CONVERSION GUIDE
EasyACCT Write-Up to Write-Up CS

Introduction

The EasyACCT to Write-Up CS® conversion program and the **Utilities > Data Conversion > EasyACCT > Write-Up** command in Creative Solutions Accounting™ (CSA) are provided to convert your client data from Intuit® EasyACCT® (formerly TAASC EasyACCT) — **version 2013.1.01 only** — into the Write-Up CS software within CSA and the CS Professional Suite® Accounting Products software. This conversion guide explains the 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.

Note: If you process after-the-fact payroll in EasyACCT, you can convert employee current-period, current-quarter, and year-to-date balances for W-2 processing. For this reason, you should convert the data **after** finishing the payroll processing for a quarter or at year-end. For more information regarding the conversion of payroll amounts, please see "Items transferred during conversion of data from EasyACCT" on page 5. Also, see "Processing steps required for each client prior to running the conversion program" on page 2 for important details.

Conversion program overview

The overall objective of the EasyACCT to CSA conversion program is to provide a comprehensive conversion of your EasyACCT data to Write-Up CS and 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 the program 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 13.

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

- We strongly recommend that you make a backup of the EasyACCT client data 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.

- The conversion program assumes that you have closed out the processing period for the client in EasyACCT and that you will be processing the next period's transactions in CSA. If you have already begun a new processing period in EasyACCT for a client, you should **not** run the conversion until you have posted all transactions for that period.

  For example, if you are processing November data for client 123, you should post the transactions in the November period in EasyACCT and then convert to CSA prior to entering any December transactions.

  Note: We recommend **not** closing the year-end before converting your EasyACCT client. Employee pay items and general ledger transactions are converted only for the current year. Therefore, closing the year would cause pay items and transactions to be zero and would stop any of last years' transactions from converting.

- Ensure that all transactions have been posted to the general ledger and payroll journal. You can generate a current general ledger and payroll journal in EasyACCT to post any transactions that are outstanding. Only transactions from the General Journal, Sale Journal, and Special Journals are converted to CSA. If you have other journals set up in EasyACCT, make sure that you move or re-enter all of the transactions to one of the specified journals before converting the data.

- If you process **live (calculating) payroll** for the client using EasyACCT Batch Payroll, you should run the EasyACCT Batch Payroll to Payroll CS® conversion program **prior** to running the EasyACCT Write-Up to Write-Up CS conversion program. You first need to convert the payroll data into the CSA client database, and then follow this conversion guide to bring the general ledger data in to the same CSA client.

- We recommend that you print the Pay Period Worksheet report in EasyACCT for each client that you want to convert. This will help you translate each client's payroll codes to CSA while running the conversion program. To print this report, start the EasyACCT program, select the company you want to convert, choose **Batch Payroll Processing**, choose **Print reports**, select Report Sort Order of **By Department**, and then select **Print**.

Important!

- To avoid possible delays in converting your data, do **not** install any updates to your EasyACCT Write-Up software. Doing so could change the format of the client data and could require an 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 Write-Up version 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 from which the conversion will be run.

Installing 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 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 enclosed 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) Open Windows Explorer and navigate to your CD drive.

    b) Double-click **SETUP.EXE**.

4. Follow the prompts on the screen to install the 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 conversion program from your computer repeating step 1.

Converting the client data prior to import into CSA

Complete these steps to create the EasyACCT export file. 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 may not create an accurate 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. Double-click the CS Data Conversion icon on your desktop to start the conversion program. If you did not install the shortcut, click Start on the Windows taskbar and then choose **Programs > CS Professional Suite > CS Data Conversions**.

2. In the *Conversion Type* field, select **Accounting**.

3. In the *Competitor* field, select **EasyACCT**.

4. In the *Input Data Folder* field, enter the path to the EasyACCT client data you want to convert. The path will default to **C:\EASYW\DATA**. If EasyACCT data is in a different location, you can click the Browse button to navigate to the drive and folder. (For DOS versions of EasyACCT, navigate to c:\easy\data.)

5. Click **Start** to begin the conversion.

6. The conversion program lists all clients found in the specified data directory. Select a client and then click the **Continue** button. You may also select a client by double-clicking it.

7   In the Assign Account mask dialog, enter the account mask you use for the EasyACCT client, including the decimal, if applicable. Enter Xs for core accounts and Ds for departments. The mask you enter must match the account numbers entered in EasyACCT. The conversion program uses this information to determine if department numbers exist.

8. Click the **Continue** button.

9. The program displays a message prompt asking if you process after-the-fact payroll for this client.

    ▪ If you **do** process live payroll for the client using the EasyACCT Batch Payroll, click the **No** button so the program does not convert any payroll information.

    ▪ If you do **not** process live payroll for the client using EasyACCT Batch Payroll, click the **Yes** button.

10. If you process after-the-fact payroll for the client, the Assign CSA Pay Codes screen allows you to translate EasyACCT payroll codes into CSA payroll codes. If you do **not** have employees for the current client, click the **Clear All** button to set the value for each field as **Not Assigned**, and then proceed to step 14.

11. The conversion program will display a new translation screen for each employee type payroll source in the client. The conversion program will not display a translation screen for vendor or miscellaneous type payroll sources because pay code assignments are not necessary for non-employee sources.

12. To translate an EasyACCT pay code to CSA, click the item in the Description column of the Assigned Pay Codes table and choose the type: **Pay**, **Withholding** (taxes only), or **Deduction** (any reduction besides a tax). Next, choose the CSA category. The conversion program then places the amount associated with this pay code in the appropriate CSA pay, withholding, or deduction field for each employee.

    Note: You may save the current settings as the default for all clients that are converted by clicking the Save as Defaults button.

13. Click the Continue button to begin the conversion process. The conversion program displays the progress.

    Note: If you have a very large client with many transactions, the conversion process may take several minutes to complete. Allow the conversion program time to complete the process.

14. When the conversion is complete, click OK. To process another client, repeat the above steps starting from step 5. To begin importing the converted data into Write-Up CS, click the Close button.

15. After creating the export files and prior to importing the converted clients into CSA, you should print the conversion report. To print this report, choose Start > Run on the Windows taskbar and enter the same EasyACCT client data path you entered in step 4 above, then a backslash, then <ClientID>.PDF, and click OK. For example, if the EasyACCT data directory you specified in step 4 was **C:\EASYW\DATA** and the client you converted had an ID of **ABC**, to access the report you would enter **C:\EASYW\DATA\ABC_W.PDF** and click OK.

Importing the converted client files into CSA

Use the following steps to import data for an EasyACCT client into CSA.

1. Start the CSA program by double-clicking the shortcut icon on your desktop.

2. Create a new client in CSA by choosing File > New Client. For more information about creating a new client, choose Help > Help & How-To and enter New Client [File menu] in the search field. If you are converting general ledger and after-the-fact payroll information, you will need to mark the checkboxes for the General Ledger module, the Payroll Compliance module, and Financial Reporter module when adding the client.

    Important!

    ▪ When you add a new client to CSA, you must enter the **current** general ledger period end and **current** fiscal year end dates for the client in EasyACCT. If you intend to process after-the-fact payroll for the client, enter the **next** payroll month end that you intend to process.

    ▪ If you are converting a client with combining accounts, make sure you set up an account mask in CSA that includes departments.

3. From the CSA main window, choose **Utilities > Data Conversion > EasyACCT > Write-Up**.

4. In the first field of the EasyACCT Write-Up Import dialog, enter the location of the EasyACCT data files that you want to import into CSA. This is the same directory you entered in step 4 of "Converting the client data prior to import into CSA" on page 3.

5. Specify the client ID in the *Client to Import* field using the three-character client ID. This should be the same client ID you used when you added the client in EasyACCT.

6. If you want to convert the employee earnings totals, mark the *Convert Employee Earnings* checkbox.

7. Click the Import button.

8. Once the import has finished, make any necessary changes or corrections to the converted data as specified in "Items transferred during conversion of data from EasyACCT" on page 5 and "Conversion notes and exceptions" on page 13.

Items transferred during conversion of data from EasyACCT

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. Note that some amounts are calculated during the import process based on data from multiple fields in EasyACCT.

General ledger account information

EasyACCT field name	CSA menu navigation CSA field name	Comments and additional information
	Setup > Chart of Accounts	
Account Number	Account	See "Conversion notes and exceptions" starting on page 13 for more information on the conversion of the account numbers.
Account Type	Type	See "Conversion notes and exceptions" starting on page 13 for more information on the conversion of the account type.
Account Description	Description	The description in EasyACCT is 30 characters in length. The conversion program allows for up to 29 characters for the description. Only the first 29 characters are converted.
Current Yr.	Balance	
1st Prior Yr.	Balance	
2nd Prior Yr.	Balance	
Current Yr. Budget	Budget	See "Conversion notes and exceptions" starting on page 13 for more information on the conversion of the budget information.

General ledger transactions

EasyACCT field name	CSA menu navigation CSA field name	Comments and additional information
	Tasks > Transaction Entry	
Reference	Reference	EasyACCT allows up to 7 characters for reference numbers. the conversion program allows up to 6 characters for the transaction reference. Only the first 6 characters of the reference number are converted.
Date	Date	
Account #	Account/Vendor	See "Conversion notes and exceptions" starting on page 13 for more information on the Chart of Accounts mask.
Payee/Description	Description	If no description is entered in EasyACCT, the description "Converted Transaction" is added by the conversion program.
Amount	Amount	

Employee information

EasyACCT field name	CSA menu navigation CSA field name	Comments and additional information
	Setup > Employees > General tab	
Employee ID	ID	EasyACCT allows up to 10 characters for the employee number. The conversion program allows up to 8 characters for the employee number. Only the first 8 characters are converted.
First Name	First	
MI	MI	
Last Name	Last	
Address 1	Street	
City	City	
ST	State	
ZIP Code	Zip	
Telephone	Telephone #	
Soc. Sec. #	SSN/EIN	
	Setup > Employees > Tax Withholdings and Deductions tab > State W/H Properties button	
State	State	
	Setup > Employees > Other tab > SUTA GL Accounts	
State	State	
	Setup > Employees > General tab	
Department	Department	EasyACCT allows up to 6 characters for the department. The conversion program allows up to 3 characters for the department. Only the first 3 characters are converted.

Employee earnings balances

See "Conversion notes and exceptions" starting on page 13 regarding the conversion of employee earnings and withholding balances for the current period, current quarter, and year-to-date.

EasyACCT field name	CSA menu navigation CSA field name	Comments and additional information
	Setup > Employees > Earnings tab	
Current Period Current Quarter Year to Date (GP1-GP10)	Wages	Any EasyACCT payroll code (GP1-GP10) that was translated to CSA pay item code Hourly Wages in the Assign CSA Payroll Categories screen is converted to this field.

EasyACCT field name	CSA menu navigation CSA field name	Comments and additional information
Current Period Current Quarter Year to Date (GP1-GP10)	Salary	Any EasyACCT payroll code (GP1-GP10) that was translated to CSA pay item code Salaried Wages in the Assign CSA Payroll Categories screen is converted to this field.
Current Period Current Quarter Year to Date (GP1-GP10)	Overtime	Any EasyACCT payroll code (GP1-GP10) that was translated to CSA pay item code Overtime Wages in the Assign CSA Payroll Categories screen is converted to this field.
Current Period Current Quarter Year to Date (GP1-GP10)	Commissions	Any EasyACCT payroll code (GP1-GP10) that was translated to CSA pay item code Commissions in the Assign CSA Payroll Categories screen is converted to this field.
Current Period Current Quarter Year to Date (GP1-GP10)	Bonus	Any EasyACCT payroll code (GP1-GP10) that was translated to CSA pay item code Bonus in the Assign CSA Payroll Categories screen is converted to this field.
Current Period Current Quarter Year to Date (GP1-GP10)	Sick Pay	Any EasyACCT payroll code (GP1-GP10) that was translated to CSA pay item code Sick Pay in the Assign CSA Payroll Categories screen is converted to this field.
Current Period Current Quarter Year to Date (GP1-GP10)	EIC Advance	Any EasyACCT payroll code (GP1-GP10) that was translated to CSA pay item code EIC Payments in the Assign CSA Payroll Categories screen is converted to this field.
Current Period Current Quarter Year to Date (GP1-GP10)	Vacation	Any EasyACCT payroll code (GP1-GP10) that was translated to CSA pay item code Vacation/Holiday in the Assign CSA Payroll Categories screen is converted to this field.
Current Period Current Quarter Year to Date (GP1-GP10)	Reported Tips	Any EasyACCT payroll code (GP1-GP10) that was translated to CSA pay item code Tips in the Assign CSA Payroll Categories screen is converted to this field.
Current Period Current Quarter Year to Date (GP1-GP10)	Other Wages	Any EasyACCT payroll code (GP1-GP10) that was translated to CSA pay item code Other Wage Items in the Assign CSA Payroll Categories screen is converted to this field.
	Setup > Employees > Tax Withholdings and Deductions tab	
Current Period Current Quarter Year to Date (Not displayed)	FICA-SS	The FICA amounts are converted automatically. No special translation needs to occur.
Current Period Current Quarter Year to Date (Not Displayed)	FICA-Med	The Medicare amounts are converted automatically. No special translation needs to occur.

EasyACCT field name	CSA menu navigation CSA field name	Comments and additional information
Current Period Current Quarter Year to Date (Not displayed)	Federal W/H	The Federal Withheld amounts are converted automatically. No special translation needs to occur.
Current Period Current Quarter Year to Date (Not displayed)	State W/H	The State Withheld amounts are converted automatically. No special translation needs to occur.
Current Period Current Quarter Year to Date	Local	The Local Withheld amounts are converted automatically. No special translation needs to occur. See "Conversion notes and exceptions" starting on page 13 for more information on the conversion of the local information.
Current Period Current Quarter Year to Date (WH1-WH10)	401(K) Fixed Amount	Any EasyACCT payroll code (WH1-WH10) that was translated to CSA deduction item code 401(k) Contributions in the Assign CSA Payroll Categories screen is converted to this field.
Current Period Current Quarter Year to Date (WH1-WH10)	Cafe Fixed Amount	Any EasyACCT payroll code (WH1-WH10) that was translated to CSA deduction item code Cafeteria Health Plan in the Assign CSA Payroll Categories screen is converted to this field.
Current Period Current Quarter Year to Date (WH1-WH10)	Loan Repayments	Any EasyACCT payroll code (WH1-WH10) that was translated to CSA deduction item code Loan Repayments in the Assign CSA Payroll Categories screen is converted to this field.
Current Period Current Quarter Year to Date (WH1-WH10)	Medical Insurance	Any EasyACCT payroll code (WH1-WH10) that was translated to CSA deduction item code Medical Insurance in the Assign CSA Payroll Categories screen is converted to this field.
Current Period Current Quarter Year to Date (WH1-WH10)	Life Insurance	Any EasyACCT payroll code (WH1-WH10) that was translated to CSA deduction item code Life Insurance in the Assign CSA Payroll Categories screen is converted to this field.
Current Period Current Quarter Year to Date (WH1-WH10)	Meals/Lodging	Any EasyACCT payroll code (WH1-WH10) that was translated to CSA deduction item code Meals/Lodging in the Assign CSA Payroll Categories screen is converted to this field.
Current Period Current Quarter Year to Date (WH1-WH10)	Uniform	Any EasyACCT payroll code (WH1-WH10) that was translated to CSA deduction item code Uniforms in the Assign CSA Payroll Categories screen is converted to this field.

EasyACCT field name	CSA menu navigation CSA field name	Comments and additional information
Current Period Current Quarter Year to Date (WH1-WH10)	Union Dues	Any EasyACCT payroll code (WH1-WH10) that was translated to CSA deduction item code Union Dues in the Assign CSA Payroll Categories screen is converted to this field.
Current Period Current Quarter Year to Date (WH1-WH10)	Direct Deposit	Any EasyACCT payroll code (WH1-WH10) that was translated to CSA deduction item code Direct Deposit in the Assign CSA Payroll Categories screen is converted to this field.
Current Period Current Quarter Year to Date (WH1-WH10)	Other Deduction	Any EasyACCT payroll code (GP1-GP10) that was translated to CSA deduction item code Other Deductions in the Assign CSA Payroll Categories screen is converted to this field.

Vendor information

EasyACCT field name	CSA menu navigation CSA field name	Comments and additional information
	Setup > Vendors > General tab	
Vendor ID	Vendor ID	
Name 1	Name	
Name 2 or Address	Street #1	If the *Name 2* field in EasyACCT contains text, the *Name 2* field is transferred to the *Street 1* field in CSA. If the *Name 2* field is blank in EasyACCT, the *Address* field is converted to the *Street* field.
Address	Street #2	
City	City	
ST	State	
ZIP	Zip	
Federal ID#	EIN	
Contact	Contact	The *Contact* field in EasyACCT is 25 characters. The *Contact* field in CSA is 20 characters. Only the first 20 characters of the contact are converted.
Telephone	Phone	

EasyACCT field name	CSA menu navigation CSA field name	Comments and additional information
	Setup > Vendors > Address and Accounts tab	
MEMO	Check memo	The *Memo* field in EasyACCT is 60 characters in length. The conversion program allows up to 20 characters for the check memo. Only the first 20 characters of the memo are converted to the *Check memo* field. (Note that the *Check memo* field is visible in CSA only when using Payroll CS.)
	Setup > Vendors > Distributions tab	
Std G/L Acct	Account #	
Amounts Paid YTD Totals	Year to date checks	This amount represents the year-to-date checks paid to the vendor. The conversion does not break the amounts up by 1099 type. If there are multiple 1099 type payments, you will need to break this information apart in CSA after completing the conversion.

Items not transferred during conversion of data from EasyACCT

Although most data from EasyACCT is converted, some data cannot be converted due to differences in program features and data structures between EasyACCT and CSA. The following items cannot be converted.

General client information

Company ID, name, tax name, address, contact name, phone numbers, federal ID number, state ID number, state unemployment ID number, client password, fiscal year end, type of company, period end dates, default bank ID, and billing information cannot be converted. This information should be entered while setting up the client in CSA.

General ledger accounts

Tax page, schedule, and tax line grouping codes cannot be converted to CSA. In addition, balances from the 3rd, 4th, and 5th-most-recent years cannot be converted. (Balances from the current year, prior year, and 2nd-most-recent year are converted.)

Budget amounts

Prior-year budget amounts cannot be converted.

Payroll transactions / prior employee earnings balances

Although each payroll transaction is converted to the Transactions window in CSA for each GL period, these transactions are not converted to the payroll checkbook. Therefore, none of the payroll transactions for payroll purposes are converted from EasyACCT to CSA. Current-quarter and year-to-date earnings are converted to enable you to process W-2s and current-quarter payroll reports.

Earnings for quarters other than the current quarter in the current fiscal year end cannot be converted. Likewise, earnings for prior years cannot be converted.

Company payroll information

Payroll codes for employees and employer, the payroll report and report options, and payroll forms cannot be converted.

Journal entry information

Journal codes, item, and detail formats cannot be converted. Automatic adjusting entry information such as payroll adjustments information, employer payroll adjustment information, gross profit adjustments information, inventory adjustments, and all other setup information for automatic adjusting entries cannot be converted.

Financial statements

Report formats, report details, notes, and transmittal letters cannot be converted.

Employee information

Date hired, date terminated, birth date, last raise date, pay type, pay frequency, marital status, workers' comp state, EIC credit marker, training wage, standard hourly wages or salary, default normal hours, exempt amounts and extra withheld amounts W-2 box 15 items or direct deposit information cannot be converted.

Vendor information

Remit to information, fax number, email address, standard amounts, terms, description, IRS code, box, EFT marker, and prior-year payments cannot be converted. Also year-to-date check amounts are converted only from amounts entered in Misc Payments within EasyACCT. Amounts from A/P Payments are not converted.

Accounts payable

Information entered in the Accounts Payable modules in EasyACCT such as purchases, credits, due dates, discounts, and amounts due cannot be converted.

Other information / add-on modules

Bank account reconciliation, financial/loan amortization schedules, electronic fund transfer information, and credit card processing information cannot be converted. Information from the customer invoices and receivables module cannot be converted.

Conversion notes and exceptions

The following 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.

Adjustments to prior-year balances

If you need to make an adjustment for a prior-year account balance in CSA after the client's data has already been converted and imported into CSA, choose Edit / Chart of Accounts and enter the correct balance directly into the appropriate column for the prior year.

Important! Do **not** attempt to enter any adjustments to prior-year balances via the Transactions window in CSA for any client whose prior-year data has been converted and imported from another accounting software product. Doing so would remove the historical balance information and the account balances in CSA would be incorrect.

Bank reconciliation users

If you are converting an EasyACCT client and will be using the bank reconciliation features within Write-Up CS, all transactions will convert into CSA as cleared transactions for the bank reconciliation. Therefore, if there are any transactions outstanding at the time of the conversion, you will need to enter them in the Initial Open Items dialog that is accessible from the Edit menu or the F3 context menu when the Tasks > Bank Reconciliation window is active.

Budget information

Current-year beginning balances for budget amounts cannot be transferred.

Chart of Accounts mask

- The mask you enter for the EasyACCT to CSA conversion program must exactly match the account mask that is used in EasyACCT. If it does not match, the conversion program will not function properly.

- The account mask in EasyACCT allows four characters to the right of a decimal. The conversion program allows for only three characters to the right of the decimal. If the EasyACCT client uses accounts with four characters to the right of the decimal, you will need to renumber them in EasyACCT prior to converting.

Account types

EasyACCT account types of P-Div Asset, D - Div Liability, I - Dep/Div Revenue, and C - Dep/Div Expense are converted as combining accounts. In CSA "combining" accounts link individual department accounts and combine their amounts for reporting purposes. They are simply used to combine general balances for accounts to which transaction data has already been posted. For more information, about setting up and using combining accounts, enter Help > Help & How-To and enter Setting up combining accounts in the search field.

Terminated employees / inactive vendors

Employees with a termination date or vendors marked as inactive in EasyACCT are converted to CSA to complete W-2s or 1099s for the current year. You will need to manually mark them as non-active in the CSA program after the data has been converted.

Employee earnings and withholding balances

During the conversion process, the program displays a payroll code translation dialog that provides information that enables the conversion program to properly identify each EasyACCT payroll balance and convert it to the proper CSA field (as described in "Employee earnings balances" on page 7). EasyACCT allows you to enter up to 10 gross pay items and 20 other withholding/deduction items. The descriptions GP1 through GP10 and WH1 through WH10 displayed in EasyACCT for each item are presented in the pay code translation section of the dialog. You are then asked to match one of the EasyACCT pay codes with the appropriate CSA payroll items. If any of the EasyACCT pay codes is not used, leave the default entry of **Not Assigned** in that field.

All local amounts are combined into one total for monthly, quarterly, and year-to-date amounts. If you want to have these items listed separately in CSA, you must first create the local tax items and then manually split the amounts in Earnings History for each employee.

Security

Both CSA and EasyACCT support user-level security. However, the EasyACCT to CSA conversion program cannot convert user information such as password, user rights, user name, authorizations, etc. You will need to manually set up this information for the client in CSA.

Verifying your converted data

Although the conversion program is designed to convert your data as accurately as possible, there are some instances when the conversion may not convert all data correctly due to data corruption or other anomalies within the EasyACCT data. Follow the steps to verify that your EasyACCT data has been converted correctly.

1. Start CSA and open the new Write-Up CS client that you just created.

2. Make all necessary changes as noted in "Conversion notes and exceptions" on page 13, including the posting of transactions in each period of the current year.

3. In EasyACCT, print the Current Period General Ledger and Trial Balance Report.

4. In CSA, print the General Ledger and Trial Balance reports.

5. Compare the reports. If the information contained in the EasyACCT reports does not match the CSA reports, you will need to determine which transaction(s) are invalid or missing and enter those transactions into CSA manually. Other reports are available in both programs if you cannot determine the discrepancy using the reports listed above.

6. In EasyACCT, print the Earnings Report.

7. In CSA, print the Payroll Tax Summary Report.

8. Compare the amounts on the EasyACCT and CSA payroll reports and note any discrepancies. You can make manual changes to any payroll amount in the CSA program.

If you encounter problems

If you encounter problems while converting client data from EasyACCT to your Write-Up CS software and you are unable to reconcile the data using the various reports and tools in CSA, contact CS Support.

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.