
CONVERSION GUIDE

EasyACCT Batch Payroll to Payroll CS

<i>Introduction</i>	<i>1</i>
<i>Conversion program overview</i>	<i>2</i>
<i>Processing steps required for each client prior to running the conversion program.....</i>	<i>2</i>
<i>Installing the conversion from the CS Professional Suite Accounting Products Conversions CD</i>	<i>2</i>
<i>Creating the EasyACCT Batch Payroll export file.....</i>	<i>3</i>
<i>Importing the converted client files into CSA</i>	<i>4</i>
<i>Items transferred during conversion of data from EasyACCT Batch Payroll.....</i>	<i>5</i>
<i>Conversion notes and exceptions.....</i>	<i>9</i>
<i>Items not converted during data conversion.....</i>	<i>12</i>
<i>Suggestions for reviewing converted data.....</i>	<i>15</i>
<i>Help and Support</i>	<i>15</i>

Introduction

The EasyACCT® Batch Payroll to Payroll CS® conversion program and the **Utilities > Data Conversion > EasyACCT Batch Payroll** command in Creative Solutions Accounting™ (CSA) are provided to convert your client data from EasyACCT Professional Series version 2013/2014 into the Payroll CS software or into the Payroll Compliance module in Write-Up CS® within CSA and the CS Professional Suite® Accounting Products software. Please note that this conversion will work **only** with EasyACCT v.2013.1.01

This conversion guide explains the necessary steps to convert your data, to identify the fields that will not be converted, and to document exceptions that you may encounter during the conversion process. There's also a section near the end of this guide that explains the steps you should take to verify that the converted information is correct.

Please read this entire document prior to starting the conversion of client data. Refer to this guide for all information regarding this conversion.

Important!

- To avoid possible delays in converting your data, do **not** install any updates to your EasyACCT software. Doing so could change the format of the client data and, thus, could require yet another update to the CSA conversion program to enable you to convert your client data. This conversion program was written to convert data only from EasyACCT v.2013.1.01 as noted above.
- Prior to running the conversion, please be sure that you have installed your CS Professional Suite Accounting Products software on the computer where the Conversions CD will be run.

Conversion program overview

The overall objective of the conversion program is to provide a comprehensive conversion of your EasyACCT Batch Payroll data to CSA. However, due to differences in processing calculations and data structures between EasyACCT and CSA, some EasyACCT data cannot be converted. **Therefore, you should not expect to exactly duplicate results from EasyACCT using the converted data without adding or modifying the appropriate data in CSA.** The specific items that cannot be converted and conversion exceptions are listed in “Conversion notes and exceptions” on page 9

Processing steps required for each client prior to running the conversion program

- If the client is also an EasyACCT Write-Up general ledger client, you must complete the Batch Payroll conversion **prior to** processing the conversion to CSA. This is **required** to ensure accurate conversion results.
- We strongly recommend that you make a backup of the EasyACCT client before beginning the conversion process. The conversion program will not change any of your EasyACCT data. If you need to modify the data in EasyACCT as part of the conversion process, making a backup will enable you to restore the original data.
- You will need to know the data path of the EasyACCT client data, which is displayed in the Current Data Path field in the EasyACCT client selection screen.
- You will need to know both the client ID and the current payroll period end date in EasyACCT. It may be useful to print a list of clients from EasyACCT. It is recommended that you complete the conversion at the end of a quarter.
- The payroll data conversion process converts the earnings history only from paychecks that have already been posted. Prior to starting the conversion of the client, verify that the client's payroll totals have been posted and are accurate in EasyACCT.
- Prior to importing the converted data into CSA, download and apply all available CSA software updates from CS Connect.™ We continually update the data import features of CSA, and using the current version will help to ensure the accuracy of the conversion.
- The EasyACCT Batch Payroll to CSA conversion program generates a report in PDF that is saved in the EasyACCT client data folder. This report contains notes and information on changes you may need to make to the client data in CSA. We recommend that you print these reports after finishing the conversion process but before importing the client into CSA. You need to have Adobe® Reader® version 7.0 or higher installed to view and print these reports. (If the Adobe Reader is not already installed on your computer, choose **Help > On the Web > Adobe Reader** from the CSA main window; this takes you to the [Adobe website](#) from which you can download and install the Reader.)

Installing the conversion from the CS Professional Suite Accounting Products Conversions CD

1. Uninstall any previously installed versions of the CS Professional Suite Accounting Products Conversions CD.

- a) From the Windows[®] Start menu, choose **Control Panel**. (On some Windows systems, you may need to choose **Settings > Control Panel**.)
 - b) Double-click Add or Remove Programs.
 - c) Scroll to **CS Accounting Conversions** (or to **CSI Accounting Conversions**) and highlight that item.
 - d) Click the Change/Remove button.
 - e) At the prompt, click **Yes** to uninstall the program.
2. Place the Conversions CD in the CD drive on your computer.
 3. The setup program will open automatically, or you can do the following to open it.
 - a. Using either My Computer or Windows Explorer, navigate to your CD drive.
 - b. Double-click **SETUP.EXE**.
 4. Follow the prompts on the screen to install the CSA conversion program.
 5. After the conversion program has been successfully installed, store the CD in a secure place.

Notes

- The conversion program is installed only on the local computer. You need to install the conversion program on **each** computer from which you will run the conversion program.
 - Once you have converted all of your accounting client data, you can remove the Accounting Conversion program from your computer by repeating step 1.
-

Creating the EasyACCT Batch Payroll export file

Complete these steps to create the EasyACCT Batch Payroll export files. The export file is a specially formatted file that CSA can use to import your data. The conversion program does not change your original EasyACCT data in any way.

Important! The conversion program cannot create an export file for a client that is locked by EasyACCT. Ensure that the client is not in use and exit the EasyACCT program before continuing.

1. Close the client in EasyACCT.
2. Start the EasyACCT to CSA Conversion Program: From the Windows Taskbar, choose **Start > All Programs > CS Professional Suite > CS Data Conversions**. If you chose to create a CS Data Conversions icon on your Windows desktop, you could click that icon instead to start the conversion program.
3. Select **Payroll** from the drop-down list in the *Conversion Type* field.
4. Select **EasyACCT** from the drop-down list in the *Competitor* field.

5. In the *Input Data Folder* field, specify the data path to the EasyACCT client data you want to convert. The *Data Directory* field defaults to **C:\EASYWData**. If your data is in a different location, click the Browse button and navigate to the appropriate drive and folder.
6. Click the **Start** button to begin the conversion.
7. The conversion program will list all of the clients found in the specified data folder. Select a client by highlighting the client and then clicking the **Continue** button. You could also select a client by double-clicking it.
8. When the conversion is complete, click OK.
9. To convert data for another client, repeat steps 7-9 above. To begin importing the converted data into CSA, click the Close button and follow the steps outlined in "Importing the converted client files into CSA" on page 4.

Note: If your payroll client is also a write-up client, you must convert the client data from EasyACCT Batch Payroll **before** converting data from EasyACCT Write-Up. To convert client data from EasyACCT Write-Up, follow all steps listed above except Step 3. Instead of selecting Payroll from the *Conversion Type* field, you would select Accounting.

Importing the converted client files into CSA

Complete the following steps to import the converted EasyACCT payroll data into CSA.

1. Start the CSA program.
2. Create a new client in CSA by choosing **File > New Client**. The Add/Remove Modules dialog opens automatically and, after you select the desired modules, the New Client dialog opens.

Notes

- If the client is also a write-up client, you may select the General Ledger module at this time. If you add the General Ledger module, be sure to specify the dates in the General Ledger tab of the CSA New Client dialog exactly as they are currently specified in EasyACCT.
 - To use the full-featured payroll functions in CSA, select both Payroll CS and the Payroll Compliance module in the Add/Remove Modules dialog.
 - For more information on creating a new client, choose Help > Help & How-To and enter [New Client \[File menu\]](#) in the search field.
-
3. In the Payroll tab of the New Client dialog, specify the current payroll period end date exactly as it appears in EasyACCT.
 4. In the Calculating Payroll tab of the New Client dialog, specify the default payroll frequency as it appears in EasyACCT.
 5. To begin the import of converted data, choose **Utilities > Data Conversion > EasyACCT > Batch Payroll**.

6. In the first field of the EasyACCT Payroll dialog, specify the location of the converted EasyACCT data files to be imported into CSA. This will match the path specified in step 5 of “Creating the EasyACCT Batch Payroll export file” on page 3. The default data folder is **C:\EASYW\data**.
7. In the *Client to Import* field, select the EasyACCT client.
8. Mark the *Convert Employee Earnings* checkbox.
9. Click the Import button.
10. In the Payroll tab of the New Client dialog, in the State Tax Information grid, enter the state withholding and SUI (SUTA) ID numbers for each applicable state. You may want to use the CTRL+C and CTRL+V shortcut keys to copy and paste the appropriate information from EasyACCT to CSA.

Items transferred during conversion of data from EasyACCT Batch Payroll

The following tables are provided to identify fields in EasyACCT that will be converted to CSA. The tables are organized by screens in EasyACCT and CSA and denote the necessary CSA screen navigation.

Employee information

EasyACCT field name	CSA menu navigation CSA field name	Comments and additional information
Employee	Setup > Employees > General tab	See “Conversion notes and exceptions” starting on page 9.
Employee ID	Employee ID	
Soc. Sec #	SSN/EIN	
First Name	First name	
MI	Middle Initial	
Last Name	Last name	
Address 1	Street	
City	City	
ST	State	
ZIP	Zip code	
Telephone	Telephone number	See “Conversion notes and exceptions” starting on page 9.
Department	Department	The Department defaults to 01 if an employee was not assigned to a department in EasyACCT.

EasyACCT field name	CSA menu navigation CSA field name	Comments and additional information
	Setup > Employees > Other tab	
SUTA	SUTA State	
Standard Hours	Std. Hours/Week	Std. Hours/Week defaults to 40 if the <i>Standard Hours</i> field in EasyACCT is blank.
	Setup > Employees > Personal W-2 tab	
Birth Date	Date of birth	
Date Hired	Date of hire	
Last Raise	Last raise date	
Marital Status	Marital status	
W-2 Box 13 Items Code 1	Statutory employee	
W-2 Box 13 Items Code 2	Pension Plan	

Employee pay information

EasyACCT field name	CSA menu navigation CSA field name	Comments and additional information
Employee Pay Information	Setup > Employees > Earnings tab	
Description/Item	Description	
Account#	G/L Acct	
	Setup > Employees > Edit > Earnings History	
January – December monthly pay item totals	Reg. Amt.	Lists month-to-date, quarter-to-date, and year-to-date totals for pay items.
	Setup > Employees > Edit > Earnings tab > Item properties > Pay Info tab	
Pay Type	Wage type	Hourly, Salaried – Hours Sensitive
Pay Period	Frequency	Weekly, Bi-Weekly, Monthly, Twice Monthly
Vac./Sick/Leave	Benefit Accrual Information fields	Only Method, Allowance, Limit, Accrued, and Used amounts are converted. See “Conversion notes and exceptions” starting on page 9.

Employee deduction information

EasyACCT field name	CSA menu navigation CSA field name	Comments and additional information
Employee Deduction Information	Setup > Employees > Tax Withholdings and Deductions tab	
Description/Item	Description	
Account#	G/L Account	
	Setup > Employees > Edit > Earnings History	
January – December monthly deduction totals	Reg. Amt.	Lists month-to-date, quarter-to-date, and year-to-date totals for deductions.

Employee withholding information

EasyACCT field name	CSA menu navigation CSA field name	Comments and additional information
Employee Withholding Information	Setup > Employees > Tax Withholdings and Deductions tab	
Description/Item	Description	
Account#	G/L Acct	
	Setup > Employees > Tax Withholdings and Deductions tab Edit > Earnings History	
January – December monthly withholding totals	Reg. Amt.	Lists month-to-date, quarter-to-date and year-to-date totals.
	Setup > Employees > Tax Withholdings and Deductions tab > Withholding item properties > General tab or Other tab	
State	State	Depending on whether the withholding item is a state or federal item, these fields could appear on the General or the Other tab.
Marital Status	Marital Status	
State	Withholding Table	See “ Conversion notes and exceptions” starting on page 9.
Exemptions	Allowances	
Amount	Additional amount	
%	Additional percent	
	Setup > Employees > Tax Withholding and Deduction tab Local properties button	
Local	Locality	See “ Conversion notes and exceptions” starting on page 9.

Employee direct deposit information

EasyACCT field name	CSA menu navigation CSA field name	Comments and additional information
Employee Direct Deposit	Setup > Employees > Direct Deposit tab	
Bank Routing Number	Bank ID	
Bank Account Number	Account Number	
Type of Account	Account Type	

Global bank list information (employee direct deposit)

EasyACCT field name	CSA menu navigation CSA field name	Comments and additional information
Payroll Global Bank List Information	Utilities > Direct Deposit > Setup > Bank Information	
Bank Routing Transit Number (RTN)	Bank routing transit number	RTN converts as both Bank ID and RTN.
	Bank ID	
Bank Name	Bank name	Company bank name only.

Global pay / deduction item information

EasyACCT field name	CSA menu navigation CSA field name	Comments and additional information
Global Pay Item Information	Setup > System Configuration > Pay or Deduction Items > Description and W-2 Info tab	
Description	Description	
W-2 Boxes	W2 Checkboxes (1-19)	
W2 Box 12 Desc	W2 Box 12 code	
W2 Box 14 Desc	W2 Box 14 desc	
	Setup > System Configuration > Pay or Deduction Items > Tax Treatment tab	
No FWT	Federal W/H checkbox	
No FICA	FICA SS checkbox FICA Med checkbox	The FICA Med checkbox is set equal to FICA SS.
No FUTA	FUTA checkbox	
No State	Taxable All States	
No Local	Taxable All Locations	

Company checkbook information

EasyACCT field name	CSA menu navigation CSA field name	Comments and additional information
Client Checkbook Information	Setup > Checkbook > General tab	
ID	Description	
Bank Name	Bank Name	
Bank Address	Address line 1	
City/State/ZIP	Address line 2	
Bank Routing Number	RTN	
Bank Account Number	Account Number	
G/L Account Number	G/L Account #	
Last Check Number (+1)	Next Check	Defaults to 100 if left blank.

Conversion notes and exceptions

This section details all known conversion exceptions between data from EasyACCT and the converted data in CSA. Conversion exceptions may include differences in field lengths between EasyACCT and CSA, required parsing of information from one field in EasyACCT to multiple fields in CSA, manipulation of EasyACCT data to conform with CSA requirements, and so on.

Terminated employees

While information for terminated employees is converted to CSA, the termination date is not converted. After the conversion is complete, you may either mark these employees as inactive by entering an inactive date on the Personal/W2 tab of the Employees window or delete those employee records from the Employees window in CSA.

Employee phone number

If an employee's phone number is an incorrect length, the telephone number converted will zero fill to make the correct length.

Employee direct deposit status

Employee direct deposit status is converted based on the Processing Date in the EasyACCT employee direct deposit screens. Status converts as Approved if a First Deposit Date exists or as Prenote/Zero Balance if only a PreNote Date exists. When both dates exist, the status converts as Approved. If no dates exist, the *Status* field in CSA is blank. A deduction item for Direct Deposit must be added for the employee after the conversion is complete. This item can be added quickly and easily in CSA after the import of the converted data.

Employee direct deposit banks

The employee direct deposit Bank ID value does not exist in EasyACCT Batch Payroll, nor does the employee bank name. In CSA, this value is set equal to the RTN. The ID(s) may be changed to a different value after the conversion, and the employee bank names may be added in CSA after the conversion.

Employee direct deposit percentage

Amounts and percentages for the employee direct deposit bank account are not available in EasyACCT. For direct deposit employees, the conversion assumes only one bank account per employee and transfers the percentage as 100.

Employee departments

In CSA, each employee must be assigned to at least one department. An employee not assigned to any department in EasyACCT is automatically assigned to Department 01 in CSA.

Withholding items

The following withholding item descriptions transfer when their equivalent employee tax item exists:

Federal W/H	State W/H	Local
FICA-SS	SUI	
FICA-MED	SDI	

Tipped employees

EasyACCT requires that tipped employees have five payroll items with the codes BTP, RTP, 8, 12A, and 12B. Employees with year-to-date amounts for reported tips (RTP) convert as tipped employees with the corresponding payroll item descriptions in CSA, as shown in the following table.

EasyACCT Code	CSA Payroll Item Description
BTP	Tipped Wages
RTP	Reported Tips
8	Allocated Tips
12A	Uncoll SS on Tips
12B	Uncoll Med on Tips

Notes

- A second payroll item with a code of BTP may exist in EasyACCT for overtime tipped wages. This item converts to CSA with a description exactly as it appears in EasyACCT.
- The EasyACCT withholding items Uncoll. Med on Tips and Uncoll. SS on Tips convert to CSA as **pay** items.

Overtime information

Overtime information is often included with regular pay in earnings history. Overtime is converted as a separate pay item, and the monthly totals are considered to be regular pay. This information may be modified in CSA after the conversion process has been completed.

Tax credit states

For employees with the tax state of AR, CA, DE, IA, KY, OR, or WI, the number of exemptions converts to the *Tax Credit* field in the General tab of the Withholding Item Properties dialog in CSA.

Standard weeks and hours

For all employees, the value for standard weeks per year is set during the conversion to 52. Standard hours per week defaults to 40 if the *Standard Hours* field in EasyACCT is blank.

Cumulative deduction amounts

Prior-year deduction amounts cannot be converted. Therefore, cumulative deductions are converted as a year-to-date amount in CSA.

OST items

The following OST codes are converted as withholding items with the description SDI or SUI, as appropriate.

- AK
- HI
- NJ(J1) and (J2)
- NY
- RI

All other codes from the *OST* field in EasyACCT convert as deduction items with monthly balances. After the conversion, these items can be changed to tax items in CSA. Employer items entered in OST — that is, items with no WH (1-10) assignment — are not converted.

Localities and states assigned to withholding items

State and local withholding items assigned to WH (1-10) items in EasyACCT are converted as deduction items with monthly balances. After the conversion, you need to manually change these from deduction items to withholding items.

Local codes SDI and NJD

Local codes of SDI and NJD in EasyACCT convert to CSA as SDI with the appropriate state information.

Global pay and deduction items

Existing CSA global pay and global deduction items are not duplicated during the import of the converted data. Furthermore, options such as W-2 selections are not altered in CSA if the global pay or deduction item already exists in CSA.

Example: Assume that Client ABC in EasyACCT has a deduction item called Medical Insurance that is pretax for all federal, state, and local taxes and that this client's EasyACCT data has already been converted and then imported into CSA. Also assume that EasyACCT Client DEF has a deduction item also called Medical Insurance that is pretax only for FICA Social Security and FICA Medicare. When Client DEF is converted (after the data for Client ABC has already been converted and imported into CSA), the global payroll item Medical Insurance cannot be added to CSA because a deduction item of that same name already exists in the CSA global data file, and none of the pretax options for the now existing Medical Insurance deduction item in CSA is changed by the import of converted data from Client DEF.

Important! Additional setup may be necessary to add or modify pay and deduction items if the same name was used on multiple clients or employees for items with different presentation and tax treatment options. Pay and deduction items can be modified or added by choosing **Setup > System Configuration** and selecting Pay Items or Deduction Items. You can print or preview a report of the presentation and tax treatment of pay and deduction items by choosing **Utilities > Global Payroll Item Reports > Payroll Item Listing**.

Items not converted during data conversion

This section provides detailed information for items not converted. The following items cannot be converted due to reasons such as differences in data file structures between EasyACCT and CSA. Some of these items (such as payroll checks) may not be needed following the conversion. However, other items will require manual data entry either prior to or following the import of converted data into CSA.

Payroll checks

While earnings history converts for each employee, live payroll checks cannot be converted. Therefore, check-based reports are not available immediately after the conversion. Earnings-based reports such as the Earnings History Report, Payroll Tax Summary, and W-2s are available to print following the conversion.

Employer information

Company name, address, city/state/zip, phone number, federal and state reporting IDs, SUTA information, check setup information, special payroll report formats, and so forth cannot be converted.

Some of the items listed above, such as the company demographic information, need to be entered for the CSA client prior to the import of the converted data.

State SUTA codes will convert however additional data entry will be required for the State/WH ID, SUTA ID, and rates.

Checkbook information

General information for the company checkbook is converted. However, the following items are not transferred during the conversion: check layouts, MICR information, and direct deposit information.

Payroll item pay rates

Pay rates are not converted. This information can be added quickly and easily in CSA after the import of the converted data.

Automatic deduction information

Automatic deduction items act as paycheck entry options for EasyACCT employees and are not converted.

Pay Items without current-year balances

Payroll items without current-year balances are not converted.

Payroll tax rates

CSA includes updated payroll tax rates, tables, and other information from the appropriate federal and state taxing authorities. Federal, state, and local (global) withholding/tax items are not modified in CSA by the import of converted data.

The conversion does add the EasyACCT locality code for localities as needed. Default local descriptions in EasyACCT are converted and imported into the **Setup > System Configuration > Payroll Tax Information > Local** dialog. The three-digit code transfers as the description for local items that are not available by default. Any other local information cannot be converted and must be entered in CSA following the import of the converted data. To add the local tax setup information in CSA, complete the following steps:

1. From the CSA main window, choose **Setup > System Configuration > Payroll Tax Information > Local**.
2. Select the appropriate locality name and click the Edit button.
3. If the local tax is calculated using tables, click the Tables button and enter the applicable information.
4. If the local tax is calculated based on a percentage of wages, enter the information on the Special Calculations tab.

Due to differences in data structures between EasyACCT and CSA, not all of the state withholding table's designations could be converted. You can verify/change the Withholding table used for State Withholdings by choosing **Setup > Employees > Tax Withholding and Deduction tab State W/H Properties** button.

Non-default tax items

Information cannot be converted for custom state withholding items. Custom items include any code that does not match the defined EasyACCT default state codes. States with custom codes can be set up only for employees for whom the values are stored as withholding items.

Employee localities and local withholding balances

Only the first locality for each employee is converted. After the conversion is complete, you must add any additional localities and their year-to-date amounts as needed for each employee.

Employee prior-year information

Only current-year payroll information is converted. Prior-year information for employees cannot be converted.

Employer contributions and deductions

Employer contributions and/or deductions entered on the Contrib./ Deduction tab in EasyACCT cannot be converted. However, employer contributions and/or deductions can easily be added for the client after converting. In CSA, use the Pay or Deduction Item Properties dialog (accessed from the Tax Withholdings and Deductions tab of the **Setup > Employees** window).

Vac/Sick/Leave

Accrual amounts, rates, and balances are converted into CSA. Monthly, quarterly, and YTD amounts are also converted with the pay item if they exist. Because accrual items can be associated with different pay items in EasyACCT, you must complete the setup of the accrual item in CSA after completing the conversion. The accrual items Vacation, Holiday, Personal, and Sick are already set up in CSA by default. If you use accruable benefit items other than these in EasyACCT, you must create new items within CSA. To set up this information, choose Setup > System Configuration > Accruable Benefits and enter the name of the accrual item.

After the names of the accruable items have been entered, you must associate the accruable item with the pay item being used. Choose Setup > System Configuration > Pay Items, select the appropriate pay item, click Edit, and click the Special Information tab. Select the appropriate accruable item from the drop-down list in the *Benefit* field.

Workers' compensation information

Workers' compensation information for employees is not converted.

Vendors

The conversion program does not convert vendor information. Vendor data entry is included within the Write-Up module in EasyACCT, and therefore the EasyACCT Write-Up to Write-Up CS conversion program can be used to convert vendor information.

Pay type

The EasyACCT pay type Piecework does not convert to the *Wage Type* field on the employee Pay Item Properties. The *Wage Type* field will be left blank for these employees. For more information on creating a new client, choose Help > Help & How-To and enter [Piecework payroll overview](#) in the search field.

Training wage

Although EasyACCT allows for the setup of Training Wage for certain employees, this information cannot be converted. After the converted data has been imported into CSA, a withholding item for training tax may be added in CSA via manual entry.

Suggestions for reviewing converted data

To verify converted data, careful examination of client data with the following Payroll CS reports is recommended.

- For employee basic setup information, print the **Employee Listing Report**.
- For employee detailed setup information, print the **Employee Payroll Item Configuration Report**.
- For detailed month-to-date, quarter-to-date, and year-to-date earnings, print the **Earnings Report**. This report may be compared to the EasyACCT Earnings Report to verify converted values.
- For additional client data information, print the **Client Data Transfer Reports** (described in “Client data transfer report” on page 15.)

Before you begin processing payroll tax forms in CSA, you may need to modify global payroll items (for their W-2 selections, tax treatments, and special information). Some personal W-2 information that could not be converted may now be added in CSA.

If you use the Payroll CS Direct Deposit module, be sure to review the Direct Deposit information for each employee and verify the values for RTN and Status. Also verify the bank information by choosing Utilities > Direct Deposit > Setup Bank information, and so forth.

Client data transfer report

The conversion program automatically creates a Client Data Transfer Report for each client for which it identifies special differences in the data that result during the conversion process. In most instances, no action is required.

We recommended that you print the Client Data Transfer Report to store it with the client files in your office. These reports are saved in PDF format and can be viewed and printed using the Adobe Reader.

1. Using My Computer or Windows Explorer, navigate to the folder where the client’s original EasyACCT data and conversion files are stored.
2. Double-click the **xxx_R.PDF** file, where the **xxx** represents the three-digit EasyACCT client ID.

Most items noted on the report are strictly informational, although you may need to manually modify certain items in CSA (such as abbreviations, truncations, and so forth).

Help and Support

Help & How-To Center

For answers to questions on using CSA, access the Help & How-To Center by choosing Help > Help & How-To, by clicking the  button on the toolbar, or by pressing CTRL+Y. For more information, including sample searches, see [Finding answers in the Help & How-To Center](#).

Product support

From the [Support Contact Information](#) page on our website, you can complete a form to send a question to our Support team. To speak directly with a Support Representative, call (800) 968-0600, press 2 for Product Support, and listen to the available options. Normal weekday support is available from 9:00 a.m.

to 8:00 p.m. eastern time. For additional details (including extended support hours for tax season and hours for other applications), visit the [Support section of our website](#). You can also access the Support section from within CSA by choosing **Help > Additional Resources > General Support Information**.

Website resources and email subscriptions

Visit [our website](#) to access the ARNE Community (an online user forum), to learn about training courses, to view blogs and articles, and more. You can access the website from within CSA by choosing **Help > On the Web > CS Professional Suite Home Page**.

We issue application update notices via email. You can sign up to receive these notices by visiting the [My Account section of our website](#). You'll need to create a web account (if you don't already have one) and then sign up for the Email Subscription service where you can indicate which notices you want to receive.