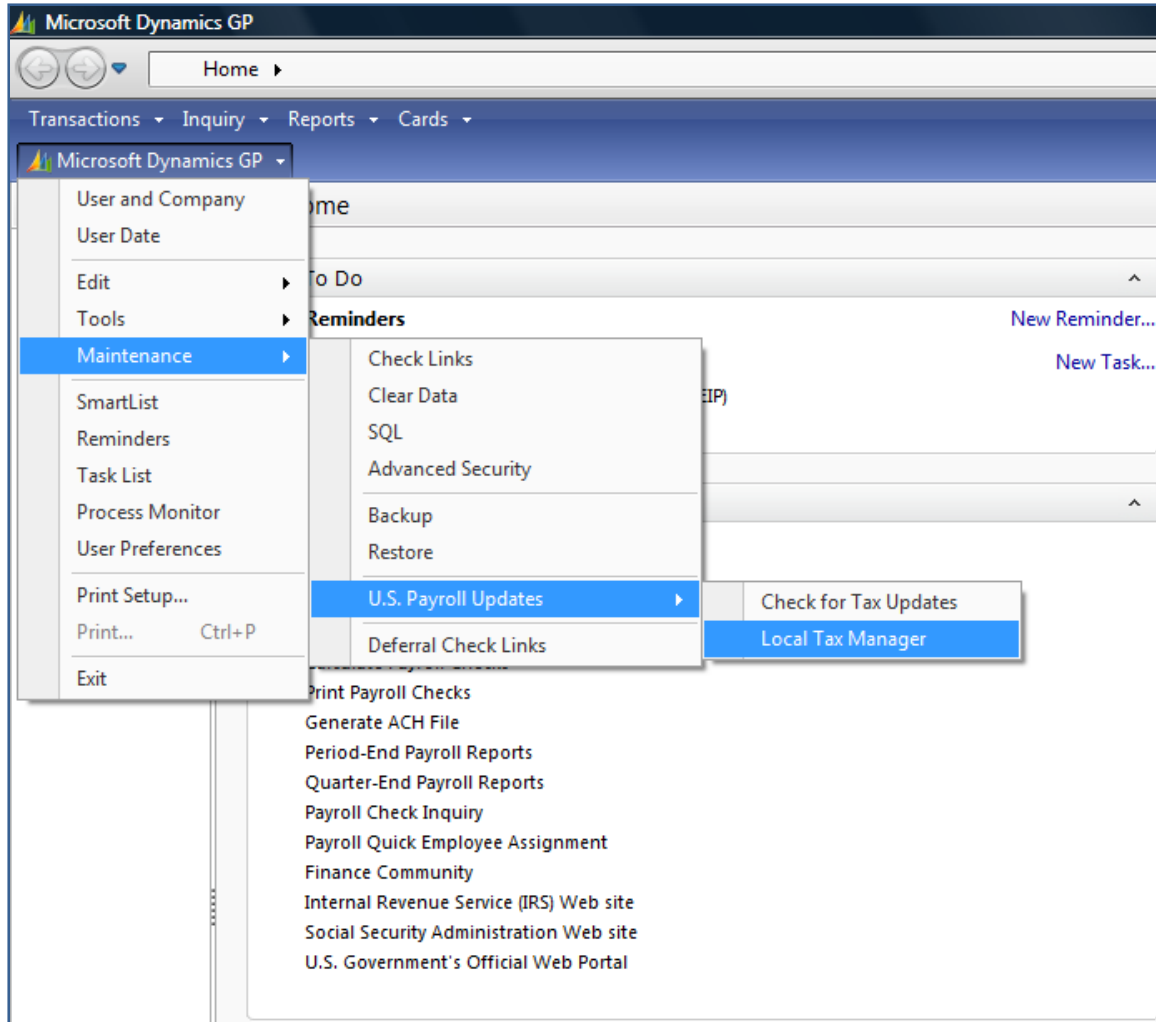
From here, the Local Tax Manager Install Wizard will guide you through the installation process. Simply follow the onscreen instructions to complete this installation.

For the final step, you must run the Local Tax Manager while logged into Dynamics as a user with 'create' privileges on your Dynamics server (such as 'sa').

The first time that the application is run it must create tables and stored procedures on your Dynamics server, and therefore will require super-user permissions. To learn how to launch the Local Tax Manager, please refer to the 'Running the Local Tax Manager' section below.

## Running the Local Tax Manager

Once the Local Tax Manager is installed, you can access it from within Dynamics GP by navigating to Maintenance > U.S. Payroll Updates > Local Tax Manager.

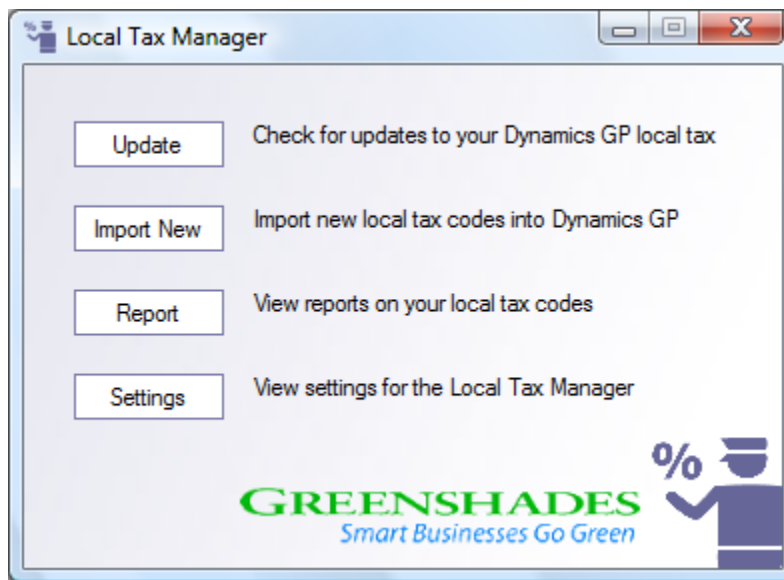


Once you have successfully logged into your Dynamics GP server and run the Local Tax Manager, the main screen of the Local Tax Manager will appear. From here you can access all of the functionality provided by the Local Tax Manager.

## Product Overview

Shown below is the main screen for Greenshades Local Tax Manager. From this screen you will access each of the Local Tax Manager main functions. Local Tax Manager is intended to perform three separate functions:

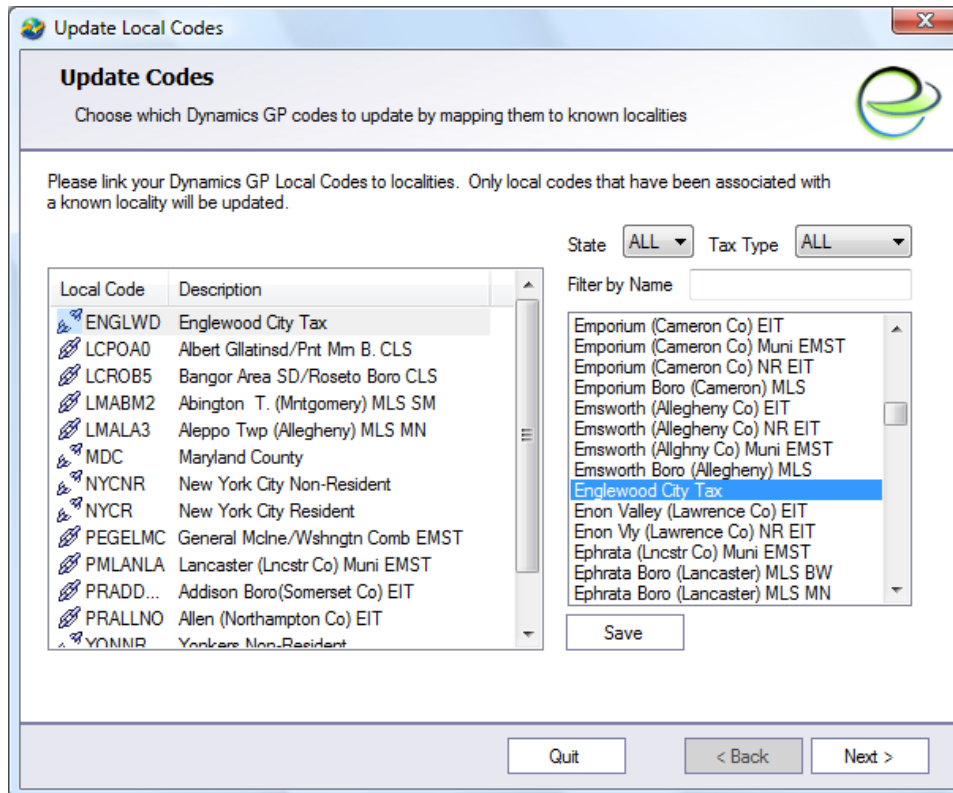
- ✓ Updating existent codes with any changes made by the localities themselves
- ✓ Importing new Local Tax Codes to your Dynamics GP system
- ✓ Reporting on codes that are currently configured.



Each of these functions is described in more detail below.

## Updating Existent Local Tax Codes

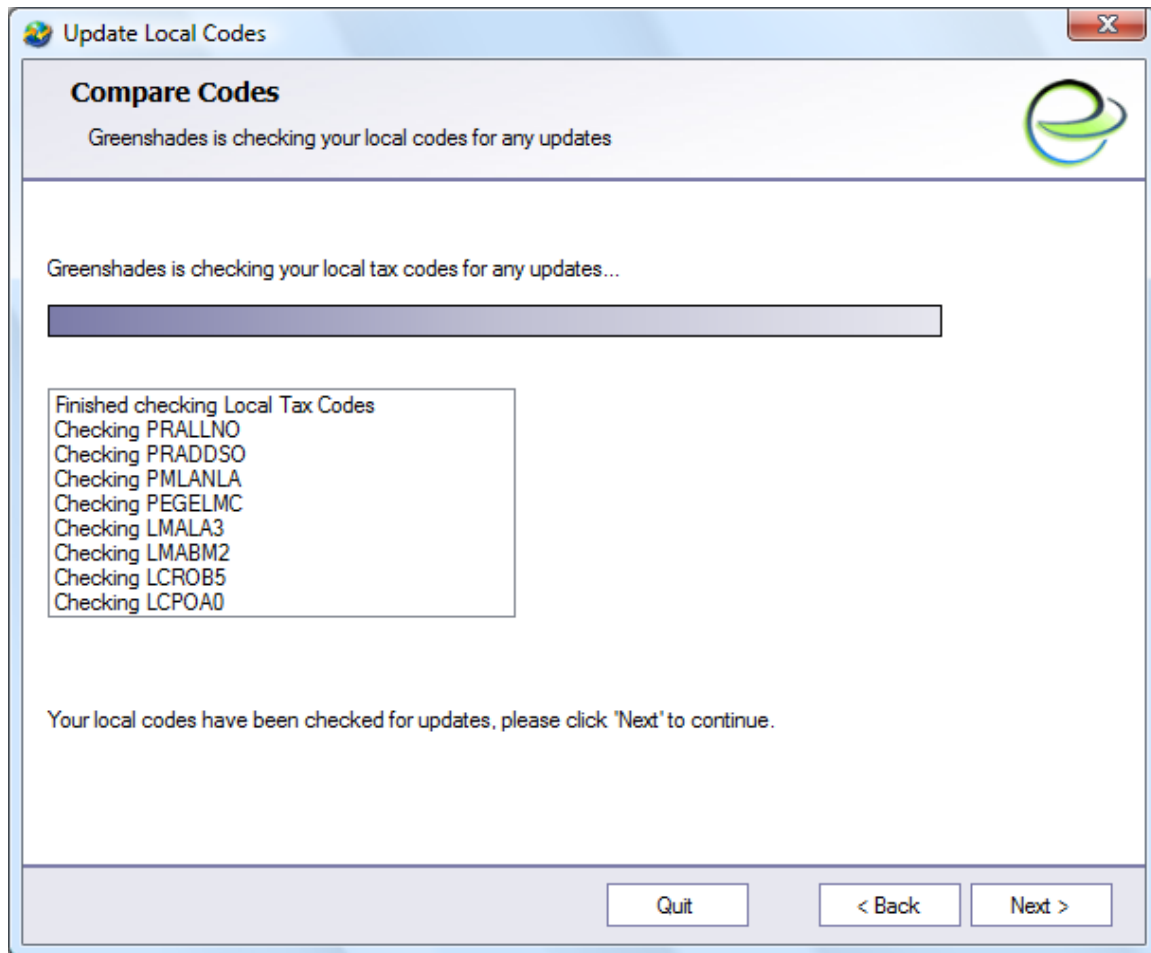
From the main screen of the Local Tax Manager, click 'Update' to enter the 'Update Local Codes' wizard. Before the Local Tax Manager can check for updates to your Dynamics GP local codes, it must first associate your codes to Greenshades' database of local taxes.



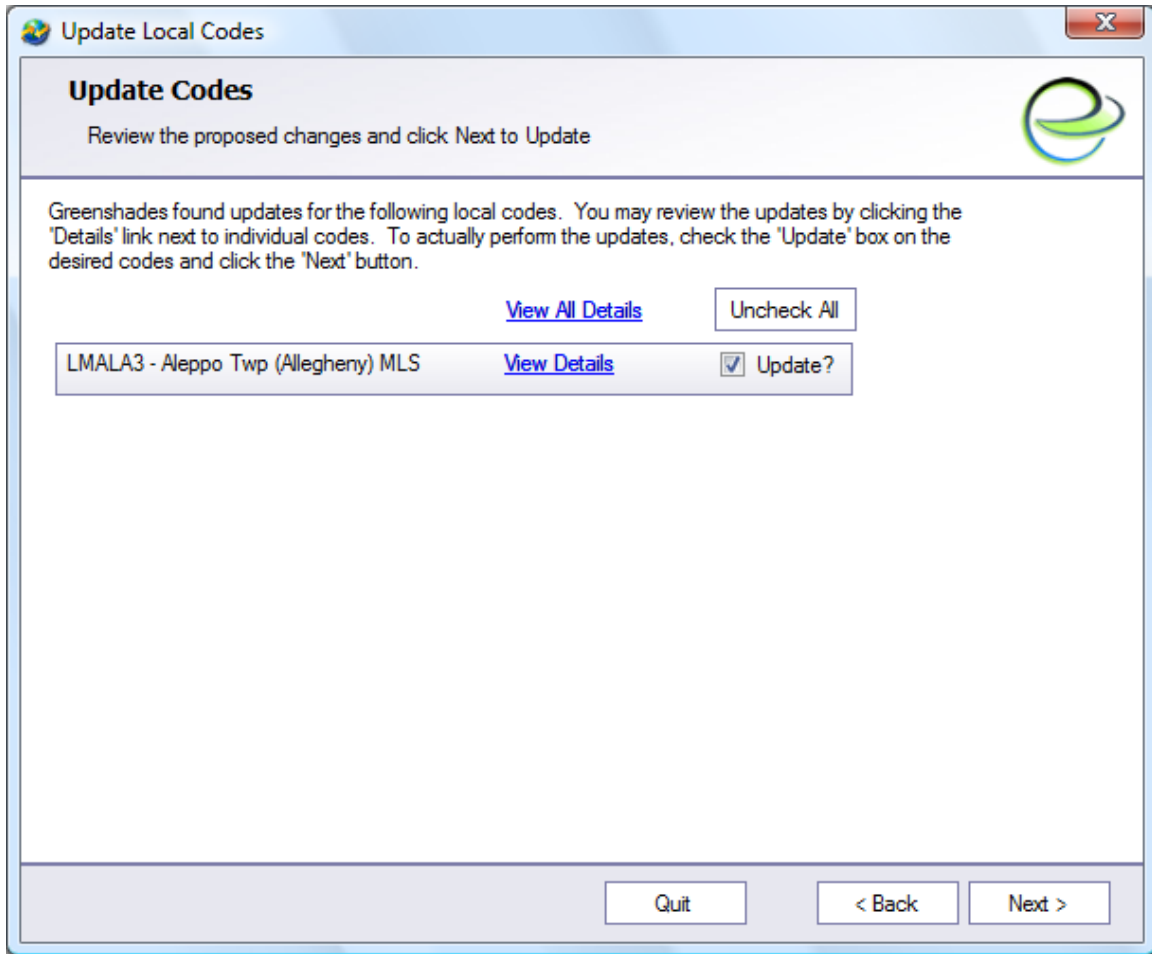
Along the left side of the 'Update Codes' screen is a listing of each local tax code that has currently been set up within Dynamics GP. The icon next to the Local Code is either an open chain (indicating it has not yet been mapped to a Greenshades local tax) or a closed chain (denoting it has been mapped to a Greenshades local tax). Greenshades will only be able to find updates for Dynamics local tax codes that have been mapped to one of our localities.

To map a local code, simply select it from the 'Dynamics GP Local Codes' list and then choose a locality from the box on the right side. You can filter the choices listed by selecting a state and tax type from the dropdown boxes at the top of the screen. You can also type the first few letters of the locality name into the 'Filter by Name' box to have it automatically filter the available localities. Once you have found the Greenshades locality that should be associated with your local code, click the 'Save' button.

Once you map a Dynamics local code to a Greenshades locality, it will be saved for all future sessions. When you have mapped all of the local codes that should be checked for updates, click 'Next'.



The 'Compare Codes' screen will show a progress bar as each of your mapped local codes are checked for updates. As a code is checked, it will be listed in the box below the progress bar. Once each of your codes is checked, click 'Next' to view the results.



The 'Update Codes' screen will display any local codes whose information did not match the latest available specifications from the locality itself. The Local Tax Manager will now give you a chance to review all changes and choose which local codes it may update. To review a proposed update, simply click the 'View Details' link to see a complete description of the discrepancies between your current tax code and the one that Greenshades believes is correct.

The 'Update?' checkbox will control which local codes the tax manager will update. By default, all updates are checked. If you wish to disallow an update to a specific local code, simply uncheck the box. Once you have finished reviewing the proposed changes, click 'Next' to allow the Local Tax Manager to update your Dynamics GP system.

Each local tax code that has 'Update?' checked will be modified to match our local tax specifications. The update process itself should only take a few seconds. Once the update process has finished, you will see a success message at the bottom of the window and you can click 'Finish' to exit the wizard.

## Importing New Local Tax Codes

From the main screen of the Local Tax Manager, click the 'Import New' button to enter the 'Add New Local Codes' wizard.

**Add New Local Codes**

**Add Local Codes**

Select all of the localities you wish to add to Dynamics GP

Please check the box next to each of the Greenshades localities that you wish to add. Localities that have already been added (or that have been mapped to existant local codes) will not be displayed.

State **PA** Tax Type **ALL**

Filter by Name

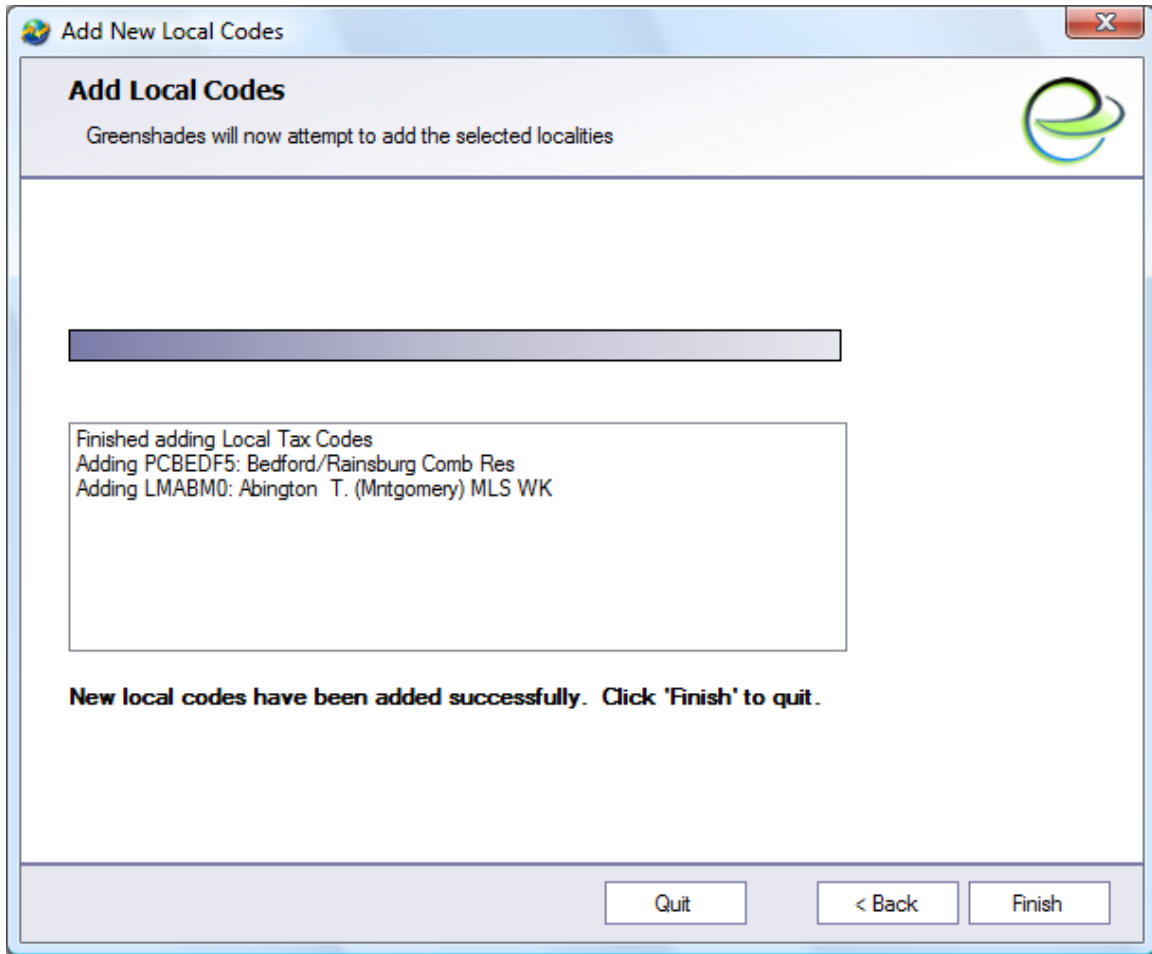
- Bedford/Hyndman Comb EMST
- Bedford/Hyndman Comb Res
- Bedford/Londondery Comb EMST
- Bedford/Londondery Comb Res
- Bedford/Manns Choice B. CLS
- Bedford/Manns Choice Comb EMST
- Bedford/Manns Choice Comb Res
- Bedford/Rainsburg Comb EMST
- Bedford/Rainsburg Comb Res
- Bedford/Snake Spring Comb EMST
- Bedford/Snake Spring Comb Res
- Bedminster (Bucks Co) EIT
- Bedminster (Bucks Co) NR EIT
- Beech Creek Boro (Clinton) MLS
- Beech Creek Twp (Clinton) MLS

Only codes that are checked and visible will be added.

In the 'Add Local Codes' screen, you can view descriptions of all localities that have withholding taxes. You can filter the choices listed by selecting a state and tax type from the dropdown boxes at the top of the screen. Additionally, you can type the first few letters of the locality name into the 'Filter by Name' box to have it automatically filter the available localities.

Some taxes are specific to the payment frequency that you use at your company. For instance, a single tax may have weekly, biweekly, semi-monthly, and monthly variants. This is especially prevalent with Pennsylvania LST codes. You can identify these codes by the 'WK', 'BW', 'SM', or 'MN' suffixes on those lines.

Once you have located one or more localities that you wish to add to Dynamics GP, check the box next to its description. Click the 'Next' button when you are ready to proceed.

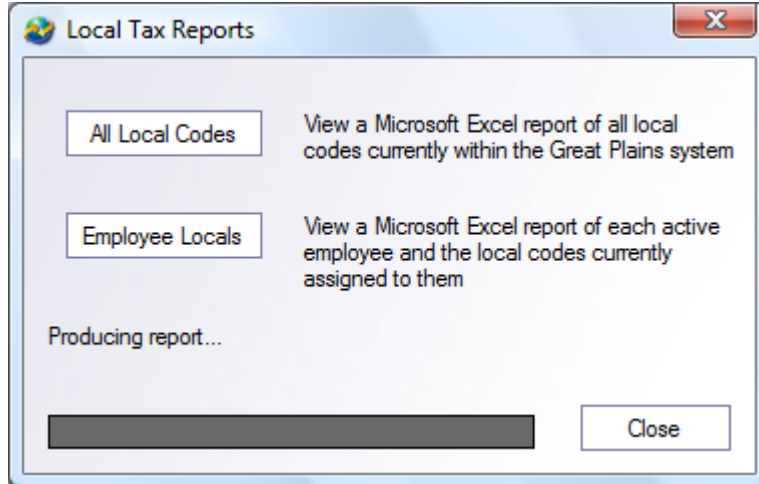


When you click 'Next', the Local Tax Manager will begin the process of adding all checked localities that are currently visible. Both the Local Tax ID as well as the description of each tax being added will be displayed under the progress bar.

Once your taxes have been added, click 'Finish' to close the wizard. You can now use Dynamics GP to associate employees with the newly added tax codes.

## Reporting on Local Tax Codes

Click the 'Report' button on the main screen to bring up the 'Local Tax Reports' section. Currently, there are two reports available. These reports are generated in Microsoft Excel.



*All Local Codes Report* The 'All Local Codes' report contains each local code that is currently in your Dynamics GP system along with easy to read information about the tax code itself.

*Employee Locals Report* This report lists each of the local codes that were assigned to your employee at the time that you most recently ran payroll. It also lists what their tax amounts were at that time.

Simply click the desired report button to produce your report.

## Greenshades Formats and Abbreviations

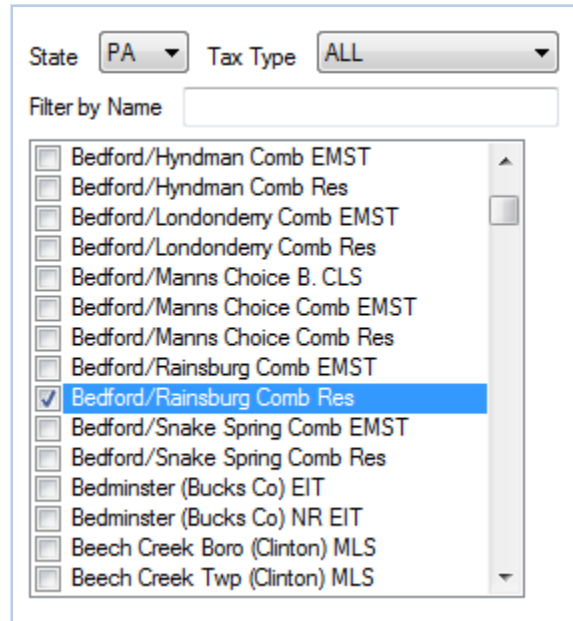
Both the ‘Add New Local Code’ wizard and the ‘Update Local Code’ wizard will ask you to find one or more Greenshades localities in order to add them or map them to your current Dynamics GP codes. In order to facilitate you locating the correct locality within our lookup control, we have tried to keep our naming and formatting conventions specific across all localities:

First, all of our local taxes are properly categorized into *City*, *County*, *School District*, or *Other*. The most common use of an ‘other’ tax is to represent a tax code that has implicitly combined multiple smaller tax codes. For instance, if there is a specific County Tax and a School District Tax for a school within that county,

Greenshades will usually provide three separate local tax codes: a county tax code for the county tax, a school district tax code for the school district, and an ‘other’ tax code that represents the cumulative tax levied by both the school district and the county.

Secondly, we have sorted each locality into its state so that you can filter by state whenever looking for a locality. Once the localities have been added to Dynamics, you will no longer have a state designation (because Dynamics does not have the ability to look up a locality by state).

Finally, we have tried to be as detailed as possible when describing a locality. Unfortunately, there is a limit on the amount of character space available for use to describe a locality. Accordingly, we have abbreviated some descriptions, especially those that are a combination of two separate taxes. Often, we have removed vowels from the names of localities (*Westmoreland* becomes *Wstmrlnd*) and used some standard abbreviations (*East* becomes *E.*, *Valley* becomes *Vly*). When you search for a locality, you will find results for everything that matches your query *in addition to* anything that looks like an abbreviation for your query. For instance, the search *cra* will yield both ‘Crafton’ city as well as the cities in Crawford County, even though Crawford has been abbreviated as *Crwfrd* in the lookup. Borough is often abbreviated B. and Township as T. when space is a concern. School District has been abbreviated as SD when possible and sometimes the SD has been omitted completely. New York City and Yonkers both have local taxes that are not included in this product because these local taxes are provided with Great Plains as general payroll taxes. The Greenshades Local Tax Manager will only update local tax codes. Any updates for these taxes must be received from Great Plains.



The screenshot shows a software interface for managing localities. At the top, there are two dropdown menus: 'State' set to 'PA' and 'Tax Type' set to 'ALL'. Below these is a text input field labeled 'Filter by Name'. The main area is a list of localities, each with a checkbox and a name. The list is as follows:

Checkbox	Locality Name
<input type="checkbox"/>	Bedford/Hyndman Comb EMST
<input type="checkbox"/>	Bedford/Hyndman Comb Res
<input type="checkbox"/>	Bedford/Londondery Comb EMST
<input type="checkbox"/>	Bedford/Londondery Comb Res
<input type="checkbox"/>	Bedford/Manns Choice B. CLS
<input type="checkbox"/>	Bedford/Manns Choice Comb EMST
<input type="checkbox"/>	Bedford/Manns Choice Comb Res
<input type="checkbox"/>	Bedford/Rainsburg Comb EMST
<input checked="" type="checkbox"/>	Bedford/Rainsburg Comb Res
<input type="checkbox"/>	Bedford/Snake Spring Comb EMST
<input type="checkbox"/>	Bedford/Snake Spring Comb Res
<input type="checkbox"/>	Bedminster (Bucks Co) EIT
<input type="checkbox"/>	Bedminster (Bucks Co) NR EIT
<input type="checkbox"/>	Beech Creek Boro (Clinton) MLS
<input type="checkbox"/>	Beech Creek Twp (Clinton) MLS

1. Locality Code Detail

## **Pennsylvania Specific Formats and Abbreviations**

Pennsylvania has the largest number of local taxes and was the most difficult to describe meaningfully. Accordingly, there are a few extra naming conventions that were employed for Pennsylvania. First, each of the types of Pennsylvania Local Taxes received their own indicators on the descriptions within the Local Tax Manager and thereby the local tax code identifiers when they are added to Dynamics. These are listed below:

### **Resident Taxes**

The description in the lookup control, as well as the description when added to Dynamics GP, ends with 'EIT'. When added to Dynamics GP, the local tax identifier starts with the letters 'PR'.

### **Non-Resident Taxes**

The description in the lookup control, as well as the description when added to Dynamics GP, ends with 'NR EIT'. When added to Dynamics GP, the local tax identifier starts with the letters 'PN'.

### **School District Taxes**

The description in the lookup control, as well as the description when added to Dynamics GP, ends with 'School'. When added to Dynamics GP, the local tax identifier starts with the letters 'PS'.

### **Combined School District/Resident Taxes**

The description in the lookup control, as well as the description when added to Dynamics GP, contains first the school district, a slash ('/') and then the county that are being combined. The description ends with 'Comb Res'. When added to Dynamics GP, the local tax identifier starts with the letters 'PC.'

### **Pennsylvania Municipal Emergency and Municipal Services Taxes**

The EMST taxes were renamed and restructured significantly by Pennsylvania effective January 1<sup>st</sup>, 2008. Because of the significance of the change, these codes are no longer valid for use within Dynamics GP. These now obsolete codes had 'EMST' in the description and the local tax code in Dynamics started with PM (Municipal EMST), PO (School District EMST), and PE (Combined EMST). Older clients who have EMST taxes should remove them from Dynamics so they do not take effect. The EMST has been replaced with the Local Service Tax, or LST. The Local Tax Manager does provide LST codes (see below).

## **Pennsylvania Local Services Tax**

A Local Services Tax may be levied by Pennsylvania municipalities and school districts. The withholding rules for LST depend on the amount of the tax itself. For taxes of \$10 and less, the entire amount of the tax may be withheld from the employee's first paycheck(s). If the amount of the LST exceeds \$10, the amount withheld must be spread evenly throughout the employee's paychecks. This provides a challenge for updating local tax codes in Dynamics, which do not take into account payroll frequency when calculating the withholding. In order to overcome this obstacle, we have added four variants of each LST: a weekly version (that withholds the bulk amount divided by 52), a bi-weekly version (bulk amount / 26), Semi-Monthly version (bulk amount /24) and a monthly version (bulk amount /12). The description for these codes has been suffixed with a 'WK', 'BW', 'SM', or 'MN' to indicate their frequency. Please add the appropriate code to your employees based on their payment frequency. Note that these variants are only necessary (and available) when the LST amount is over \$10. For lower-amount taxes, there is only a single LST code available that may be associated with all of your employees.

## **Pennsylvania Municipal Local Services Tax**

Municipal Local Services Tax codes will have 'MLS' in their description and will have a code that starts with LM once added to Dynamics. The first part of the description will be the municipality that is levying the LST and the county will appear in parentheses. For example, 'Pottstown B. (Mntgomery) MLS WK' is the LST levied by the Pottstown Borough Municipality of Montgomery County with a rate that is appropriate for a weekly payroll.

## **Pennsylvania School District Local Services Tax**

School District Local Services Tax codes will have 'SLS' in their description and will have a code that starts with LS once added to Dynamics. The description will be the school district that is levying the LST. For example, 'Spring Ford Area SD SLS' is the LST levied by the Springford Area School District. Since there is no frequency suffix of this code (WK, BW, MN, or SM), this code may be added to all of your employees, regardless of pay frequency

## **Pennsylvania Combined Local Services Tax**

For your convenience, many Municipal and School District LST taxes have been combined into a single code. These are optional codes. Some clients may choose to use a single combined code while others will prefer to have them broken down into their separate components and use two codes. The majority, but not all, municipal/school district codes that can be combined are present within the Local Tax Manager. Combined Local Services Tax codes will have 'CLS' in their description and will have a code that starts with LC once added to Dynamics. The description will have the school district and municipality separated by a forward slash. For example, 'Abington SD/Abington Twp CLS BW' is the combined LST levied by Abington School District and Abington Township that may be associated with employees that are paid Bi-Weekly.

## **Special Considerations**

### **LST Low-Income Exemption**

Many PA municipalities and school districts have a low-income exemption amount that determines when LST (Local Services Tax) will be withheld from an employee. In most cases we've edited the local tax codes within the Local Tax Manager to reflect the low-income amount if a certain payment threshold must be met prior to withholding the tax.

However, there are a couple municipalities and school districts where the Local Tax Manager could not reflect the requirements based on limitations within Dynamics GP. Examples of LST special considerations are employee's age and hours worked.

Any local code that falls under the special considerations for employee's age when added to Dynamics GP will start with the letters 'XX'. If you notice any of your local codes begin with 'XX' then you must not withhold LST from the employee if they are under 18.

Any local code that falls under the special considerations for employee's hours worked when added to Dynamics GP will start with the letters 'YY'. If you notice any of your local codes begin with 'YY' then you must not withhold LST from the employee unless they work more than 10 hours a week.

## 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](mailto:support@greenshades.com).

### ***I am not familiar with Greenshades, may I schedule a walkthrough?***

Yes, Greenshades technical support has limited walkthrough appointments available. Walkthroughs, referred to as OnRamp sessions, are available twice daily except the week prior to any major filing deadline. OnRamp time slots are 11:00am and 3:00pm, Eastern times. To schedule an OnRamp session, please contact Greenshades Support via email at [support@greenshades.com](mailto:support@greenshades.com) or by calling 888-255-3815 extension 700.

### ***Does Greenshades offer any additional guides?***

Absolutely! Please visit the Greenshades Center Help section of our website for the latest guides available. New guides will be offered as we expand this section, so check back often. You can visit our Greenshades Center Help by clicking the following link: <http://www.greenshades.com/support/gschelp2.aspx> or by visiting <http://www.greenshades.com> and then clicking on Downloads from the menu, then Greenshades User Guides and Videos.

### ***Client feedback:***

Was this guide helpful to you? We would love to hear your feedback. Was there something else that you feel should have been included? We will do our best to accommodate you! Did this guide make your task easier? Make our day and let us know! Please send all feedback to [support@greenshades.com](mailto:support@greenshades.com).