

# Greenshades Year-End Forms

Support Guide and FAQ



**GREENSHADES**  
— *Smart Businesses Go Green.* —

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## **General Overview**

The Year-End Forms Wizard works with the Greenshades Center to extract financial information from your company's payroll package and load it onto tax forms. These forms may be viewed, edited, and finally printed.

Before you begin the process of printing and e-filing you need to close out your year within Great Plains. Once you have closed out your year you launch the Greenshades Center within Great Plains version 7.5 by selecting Greenshades under the Routines menu and for versions newer than 7.5 by going to Tools-Routines-Payroll- Greenshades. The Year-End Forms Wizard, which you will use to create your forms for your employee or vendors and e-file to the government, is on the fourth option on the left side of the Greenshades Center.

The Year-End Forms Wizard enables you to create various formsets, which are a compilation of the information pulled from your accounting package, that you can print for your employees/vendors and electronically file with the government.

First you'll create your formset, which you can use as a basic snapshot of your year end information. After you've created your formset, you will use the Greenshades Forms Viewer to view the exact form you will mail out to your employee or vendor and view company totals. The Forms Viewer also enables you to make any edits directly onto a form, without having to go back into your accounting package.

Once you've created your formset, you'll mail out your forms to your employees and/or vendors. Use the Year-End Forms Wizard to select a previously created formset and view it exactly how it will look on paper with the forms viewer. Please ensure you make all changes before submitting your electronic file to the government.

The final step in the process is to electronically file (E-File) your formset via the internet to the federal government. Electronic filing eliminates the need to print and mail in W-2 Copy As and the W-3.

Many of our clients use a separate shortcut on the Greenshades Center called 'E-File Wizard' in order to electronically file various quarterly and annual returns. You will not need to use that shortcut if you've already created a formset, however, and instead will follow the e-file prompts from within the forms wizard itself.

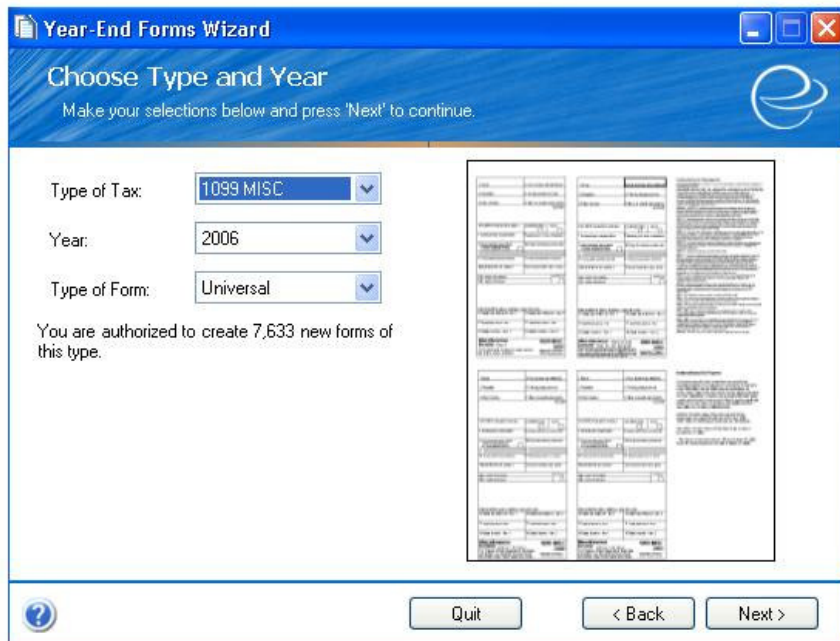
The purpose of this packet is to provide you with a basic overview of the forms module. While using the product itself, you can access in-product help that's specific to the page that you're viewing by clicking on the question marks that appear in the lower left corner of many screens. The question marks in the lower left hand corner of each screen with the Year-End Forms Wizard offer additional guidance. If you have any additional questions, please contact our support department either by email at [support@greenshades.com](mailto:support@greenshades.com) or phone at 888-255-3815 ext 700.

## Creating a new formset

The first step in the Year-End Forms Wizard is to create a new formset, which you'll do by clicking on the 'Create a New Formset' button within the wizard and click next. On the next screen you will select the type of tax, year you need to file for, and the type of form.



Greenshades offers several different form layouts for W2s and 1099s. When you select the type of tax you'll be filing, the total number of new forms you're authorized to create will show on the screen. If you're unsure what form layout you want to use, you can view a preview of the form by highlighting each form name.

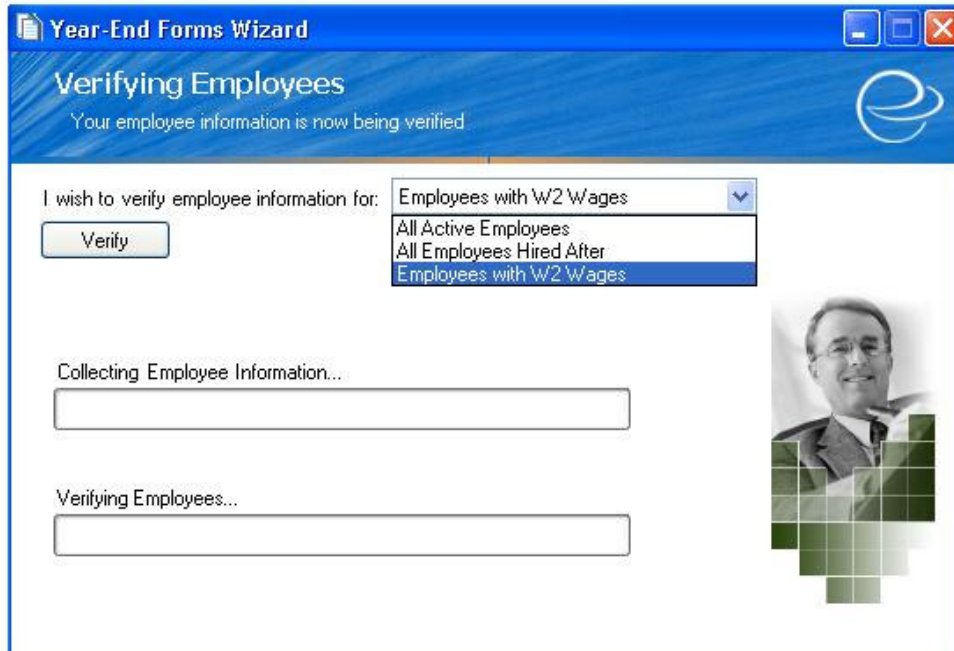


Whenever you create a new formset you will go through several screens that will help determine what information you want pulled from your accounting package. If you have any questions on a specific screen, please use the small question marks on each screen or

contact support for additional clarification. If you're creating a 1099 formset the [1099 eFile Creation Guide](#) may be a useful resource as well.

## Electronic Verification

The Greenshades Forms Wizard also provides you with the opportunity to verify your employees' information. The electronic employee verification service is available to anyone creating a W2 formset. We provide this service to prevent any potential filing penalties associated with submitting incorrect employee or vendor information to governmental agencies.



You have three choices for which employees' identification you'd like to verify: all active employees, all employees hired after a certain date you specify, or employees with W2 wages. Based on the parameters you select, Greenshades will compare the employee information within your accounting package to the SSA records. If you would like Greenshades to verify your employee identification, you will be informed of the number of discrepancies found. To view a detailed report, there will be a small charge per discrepancy. Running the Employee Verification process does not obligate you to purchase the detailed report.

This concludes the portion of the user guide dedicated to explaining the process of creating a new formset. The next important step in using the Year-End Forms Wizard is to understand how you can work with the formset you just created, which you will do by selecting the 'work with current formset' option. To learn more about this feature, please continue reading.

If you have any additional questions about creating a new formset, please contact [support](#).

### ***Working with a current formset***

Ideally you will only create a new formset once for each filing type and company. Once you have created a formset, you can use the 'Work with a Current Formset' option to make any edits or changes. This feature provides you with the ability to make any edits over a period of time.

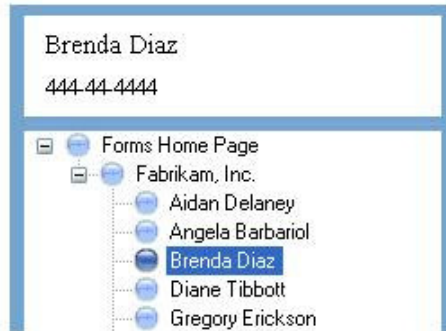


You can use this option to make basic changes to fields such as names or addresses or bigger changes such as adding or removing an employee or vendor. When you receive correction requests from your vendors/employees, you will use the 'Work with a Current Formset' option to look up their specific form and make any changes. Any changes that you make to a formset will be saved and included within your e-file when it comes time to submit to the SSA or IRS. If you have already e-filed your information then you will need to submit a correction to the federal government.

## Using the Forms Viewer

The Forms Viewer will launch automatically once you have completed the process of creating a new formset or select which current formset you wish to view. The Forms Viewer is the part of the Year-End Wizard where you can view each form individually as well as review your totals for your entire formset.

### Viewing Forms within your formset



On the far left side of the Forms Viewer is a listing of each form within your formset. If you select the 'Forms Home Page' or a company name, the right side of the forms viewer will be filled with helpful information and totals for the related forms. If you select a specific form from the left side, a digital version of the form will be displayed on the right side. The forms will be completed with information extracted from your accounting package.

### Viewing Totals



Fabrikam, Inc. Totals		<a href="#">Save Totals</a>	<a href="#">Open Totals in Excel</a>
Box1		\$397,580.52	
Box2		\$43,936.32	
Box3		\$409,655.62	
Box4		\$25,398.67	
Box5		\$409,655.62	
Box6		\$5,940.01	
Box7		\$0.00	
Box8		\$0.00	
Box9		\$0.00	
Box10		\$0.00	
Box11		\$0.00	
Box16-StateWages1		\$0.00	
Box17-StateTax1		\$0.00	

As well as having the ability to view each form individually, you have the ability to view the totals for your entire formset. By selecting either the 'Forms Home Page' or a company name from the listing on the left side, you will be presented with a summary screen. At the top of the summary screen are two options: 'Home' and 'Totals'. The default is Home, and this option will display summary information about the forms

themselves and upcoming deadlines. By switching to Totals you'll be able to view the totals for all related forms.

## Making Edits

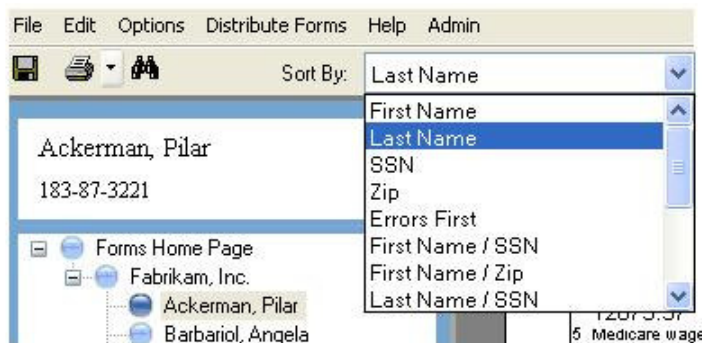
Often, one or more pieces of information contained on a form will be pertinent to multiple forms within the formset, like a company's name or address. If this information is changed on one form, it will also change on every other form for that company. Accordingly, making changes that affect every employee within a formset is an effortless operation.

If you wish to edit any information that you see on any specific form, simply select the box that you wish to change. The box will be highlighted and allow you to edit the field. If you do make an edit to a specific field, it will be repeated everywhere that information appears on that form. If you type an inappropriate value into a box (for instance, type alphabetic characters into a money field), the box will turn red.

## Sorting Feature

There are two main ways to locate a specific form within the Forms Viewer. First, you may sort your forms in different ways. In order to sort your forms, you must select a sort method from the drop down box inside the Forms Viewer's toolbar. Whenever you sort your formset, your forms will be listed based off your sort preference. You can choose a different sort method and the forms will become listed and sorted in that way.

Depending on what type of form you are viewing, different sort options will be available. When you're viewing a W2 formset you have the option of sorting by first name, last name, SSN, errors, or a combination of first name and SSN or zip code, last name and SSN or zip code, zip code and first name, last name, or SSN. The combination sorting will sort by your initial selection first and then sort within your second choice. For example, if you choose to sort by First Name/SSN your formset will be sorted by first name and then within the first names by SSN. Or you can select to sort by a single option like SSN.

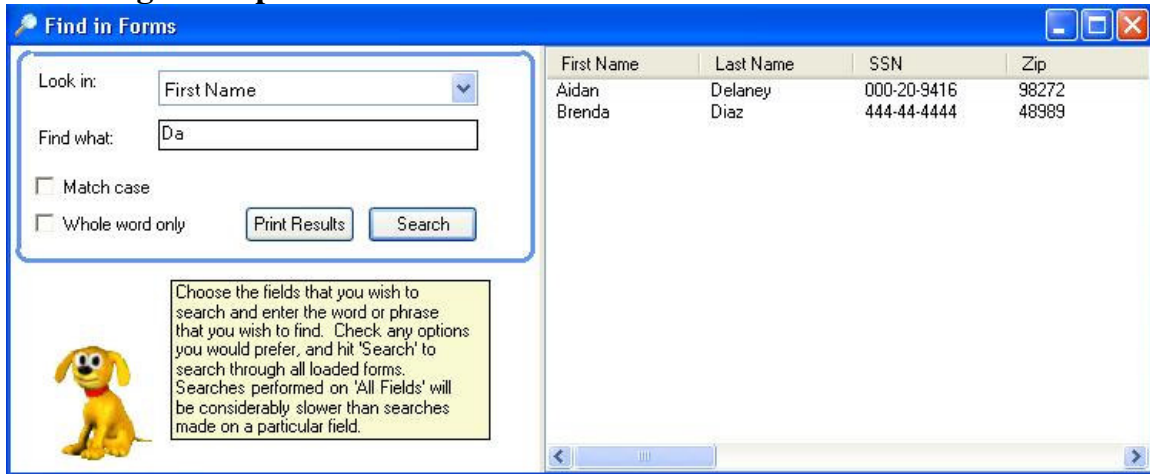


Here, the forms have been sorted by their last name.

When you're working with your 1099 formset you have the option of sorting by vendor name, TIN, zip code, errors, and a combination of vendor name, TIN, or zip code.



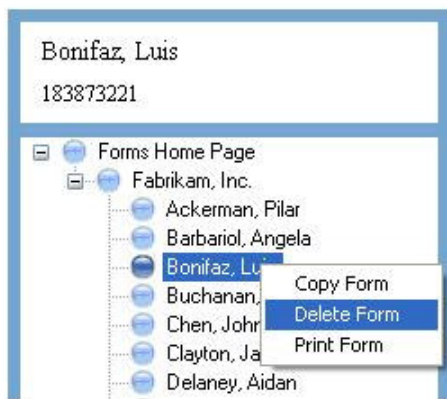
## Searching for a specific form



The other method of searching for a specific form is to use the search tool. To bring up the search window, use the 'Edit->Search Forms' menu option or click on the binocular icon.

The search wizard provides you with the ability to search through specific boxes on each form (such as first name, last name, vendor name, etc.) for a quick search, or search through all boxes on your forms for a specific word. To execute a search, simply select what field you want to sort by, what you would like to find, and press the 'Search' button. When completed, you can click on one of the forms in the result box and it will automatically be loaded into the right side of Forms Viewer. To view or edit that form, simply close down the search wizard and work with that form.

## Adding or Removing a form



In order to add a new form to your formset, you must first select a form that is to be copied. Right click the form in the navigation pane and select "Copy to New Form". A new form will be added to the Formset that contains all of the generic information (Company name, etc.) found within the original form but has no specific information (Employee name, wages, etc.). The newly copied form will be listed as Copied Form #1. You may add information to this form and it will be saved as part of your Formset.

To remove a form from your Formset, simply right click on the form in the navigation pane and select the 'Delete Form' option. The selected form will no longer be a part of your Formset.

## Printing

The Forms Viewer print function is designed to print forms on the paper supplied by Greenshades. You can print your forms by using the 'Distribute Forms->Print Forms' menu option or clicking on the printer icon.

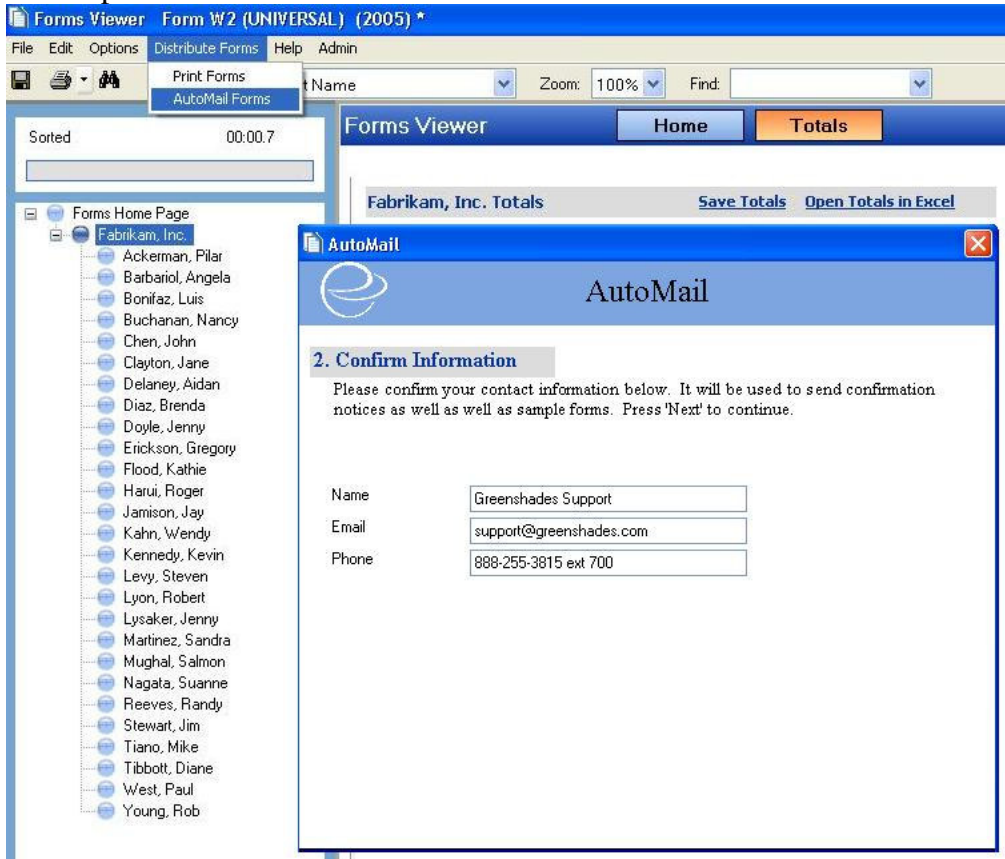
The screenshot shows the 'Forms Viewer' application window titled 'Form W2 (UNIVERSAL) (2005)'. The menu bar includes 'File', 'Edit', 'Options', 'Distribute Forms', 'Help', and 'Admin'. The 'Distribute Forms' menu is open, showing 'Print Forms' and 'AutoMail Forms' options. A printer icon is also visible in the toolbar. The main window displays a list of employees for 'Fabrikam, Inc.', with 'Aidan Delaney' selected. A 'Configure Print Range' dialog box is open, allowing the user to select which forms to print. The dialog has three radio button options: 'Print All Forms in Formset', 'Print a specific range of forms:', and 'Print only the selected form'. The 'Print a specific range of forms:' option is selected. It includes fields for 'From this company:' (Fabrikam, Inc.), 'Starting with:' (Aidan Delaney), and 'Ending with:' (Wendy Kahn). A 'Filter Actives:' dropdown menu is set to 'No Filter', with other options being 'Only Active Employees' and 'Only Inactive Employees'. The dialog also has 'OK' and 'Cancel' buttons. In the background, a portion of a W2 form is visible, showing fields for wages, taxes, and social security wages.

15 State	Employee's state ID	16 State wages, tips, etc.	17 State income tax	15 State	Employee's state ID	16 State
IL	5027-8310	0.00 n nn	0.00 n nn	IL	5027-8310	0.00 n nn

You have three printing options. The first option will print every form in your formset. The second option will allow you select a specific range of forms. This option depends on the sort feature you chose. For example, if your W2 formset is sorted by last name, you will select a range based on the last names of your employees within your formset. This print feature also provides you with the ability to filter the forms you print by selecting, no filter or printing only active or inactive employees. The third printing option is to print only a selected form. To use this option you will need to highlight the specific form you wish you print within the Forms Viewer, and then open the print screen and select the third option. If no form is highlighted within the Forms Viewer then this option will be grayed out.

## AutoMail Feature

The Greenshades AutoMail feature provides you with the option of having Greenshades take care of the printing and mailing of your forms. This feature is an add-on to the Year-End Forms. If you would like to use the AutoMail feature, you will be charged based off how many forms you choose to have Greenshades print and mail. To begin the process of AutoMailing your forms you will use the 'Distribute Forms->AutoMail Forms' menu option.



## Submitting formset

Before submitting your forms for AutoMailing, you'll need to ensure that no additional edits need to be made. You will be able to verify your totals and enter in your contact information before submitting your forms to our AutoMail feature.

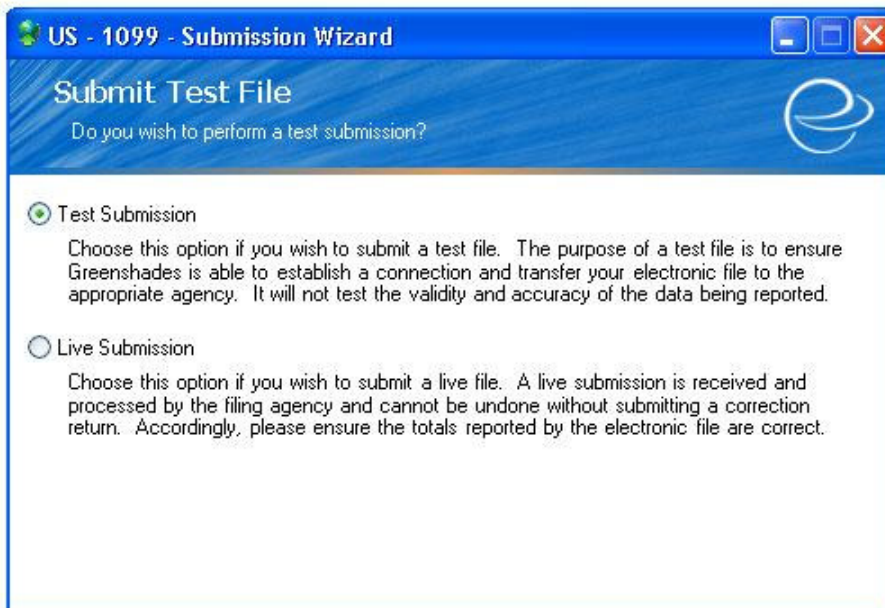
If the AutoMail Wizard completes successfully, you will receive confirmation receipt email and an explanation of the rest of the AutoMail process. However, the AutoMail wizard may fail if it finds missing or incorrect data within your forms. If so, it will show you a sheet of problems that must be fixed. After fixing the problems, you may then attempt to AutoMail again.

## *E-Filing a formset*



Once you have mailed out your forms and made any necessary corrections to your formset, you're ready to e-file your formset to the federal government. To begin the e-file process, select the 'E-File a Formset' option and follow the wizard to submit your file.

## **Test and Live Submissions**



Greenshades provides you with the opportunity to submit either a test or live submission. If you decide to use the test submission feature, please note that even if your test file is successful, you will still need to do a live submission.

You can submit multiple test submissions, but only one live submission. When you submit a test file no actual information is submitted, nor is validity or accuracy checked on the data you are transmitting. You will receive a confirmation email from Greenshades Support if your test submission is successful.

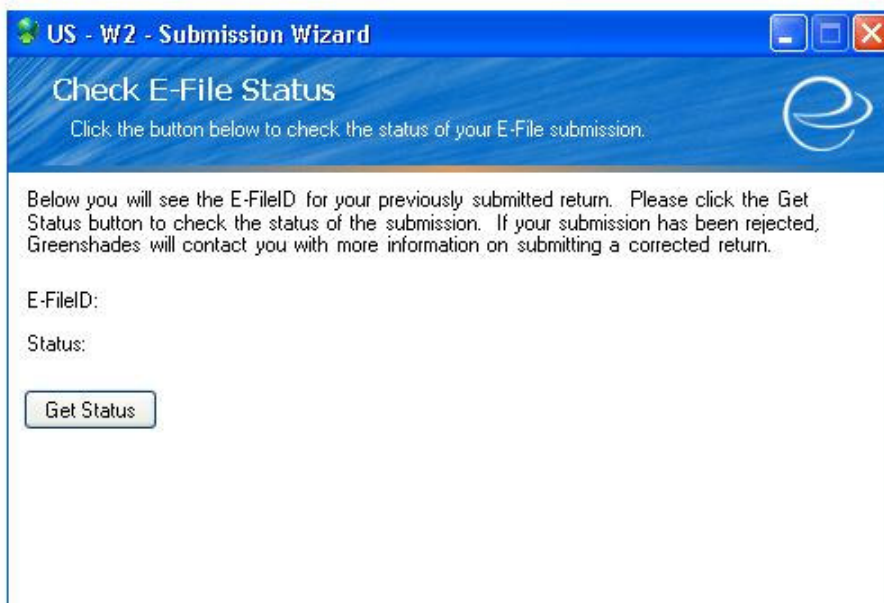
A live submission will actually transmit your file to the IRS or SSA. Choose this option after you have made any necessary edits to your formset and you are satisfied with your totals.

### **E-File Confirmation E-Mail**

Once you've successfully completed either a test or live submission of your e-file you will receive a confirmation email from Greenshades Support. Your confirmation email is automatically generated, and you should receive it within two hours of submitting your e-file. If you do not receive your confirmation e-mail within two hours, please first check your junk or spam mail folder and then contact Greenshades Support.

The confirmation email is an important piece of documentation. The 'EfileID' referenced in your email will be needed for any communication with Greenshades or the government concerning your file.

### **Check Status of E-File**



Once you've submitted your return you can check the status of your submission by navigating to the Check E-File Status screen. This screen is accessible by going to 'View Previous Filings' and double clicking on the return you'd like to see the status of. Double clicking on the file will launch the Totals page, this will help you ensure you

selected the proper file, then click Next, which will bring up the Check E-File Status screen. To get the status of your return, click on Get Status.

## **Frequently Asked Questions**

Only some questions are addressed in this portion of the manual. If you have any additional questions that aren't addressed here or would like additional clarification on an issue please contact our support department.

### ***Where is my forms file saved?***

Your formset is saved as forms.gsf within your Forms folder. The Forms folder is located within your Greenshades Center data directory. This directory defaults to the 'data' folder under the Greenshades Center installation directory, but can be changed through the Greenshades Center's settings screen. You will reach the actual forms.gsf file by selecting the appropriate folders based off the company name you created the file for, file type, and year. For instance, if you used the default installation directory then a 2006 W2 forms.gsf location would be:

C:\Program Files\Greenshades Software\Greenshades Center\Data\Forms\Company\W2\2006

### ***How do I print out prior year W-2s or 1099s?***

Greenshades' Forms Module supports printing out or editing prior year W-2s or 1099s. If you used Greenshades to create the forms, you can load them (with changes) by using the 'Work with Current Formset' option from the FormsWizard and selecting a previous year. Otherwise, you can create a new formset from a prior year using the 'Create a New Formset' option and selecting the year in question..

Once you are viewing the forms within the Forms Viewer, simply follow this manual's instructions to print the form(s).

### ***Can I sort my formset?***

You can sort your formset within the Forms Viewer, for more information on sorting, please review the sorting section within this guide.

### ***Can I track all the changes made to a formset?***

Any changes made to your formset are logged by Greenshades for your convenience. The tracking file is saved as activity.tab within your Forms folder.

### ***When should I create a new formset?***

You only need to create a new formset whenever you are initially pulling information from within your accounting package. For example, you'll only create one W2 formset for each of the companies you plan on filing for. If you only need to make edits, you can work with a current formset. Each time you create a new formset you're overwriting any edits or modifications you've previously made. If you've already created a formset for the year and filing type, a window will popup to ensure you're not trying to create a new formset by mistake.



***Can I mail my file in on diskette?***

The federal government will no longer accept diskette submission for W-2 or 1099 filing. The forms wizard will assist you in submitting your W2 or 1099 file over the internet (e-filing) when you're ready to report your forms to the government.

***I've already bought pre-printed forms, can I print on those?***

Greenshades forms is designed to print on the paper and envelopes we supply. You can try to print out on the forms you've already purchased, but we do not guarantee the forms will align. In order to stop the Greenshades Center from printing out the image of the form itself, you may adjust the 'Print Options' found under the 'Options' menu item in the Forms Viewer.

***How do I handle a correction when I've already mailed out the forms?***

If you need to make any corrections after mailing out your forms, you can edit the necessary forms within the Form Viewer. Once you've made the corrections you can re-print the form for your employee or vendor.

If you need to make any corrections after e-filing your formset, you will need to file a correction. You can make corrections on paper or contact Greenshades for help in creating a correction e-file.

***What are the filing deadlines?***

January 31 – your employee/vendor W-2s/1099s need to be post marked

March 31 – you must E-File your W-2s/1099s