



April 30, 2009

TO

All NetFirm CS™ users.

This user bulletin explains enhancements available with this release of NetFirm CS.

ENHANCEMENTS

Next generation NetStaff CS

The next generation of NetStaff CS® is now available. It contains many new and enhanced features, including:

- Enhanced interface and navigation that is more consistent with other CS Professional Suite® applications.
- Integration with additional CS Professional Suite products.
- The ability to view a file activity history for files in Document Presentation and File Exchange.
- Improved management of Account Aggregation, Stock Quotes, Links, and News.
- The ability to upload multiple files at once in File Exchange.
- Increased file size (up to 250 MB) for File Exchange uploads.
- The ability to search in File Exchange and Document Presentation.
- Updated Staff Availability functionality.

To enable your staff to take advantage of the new features and enhancements available in next generation NetStaff CS, click the NetStaff CS tab in your portal, click the **NetStaff NG** navigation link, click the *Enable* option, and click OK.

Note: You can access NetFirm CS administration screens from within next generation NetStaff CS. To view information about this, click the help link at the top of any NetStaff CS window, click the Index button, enter **Next generation**, and click the “accessing administration screens from within next generation NetStaff CS” link in the Index frame to view the help topic.

Next generation NetClient CS

QuickBooks®, powered by Right Networks®

Firm administrators can now give next generation NetClient CS™ users access to QuickBooks, powered by Right Networks, and the CS QuickBooks Data Utility. The utility enables your clients to export data to you that you can then import into Write-Up CS and it enables them to retrieve adjustment transactions from your firm.

To view information about giving next generation NetClient CS users access to QuickBooks, click the help link at the top of any NetStaff CS window, click the Index button, enter **QuickBooks, powered by Right Networks**, and press ENTER.

ClientFlow

ClientFlow™ provides a secure, online mechanism through which firms that use GoFileRoom® can share documents with their clients. With the version 7.2 release of GoFileRoom, which is scheduled for May 2009, GoFileRoom users will be able to create NetClient CS user accounts and give those user accounts access to GoFileRoom client documents. Once client access has been granted, ClientFlow users can access the appropriate documents through the ClientFlow screen in NetClient CS.

Note that all ClientFlow administration takes place in GoFileRoom.

ActiveSync

ActiveSync® technology allows your NetStaff CS users 24/7 wireless access to their Microsoft® Outlook® (Exchange) data. Once a user activates his handheld device, he will have access to the following personal information from Virtual Office CS.™

- **iPhone:** Calendar, Contacts, and Email
- **Personal handheld device running Windows Mobile:**® Calendar, Contacts, Email, and Tasks

If your firm is licensed for Virtual Office CS Microsoft Exchange and a NetStaff CS user has a compatible iPhone or personal handheld device, you can enable this technology for that user. Compatible handheld devices are:

- iPhone devices running operating system 2.0 or higher
- Personal handheld devices running Windows Mobile® version 5.0 or higher

Note: The contract with the service provider must include a data plan that supports synchronization with a Microsoft Exchange server.

For information about enabling ActiveSync for a NetStaff CS user, click the **Help** link at the top of any page within NetStaff CS, click the Index button, enter **ActiveSync**, and press ENTER to view the topic.

SUPPORT

NetFirm CS help

For step-by-step procedures, click the **Help** link at the top of any NetFirm CS window.

Website

If you have questions or need assistance, you can visit our website at CS.ThomsonReuters.com 24 hours a day for access to our support knowledgebase and for the latest information on current issues and processing tips.

Email subscriptions

We issue software update notices via email. If you want to receive these notices, you must have an email account and sign up for the Email Subscription service. To sign up for the Email Subscription service, visit the My Account section of our website at CS.ThomsonReuters.com. (Note that you must create a web account to sign up for email subscriptions.)

Product support

To speak with a Product Support Representative, please call CS Support at (800) 968-0600, press **2** for Product Support, and then listen to the available options. Normal weekday support is available from 9:00 a.m. to 8:00 p.m. eastern time. For details on our Support hours for other CS Professional Suite applications, please visit our website.