



September 27, 2011

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## TO

All NetFirm CS™ users.

This user bulletin explains the changes and enhancements that are available in this release of NetFirm CS.

## CHANGE

### Recommended Internet browsers

Although we still support Microsoft® Internet Explorer® 7.x, it is less secure than more modern browsers. Therefore, we strongly recommend that you and your clients access NetStaff CS® and NetClient CS® through one of the following browsers.

- [Apple® Safari®](#) version 5.0 or higher
- [Google Chrome™](#)
- [Microsoft Internet Explorer](#) version 8.0 or higher
- [Mozilla® Firefox®](#) version 3.0 or higher

If you or your clients attempt to log in to next-generation NetClient CS or NetStaff CS through Internet Explorer 7.x, the application will prompt you to install Google Chrome Frame,™ which is a free plug-in for Internet Explorer that provides additional features and better performance. Note that the Chrome Frame plug-in runs only when a web application or website requires it.

## ENHANCEMENTS

The following enhancements are available with next-generation NetFirm CS administration, NetClient CS, or NetStaff CS. These enhancements are not available in “classic” mode.

### Next-generation NetFirm CS administration

#### Accessing next-generation NetFirm CS administration

With this release, we removed the Administration button from the navigation pane in NetStaff CS. You must click the Administration button near the upper-right corner of any NetStaff CS screen to enter NetFirm CS administration.

#### Accessing classic administration

The NetStaff CS Home Dashboard no longer includes links to launch classic NetFirm CS administration. To access classic administration, you must log in to NetStaff CS, click the Administration button near the upper-right corner of the screen, and click the **Classic Administration** link in the navigation pane.

**Note:** Classic administration opens in a popup window. If you are using a popup blocker with your Internet browser, you must allow popups from \*.netlinksolution.com. To learn more about allowing popups, see the help for your Internet browser.

### **Enabling NetStaff CS users to view NetClient CS portals through NetFirm CS administration**

You can allow NetStaff CS users to view all or selected NetClient CS portals as the NetClient CS users see them. In this view, all functionality that has been enabled for the NetClient CS user is available to the NetStaff CS user.

**Note:** All NetStaff CS users who already have access to NetClient CS administration can now view all NetClient CS portals through NetFirm CS administration.

To learn how to enable NetStaff CS users to view NetClient CS portals, see the Giving administrative privileges to NetStaff CS users help topic.

To see how a NetStaff CS user can view a NetClient CS portal from within NetFirm CS administration, see the Viewing NetClient CS portals through NetFirm CS administration help topic.

### **Limiting the NetClient CS portals for which NetStaff CS users can access File Exchange folders**

With this release, you can give NetStaff CS users permission to view File Exchange folders for only specific NetClient CS users. To learn how to do this, see the Giving administrative privileges to NetStaff CS users help topic.

### **Transferring files from Practice CS to NetClient CS portals**

If you are licensed for Practice CS<sup>®</sup> version 2011.2.0 or higher and its Client Management module, you can now send files to or request files from clients or contacts from within Practice CS. When you send a file, you can request that the client or contact sign the file electronically and you can send a secure message that is available only through NetClient CS. Note that if the client or contact doesn't have a NetClient CS portal, Practice CS and NetFirm CS will create one during the file transfer.

To learn more about performing and tracking file transfers in Practice CS, open Practice CS, choose Help > Practice CS Help, click the Index button, search on **File transfers**, and click "overview."

To learn how the file transfer will appear for your clients in NetClient CS, see the File Exchange overview help topic.

### **Accessing Web Builder CS from within your portal**

If you were able to access Web Builder CS<sup>®</sup> through NetStaff CS in previous releases, you must now access NetFirm CS administration to launch Web Builder CS. To do this, log in to your NetStaff CS portal, click the Administration button near the upper-right corner of the window, and click the Web Builder CS button in the navigation pane.


### **Customizing the User Accounts report**

With this release, you can customize the User Accounts report to include the date on which each user last logged in, to display only users who have access to specific modules, and to include the date on which users first received access to each module. To learn more about this report, see the Viewing the history of NetClient CS and NetStaff CS portals help topic.

### **Exporting NetFirm CS reports to CSV files**

You can now download CSV files of NetFirm CS reports. You can open CSV files in any spreadsheet program to work with report data.

To create a CSV file:

1. Open NetFirm CS administration.
2. Click the Utilities button in the navigation pane.
3. Click the Reports action icon and select the report in the Reports list.
4. Click the Download a spreadsheet of this report  button near the upper-right corner of the screen.

## **Giving us feedback on next-generation NetFirm CS administration, NetClient CS, and NetStaff CS**

We'd love to hear what you think about our products. To share your thoughts, open NetFirm CS administration, click the Utilities button in the navigation pane, and then click the Feedback action icon to open a feedback form.

## **Next-generation NetClient CS and NetStaff CS**

### **Working in the Home Dashboard**

In this release, we moved the links in the NetClient CS and NetStaff CS Home Dashboards into widgets. NetClient CS and NetStaff CS users can drag and drop each widget to the desired location in the Home Dashboard.

In future releases, we'll enable NetClient CS and NetStaff CS users to:

- add other widgets to the Home Dashboard, such as Most Used and Recently Visited.
- remove widgets.
- customize the content of widgets.

### **Uploading files to File Exchange**

Next-generation NetClient CS users can now upload files of up to 2 gigabytes (GB) to File Exchange, and there is no aggregate file size limit when uploading multiple files.

## **SUPPORT**

### **NetFirm CS help**

For step-by-step procedures, click the **Help** button 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<sup>®</sup> applications, please visit our website.