



November 18, 2009

TO

All NetFirm CS™ users.

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

ENHANCEMENTS

NetFirm CS administration

With this release, you can find NetStaff CS® or NetClient CS® users in the administration screens by searching on a login, first name, or last name. See the Searching for NetClient CS or NetStaff CS users by login, first name, or last name help topic for more information.

Revised NetClient CS pricing model

As of November 1, 2009, NetClient CS pricing has been restructured to enable you to take advantage of NetClient CS features with all of your clients. See the Pricing information help topic for more information.

2009 UltraTax CS demos

If you run 2009 UltraTax CS™ through Virtual Office CS™ and you want to view the Beginner's Introduction to UltraTax CS demo or the What's New for 2009 UltraTax CS demo, you should access the demos through the Viewing demos from the UltraTax CS Home Page help topic. If you attempt to view the demos through the links in the Products tab of the UltraTax CS Home Page, you will not be able to hear the audio.

Document Presentation

With this release of NetFirm CS and after FileCabinet CS™ version 09.1.0 is released in late November, you will be able to create subfolders in FileCabinet CS drawers that are designated for sending documents to NetClient CS users. For more information, open FileCabinet CS, choose Help / FileCabinet CS Help Topics, click the Index button, enter subfolders, and click "adding."

FileCabinet CS printer driver

On October 27, 2009, we released an updated FileCabinet CS printer driver for Virtual Office CS that is compatible with Windows® 7. If you had issues printing to the Virtual Office CS installation of FileCabinet CS prior to October 27, you will need to reinstall the printer driver by opening the Virtual Office CS screen and clicking the **FileCabinet CS Print Driver** setup icon in the navigation pane.

Notes

- If you are using Windows Vista® or XP, you do not need to install the updated printer driver.
- The FileCabinet CS printer driver is available only through next generation NetStaff CS. See the Next generation Web Services products help topic for information about enabling next generation features for your clients.

Next generation Web Organizer and My Tax Documents

After UltraTax CS version 09.1.0 is released in late November, next generation NetClient CS portals will be created automatically for the recipients of tax returns and/or organizers when the tax returns and organizers are delivered via the web. This will enable your firm to offer these clients all features of NetClient CS, including Account Aggregation, Remote Payroll Data Entry, Virtual Client Office,™ and so on.

Note: To view information about enabling these and other features, see the Modifying a NetClient CS user's access to modules help topic.

With this release, existing UltraTax CS clients who have access to My Tax Documents will use next generation NetClient CS. No action is required on your part; we will handle the conversion.

Notes

- My Tax Documents users will continue to log in from the same login page as in previous years.
- After we convert My Tax Documents users to next generation NetClient CS, they will be listed in the Login column of the NetClient CS tab as <firmID>.<clientID>.

QuickBooks, powered by Right Networks

Additional enhancements have been made to our QuickBooks,® powered by Right Networks,® offering. You can now:

- give multiple next generation NetClient CS users access to the same QuickBooks data.
- give next generation NetStaff CS users access to QuickBooks, powered by Right Networks, for their personal use.
- grant a QuickBooks administrator in your firm access to NetClient CS or NetStaff CS users who currently have access to QuickBooks, powered by Right Networks.

To view pricing information for QuickBooks, powered by Right Networks, see the Pricing information help topic.

Software as a Service

With this release of NetFirm CS, Trial Balance CS™ has been added to the Tax profile and Fixed Assets CS® has been added to the Accounting profile. If you have NetStaff CS users whose profiles should be updated to include these applications, you will need to remove their current permissions to Software as a Service and then re-assign their permission to the appropriate profile.

Source documents for UltraTax/1040 tax returns

With this release of NetFirm CS and after UltraTax CS version 09.1.0 is released in late November, you will be able to send client copies of 1040 returns and related source documents directly from UltraTax CS to next generation NetClient CS. For more information, open UltraTax CS, choose Help / UltraTax CS help topics, click the Index button, enter **portals**, and then click "sending client source documents to."

Virtual Client Office

Beginning Monday, November 23, 2009, you will be able to give your next generation NetClient CS users access to FileCabinet CS and Microsoft® Office applications through Virtual Client Office. See the Modifying a NetClient CS user's access to modules help topic for more information.

Note: Virtual Client Office is available only in next generation NetClient CS. See the Next generation Web Services products help topic for information about enabling next generation NetClient CS for your clients.

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.