# The Greenshades Center

# 1099 E-File Creation Guide



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# **General Overview**

#### About the Greenshades Center

The Greenshades Center serves as a single point of access to all of Greenshades' tax filing products. By assembling our E-Filing, Forms, and Archive capabilities into a single application we can provide easier access for our clients and better communication between our services.

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

The Greenshades Center has some basic requirements that must be met 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 the responsibility is on the client to ensure that adequate internet access is provided to the Greenshades Center.

Secondly, the Greenshades Center requires an update to Microsoft Windows called the 'Microsoft .NET Framework'. Specifically, the center requires version 2.0 or newer to be installed.

#### Starting the Greenshades Center

#### To run the Greenshades Center from Dynamics GP:

The Greenshades Center can be accessed in Dynamics GP version 8.0 and newer by navigating from the top bar menu through: Tools > Routines > Payroll > Greenshades Center. In version 7.5 or older, 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 Dynamics SL:

Open Greenshades using the desktop icon placed on your desktop after installation.

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

The Greenshades Center can be accessed in Thinkware Darwin by navigating from the top bar menu by selecting: Routines > Greenshades Center.

should launch the Greenshades Screen where you can enter a date range and navigate to the installation directory of the Greenshades Center.



### **Electronically Filing your Federal 1099's**

This guide will explain each screen you will encounter as you create your electronic 1099 file. If you have any questions that are not addressed in this guide, please contact our support team.

When using the Greenshades Center, you can also access in-product help by clicking the icon in the bottom left corner of the wizard.

#### Step 1 – Starting the E-File Wizard

You will use the E-File Wizard to create your electronic Federal 1099 efile. Begin by clicking 'E-File Wizard' on the main Greenshades Filing Center page.

🕙 E-File Wizard	X		
E-Filing Wizard Select the type of filing you would like t	to create from the list below.		
	This wizard will assist you in building various electronic files, both tax and otherwise. Once the file has been built, you can use the Generate E-File Wizard to take the information and generate the electronic file. To begin, please select a filing type from the options below.		
	<ul> <li>Annual Filing</li> <li>Quarterly Filing</li> <li>Other Filing</li> </ul>		
	Enter the Company Name as it should appear on your e-file Fabrikam, Inc.		
0	Quit < Back Next >		

#### Step 2 – Company Name and Period Selection

As 1099's only need to be filed once a year, you will want to select the radio button next to 'Annual Filing'.

You will also notice that there is a 'Company Name' field. This defaults to the company name retrieved from your accounting package but you can modify it to match the company name you wish to appear in your 1099 eFile. The company name in your 1099 eFile should match the name your company used to register with the IRS for your EIN.

S E-File Wizard	×
Choose Annual Filings Choose which types of file you wish to electronically file as well as the reporting year.	$\bigcirc$
Reporting Year 2008 -	
Types of Files	
E Federal Withholding	
State Withholding	
Cocal Withholding	
940 (Federal Unemployment)	
🔲 1099-R	
1099 (MISC, DIV, INT, PATR, S, OID, etc.)	
Would you like to combine multiple Great Plains companies into a single company for this filing?	No
Quit < Back N	ext >

#### Step 3 – Choosing your file type and reporting period

This screen has some very simple selections for you to make. First, select the tax year that you wish to create your report for. This is the year that payments were made, not the year you are currently reporting in. You can create historical files as long as the data is present in the company you are currently logged in to.

Second, select the types of files you wish to build. While you may select options other than 1099, this guide only deals with the 1099 eFile creation process. As such, some screens may not match if you make additional selections.

The third option is for combining multiple companies into a single file. This is an additional module and must be purchased for it to be activated. If you have not purchased the combined module, this question will be greyed out.

E-File Wizard
Basic 1099 Information Enter basic information applicable to all 1099s.
Please enter the 5 character alpha/numeric Transmitter Control Code (TCC) that was assigned to you by the IRS. TCC: 12345
The IRS does not require companies to issue 1099 forms to vendors that did not exceed a <u>minimum payment amount</u> . By default, Greenshades Software will automatically exclude vendors that do not meet these minimum payment thresholds. You can use the option below to override this setting and include all vendors regardless of their payment amounts.
Include vendors under payment threshhold? 🔘 Yes 💿 No
Quit < Back Next >

#### Step 4 – Basic 1099 Information

The first field is asking for the TCC, or Transmitter Control Code. This is a required field and the eFile wizard will not let you continue unless you provide this code. The TCC is assigned to you when you are registered to file electronically with the IRS. If you plan on selecting the Automatic Upload option, where Greenshades will submit the file for you, you can enter in 12345 as your TCC to continue creating your 1099s.

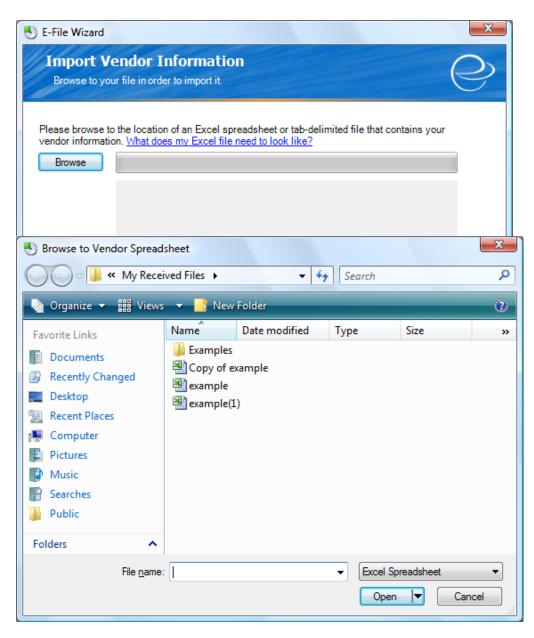
The last option on the screen allows you to ignore 1099 minimum amounts when pulling data from Great Plains. If you click yes to this message, all of your vendors will be imported into Greenshades.

Please note this option only allows you to make edits to your vendors before your final eFile is created. It will not include vendors below the minimum reporting amount in your final file.

🕙 E-File Wizard				
1099 Information Source         Choose where your vendor information will be found.				
<ul> <li>Choose from where you will get your 1099 information. If you retrieve infromation from Great Plains, you will have the opportunity to export to Excel, edit, and re-import your changes.</li> <li>Retrieve vendor information from Dynamics GP</li> <li>Select options to determine which Great Plains vendor information you will retrieve in order to complete your 1099 forms or electronic files. (You will be able to export this Great Plains information to Excel for reviewing, editing, and importing using the Import from Excel option)</li> </ul>				
Import vendor information from an Excel file or Tab Delimited report Select an Excel file or Tab Delimited report that contains vendor information you will use to create 1099 forms or electronic files.				
Quit < Back Next >				

#### Step 5 – 1099 Information Source

You have the option of either importing your data from your accounting package or from an Excel file or Tab delimited report. If the majority of your 1099 vendors are in your accounting package you can import these vendors and later add additional vendors and make edits in Step 9b.



#### Step 6a – Importing Vendors from an Excel file

If your vendor information can't be extracted from your accounting software, you can create an Excel file that can be imported into the Greenshades Center. To create an Excel file to import into the Greenshades Center you will use the 'What does my Excel file need to look like' link. The format of your Excel file is very important so please follow the guidelines exactly, or you may have some difficulty importing your file into Greenshades.

After you have created your Excel spreadsheet you need to import your file into the Greenshades Center. To import your file, click on the 'Browse' button. Select the file you wish to import, click 'Open' to return to the eFile Wizard.

🕙 E-File Wizard	<b>X</b>
Great Plains 1099 Set the default options to spe from Great Plains.	Defaults ecify which 1099 box will recieve the 1099 amounts
	e 1099 amount per vendor. For each of the 1099 types in Great 99 for which you would like that 1099 amount to apply.
Default Miscellaneous Box:	Nonemployee compensation (Box 7)
Default Dividend Box:	Total ordinary dividends (Box 1a)
Default Interest Box:	Interest income (Box 1)
	allow you to specify a 1099 type other than MISC, INT or DIV, would ins 1099 type as something else?
New 1099 Type:	▼ OYes   No
Great Plains 1099 Type:	<b>•</b>
Default Box:	<b>v</b>
0	Quit < Back Next >

#### Step 6b – Great Plains 1099 Defaults

The 1099 Default Options screen allows you to specify how you want your data to be extracted from Dynamics. These options will dictate how your 1099 eFile is created unless overridden by a setting later in the eFile Wizard.

#### Default 1099 Amount Mapping:

Since Dynamics only allows for a single '1099 Amount' field, you must select what this 1099 amount represents for each of the 1099 types that you are filing. For example, if the majority of your 1099 Miscellaneous vendors received Nonemployee compensation payments, you would select Box 7 for your default box. If you are only filing Miscellaneous 1099s, you can ignore the default information for Dividend and Interest 1099s.

#### Other 1099 Types:

Greenshades supports 1099 types that are not supported by Dynamics. Selecting 'Yes' to this option will allow you to chose which of your Great Plains 1099 types should not be filed as either Miscellaneous, Dividend, or Interest 1099s. For example, if all of your DIV 1099 Vendors in Dynamics should actually receive PATR 1099s you would select 'Yes' then choose 'PATR' as the "New 1099 Type," 'DIV' from the "Great Plains 1099 Type" field and then select the appropriate default box.

🕙 E-File Wizard		×		
Great Plains 1099 Opt Set the following 1099 options in o Great Plains.	tions rder to properly complete your 1099s from	Q		
Greenshades will attempt to guess thi	Type. Great Plains does not store this information is type by examining the 'Tax ID' field on the Caro N, 00-0000000 is an EIN). If Greenshades is una pecify below.	ls > Vendors >		
Default TIN Type:	EIN			
	names, check names, and contacts. Greenshad you like to override this guess? (If yes, you must o			
Vendor Name Line 1:	Vendor Name 👻			
Vendor Name Line 2:	None			
Have you have completed Form 6847 and are an authorized participant in the Oregon Yes No Combined Federal/State Filing Program?				
0	Quit < Back	Next >		

#### Step 7 – Great Plains 1099 Options

*Default TIN Type:* The first dropdown menu prompts you to select the appropriate Default TIN Type. This selects which TIN type to use when the Tax ID in Dynamics does not match a standard format (12-3456789 for EIN and 123-45-6789 for SSN) or has no format at all. It is recommended that you select the type that represents the bulk of your vendors.

*Vendor Name mapping:* Greenshades will attempt to determine the appropriate naming scheme for your vendors using some default name determining logic. If you would like to chose exactly where Greenshades will pull these names from, click the radio button next to 'Yes' and then choose the fields from the drop down menus provided. Greenshades will allow you to populate both Name 1 and Name 2 lines on the Federal 1099. Name 1 must match the name the vendor provided to you on their W9 (the name their TIN is registered under with the IRS).

#### Step 8 – More 1099 Options

The More 1099 Options screen allows you to select the appropriate default TIN type and grants access to Greenshades' Vendor Class Mapping option.

🕙 E-File Wizard	3
Great Plains 1099 Options (cont.) Choose additional 1099 options including whether you want to use vendor class mapping to specify types of 1099s.	>
Electronic 1099 filing requires a TIN Type. Great Plains does not store this information. Greenshades will attempt to guess this type by examining the 'Tax ID' field on the Cards > Vendors > Options screen (000-00-0000 is a SSN, 00-0000000 is an EIN). If Greenshades is unable to guess this type, it will assign the type you specify below.	
Default TIN Type:	
Greenshades allows you to override the default 1099 amount boxes and TIN Types by vendor classes. Do you want to specify what type of 1099 (MISC, DIV, INT, PATR), what type of TIN, and which box you want the vendor amounts to apply to by vendor class? Yes Not If you are mapping vendor classes, you may have vendors who are actually the same entity, but are setup in Great Plains as seperate vendors to acrue different 1099 box amounts. Would you like these vendors amounts to be combined according to their SSN or EIN?	
Quit Cack Next >	

The first question prompts you to select the appropriate Default TIN Type. Like the Default Box mapping, this selects which TIN type to use when the Tax ID in Dynamics does not match a standard format (12-3456789 for EIN and 123-45-6789 for SSN) or has no format at all. It is recommended that you select the type that represents the bulk of your vendors. Like the Default Box mapping option, this setting can be superseded by options you select later in the wizard.

Next, you are asked if you would like to override default 1099 payment amounts based on vendor classes. Selecting 'Yes' to this option grants you access to Greenshades' powerful Vendor Class Mapping. Vendor Class Mapping allows you specify 1099 type, TIN Type and Payment Boxes for any of your vendor classes that you have set up in Dynamics.

The next question is asking if you would like to combine vendors with the same TIN. This option is helpful if you have the same vendor entered in multiple times within Dynamics. The final question is referring to the Combined Federal/State Filing Program. This program enables the IRS to reciprocate 1099 information to participating states where employers have registered with their state. If you have registered for this program and need to report information 1099 information to your state, select 'Yes.' More information on this program is available on the IRS website.

Once you are satisfied with your selections, click 'Next'.

#### Step 9a – Vendor Class Mapping

Vendor Class Mapping is a powerful tool used to compensate for the functionality that is not available in Dynamics GP 9 and older. This feature is not in the Greenshades Center for Dynamics GP 10 because GP 10 allows you to save specific Box amounts for 1099s. For Greenshades Center users not on GP 10, Vendor Class Mapping allows you to specify what kind of payments any of your vendor classes receive instead of only having a single "1099 Amount" field.

10/20				Type, and Box to designate where II go.	C
∕/ould you like	to ex	clude all ven	dors whose cla	ass is not mapped in the vendor class mappin Yes	g? No
Vendor Class		TIN Type	1099 Type	Box	
CAN-ALL-C	Q	Default 🔻	INT -	Interest income (Box 1)	+ -
AUS-NSW-M	Q	EIN -	MISC -	Nonemployee compensation (Box 7)	-
	Q	-	-		-
	0	-	-		-
	Q	-			•
	0	-		Î	-
	Q	-			<b>-</b>
	0	-		1	<b>•</b>
Vendor Class:				~	

Designed to mimic familiar Dynamics controls, Vendor Class Mapping only requires 4 pieces of information. First, select the Vendor Class that you would like to map. You can type the Vendor Class ID or click the magnifying glass to choose from a list of available classes.

Next, select the TIN Type that you would like this class to be imported as. TIN Type choices are EIN, SSN and Default. Choose default if you would like Greenshades to determine the TIN Type based on the Tax ID format. If Greenshades is unable to determine the TIN Type, it will use the default TIN Type you have chosen previously. **Please note that choosing EIN or SSN for your type will ignore any formatting you have for vendors in that class and override with your choice here.** 

E-File Wizard
Great Plains Vendor Information Review the Great Plains totals. If you need to alter your Great Plains 1099s, export the file for editing.
If you would like to edit or view a detailed Excel output of your 1099 information from Great Plains, click 'Export'. To use the edits, save the Excel file and choose to re-import on the next screen.
Great Plains MISC Totals: Total Vendors 1 Total Box 7 \$9,274.45
Would you like to re-import your changes from Excel on the next screen? ( Yes  No
Quit Cauit Next >

#### Step 9b – Great Plains Vendor Information

The Great Plains Vendor Information is a simple review screen, but also provides you with the ability to Export and Import an Excel file. You can review your preliminary totals on this screen as well. It provides you with the total number of vendors and the total of all payments by Box to those vendors.

If you would like to add any vendors who were not pulled from Dynamics you will need to click the 'Export' button. This option will bring up an Excel file with all the vendors we have pulled from Dynamics. You can then add or edit your vendor information within Excel. Once you have completed the necessary edits click 'Yes' to re-import your Excel file.

If you are satisfied with these totals, click 'Next'. If these totals do not match what you are expecting, please contact Greenshades Support for assistance.

Se-File Wizard	×
Build Data The electronic filing wizard is collecting and building your information so that it may be used to generate your electronic files	$\bigcirc$
You have now successfuly completed all of the options for your electronic filings. Click the 'Next' button to extract the necessary data to complete the electronic filing process.	
Click Next to Export	
Quit < Back Nex	t >

#### Step 10 – Build Data

The Build Data simply extracts your 1099 data from your accounting package with the settings you have previously set in the eFile wizard. Depending on the number of vendors you are exporting, this process may take a few minutes. When you are ready to export your data, click 'Next' to begin the export process.

🕙 E-Fil	e Wizard			×
	elect Files to Build heck the Build box for each file y	rou wish to build.		$\bigcirc$
Filter:	1099 👻		[	Select All
	Electronic File	Status	Submission Method	Build?
	US - 1099 (MISC)	Awaiting Creation	Internet 💌	
Che	ck here if you would like the abilit	y to edit your data prior to creating		
0		Quit	< Back	Next >

#### Step 11 – Select Files to Build

Depending on the selections you have made previously, different electronic files will be ready to be built. The Select Files to Build screen lets you choose which files you would like create and electronically file at this time. Simply check the "Build?" box next to the file you would like to create.

At the bottom of the screen there is an option that will allow you to edit your data during the build process. While this functionality is available to you, it is recommended that 1099 edits be made in Dynamics.

E-File Wizard		×	
Review Built Files         Select a built file below to submit or view errors.			
Click on the link to either subm	it or view errors for each e-filing.		
Electronic File	Status	Combined Summary	
US - 1099 (MISC)	✓ Total Vendors: 1	Click Here to Begin Filing	
0	Quit	< Back Finish	

#### Step 12 – Review Built Files

Your final totals have been calculated and your eFile has been created but not submitted. If your file has successfully been created and your Total Vendors count matches what you expect, you may continue to Step 13 by clicking the link titled "Click Here to Begin Filing".

If your file failed to build you will receive see a link with the option of either "Click Here to Provide Information" or "Click Here to View Errors." Please enter in the required information or make any necessary corrections within Dynamics and rebuild your file.

///	US - 1099 (MISC) - Submission Wizard           View Totals         Image: Contract of the totals found below.		×		
۹	View Details	🖂 Print Total	Is Save Totals	🛃 Save E-File	
	erall Totals	SC)			* II
	Control Total 1	\$0.00			
	Control Total 2	\$0.00			
	Control Total 3	\$0.00			
	Control Total 4	\$0.00			
	Control Total 5	\$0.00			
	Control Total 6	\$0.00			
	Control Total 7	\$9,274.45			-
?			Quit	< Back Next >	

#### Step 13 – View Totals

View Totals is an assessment screen providing you with detailed totals for final review before submission. You will notice 4 separate options displayed above the listed totals. The details for each are listed below:

<u>View Details</u>. With View Details, you can export your 1099 data to an Excel file for an even more detailed review. *This is to be read or printed only, and not to be E-filed*.

Print Totals. Print Totals prints the total screen you are currently viewing.

<u>Save Totals</u>. Save Totals will save the total screen you are viewing in an HTML format that can be viewed at a later date in Internet Explorer.

<u>Save E-File</u>. Save E-File allows you to save a copy of the exact electronic file that is going to be submitted to the IRS. Be sure to note where you save it, as you will need it in a moment.

You have almost completed the eFile process, after you've ensured your totals are correct you must submit your file to the IRS.

🔮 US - 1099 (MISC) - Submission Wizard		
Submission Methods         Please select a submission method below.		
<ul> <li>Website Upload (Automatic)         Choose this option if you would like Greenshades to perform an online submission of your electronic file. This option is for those who wish to 'File and Forget' it. Greenshades will handle the submission and contact you should any problems arise.     </li> <li>Website Upload         Choose this option if you would like to manually submit your electronic file online. This option is for those who require control over their submission and desire the ability to check submission status online.     </li> </ul>		
Quit < Back Next >		

#### Step 14 – Submission Methods

The Submission Methods screen allows you to decide if you would like Greenshades to handle your submission for you automatically or, if you would like more control on your submission, you can choose to manually upload. We recommend you use the Automatic Website submission.

*Website Upload (Automatic)* allows Greenshades to perform the online submission for you. You will receive an email confirmation from Greenshades when your file is successfully transmitted to the IRS. If there are any problems with your file we will contact you. This option also allows Greenshades to track your submission.

*Website Upload* provides you with the file you need to submit as well as instructions on how to log into the IRS website. Select this option only if you need full control of submission and tracking of your electronic submission. If you select this option Greenshades will not be able to verify the status of your submission

🔮 US - 1099 (MISC) - Submission Wizard				
Verify Contact Information Is the contact information below correct?				
Please review the contact information below and make any necessary corrections. The contact person is responsible for the accuracy of the electronic submission and should be able to resolve any issues which may arise with the submission.				
Name	John Smith			
Phone	(555)555-5555 Ext 555			
Email	Jsmith@greenshades.com			
0	Quit < Back Next >			

#### Step 15a (Website Upload Automatic only) – Verify Contact Info

With Greenshades submitting your file automatically, we also do the file monitoring as well. In the event that there is a problem with your submission, we require this contact information so that we may work with you to get your eFile corrected. Fill in the provided fields completely.

🥹 U	JS - 1099 (MISC) - Submission Wizard		
	Manual Filing Instructions Please follow the directions below to submit your electronic file.		
Before submitting your return manually via the Internet, you must <u>Save a Copy</u> of your electronic file. After you've saved a copy of your file, please follow the instructions below. Once finished, click Finish to exit the wizard.			
1)	Log onto the <u>FIRE System</u> website. If you do not have a User ID and Password, please visit the <u>Create New Account</u> page.		
2)	Once logged on, please follow the on-screen instructions to submit your return electronically.		
3)	For more information about the FIRE System, please visit the Learn the Basics page.		
?	Quit < Back Finish		

#### Step 15b (Website Upload Manual only) – Manual Filing

These instructions are provided to our users who wish to file manually. Simply follow all of the prompts on the screen. The underlined blue text is hyperlinks allowing you access to the data or web pages described.

Once you have completed the provided steps you may click 'Finish'.

#### Step 16 – Submission Confirmation

Congratulations! You have successfully created and eFiled your 1099 data. This confirmation screen allows you a second opportunity to save the eFile that you have submitted with the 'Save a Copy' link. You can also verify the email address that was used for confirmation and record the 'EFileID' used by Greenshades to track your submission.

At this point, click 'Finish'. You have now successfully created and electronically filed your Federal 1099 filing.

# **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: <u>http://www.Greenshades.com/MyGreenshades</u>. You can also send an email directly to support at: <u>support@greenshades.com</u>. Finally, you can also call support at 888-255-3815 extension 700.

## How can I review my 1099 totals after I've submitted them?

Any time you create a report or produce forms in the Greenshades Center, the final report is stored so that it can be accessed later. By clicking on the 'View Previous Filings' button, you will be presented with a list of media you have previous produced in the Center. Simply double click any report you would like to view and you will be presented with the Totals, Transmittal Information and File that was created originally.

# How can I verify my file has been successfully filed to the IRS?

If you used the automatic website submission method, you will receive a confirmation email from Greenshades Software. This email contains your Efile ID which you can use to track your submission status.

If you used the manual website submission method Greenshades will not be able to track your submission. When you submit your file to the IRS FIRE site you will receive a confirmation number from their website.

# Can I submit my 1099 file on diskette?

No, the IRS is no longer accepting eFiles submitted on diskette. If you submit the file Greenshades Center creates for you on diskette or cd your file will be rejected by the IRS.

# How do I transmit my 1099 information to the state?

The Federal-State Combined Filing Program eliminates the need to report 1099 information to the IRS and most states. With this program any 1099 information submitted to the IRS will be automatically reciprocated to participating states. You will need to contact your state to determine if your state participates in the Federal-State Combined Filing Program.

# 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 <u>support@greenshades.com</u>.