



April 28, 2010

---

## TO

All NetFirm CS™ users.

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

## ENHANCEMENTS

### Security questions

With this release, you, your clients, and your staff can set up security questions that will enable on-the-fly password resets. When users or administrators log in to NetClient CS® or NetStaff CS®, a popup window will prompt them to set up security questions.

When users who have set up security questions enter an incorrect password in the login page and then click the **Help! I've forgotten my password** link, they will have the option of answering the security questions and then resetting their passwords.

#### Notes

- You can modify your security questions at any time by clicking the **My Account** link at the top of any page and then clicking the **Edit** link for Security Questions.
- NetClient CS users who have access to Web Organizer and My Tax Documents features will not be prompted to set up security questions.

## NetFirm CS administration

### Check retention

The check retention feature enables you to specify how long NetFirm CS should retain PDFs of Remote Check Printing check images before automatically and permanently deleting the PDFs. To view detailed information about this, see the Deleting Remote Check Printing checks automatically help topic.

### File Exchange

With this release, you can set up groups of next generation NetClient CS users and give the groups access to shared, personal, and private File Exchange folders.

- **Shared folders:** These are the same folders that existed in previous releases of NetFirm CS. As in the past, when you give a client permission to view a shared folder, they can see the entire contents of the folder.
- **Personal folders:** NetClient CS users can upload files to personal folders, and each NetClient CS user can see only the files he or she uploaded. Next generation NetStaff CS users who have access to the NetClient CS tab and to File Exchange can view and manage all files that users have uploaded to personal folders on a per-user basis.
- **Private folders:** Only NetClient CS users can upload files to the Private folder, and each NetClient CS user can see only the files he or she uploaded. Next generation NetStaff CS users **do not** have

access to any files that are placed in the Private folder. Note that your clients can create and delete subfolders and files in the Private folder.

To view additional information and the steps required to create groups and give them access to File Exchange folders, see the File Exchange overview help topic.

## Reports

Firm administrators and NetStaff CS users who have access to the Utilities tab can run reports on firm-related data, such as active user sessions, login history, password reset history, and a history of NetClient CS and NetStaff CS accounts. For more information, see the Viewing NetFirm CS reports help topic.

The Space Usage report now allows you to view the amount of space your firm is using for each NetFirm CS module as of the end of the previous day. The report is updated on a nightly basis.

## User sessions

We removed the Utilities tab > User Sessions page. You can now view a list of currently logged in NetClient CS and NetStaff CS users through the Utilities tab > Reports page > Active User Sessions report.

## Next generation NetClient CS

### ClientFlow

ClientFlow™ users can now click any column heading in the ClientFlow screen to sort data by that column.

### File Exchange

If you enable next generation NetClient CS for a client, you can give that client access to a Private folder. The client can upload files to the Private folder and create subfolders within it. Each NetClient CS user can view only the files that he or she uploaded to the Private folder. Note that no one in your firm can view the contents of the Private folder.

### Virtual Client Office, powered by Right Networks

With this release, the shortcut to launch QuickBooks, powered by Right Networks, has moved. To launch QuickBooks, go to the Home Dashboard and click the **Virtual Client Office,™ powered by Right Networks®** link under the Applications heading.

## NetStaff CS

### Virtual Client Office, powered by Right Networks

With this release, NetStaff CS users can provide the CS QuickBooks Data Utility to clients. See the Providing the CS QuickBooks Data Utility to your clients help topic for additional information.

### File Exchange

Staff members who have access to the NetClient CS tab and to File Exchange can log in to next generation NetStaff CS and view clients' File Exchange files that are stored in shared and personal folders. NetStaff CS users simply choose the appropriate client from the drop-down list at the top of the File Exchange screen and that client's folders and files display. For more information, see the Viewing a client's File Exchange files help topic.

**Note:** Staff members must use next generation NetStaff CS to access to this feature.

## **FileCabinet CS demo**

If you run FileCabinet CS™ through Virtual Office CS™ and you want to view the Introduction to FileCabinet CS demo, you should access the demo through the Viewing demos from the FileCabinet CS Home Page help topic. If you attempt to view the demo through the FileCabinet CS Home Page, you will not be able to hear the audio.

## **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](http://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](http://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.