The Greenshades Center

State Withholding Electronic Filing Guide

Greenshades Software Support Team
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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.

Filing your State W-2 Report

This guide will explain each screen you will encounter as you create your electronic state 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.
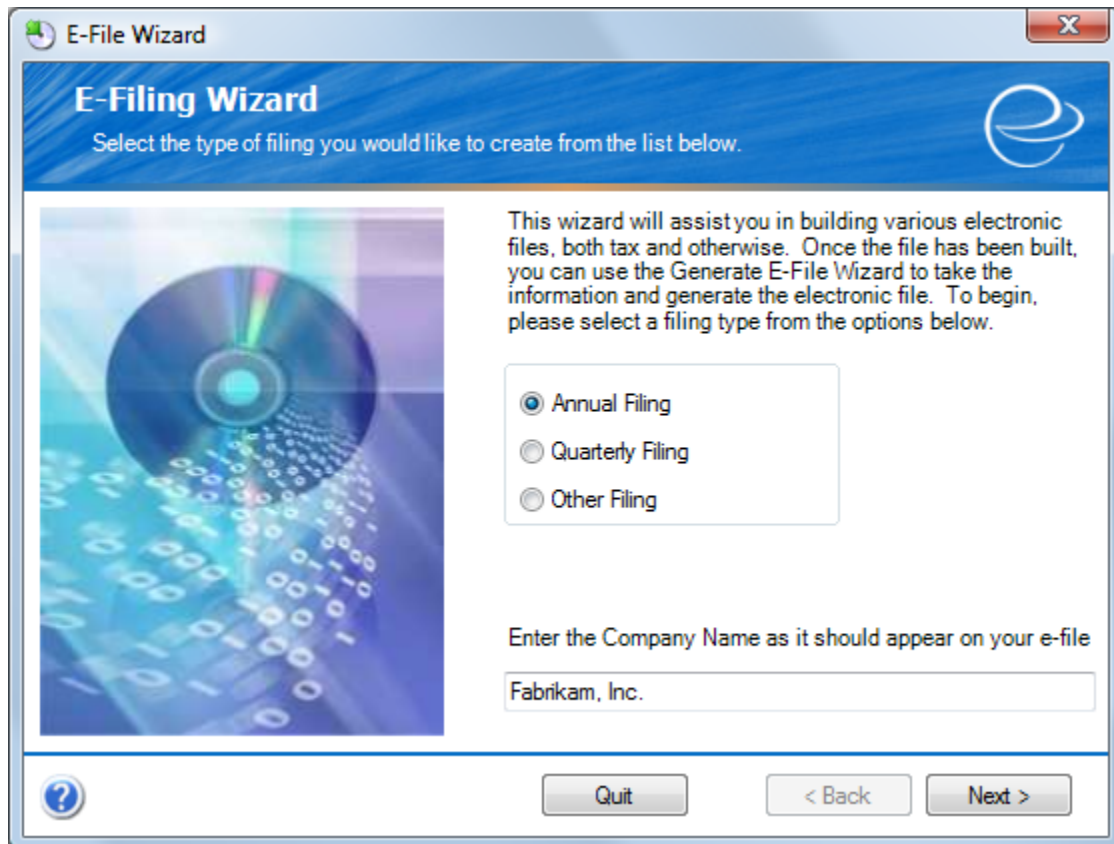
Step 1 – Starting the E-File Wizard

You will use the E-File Wizard to create your electronic state W-2 file. You can begin by clicking 'eFile Wizard' on the main Greenshades Filing Center page.
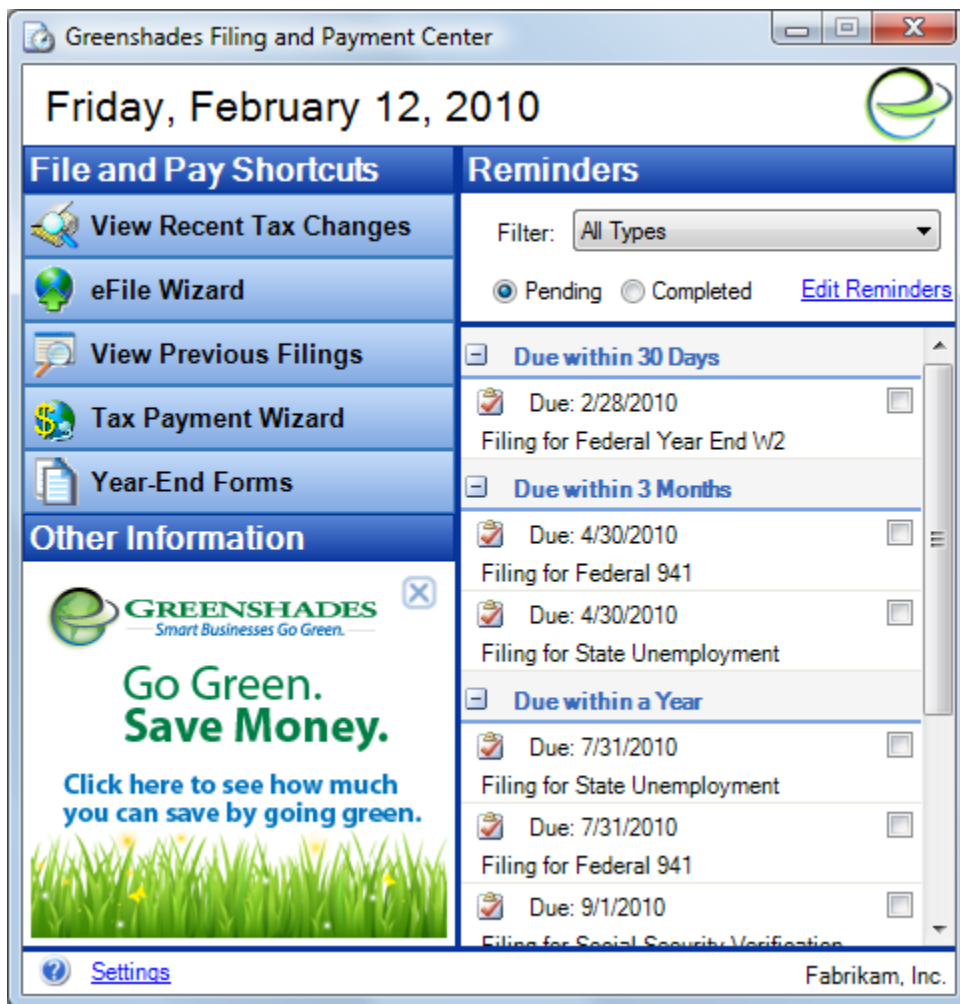
Step 2 – E-Filing Wizard

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

Click 'Next' to continue.

Step 3 – Choosing Annual Filings

Since Greenshades pulls all information for your state 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 state 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 – State Withholding IDs

The State Withholding ID screen gives you the option of reviewing, correcting and entering your state W-2 IDs. If there are differing IDs between what is in the Greenshades Center and your accounting software, you will see the notice in red text (as shown below).

If you believe the ID entered within the Greenshades Center is correct, clicking the option "Please update my Year End Tables to have the correct State W2 ID" will correct the ID within your accounting software. If you are unsure of the correct ID, please contact the state whose ID is in question.

Once you are satisfied with the state IDs, click 'Next'.

Step 5 – Build Data

The Build Data step extracts your state 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.
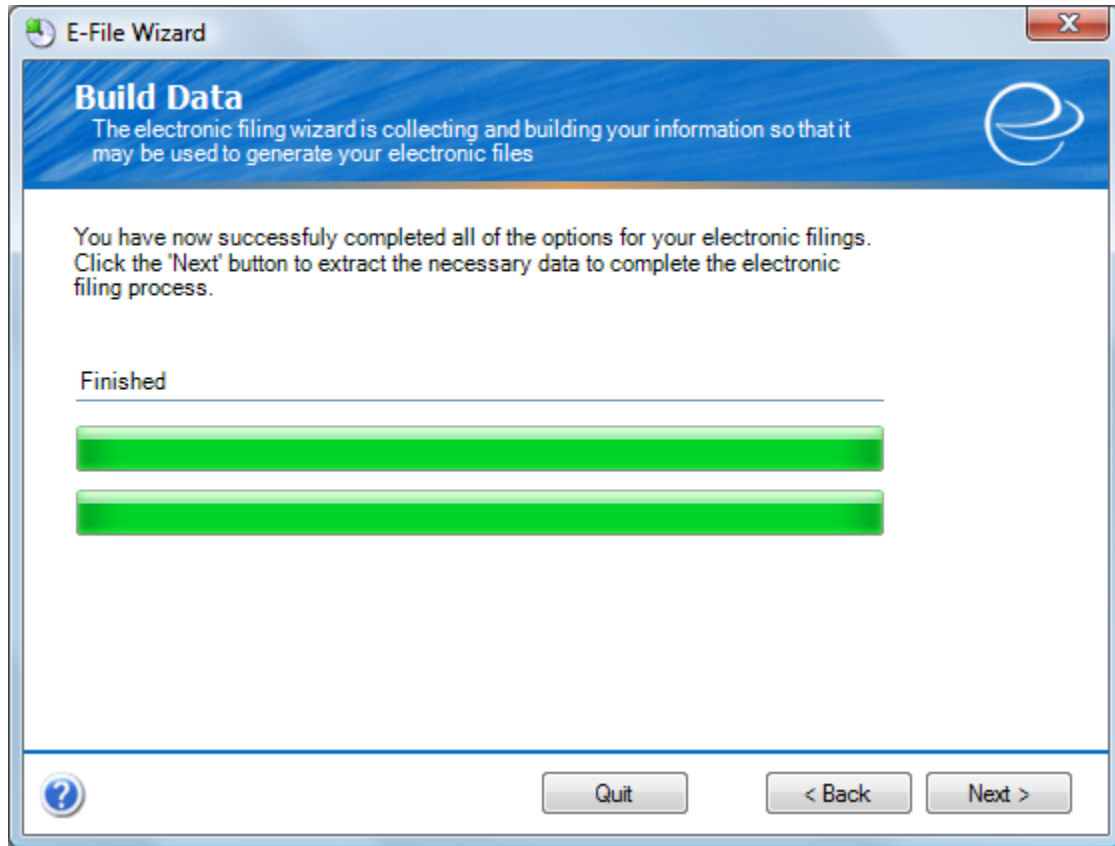
Clicking 'Next' will start the extraction process.

Step 6 – Employee Verification

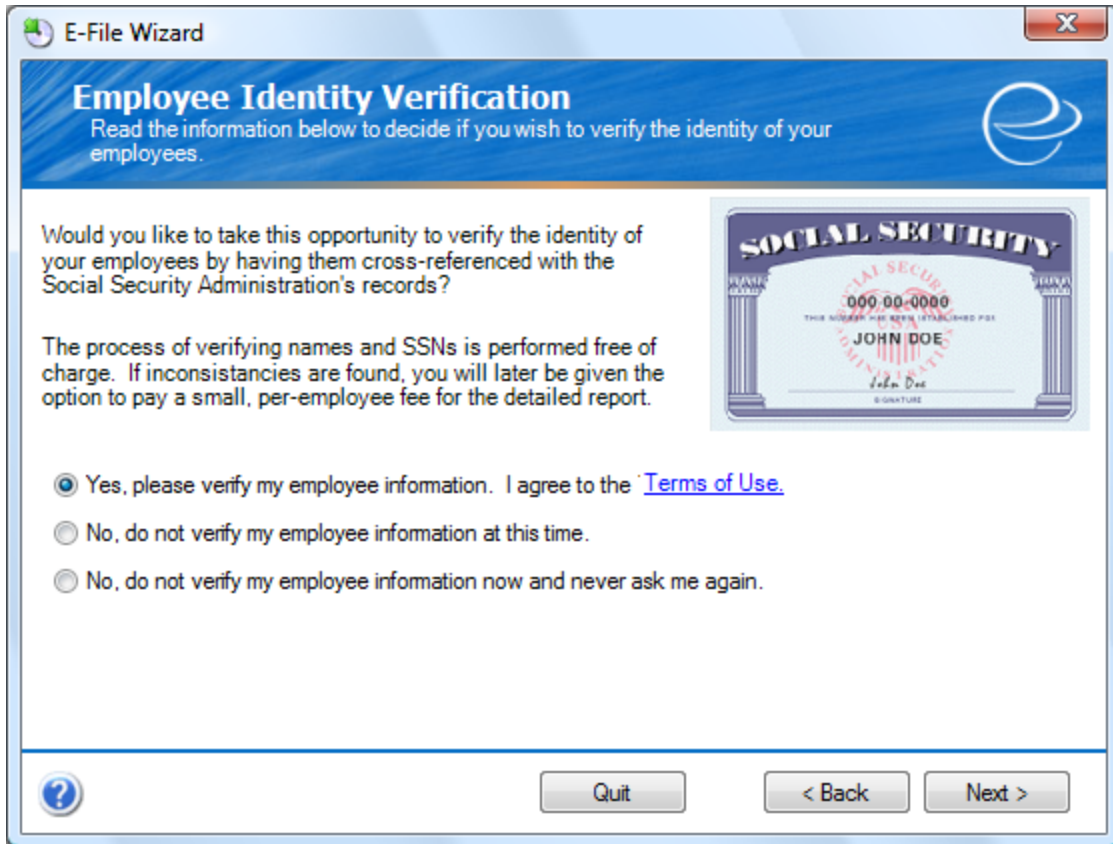Greenshades offers the ability to electronically cross-reference your employee data (names and SSN's) with the records at the SSA each time you create a file using the E-File Wizard. This verification service is provided to help circumvent any potential filing penalties associated with submitting incorrect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

You may notice that the Submission Method options vary from state to state. The submission methods that Greenshades lists for each state are determined by state specifications. One state may accept internet submissions, while another may only accept media (CD or diskette) submissions. Please check with that specific state if you have questions about the submission methods offered.

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 state 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 7A – 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 8 – Review Built Files

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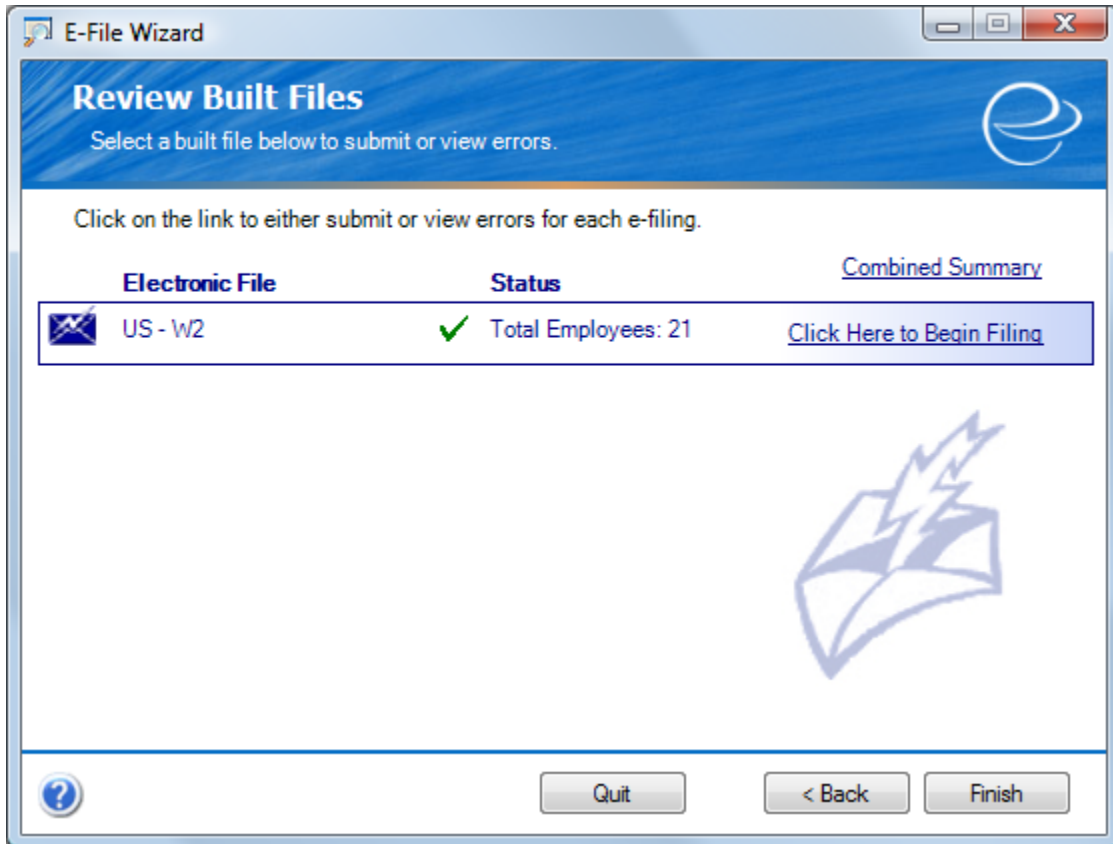
If your file failed to build a red 'X' will appear. You will be able to review the problem by clicking the "Click Here to View Errors" link. Usually these errors are easy to understand, but if you have any questions please contact our support team.

Step 9 – 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 state 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 that state. 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 10A (Internet Submission) – Manual Filing Instructions

While a *few* states offer 'Automatic' internet filing (think "one-click filing"), most states have their own website and instructions for manually uploading your E-File. If the automated E-File upload is not an option, the Greenshades Center will provide you with a direct link to the state website and instructions on uploading your file to the state. Before uploading your file to the state 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. These instructions *will* vary from state to state so make sure you follow these steps very closely.
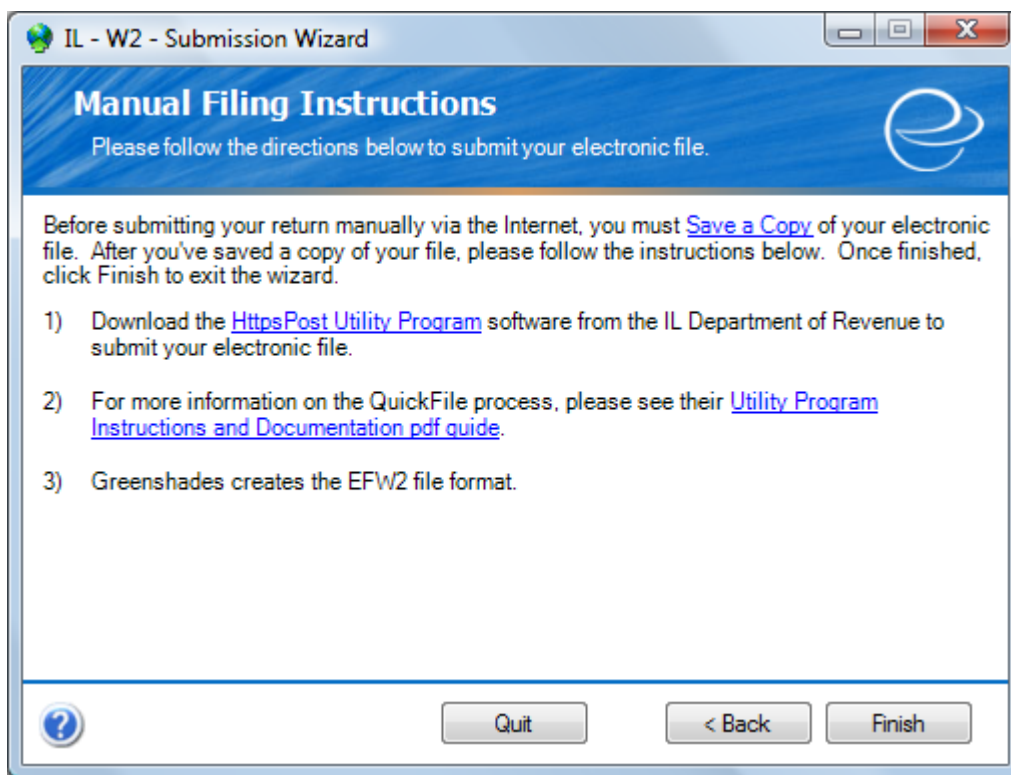
Congratulations! You have successfully created and filed your state W-2 data.

Click 'Finish' here, and once more from the 'Review Built Files' screen, and you are done. If additional states remain, return to Step 7 until all states have been completed.

Step 10B (Media Submission) – Save E-File

If the state you are submitting annual withholding for does not accept files via internet submission, you will need to save your E-File to diskette or CD and mail it to the state. The Greenshades Center will automatically detect any drives installed on your computer, which you can then select using the dropdown menu, assuming you have more than one.

Once you have selected the drive you wish to use, click the 'Save' button. If you do not have a CD or diskette drive, contact your network administrator for assistance with saving your state W-2 file to computer with one of these drives via the network, or possibly to connect an external diskette or CD drive to your computer.
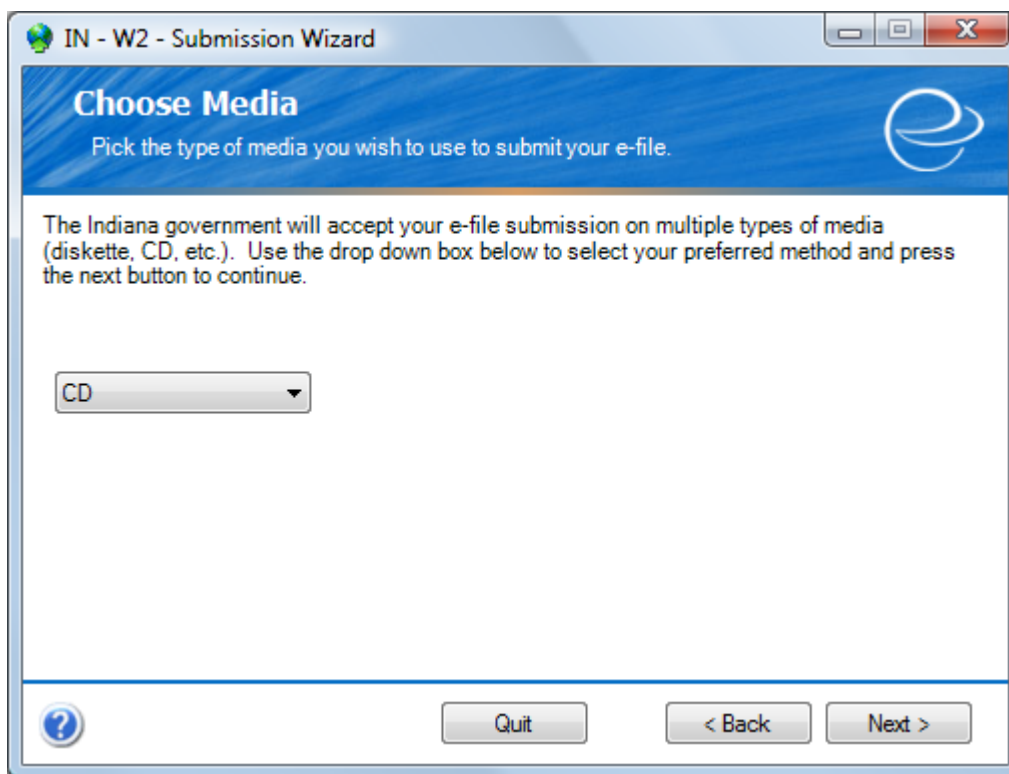
After saving your file to CD or diskette, click 'Next.'

Step 11 (Media Submission) – Print Labels

Greenshades provides you with the information that you will need to put on your diskette or CD and mailing address. You can select and copy this information into a program that can print diskette and mailing labels, or simply use the old fashioned method of labeling by hand via pen-and-ink.
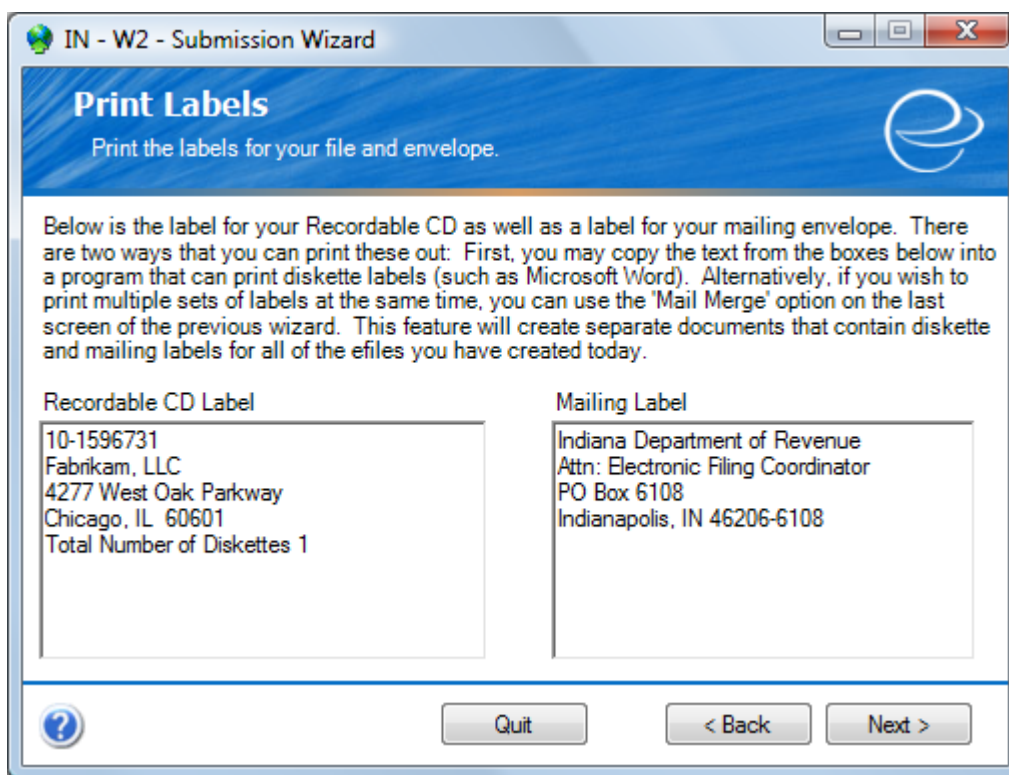
Once you have your media and mailing package labeled, click 'Next'.

Step 12 (Media Submission) – Transmittal Forms

Many states require transmittal letters be included with your diskette or CD. If the state you're filing for requires a transmittal letter, we will provide you with a link to this form.
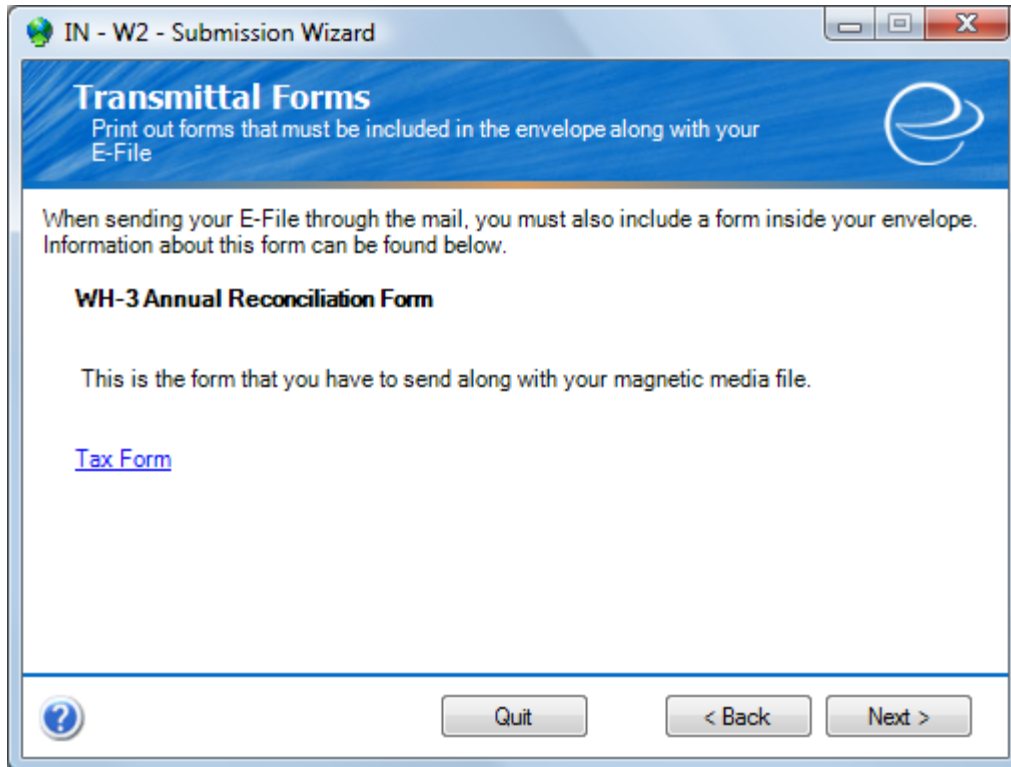
Follow the link, print and fill out the form, and then include it in your mailing package.

Step 13 (Media Submission) – Submission Completed

Congratulations! You have successfully created and saved your state W-2 data to media. You have now completed all the steps in creating and filing this E-File. Make sure it is properly labeled and packaged before mailing.
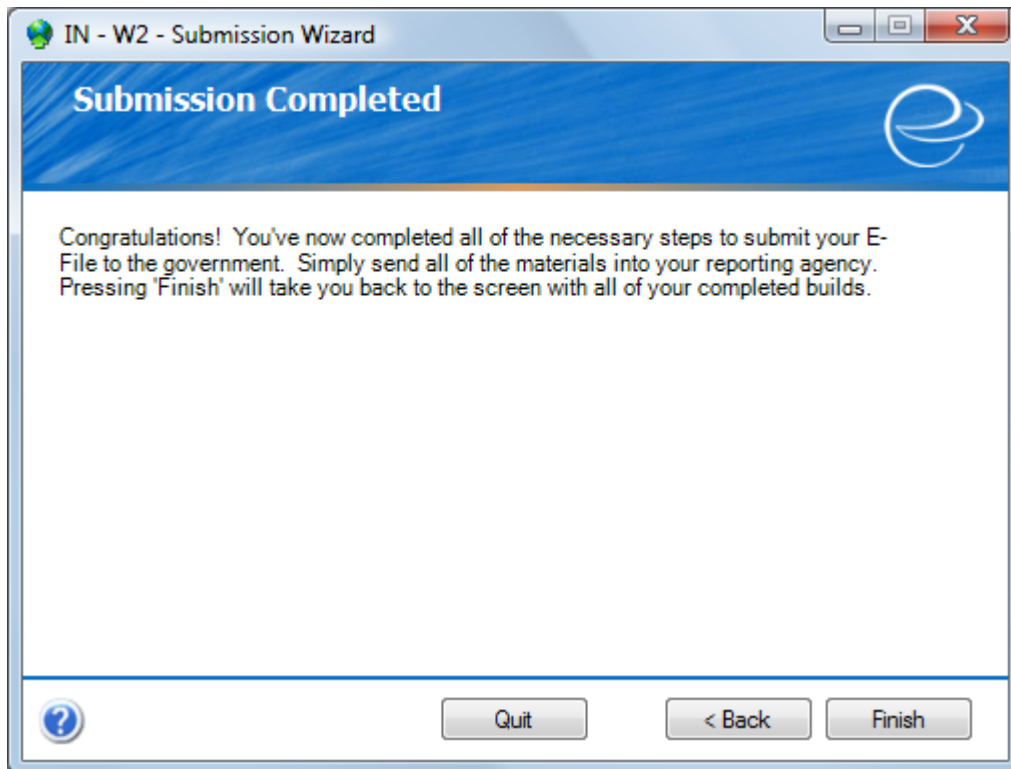
Once ready, you may click 'Finish'. If you have additional states to file for, click 'Finish' to return to the Review Built Files screen, then continue at Step 7 until all states have been completed.

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 State 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 State 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 7A within this guide for 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.