
CS PROFESSIONAL SUITE ACCOUNTING PRODUCTS

Information about Expired Licenses

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Important information

Your Creative Solutions Accounting™ (CSA) licenses (excluding Engagement CS®) will permanently expire on March 1, 2017 and cannot be renewed under any circumstances. For detailed information about how this will affect you, see [CSA license expiration 2017 - frequently asked questions](#). This March 1, 2017 date does not apply to Engagement CS licenses. Your Engagement CS license will expire at the end of your normal cycle, and you will still be able to renew those licenses as usual, even after the other CSA licenses expire.

Note: Client Bookkeeping Solution® (CBS) will continue to function as normal after this date. However, you will no longer be able to retrieve the client's data into CSA, and support for CBS will not be available.

Licensing options

Two types of licensing currently exist for the CS Professional Suite® Accounting Products (CSA): the **Annually Renewable** license and the **Perpetual** license, which has not been available for purchase since 2012. Therefore, it is not possible to switch from an Annually Renewable license to a Perpetual license.

- With **Annually Renewable** licensing, the application will continue to work with full functionality through a 60-day grace period that begins immediately after your license expires. After the 60-day grace period has ended, you will have limited access to the application. You can view your expiration date within the application by choosing **Help > About CSA**.
- With **Perpetual** licensing, your products will continue to have full functionality even after your license expires. However, you will no longer have access to technical support or application updates. See the Installing new versions for which you are not licensed section below for more information.

As your 60-day grace period nears its end

We provide a 60-day grace period after the official expiration of your CS Professional Suite Accounting Products licenses, during which time the application will remain fully functional but your firm will no longer have access to CS Support, either via phone or via email. After the 60 days have passed, specific limitations take effect automatically (as noted in the tables at the end of this document).

From 10 days prior to the expiration of your 60-day grace period, when you open the CS Professional Suite Accounting Products application, you will see a notice that lists the product licenses that are expiring and the time remaining until the products will no longer be available for use by your firm.

As your Engagement CS license expiration date approaches

As the expiration date for your Engagement CS license approaches, our CS Customer Service team will send you an invoice and a reminder that your renewal time is approaching, along with information about renewal options available to you.

Renewing your Engagement CS license

When your firm is ready to renew its Engagement CS license, you have four main options.

- The fastest and easiest option to renew licenses is through our website at cs.thomsonreuters.com/myaccount/productlisting. After signing in to the website, you will be taken to the Manage My Products page, which will list your firm's CS Professional Suite products that are currently available to renew, along with current pricing information.
- The CSA Home Page displays a list of your expiring products under the Notices section. A **Renew Online Now** link is available for each expiring license; you may click that link to open the Renewals page on our website.
- If you have already received a renewal invoice, you can fill that out and fax it to us at 734.426.5946; please mark the fax as "**Attention: Renewals.**"
- During normal business hours, you can call 800.968.0600 and follow the prompts.

If you choose not to renew your licenses

The limitations that apply are based on the specific type of licensing for your firm's application. Note that you cannot change your firm's license type.

- For **Perpetual** license holders, the application will continue to function normally but you will no longer have access to program updates or to product support.
- For **Annually Renewable** license holders, the application will retain limited functionality, as detailed in the following tables. You will always be able to access any client data that you have entered or imported into the application, and you can always use the Utilities > Export command or the File > Print Reports command to report client data (including General Ledger and payroll data, plus transmittal letters).

Installing new versions for which you are not licensed

Caution! If you install a version of CSA that is more recent than the version for which you have a valid license, you will **lose** all application functionality. In this case, after the expiration of the 60-day grace period, you could no longer access your data. However, it would be possible to correct such a situation in one of the following ways.

- Renew your licenses for another year.
- Use the **trial** version of the licenses to export your data from CSA and gain access to your data with the limitations listed in the tables that follow.

If you have any questions, please contact the CS Customer Service department at 800.968.0600.

Application limitations that take effect after license expiration

The following tables list the application limitations that take effect after the 60-day grace period has expired for your Annually Renewable license.

Client Bookkeeping Solution (CBS)

Application function	Limitations after license and grace-period expiration
All CBS client modules	Available. Note: The CBS client licenses never expire. However, with an expired Accountant's Assistant license and/or Payroll Compliance module license, the accountant cannot retrieve the CBS client's exported data.

All CS Professional Suite Accounting Products

Application function	Limitations after license and grace-period expiration
Change to a different processing period	Not available.
Convert client data from other applications	Not available.
Set up report profiles from the Print dialog	Available.
Print reports	Available.
Export reports via the Utilities > Export command	Available.
Print or preview the client listing	Available.
Create or modify and print transmittal letters	Available.
Print mailing labels	Available.
Transfer data between clients	Available.
Network access for users of CSA	Available with an expired network license but with a limit of 24 users.
Open and use CS Connect™	Available. (Allows access to application updates that apply to the product year for which you are licensed.)

Write-Up CS[®]

Application function	Limitations after license and grace-period expiration
Set up multiple journals	Available.
Set up locations/departments in the Chart of Accounts	Available.
Record GL transactions	Available. However, if you have an up-to-date license for Trial Balance CS [®] but have not yet renewed your license for Write-Up CS, you can enter no more than 10 GL transactions.
Record special type journal entries	Available, but you cannot see the full effect of special type journal entries (such as tax adjusting, reversing, recurring, or recurring templates) because you cannot change the processing period with an expired version of the application.
Set up automatic journal entries	Available, but you cannot see the full effect of automatic journal entries because you cannot change the processing period with an expired version of the application.
Record adjusting journal entries	Available.
Import generic files via the Utilities > Import commands	Available.
Process bank reconciliations	Available (includes advancing the statement).
Create and modify financial statements	Not available, but printing of financial statements is available.
Process after-the-fact payroll	Available.
Set up employees	Available.
Process Forms 940, 941, 943, 944, and 945	With an expired license for the Payroll Compliance module, processing is available for federal forms. However, because the period cannot be changed with an expired license, you would need to manually enter all YTD amounts in the earnings history for each employee; and some portions of report data that pull from payroll check dates (such as the 941 Sch B) would need to be corrected manually.
Process state payroll tax forms	Not available.
E-file 940 / 941/ 944 & various state payroll tax forms	Not available.
Export payroll data to govOne Solutions	Not available.

Accountant's Assistant™

Application function	Limitations after license and grace-period expiration
Import client data from CBS	Not available. Note: The Payroll Compliance module must be renewed annually for Accountant's Assistant features to be available beyond the renewal date.
Import client data from BusinessWorks, Microsoft Office Accounting, Peachtree, Paychex, or QuickBooks Pro	Available (maximum of one time for all products).

Payroll CS®

Application function	Limitations after license and grace-period expiration
Process live, calculating payroll for clients	Not available.
Set up checkbooks	Available.
Set up payroll departments	Available.
Set up employee templates	Available.
Set up employees	Available.
Set up vendors	Available.
Set up check printing fees	Not available.
Enter payroll checks	Available.
Print calculating payroll checks	Not available.
Enter and print vendor checks	Not available.
Print reports	Available, but (because printed checks display a zero net amount) reports based on payroll check information, such as the Payroll Journal, may not include correct information.
Process Forms 940, 941, 943, 944, and 945	With an expired license for the Payroll Compliance module, processing is available for federal forms. However, because the period cannot be changed with an expired license, you would need to manually enter all YTD amounts in the earnings history for each employee; and some portions of report data that pull from payroll check dates (such as the 941 Sch B) would need to be corrected manually.
Process state payroll tax forms	Not available.
E-file 940 / 941/ 944 & various state payroll tax forms	Not available.

Payroll CS Direct Deposit

Application function	Limitations after license and grace-period expiration
Create ACH files	Available only through the Prenote function.
Transmit ACH files	Not available. (With a fully licensed version of Payroll CS Direct Deposit, this function is handled either by InterceptEFT* from within the program or by using the bank's application.)

***Disclaimer:** InterceptEFT™ is an unaffiliated third party that some of our customers have engaged to provide direct deposit, tax payments, ACH processing, or credit card merchant services.

Payroll CS Payroll Reporter

Application function	Limitations after license and grace-period expiration
Print reports	Available, but the word "TRIAL" prints across each page of a custom payroll report.

Payroll CS Remote Payroll

Application function	Limitations after license and grace-period expiration
Remote Payroll Export	Available, but an active portal site is required.

Web Employee

Application function	Product limitations after license and grace-period expiration
Web Employee Export	Not available.

Trial Balance CS

Application function	Limitations after license and grace-period expiration
Set up or edit grouping schedules	Not available.
Set up tickmarks	Available.
Set up consolidations	Available.
Record adjusting journal entries	Available.
Import generic files via the Utilities > Import commands	Available.
Import data from spreadsheets	Available.

Application function	Limitations after license and grace-period expiration
Process tax exports to Lacerte, ProSystem fx, or ProSeries	Not available.
Create and modify financial statements	Not available, but printing of financial statements is available.

Engagement CS[®]

Application function	Limitations after license and grace-period expiration
Set up engagements	Limited to two engagements.
Assign multiple staff members to an engagement	Available, but with a limit of two staff members per engagement.
Roll forward an engagement	Not available.
Convert financial statements and workpapers from GoSystem [®] Audit or GoSystem [®] Fund	Not available.

Financial Analysis CS[®]

Application function	Limitations after license and grace-period expiration
All program functions	Not available.

Integration with other CS Professional Suite applications

Application function	Limitations after license and grace-period expiration
Integration with FileCabinet CS [®]	Available, but the word "Expired" prints on each page of any document printed directly from FileCabinet CS.
Integration with Fixed Assets CS [®]	Available.
Integration with UltraTax CS [®]	Available, including the ability to assign tax codes and import account balances to UltraTax CS.
Data-sharing features with non-CSA products in the CS Professional Suite	Not available.