



Tax Filing Center Basic Product Guide



GREENSHADES
LET US HANDLE THAT

Greenshades Software Support Team

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1.1. 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.

1.1.1. 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.

1.1.2. 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:

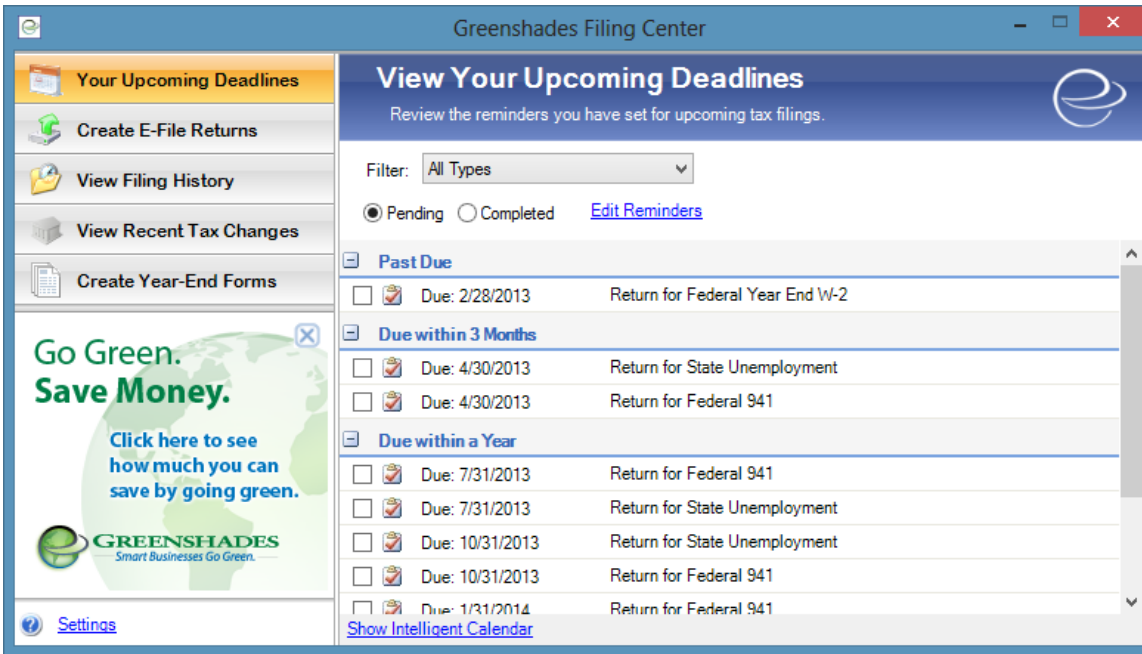
<http://www.greenshades.com/support/Gschelp2.aspx>

1.1.3. 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.

1.2. Using the Greenshades Tax Filing Center

The home page of the Greenshades Center contains a set of buttons in the upper left, an active content section to the bottom left, and a list of upcoming deadlines in the right area:



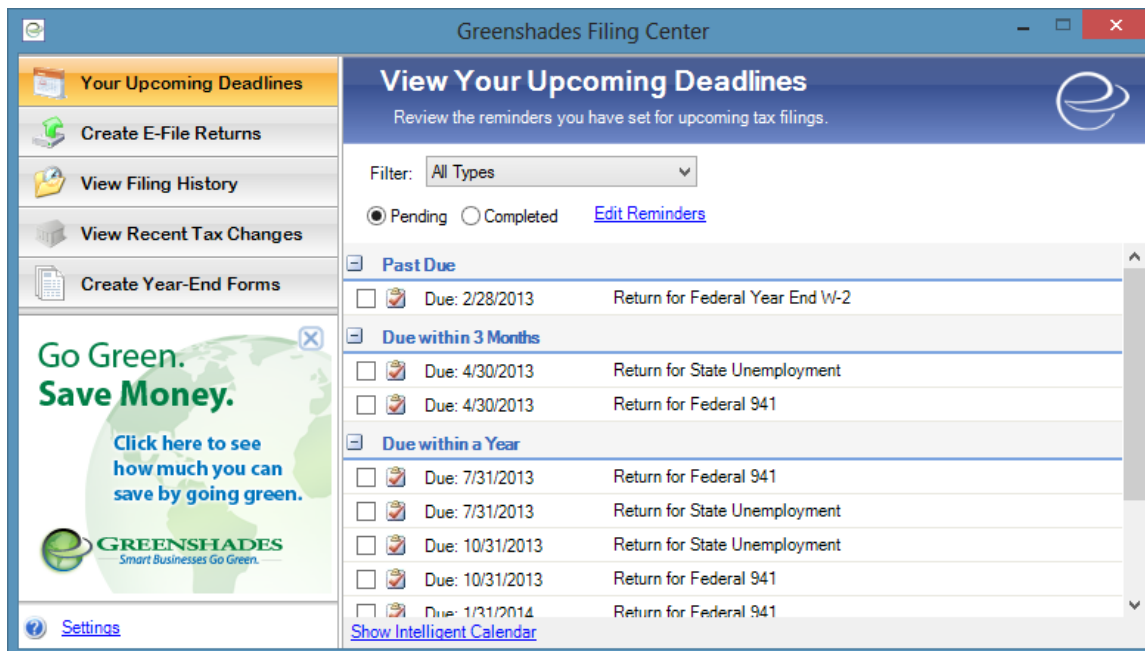
1.2.1. Basic navigation

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.

1.2.2. Using the classic tax calendar

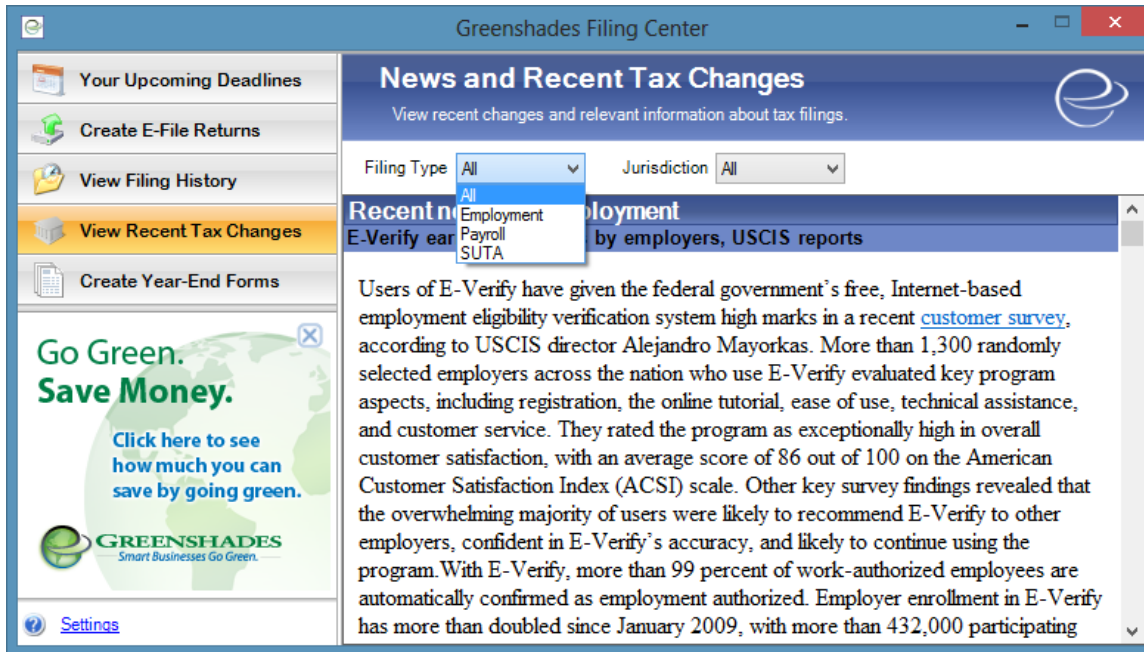
The classic Tax Calendar allows users to manually set recurring reminders for tax payments/returns.



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.

1.2.3. 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.



1.2.4. 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 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
- 1095-C return

Quarterly Filing:

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

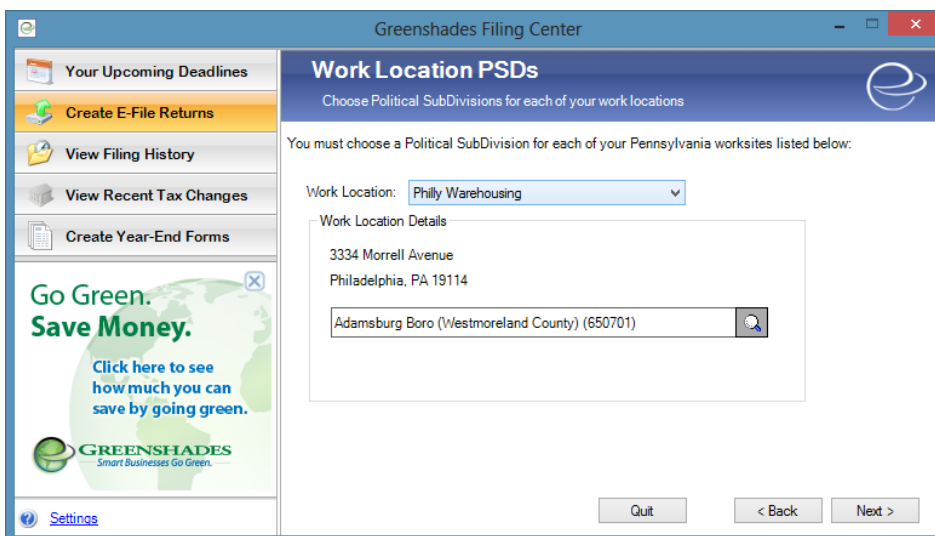
Monthly Returns:

- 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

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.**

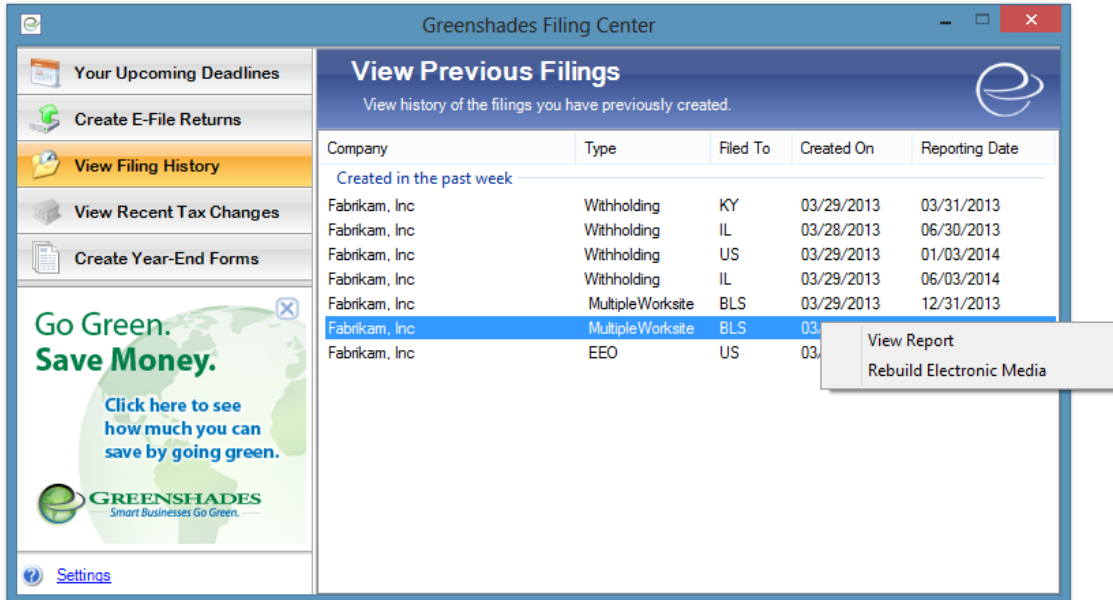
Click here to see how much you can save by going green.

[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.

1.2.5. 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.



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.

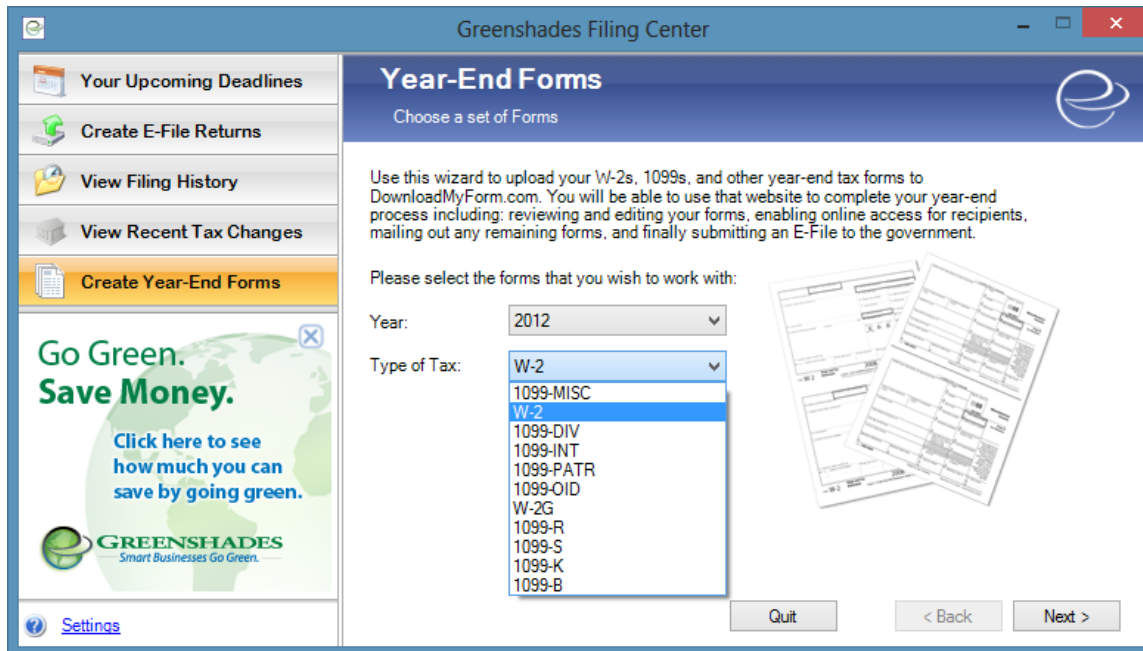
1.2.6. Create Year-End Forms

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. GreenshadesOnline 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, 1095-CS, 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>.

DownloadMyForm Admin: x
 https://www.downloadmyform.com/AdminUniversal.aspx
 For quick access, place your bookmarks here on the bookmarks bar. [Import bookmarks now...](#)

DownloadMyForm.com TWO: CHICKEN MODELING CORP. 2012 W-2 Tax Forms Test Tester

Welcome to DownloadMyForm.com
 You can view your forms and reports below as well as a checklist which will guide you through the year-end forms process.

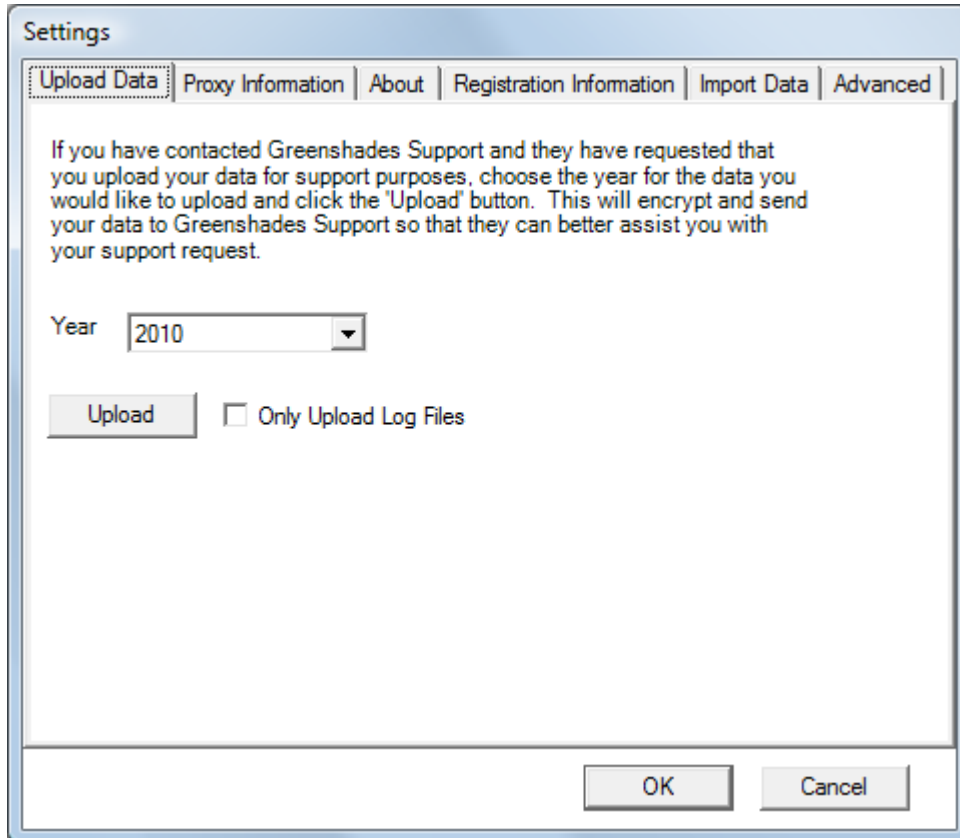
My W-2s View, Edit, and Print individual W-2 Forms
My Reports View Reports on User Activity and Overall Form Information

Year-End Forms Checklist:

- 1. Complete Company Setup**
 Test Tester used the welcome wizard to configure DownloadMyForm.com on 12/17/2012.
 COMPLETED ON 12/17/2012
- 2. Resolve Warnings with your Forms**
 There is currently 1 warning with your forms, 0 of which are considered high severity warnings.
 DUE NOW
- 3. Verify W-2 Form Totals**
 Test Tester verified our totals of 2 forms with \$20,760.00 in Federal Wages.
 COMPLETED ON 3/29/2013
- 4. Manage Employee Access**
 1 employee viewed their form online after Test Tester activated access on 12/17/2012. [View Report](#)
 1 employees consented to receive their form online-only before paper copies were issued. [View Report](#)
 COMPLETED ON 12/17/2012
- 5. Email Employees with links to W-2 Forms**
 1 employee has an email address and has been notified about viewing their W-2.
 COMPLETE
- 6. Distribute any remaining W-2s to your Employees**
 1 employee must still be issued a paper form.
 DEPENDS ON METHOD

1.3. Settings

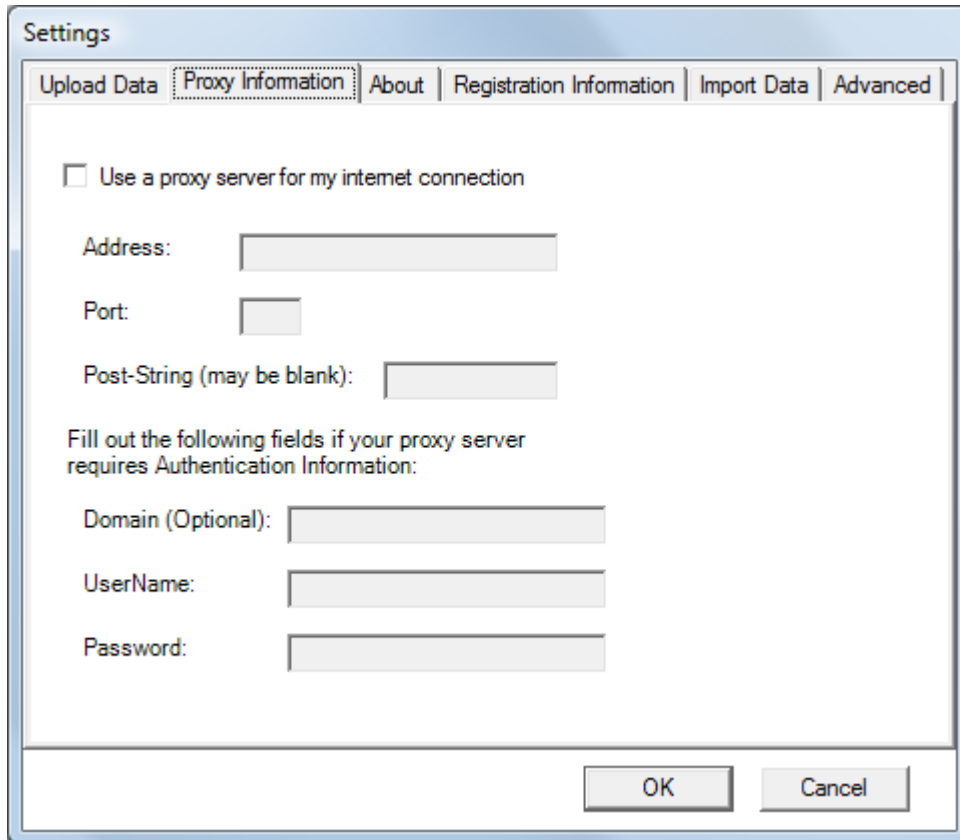
In the lower left-hand corner of the Greenshades Center you will see a Settings link. Generally, you will not need to enter this area unless you are registering the Greenshades Center, or have been otherwise directed by our support staff. We will briefly cover the different areas of the Greenshades Center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



The screenshot shows a 'Settings' dialog box with a tabbed interface. The 'Upload Data' tab is selected. The dialog contains the following text: 'If you have contacted Greenshades Support and they have requested that you upload your data for support purposes, choose the year for the data you would like to upload and click the "Upload" button. This will encrypt and send your data to Greenshades Support so that they can better assist you with your support request.' Below this text is a 'Year' dropdown menu set to '2010'. There is an 'Upload' button and a checkbox labeled 'Only Upload Log Files' which is currently unchecked. At the bottom right of the dialog are 'OK' and 'Cancel' buttons.

1.3.1. 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.

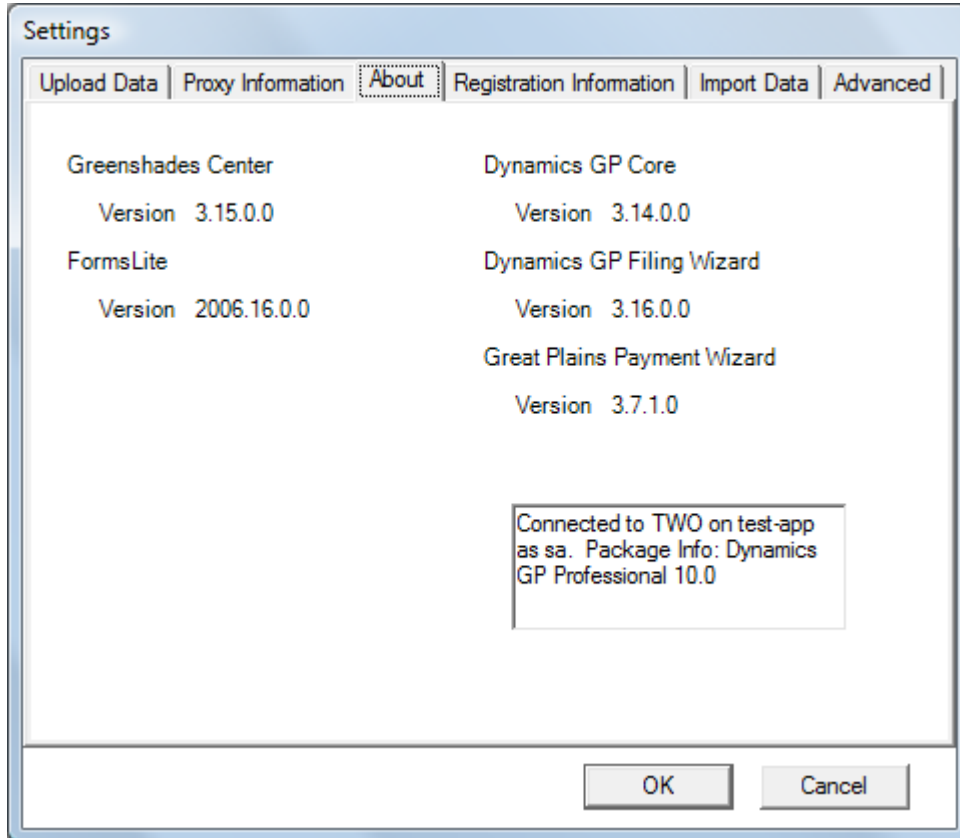


The image shows a screenshot of a software settings dialog box titled "Settings". The "Proxy Information" tab is selected and highlighted. The dialog contains the following elements:

- A checkbox labeled "Use a proxy server for my internet connection" which is currently unchecked.
- Three text input fields: "Address:", "Port:", and "Post-String (may be blank):".
- A text label: "Fill out the following fields if your proxy server requires Authentication Information:".
- Three text input fields for authentication: "Domain (Optional):", "UserName:", and "Password:".
- Two buttons at the bottom right: "OK" and "Cancel".

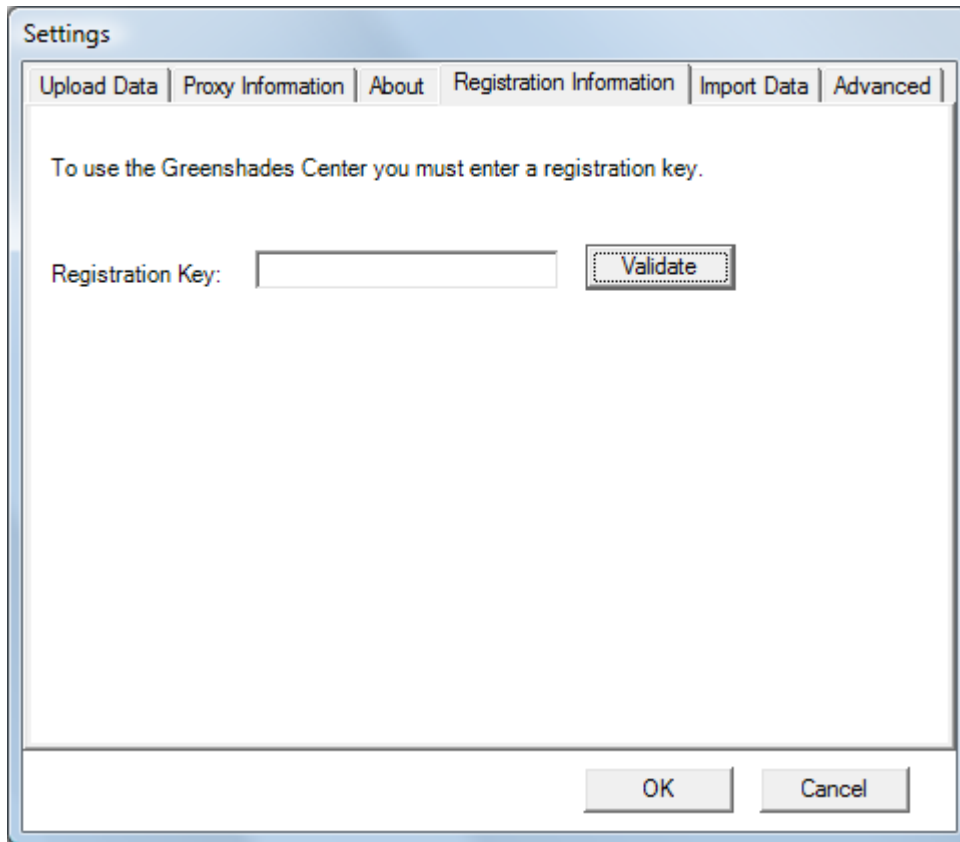
1.3.2. Proxy Information

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



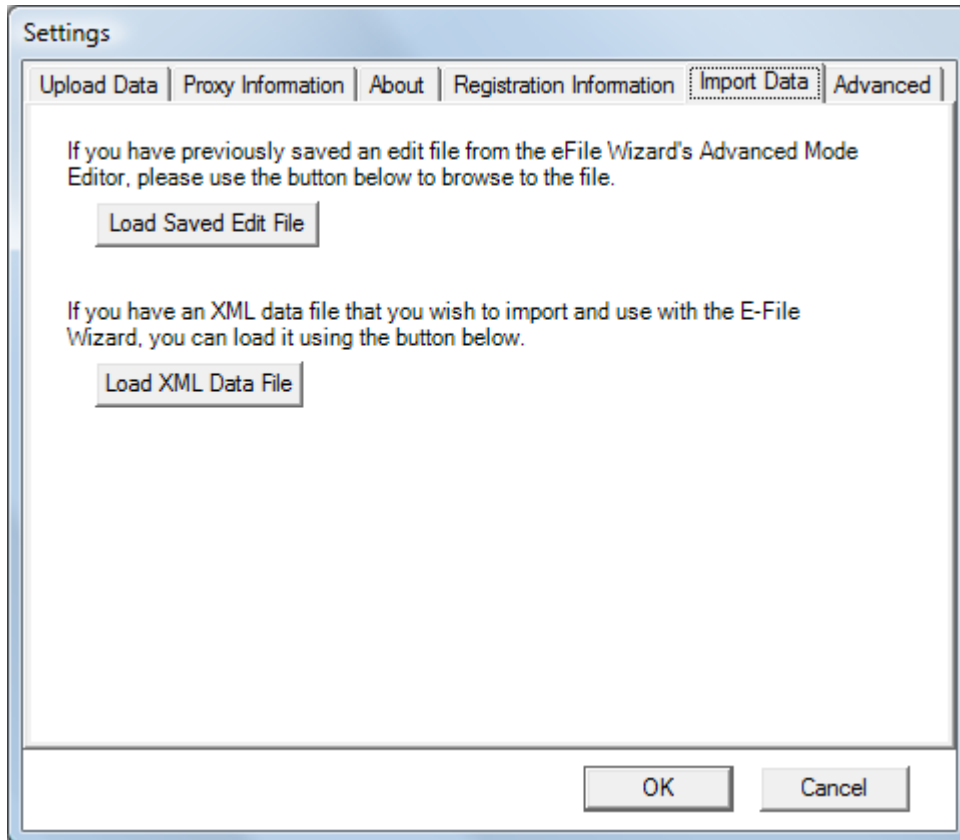
1.3.3. About

The About tab is also primarily used by our support staff, in determining if the software is up-to-date. Many problems can be avoided or fixed by simply making sure that the Greenshades Center being used is the most current version.



1.3.4. Registration Information

The Registration Key is crucial to the Greenshades Center functionality. The Registration Key is actually entered immediately after the initial installation, so chances are you may never need to use this tab, apart from viewing the Registration Key or the registration expiration date.



1.3.5. 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.

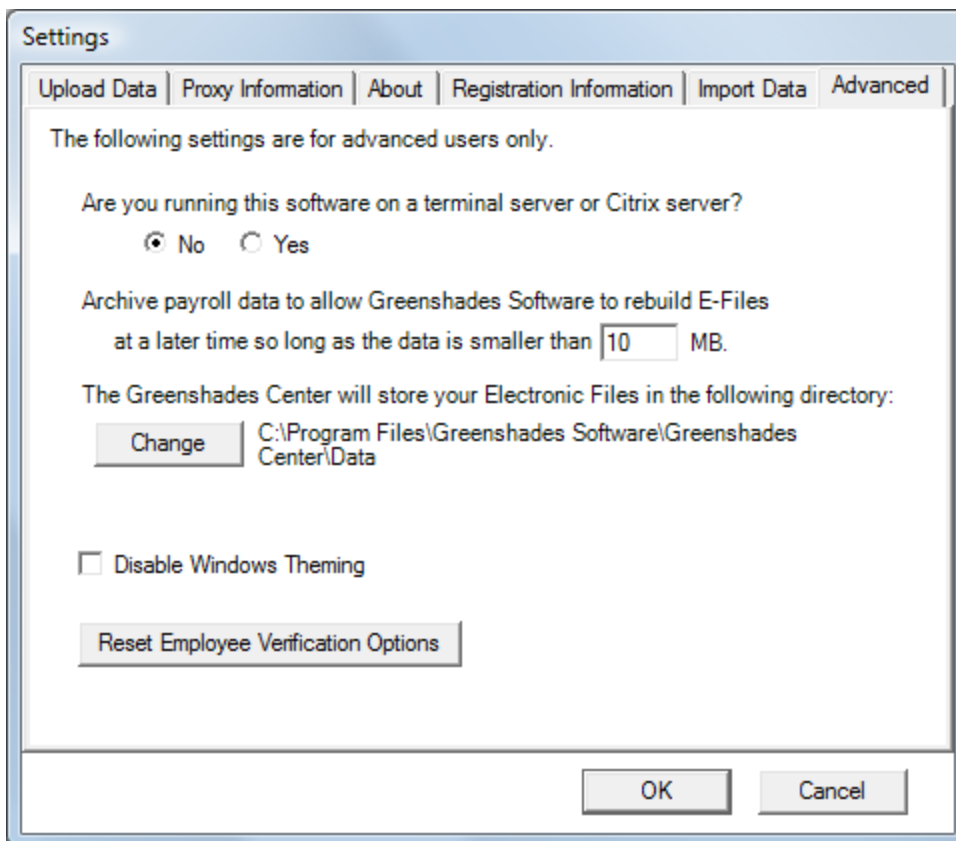
- **Load XML Data File**

Used to manually import a .xml file containing payroll reporting data.

1.3.6. Advanced

The Advanced 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'.



1.4. Frequently Asked Questions

1.4.1. 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.

1.4.2. 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.

1.4.3. How can I review my SUTA / W-2 / 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.

1.4.4. I am not familiar with Greenshades; may I schedule a walkthrough?

Yes! Greenshades support provides completely free training/re-training 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.