The Greenshades Center

Federal Withholding Electronic Filing Guide

GREENSHADES
Let Us Handle That

Greenshades Software Support Team
support@greenshades.com
1-888-255-3815

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.

Filing your Federal W-2 Report

This guide will explain each screen you will encounter as you create your electronic Federal W-2 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 W-2 file. You can begin by clicking 'eFile Wizard' on the main Greenshades Filing Center page.

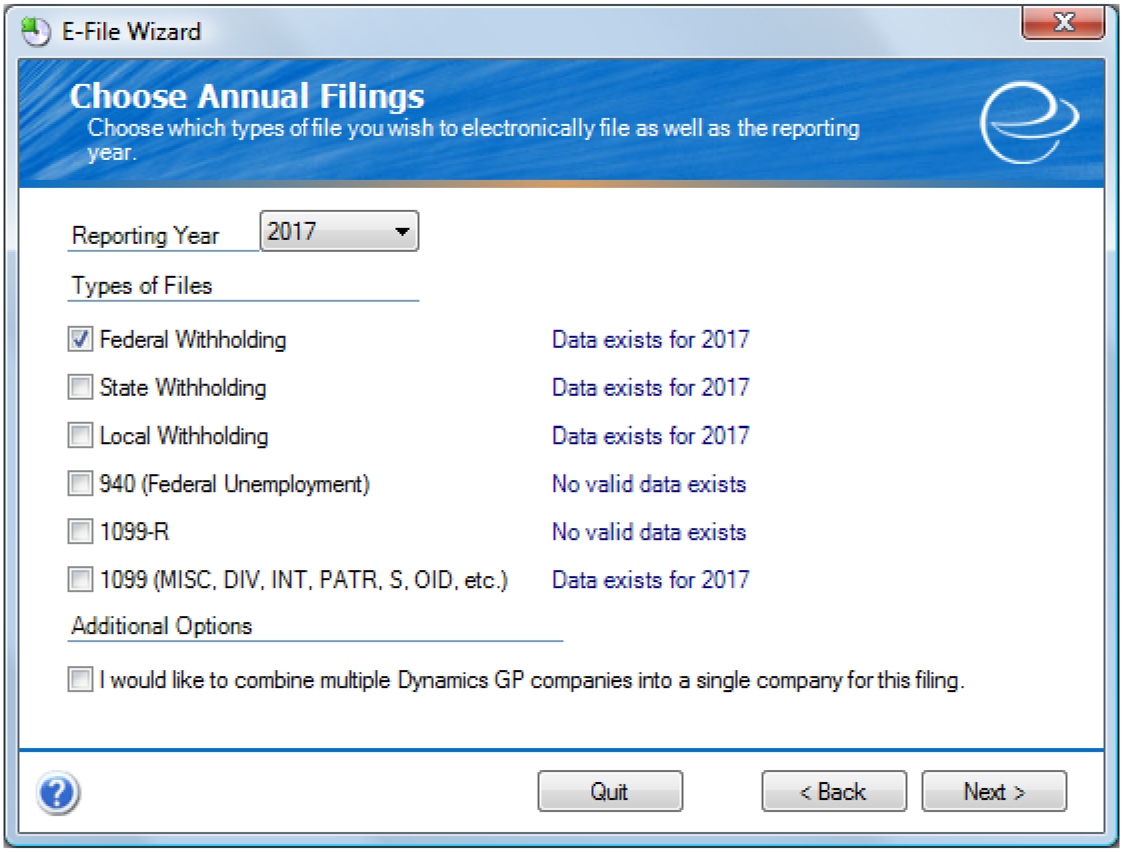
Step 2 – E-Filing Wizard

Since Federal W-2 files must be submitted once a year, select the radio button next to 'Annual Filing' to begin your annual Federal W-2 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 Federal W-2 E-file.

Click 'Next' to continue.

Step 3 – Choosing Annual Filings



Since Greenshades pulls all information for your Federal W-2 file from your accounting package you will need to have completed the annual withholding report (or year-end close) before continuing this process. If you have, you should see a corresponding “Data exists for [year]” message, as shown in the above screenshot.

Next, select the types of files you wish to build. It is possible to select multiple options on this screen if you would like to create Federal Withholding and other annual electronic files simultaneously.

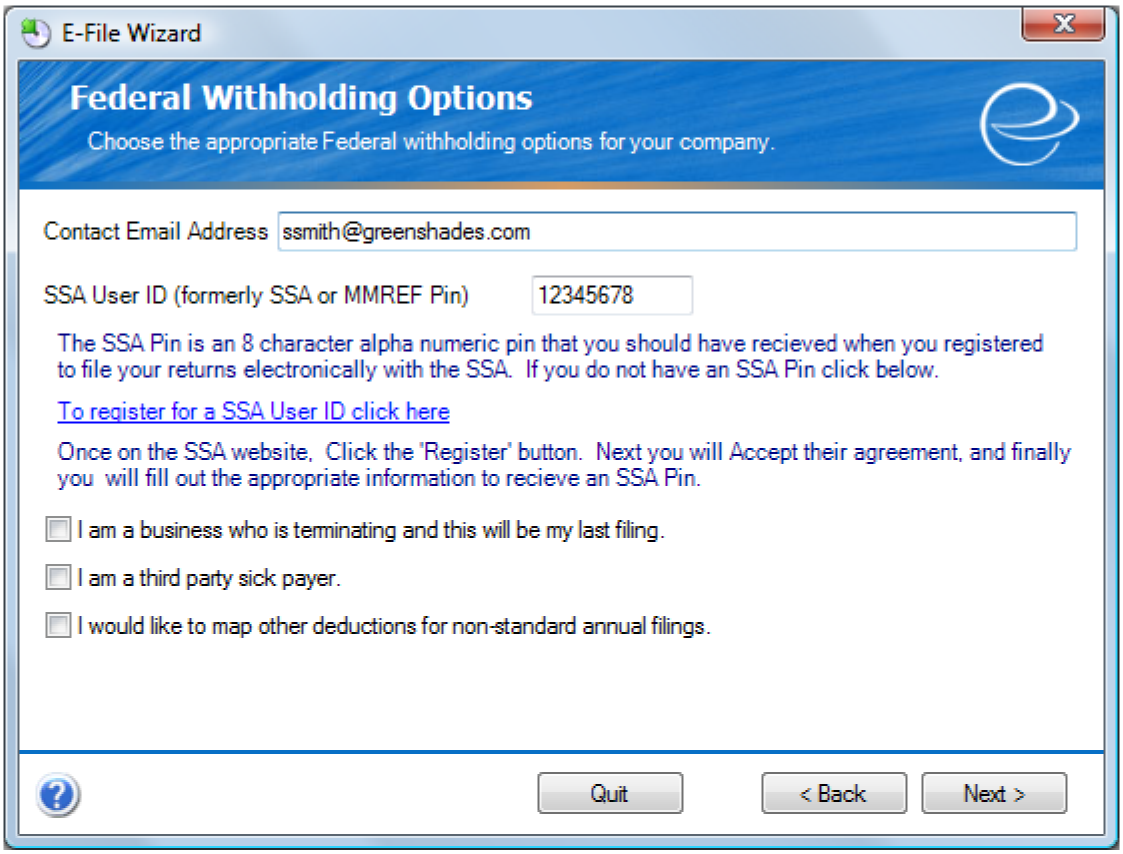
The third option is for combining multiple companies into a single file. This is an additional module and must be purchased for it to be activated. If you are interested in purchasing this feature or if you have any questions about this function please contact our support team.

Once you are satisfied with your selections, click ‘Next’.

Step 4 – Federal Withholding Options

First, enter the appropriate contact email address in the field provided. Next, enter the SSA User ID, (previously known as the SSA or MMREF Pin), which is an 8 character alpha-numeric code you received when you registered to file your returns. If you need to register with the SSA, please click the link provided.

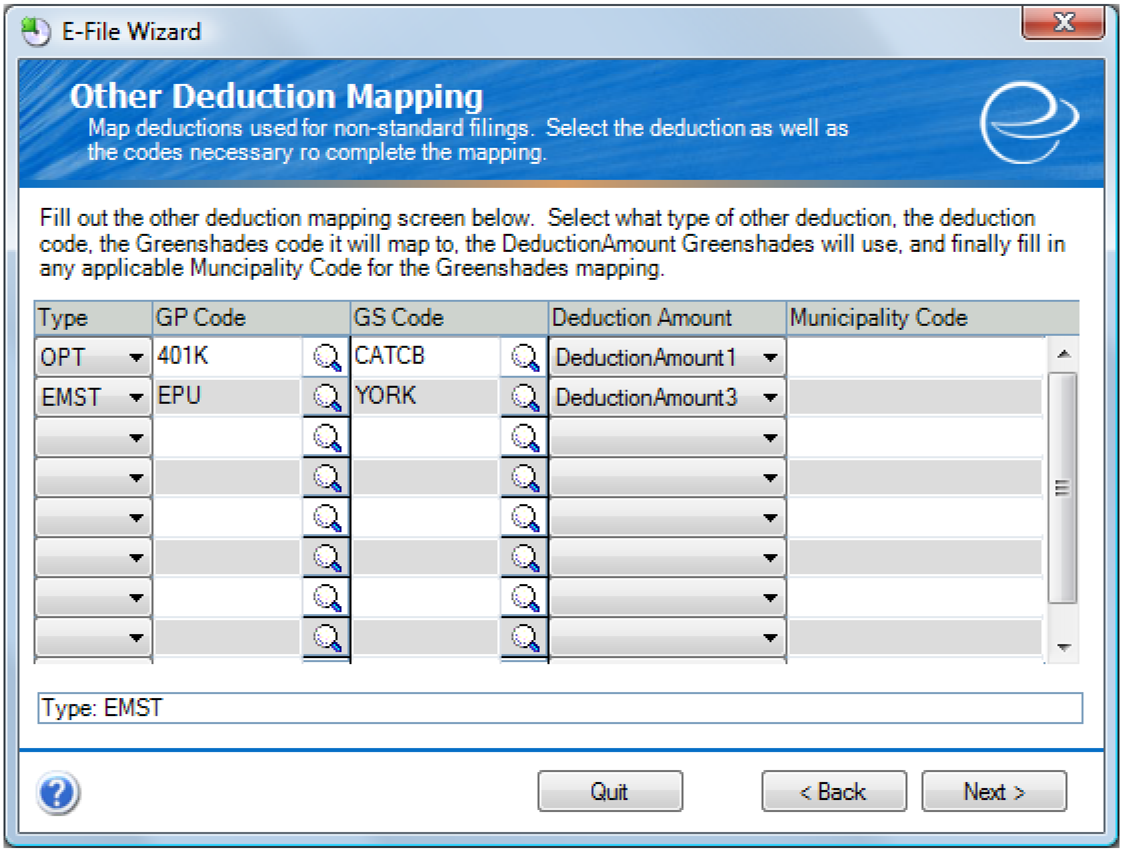
The last 3 options on this screen have been provided per your specific filing requirements.



Once you are satisfied with your selections, click ‘Next’.

Step 4.2 – Deduction Mapping

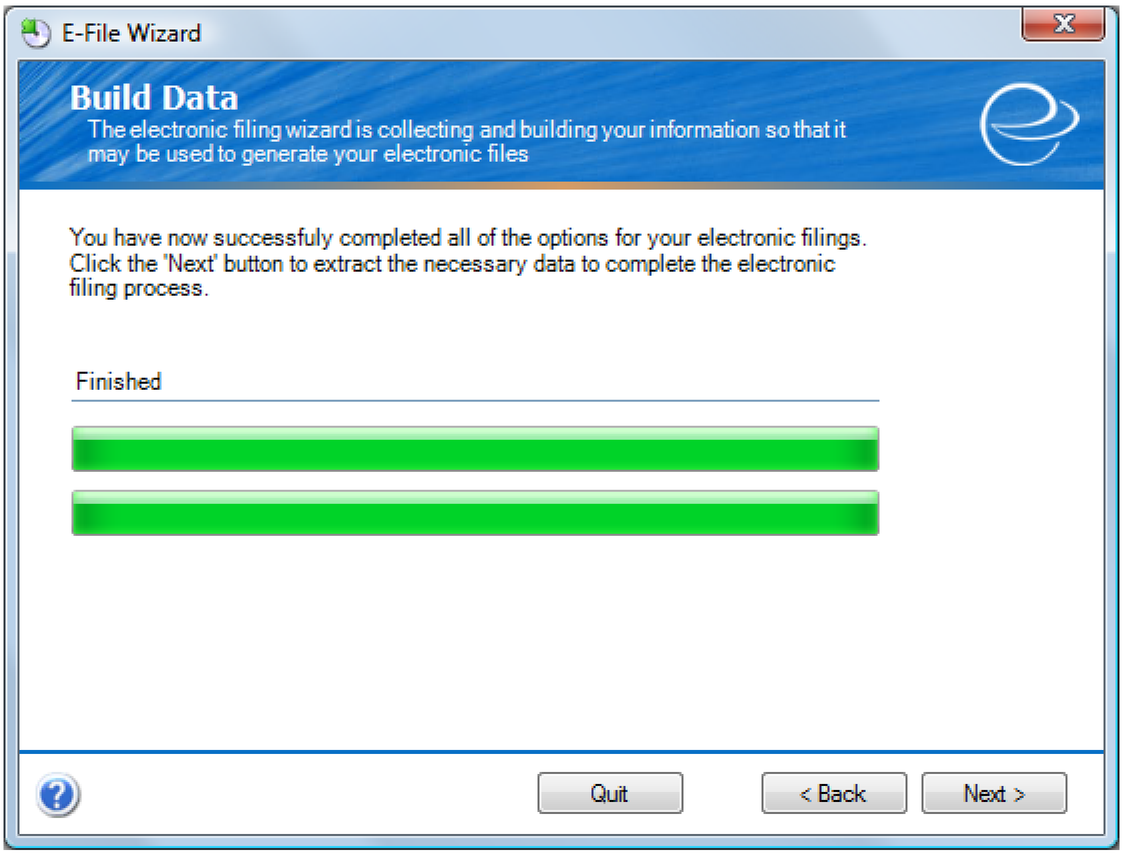
If you selected the option "I would like to map other deductions for non-standard annual filings" from the Federal Withholding Options screen (previous) you will be presented with the Other Deduction Mapping screen, as shown below. This screen allows you to map additional deductions that may apply when filing your Federal W-2.



Once you are satisfied with your deduction mappings, click Next to continue.

Step 5 – Build Data

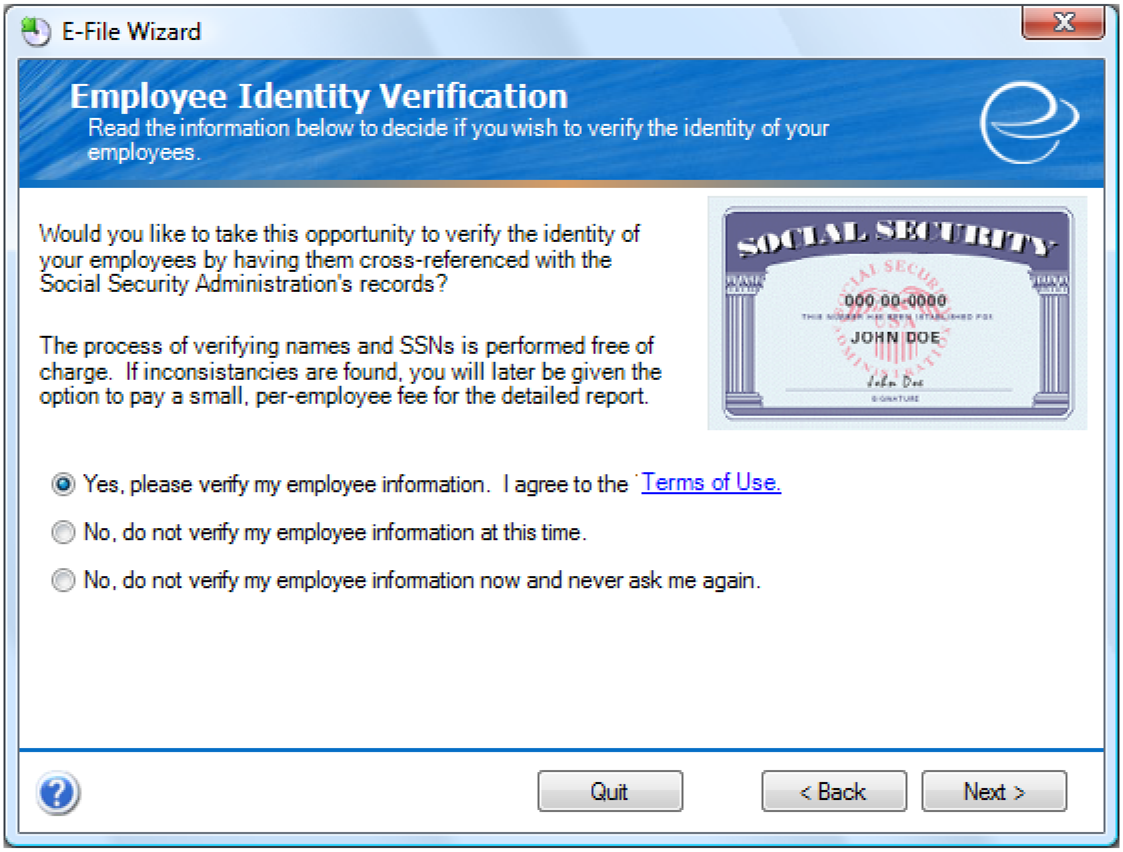
The Build Data step extracts your Federal W-2 data from your accounting software with the settings you have previously selected in the E-File wizard. Depending on the number of employees you are exporting, this process may take a few minutes.



Clicking ‘Next’ will start the extraction process.

Step 6 – Employee Verification

Greenshades offers the ability to electronically cross-reference your employee data (names and SSN's) with the records at the SSA each time you create a file using the E-File Wizard. This verification service is provided to help circumvent any potential filing penalties associated with submitting incorrect employee information to government agencies.



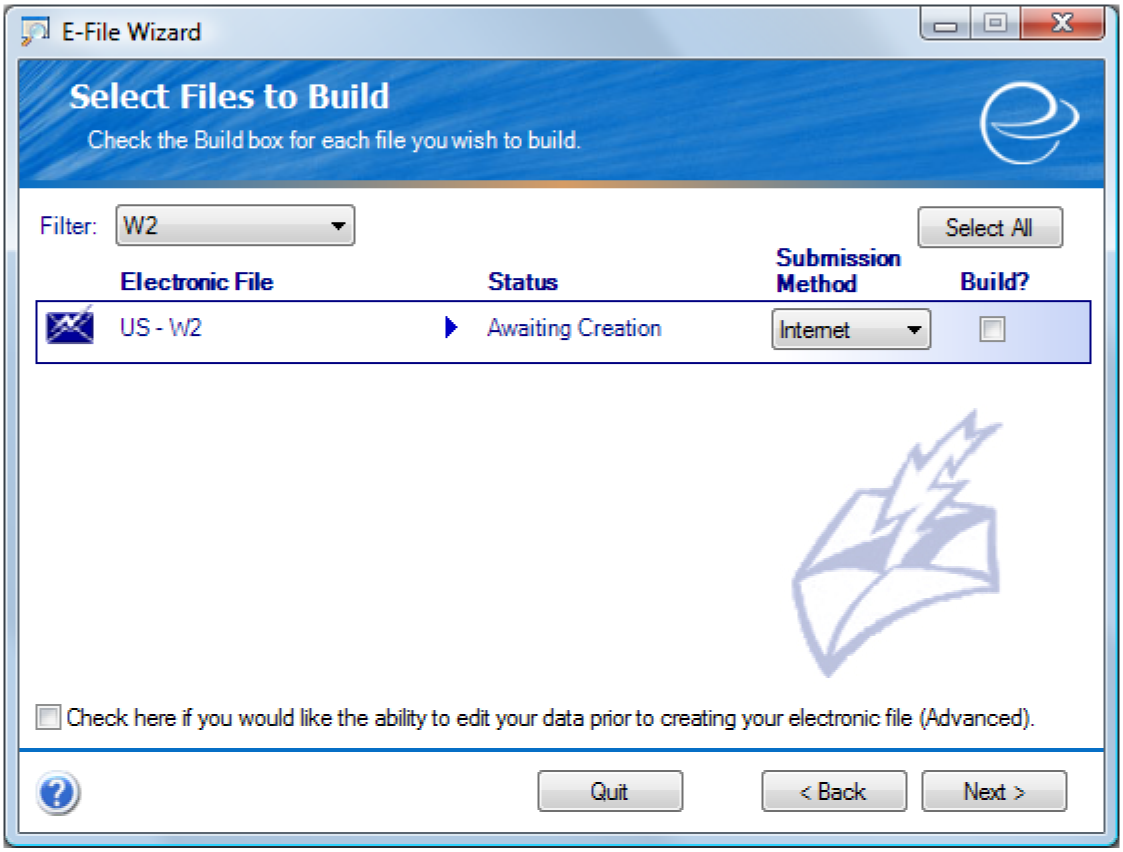
If you would like Greenshades to verify your employee identification, you will be informed of the number of discrepancies found. To view the report, there is a charge of $1.99 per discrepancy.

Once you have made your decision, click 'Next'.

Step 7 – Select Files to Build

Select Files to Build lets you choose which files you would like create and submit at this time.

Next, simply place a check in the “Build?” box next to the file you would like to create.

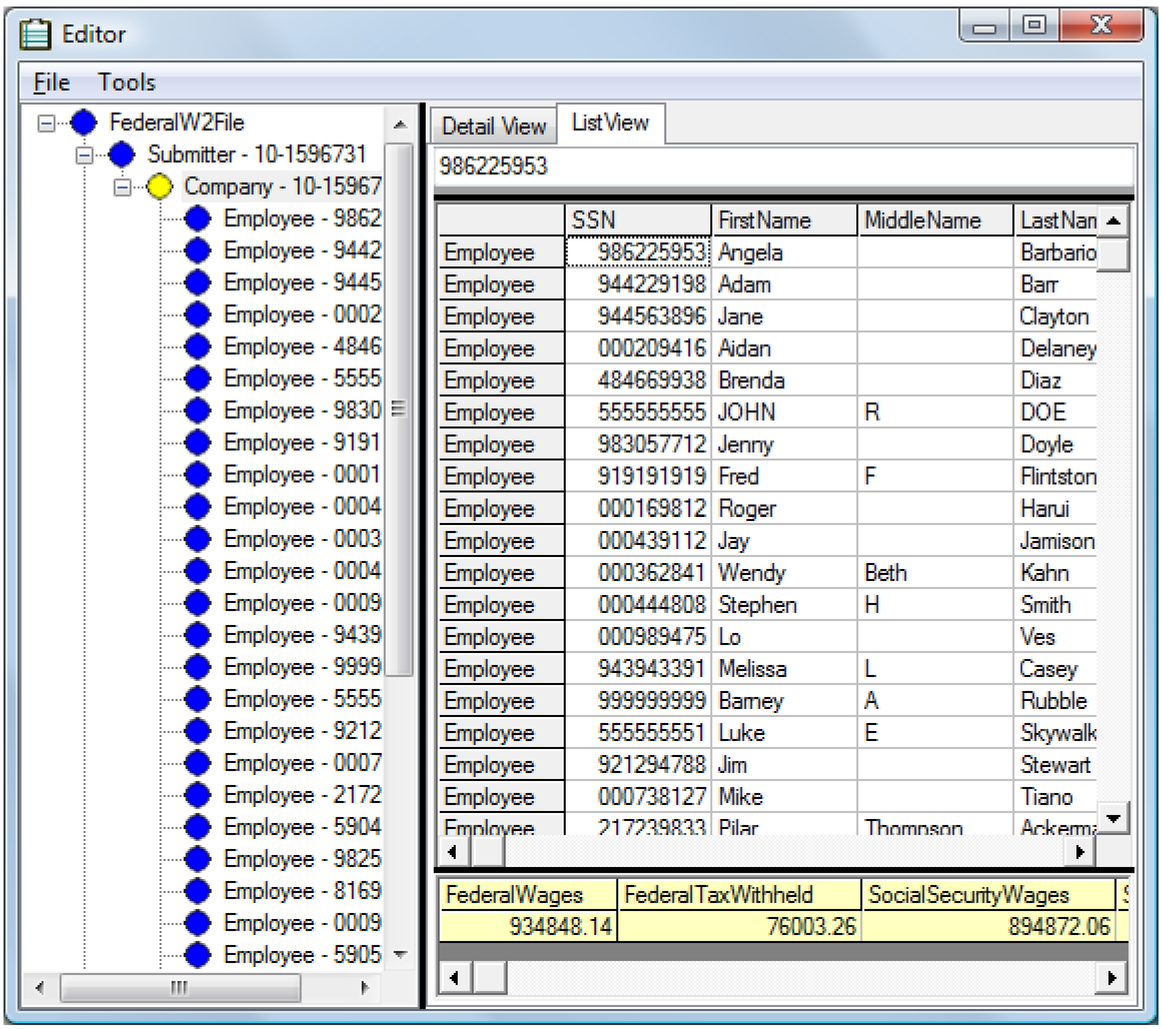


At the bottom of this screen there is an option that will allow you make any final corrections before creating and filing your E-File. While this functionality is available to you, it is recommended that Federal Withholding edits be made in your accounting package, as correcting the errors using the advanced editor does not correct the errors with the data in your accounting package.

Once you are satisfied with your selections, click ‘Next’.

Step 8 – Advanced Editor (optional)

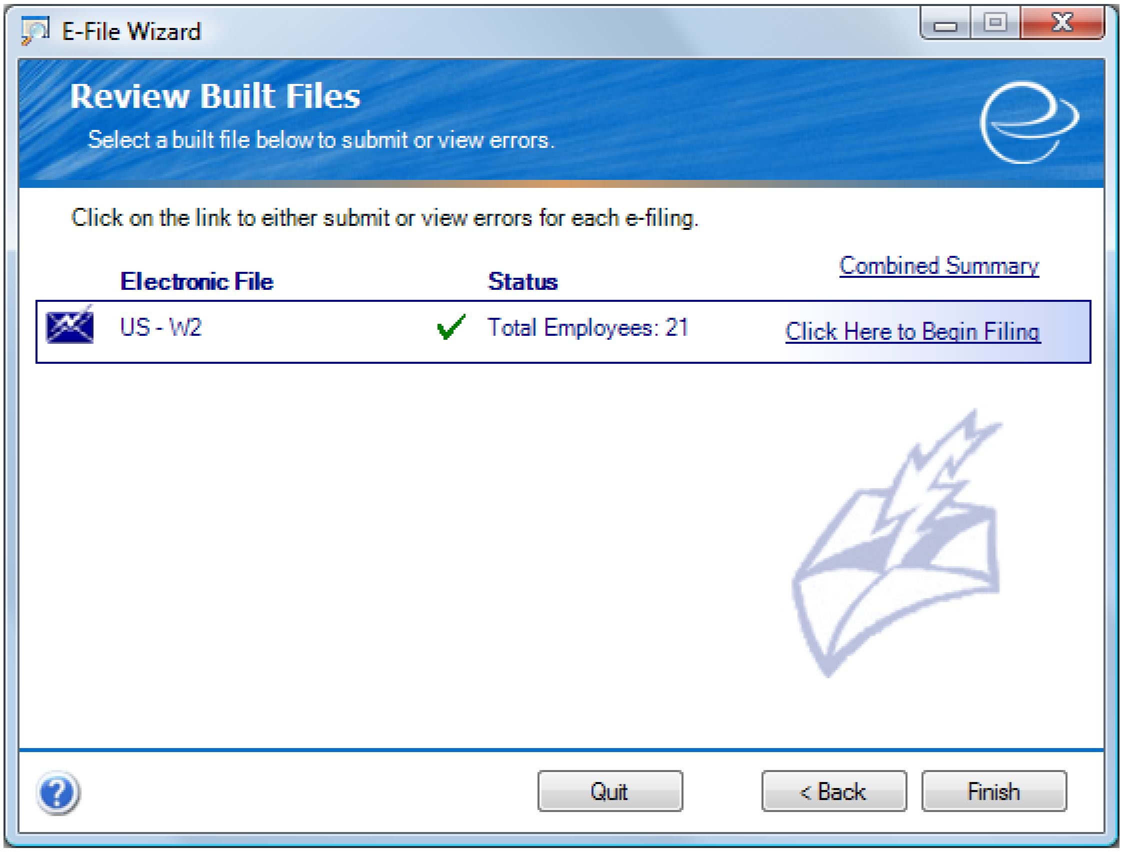
If you selected the option "Check here if you would like the ability to edit your data prior to creating your electronic file (Advanced)" from the Select Files to Build screen, you will be presented with a window which resembles the one shown below. The Advanced Editor allows you to edit or even add rows if needed (right click on any row and select the 'Add Row' option), giving you the ability to include employees who have not yet been entered into your accounting package software. Again, keep in mind that these changes do not update your accounting software, and the advanced editor should only be used as a means to correct your E-File if you do not have the ability or time to correct the data within your accounting software.



When you are finished with the advanced editor, select 'File' then 'Done Editing' if satisfied with your changes, or 'Discard Changes' if you would like to cancel any changes you made.

Step 9 – Review Built Files

At this point, your final totals have been calculated and your Federal W-2 file has been created but not submitted. If your file was successfully created you will see a green check (as shown below). Continue the filing process by clicking the "Click Here to Begin Filing" link. If you have many states to file for, you will need to select 'Click Here to Begin Filing' for each.



If your file failed to build a red 'X' will appear. You will be able to review the problem by clicking the "Click Here to View Errors" link. Usually these errors are easy to understand, but if you have any questions please contact our support team.

Step 10 – View Totals

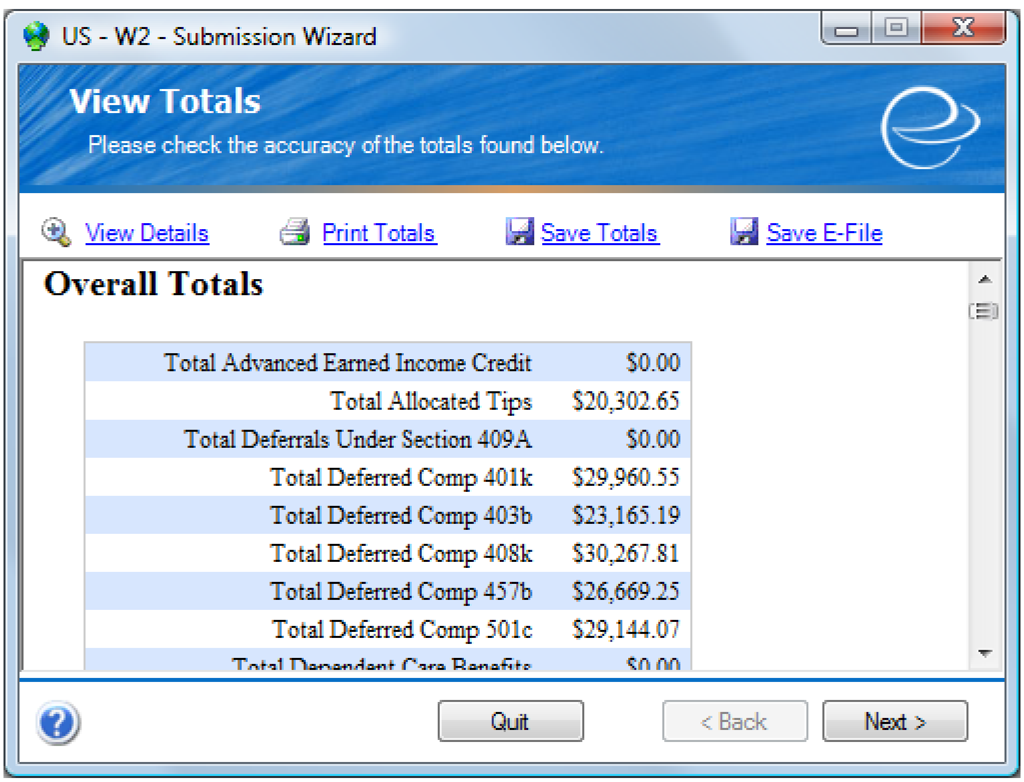
View Totals is an assessment screen providing you with detailed totals for final review before submission. You will notice 4 separate options displayed above the listed totals. The details for each are listed below:

View Details. With View Details, you can export your Federal Withholding 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.

Save Totals. 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.

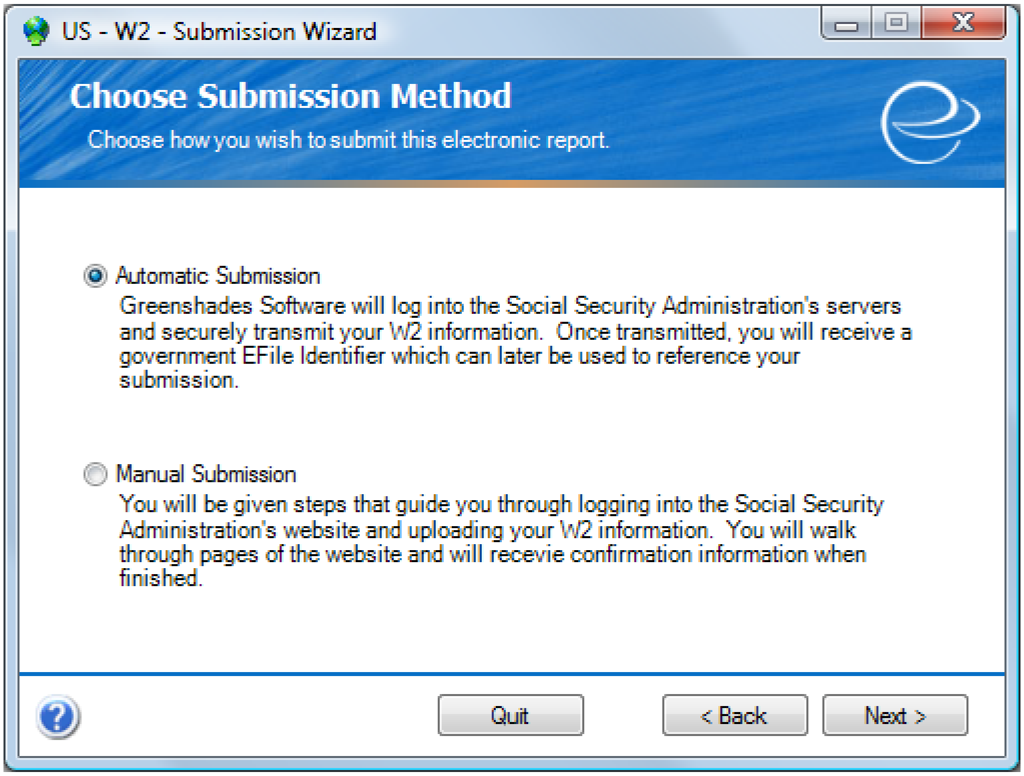
Save E-File. Save E-File allows you to save a copy of the exact electronic file that is going to be submitted to the SSA. Be sure to note where you save it, as you will need it in a moment.



Once you've reviewed your totals, click 'Next'.

Step 11 – Choose Submission Method

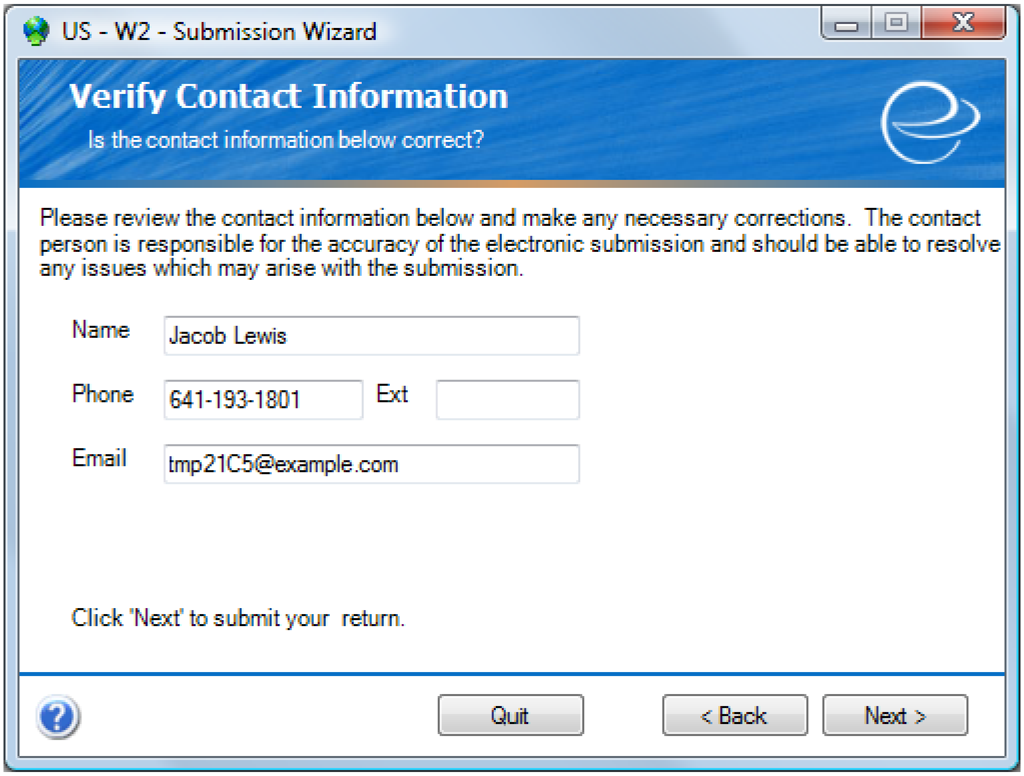
There are 2 options for filing your Federal W-2 electronically, an Automatic submission and a Manual submission.



Once you have selected the method of choice, please click ‘Next’.

Step 11A – Verify Contact Information (Automatic Submission Method)

Prior to submitting your Federal W-2 efile, contact information of the person responsible for the accuracy of the file needs to be supplied. This is only used by the SSA in the event that discrepancies are found within the data submitted.



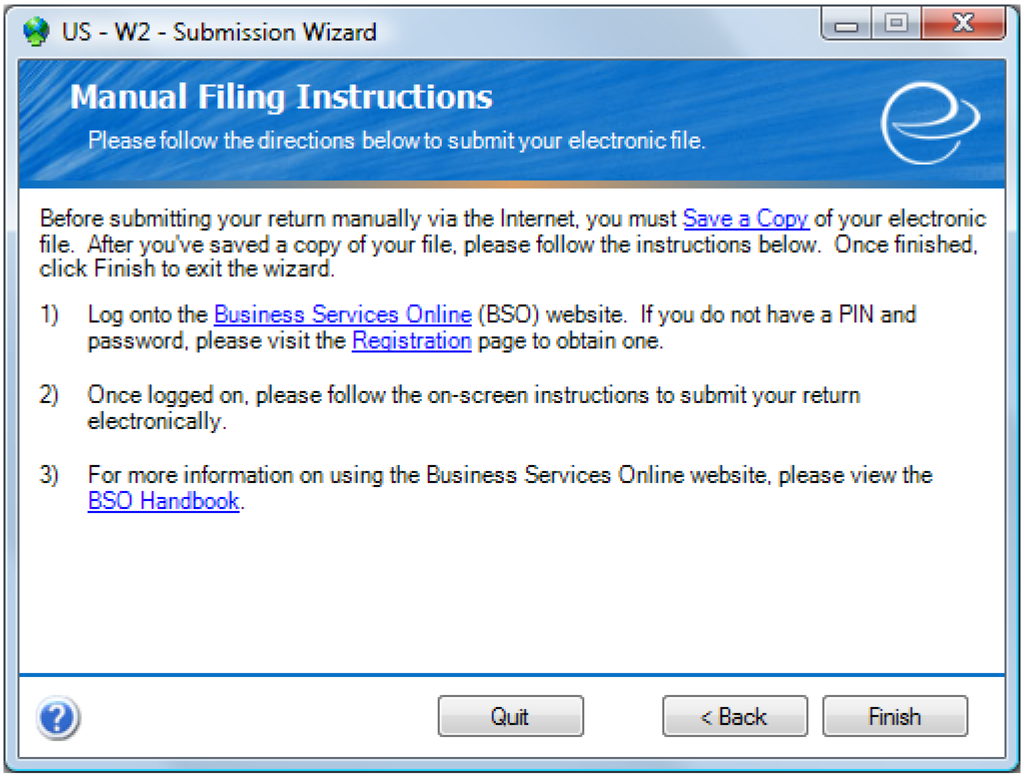
Once you have the appropriate contact information, select ‘Next’.

Congratulations! You have completed all the proper steps to submit your electronic file automatically. You will be notified per your contact email of the status of your submission. If you did not receive the email ensure you have checked your email filter. In addition you can contact Greenshades Support at support@greenshades.com or at 888-255-3815 ext. 700.

Step 11B – Manual Filing Instructions

Before uploading your file to the BSO website, you must first select the 'Save a Copy' link at the top of this page. It is worth noting that 'Save E-File' from the previous screen and 'Save a Copy' on this screen produce the exact same E-File, so if you have already saved your E-File you do not need to do this a second time.

Follow the provided instructions and links to upload your file.



Congratulations! You have successfully created and filed your Federal Withholding data.

Click 'Finish' here, and once more from the 'Review Built Files' screen, and you are done.

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.

How can I review my Federal W-2 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.

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. Visit the following link: http://www.greenshades.com/support/gscenter.aspx and click the link that reads 'Download the Updater Patch'. You may need to contact your IT department for permission if you do not have administrator rights.

How can I edit my file prior to submitting it?

You can edit your E-File by using the advanced editor we have provided in the Greenshades Center. See Step 8 of this guide, and more specifically, Step 8a on how to access the advanced editor.

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.