UniLink WriteUp*32 to Creative Solutions Accounting Conversion Guide

The UniLink WriteUp*32 – *CSA* Conversion Program and the **Utilities / Data Conversion / UniLink / WriteUp*32** command in *Creative Solutions Accounting™ (CSA)* are provided to convert your client data from UniLink WriteUp*32 Version 4.x into the *Write-Up Solution® (WSW)* bundle of modules within the *Creative Solutions Accounting* family of 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. The last section of this document explains the steps you should take to verify that the converted data is correct.

Please review this document in its entirety prior to starting the conversion of client data. You may refer to this document for all information about this conversion.

Conversion program overview

The overall objective of the UniLink to *CSA* conversion utility is to provide a comprehensive conversion of your UniLink data to *CSA*. However, due to differences in processing calculations and data structures between UniLink and *CSA*, some UniLink data cannot be converted. **Therefore, you should not expect to exactly duplicate results from UniLink 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 the section of this document entitled "Conversion notes and exceptions."**

Installing the UniLink – CSA conversion program

You must install the UniLink to *CSA* Conversion Program **prior to** creating the UniLink export files. Follow the steps below to install the UniLink to *CSA* Conversion Program.

1. Insert the most current version of the *Creative Solutions Accounting* CD (version 2003.2.0 or higher) into your CD drive.

2. Click the Start button on the Windows Taskbar and then choose Run.

3. In the Run dialog, type *d:* **UNICONVERT\SETUP** (where *d* represents the letter of your CD-ROM drive). For example, if *e* is the letter for your CD drive, you would type *e***:\UNICONVERT\SETUP** in the Run dialog.

4. Follow the prompts as they are displayed on the screen while the UniLink to *CSA* Conversion Program install program is running.

(Over)

Notes

- The conversion program can be installed only on the local machine. You need to install the conversion program on each machine 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 double-clicking the Add/Remove Programs icon in the Windows Control Panel. (To access the Control Panel, click Start on the Windows taskbar, point to Settings, and then click Control Panel.)

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

If you process After-the-Fact Payroll in UniLink WriteUp*32, you can convert employee current-period, current-quarter, and year-to-date earnings for W-2 processing. For this reason, you should convert client data **after** you finish the payroll processing for a quarter or at year end. For more information on the conversion of payroll amounts, please refer to the section of this document entitled "Items transferred during conversion of data from UniLink WriteUp*32."

If you process **live (calculating) payroll** for the client, you should complete the UniLink Payroll*32 conversion **prior to** using the UniLink WriteUp*32 to *CSA* Conversion Program.

Creating the UniLink WriteUp*32 export files

After installing the UniLink WriteUp*32 to *CSA* Conversion Program, use the following steps to create the UniLink WriteUp*32 export files. The export file layout is a specially formatted file that *CSA* uses to import your data. The conversion program does not change your original data in any way.

1. To start the UniLink to *CSA* Conversion Program, click the Start button on the Windows Taskbar, choose **Programs / Creative Solutions** and then click the UniLink W32 Conversion icon.

2. By default, the program enters **c:\Program Files\UniLink\Data** in the Data Directory field, but you may enter or browse to a different data path.

3. The UniLink to *CSA* Conversion program will list all of the clients found in the specified data folder. Highlight a client and click the Continue button to select a client. You could also double-click a client name to select it.

4. The program displays a message prompt asking if you process after-the-fact payroll for this client. If you do process after-the-fact payroll, click the **Yes** button. If you process **live payroll** for the client using UniLink Payroll*32, click the **No** button so the program does not convert payroll information.

(Continued)

5. Use the Assign CSA Pay Codes dialog to translate UniLink WriteUp*32 payroll codes into *CSA* payroll codes for each payroll source. If the current client does not have employees, click the Clear All button to set the value for each field as Not Assigned.

6. Click the Continue button to begin the conversion process.

Importing the converted client data files into CSA

Use the following steps to import the converted UniLink WriteUp*32 client data into *CSA*.

1. Start the *CSA* program by clicking the desktop icon for *Creative Solutions Accounting*.

2. Create a new client in *CSA* by choosing **File / New Client**. (For more information on creating a new client, choose **Help / CSA Help Topics** and search on **New Client [File menu]** on the Index tab of the Help Topics dialog.

   Note: When you add a new client to *CSA*, you must enter the current period end date, current fiscal year end, and current payroll end date exactly as they appear in UniLink WriteUp*32. If you are converting general ledger and payroll information, you will need to use both the *General Ledger Solution*™ and *Payroll Compliance Solution*™ modules when adding the client.

3. Choose **Utilities / Data Conversions** / **UniLink / WriteUp*32**.

4. In the Location of Files to Import field of the UniLink Conversion dialog, enter or browse to the location of the UniLink WriteUp*32 data files that you wish to import into *CSA*. This should be the same folder you entered in Step 2 of the section above entitled "Creating the UniLink WriteUp*32 export files."

5. Select the company ID from the Client to Import field. You can type the first five characters or select the client from the drop-down list.

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

7. Click the Import button.

8. Once the data has been imported, you should make the necessary changes or corrections to the converted data as specified in the sections of this document entitled "Items transferred during conversion of data from UniLink WriteUp*32" and "Conversion notes and exceptions."

(Over)

Items transferred during conversion of data from UniLink WriteUp*32

The following tables are provided to identify the fields in UniLink WriteUp*32 that will be converted to *CSA*. The tables are organized by screens in UniLink WriteUp*32 and *CSA* and denote the necessary *CSA* menu navigation.

General ledger account information

UniLink WriteUp*32 Field Name	CSA Menu Navigation CSA Field Name	Comments and additional information
	Setup / Chart of Accounts	
Account #	Acct#	See "Conversion notes and exceptions" for more information on the conversion of the account numbers
Account Range	Type	See "Conversion notes and exceptions" for more information on the conversion of the account type.
Description	Description	
Current Year Balances Debit or Credit	Balance	
Prior Year Balances Debit or Credit	Balance	The conversion program will convert up to 4 years of prior balances to *CSA*.
Budget Amounts	Budget	The conversion program will convert the current-year budget amounts to *CSA*. See "Conversion notes and exceptions" for more information on the conversion of current-year budget amounts.

GL transactions

UniLink WriteUp*32 Field Name	CSA Menu Navigation CSA Field Name	Comments and additional information
	Tasks / Transaction Entry	
Ref.	Reference	See "Conversion notes and exceptions" for more information on posting converted transactions.
Date	Transaction Date	
Account	Account Number	See "Conversion notes and exceptions" for more information on the chart of accounts mask.
Description	Description	
Debit / Credit	Amount	

(Continued)

Employee information

UniLink WriteUp*32 Field Name	CSA Menu Navigation CSA tab CSA Field Name	Comments and additional information
	Setup / Employees General tab	
Employee Code	ID	
Last Name	First	*CSA* allows 20 characters to be entered for the employee last name. The last name field in UniLink WriteUp*32 is 52 characters. Only the first 20 characters will be converted to *CSA*.
First Name	Last	
Address 1	Street	
City 1	City	
State 1	State	
Zip 1	Zip	
Social Security Number	SSN/EIN	
	Setup / Employees Tax Withholding and Deduction tab State W/H Properties button	
W2 Box [16] State #1	State	
	Setup / Employees Tax Withholding and Deduction tab Local W/H properties button	
W2 Box [19] Local #1	Locality	
	Setup / Employees Other tab	
SUTA State	SUTA G/L accounts State	

Employee earnings balances

Current-period balances are simply the month-to-date earnings for each employee as of the last payroll date in the UniLink WriteUp*32 system.

UniLink WriteUp*32 Field Name	CSA Menu Navigation CSA tab CSA Field Name	Comments and additional information
	Setup / Employees Earnings tab	
Current Period Current Quarter Year to Date Regular Wages	Wages	
Current Period Current Quarter Year to Date Overtime	Overtime	
Current Period Current Quarter Year to Date Tips	Tips	
	Setup / Employees Tax Withholdings and Deductions tax	
Current Period Current Quarter Year to Date FICA	FICA-SS	
Current Period Current Quarter Year to Date Medicare	FICA-Med	
Current Period Current Quarter Year to Date Federal Withholding	Federal W/H	
Current Period Current Quarter Year to Date State Withholding	State W/H	
Current Period Current Quarter Year to Date Local Withholding	Local W/H	If you had multiple local withholding jurisdictions, all local withholding amounts have been added together and converted to the Local W/H field in *CSA*. You will need to manually separate these amounts into the proper local authorities after the conversion has been completed.

(Continued)

UniLink WriteUp*32 Field Name	CSA Menu Navigation CSA tab CSA Field Name	Comments and additional information
Current Period Current Quarter Year To Date Earned Income Credit	EIC	
Current Period Current Quarter Year to Date Other Earning/Deductions Deduction (user defined) Deduction	*Various Descriptions	*See "Conversion notes and exceptions" for more information on other earning/deductions.
Current Period Current Quarter Year to Date Other Earning/Deductions (user defined) Earning	*Various descriptions	*See "Conversion notes and exceptions" for more information on other earning/deductions.

Vendor information

UniLink WriteUp*32 Field Name	CSA Menu Navigation CSA tab CSA Field Name	Comments and additional information
	Setup / Vendors General tab	
Vendor ID	Vendor ID	
Name	Name	The Name field in UniLink WriteUp*32 field is 53 characters long. In *CSA*, the Name field is 15 characters long. Only the first 15 characters of the last name field will be converted.
Address 1	Street	
City 1	City	
State 1	State	
Zip 1	Zip	
Social Security Number	SSN	
Telephone	Phone	
Contact	Contact	

(Over)

UniLink WriteUp*32 Field Name	CSA Menu Navigation CSA tab CSA Field Name	Comments and additional information
	Setup / Vendors Distributions tab	
Amount	Year To Date	See "Conversion notes and exceptions" for additional information regarding the year-to-date amount paid to vendors.
	Setup / Vendors Addresses and Accounts	
Account # with Vendor (Optional Acct Number)	Account #	

Items not transferred during conversion of data from UniLink WriteUp*32

Although most data from UniLink WriteUp*32 is converted, some data cannot be converted due to differences in program features and data structures between UniLink WriteUp*32 and *CSA*. If an item below is denoted with an asterisk (*), it is further explained in the section of this document entitled "Conversion notes and exceptions." The following items, which cannot be converted, are organized by screen in UniLink WriteUp*32.

General client information
Company ID, name, address, contact name, phone number, federal ID number, state ID number, state unemployment ID number, and fiscal year end cannot be converted. You should enter this information while setting up the client in *CSA*.

Chart of Accounts information
Number of periods, current period, starting period, number of history and budget years, account ranges, capital account numbers, sub-account code, and descriptions cannot be converted.

Budget amounts
Prior-year and future-year budget amounts cannot be converted for UniLink WriteUp*32 clients. Only the current-year budget amounts will be converted.

Current earnings account
The special capital account (Current Earnings Account) acts as a memo account in UniLink. If the program were to convert this item to *CSA* with a balance, it would cause the Chart of Accounts to be out of balance. To address this problem, the current earnings account(s) and the balance(s) are not converted.

(Continued)

GL history amounts

UniLink allows up to 99 years of history to be entered. Up to four prior years of balances will be converted to *CSA*.

Payroll transactions / prior employee earnings balances

Although each payroll transaction is converted to each period's GL transactions screen, these transactions are not converted to the payroll checkbook. Therefore, no payroll transactions are converted for payroll purposes from UniLink WriteUp*32 to *CSA*. However current-period, current-quarter, and year-to-date earnings are converted to enable you to process W-2s and current-quarter payroll reports.

The payroll transactions entered in the **Information in the employee mid year** tab and the I**nformation in the vendor mid year** tab do not transfer to journals in UniLink. These items will not be converted to the payroll checkbook in *CSA* or as general ledger transactions. However, current-period, current-quarter, and year-to-date earnings are converted to enable you to process W-2s and current-quarter payroll reports. The conversion will transfer earnings based on the UniLink client's payroll cycle listed on the status bar.

Company payroll information

User-defined payroll codes (other earnings/deductions)*, payroll report options, payroll forms, state codes and descriptions, local codes and descriptions, workers compensation information, reporting information and payroll reports cannot be converted.

Departments / Sub-departments / Locations / Sections

Department, sub-departments, locations, and section names cannot be converted. Departments and locations* will need to be set up in *CSA* after the data has been converted. The department and location numbers in the Chart of Accounts mask are converted for each account.

Journal entry information

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

Financial statements

Report formats, report details, user-defined statements, lead schedules, and notes for trial balances cannot be converted.

Employee information

Permanent address information, pay period, general ledger for pay, active/inactive status*, exemption status for FWT/FUTA/FICA, etc, hire date, birthday, termination date, last pay raise, job description, employee notes, and health insurance code cannot be converted.

Vendor information

Year-to-date amount paid, 1099 type, 1099 box number cannot be converted.

(Over)

Account ranges

Balance Sheet and Income Statement ranges will not be converted. You will need to set up account groups in *CSA* after the data has been converted. For more information about setting up and using account groups in *CSA*, choose Help / CSA Help Topics and search on **Account Groups** from the Index tab of the *CSA* Help Topics dialog.

Conversion notes and exceptions

The following section details all known conversion exceptions between data from UniLink WriteUp*32 and the converted data in *CSA*. Conversion exceptions may include differences in field lengths between UniLink WriteUp*32 and *CSA*, required parsing of information from one field in UniLink WriteUp*32 to multiple fields in *CSA*, manipulation of UniLink WriteUp*32 data to conform to *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 been converted and imported into *CSA*, choose Setup / Chart of Accounts and enter the correct balance directly into the appropriate column for the prior year.

Important! If your client's prior-year data has been converted and imported from another accounting software product, do **not** attempt to enter any adjustments to prior-year balances in the Tasks / Transaction Entry window in *CSA*. Doing so will remove the historical balance information and will result in incorrect account balances in *CSA*.

CSA combining accounts

UniLink WriteUp*32 departments are functionally similar to *CSA* departments, with one significant difference. *CSA* allows you to define "combining" accounts, which link individual department accounts and combine their amounts for reporting purposes. You cannot post transactions to the combining account, and you do not need to enter balances. These accounts are simply used to combine general balances for accounts to which transactions have already been posted. Controlling (Subsidiary) accounts will be converted as combining accounts. For more information about setting up and using combining accounts in *CSA*, choose Help / CSA Help Topics, and search on **Combining accounts setup** from the Index tab of the *CSA* Help Topics dialog.

Chart of Accounts mask

The *CSA* Chart of Accounts mask is similar in structure to the general ledger account mask in UniLink WriteUp*32. However, there are a few differences that must be taken into account before converting client data.

▪ *CSA* requires that department numbers precede the core account numbers. If the conversion program encounters an account mask in which the core account numbers precede the department numbers, it will rearrange the numbers so that the department numbers come first.

For example, if the account mask for a UniLink client is GGGDDSSLLAA (where **G** represents the general account number, **D** represents the department, **S** represents the sub-department, **L** represents the location, and **A** represents the section), it will be converted as

(Continued)

AALLSSDDCCC in *CSA*, and the Chart of Accounts mask would be specified as LLLLDDDDCCC in *CSA*.

Example: UniLink account number 300-553-10 will be converted as 10553300 in *CSA*.

Notes

- Only the account numbers are converted; the actual mask is not converted. Before you import the converted data for each new client, you must specify the Chart of Accounts mask in the General Ledger tab of the File / Client Properties dialog in *CSA*. The Chart of Accounts mask should be set up in *CSA* as either all core accounts or with the same number of location and department positions that are used for the client in UniLink WriteUp*32. If the account mask for a UniLink WriteUp*32 client contains both location and department accounts, you will need to set the Chart of Accounts mask in *CSA* to contain the appropriate number of **L**s, **D**s, and **C**s. If the UniLink WriteUp*32 client does not use departments and you do not wish to use the departmental features of *CSA*, you may use the default mask (**CCCCCCC.CCC**). You may change the mask at another time if you wish. For more information on setting the Chart of Accounts mask, search on **Chart of Accounts mask setup** from the Index tab of the *CSA* Help Topics dialog.

- Sub-departments are transferred to *CSA* as departments and sections are transferred as locations.

- UniLink allows up to 20 characters (including dashes) for the Chart of Accounts mask. *CSA* allows up to 11 digits (including an optional decimal), up to four of which are for departments and up to three for locations. If your Chart of Accounts does not fall within these maximum ranges, *CSA* will renumber your accounts during the import process. The accounts will be numbered sequentially within the account ranges, and a renumbering report will be generated.

Account Ranges	Renumbered Range
Assets	10001-19999
Liabilities	20001-29999
Revenue	30001-39999
Expense	40001-49999
If you use controlling accounts	
Assets	50001-59999
Liabilities	60001-69999
Revenue	70001-79999
Expense	80001-89999

After reviewing the renumbering report, you may renumber your Chart of Accounts in *CSA*. For more information about setting up and using combining accounts, search on **Renumber range of general ledger accounts** from the Index tab of the *CSA* Help Topics dialog.

- *CSA* accepts only numeric values for the Chart of Account numbers. If any account numbers for the UniLink client contain alpha characters, you must rename all such accounts in UniLink before converting the data.

  To rename alpha characters in UniLink account names:

  1. Choose **Maintenance / Chart of Accounts / Accounts**.

  2. Double-click the account you wish to change.

  3. Change the alpha character to a numeric value.

  To rename controlling and controlled accounts in UniLink:

  1. Create a new controlling account.

  2. Rename the Controlled Accounts (follow instructions above).

  3. Delete the old control account.

- The program automatically removes punctuation characters such as dashes (-) during the conversion.

Clients using processing periods other than annual, quarterly, monthly, or 13-period

CSA allows you to process clients using Annual, Quarterly, Monthly, 13 periods, or weekly periods. UniLink WriteUp*32 allows you to process clients using semi-annual periods. If you convert a client that is a two-period processor, the balances are converted to the 2nd and 4th quarter balance fields in *CSA*. You will need to add this client to *CSA* as a quarterly processor and only use the 2nd and 4th quarters for processing.

Employee other earning / deductions

UniLink allows you to create up to 99 "other earning/deduction" items such as 401(k) contributions, uniforms, meals, etc. *CSA* allows the same type of deductions or pay items. You can select specific pay, withholding, and deductions types to match the pay codes available in the screen specified in Step 4 of the section of this document entitled "Creating the UniLink WriteUp*32 export files." The items will be transferred with the description chosen in this step.

If any of the pay or deduction items do not match an available pay code in Step 4, select the **Other Wage Item** or **Other Deduction Item** codes. If you are **not** processing the current-year W-2s in *CSA*, simply add the pay or deduction item in *CSA* and post the amounts to the correct deduction from that point on. If you **are** processing the W-2s in *CSA* for the current year, you need to add the proper pay or deduction code in *CSA*. Break out the individual pay or deduction amounts in the *Other Withholding* or *Other Wage* fields and manually enter the items into their proper pay or deduction field in *CSA*.

Employee ID numbers

Employees with IDs longer than eight digits will be renumbered sequentially starting with 1.

(Continued)

Memo accounts

UniLink allows you to use memo accounts to post transactions and other items to accounts without affecting the general ledger. *CSA* currently does not support this feature. The program will not convert any account marked as a memo account. Transactions posted to these memo accounts will be converted. You may delete the transactions after the conversion.

Inactive employees

Employees with a pay period of inactive will be converted to *CSA*. Any earnings in the current year will also be converted.

General ledger account types

CSA requires that each general ledger account have an associated account type for financial statement formatting purposes. The allowable account types are **A** (Assets), **L** (Liabilities and Equity), **R** (Revenue), and **E** (Expense). The conversion program uses the account ranges in the GL Configuration to determine the account type for each account. You can change any account type after the client has been converted to *CSA*.

GL transactions

Only current-year transactions will be converted. UniLink allows multiple years of transactions to be open at the same time. If you are uncertain of the client's current year, you can verify the current year in UniLink on the Miscellaneous tab of the Maintenance / GL Configuration window.

Transactions are transferred based on the date of the transaction. They are transferred to periods using the dates set up in the UniLink*W32 Maintenance / GL Configuration assigned period end dates dialog. Even if any of the client's transactions fall outside the appropriate period date range, the year-to-date balances will be correct. However, the month-to-date and quarter-to-date balances may be incorrect, and you may need to enter manual adjustments.

Bank reconciliation

If you will be using the Bank Reconciliation features within *CSA* for a converted UniLink client, all transactions will be converted into *CSA* as cleared transactions for the Bank Reconciliation. Therefore, if there are any transactions still outstanding at the time of conversion, you will need to enter them in the Initial Open Items dialog that is accessible from the Edit menu or from the F3 context menu when the Tasks / Bank Reconciliation window is active.

Converted transaction descriptions and reference numbers

If you did not enter a description for transactions in UniLink WriteUp*32, the conversion program will enter the text **Converted Transaction** for the description in *CSA*. In addition, if you did not enter a reference number in UniLink, the program enters **CNVRT** for the transaction reference during the conversion. Descriptions and reference numbers are required when importing transactions into *CSA*.

(Over)

Vendor YTD amounts

The converted amount represents the year-to date checks marked with a 1099 code paid to the vendor. The conversion does not divide the amounts into 1099 type. If there are multiple 1099 types, you will need to divide this information in *CSA* after the data has been imported.

Security

Both *CSA* and UniLink WriteUp*32 support user-level security; however, the conversion program cannot convert user information such as password, user rights, user name, authorizations, etc. You will need to manually set up this in *CSA* after the conversion has been completed.

Verifying your converted data

Although the conversion utility has been designed to convert your data as accurately as possible, there are some instances when the conversion program cannot convert all data correctly due to data corruption or other anomalies within the UniLink WriteUp*32 data. Follow the steps below to verify that your UniLink WriteUp*32 data has been converted correctly.

1. Start *Creative Solutions Accounting* and open the new client that you just created.

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

3. In UniLink WriteUp*32, print the Current Period General Ledger and Trial Balance Report.

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

5. Compare the reports. If the information contained on the UniLink WriteUp*32 reports does not match the *CSA* reports, you will need to determine which transaction(s) are invalid or missing and manually enter those transactions into *CSA*. If you cannot determine the cause of the discrepancy using the General Ledger and Trial Balance reports, you may wish to generate other reports that are available in both programs.

6. In UniLink WriteUp*32, print the Payroll Totals Report and the Tax and Deduction report.

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

8. Compare the amounts on the UniLink WriteUp*32 and *CSA* payroll reports and note any discrepancies. You can make manual changes to any payroll amount in the *CSA* program.

9. Print the Client Data Transfer Report. The UniLink*32 to *CSA* conversion program automatically creates a Client Data Transfer Report for each client to identify any differences in the data that resulted during the conversion process. In most instances no action is required.

    a. Using My Computer or Windows Explorer, navigate to the folder where the client's original UniLink data and conversion files are stored.

(Continued)

b. Double click the *_W.PDF file, where * represents the Client ID.

It is recommended that you print the Client Data Transfer Report and 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® Acrobat® Reader. (You can choose to install the Adobe Acrobat Reader during the installation of program files from the *Creative Solutions Accounting* CD.

Most items included on the report are strictly informational; however, you may need to manually update certain items in *CSA* (such as abbreviations, truncations and so forth).

If problems are encountered

If you encounter any problems during the conversion of client data from UniLink Write Up 32 to your *Creative Solutions Accounting* software and you are unable to reconcile the data using the various reports and tools in *CSA*, contact CSI Product Support.

Support

Online Help
For step-by-step procedures, refer to the online help. To learn how to use online help, choose Help / CSA Help Topics, click the Index tab, and search on "online help."

Website
If you have questions or need assistance, you can visit our website at CreativeSolutions.com 24 hours a day for the latest information on current issues and processing tips. To take advantage of this convenient means of accessing information, point to **On the Web** on the *CSA* Help menu, and then choose **Product Support and Service**.

Product Support
To speak with a Product Support Representative, please call the CSI HelpLine at 800-968-0600, press **3** for accounting support, and then listen to the options available before pressing the number for *Creative Solutions Accounting*. Normal weekday support is available from 9:00 AM to 8:00 PM Eastern Time.