



October 26, 2011

TO

All NetFirm CS™ users.

This user bulletin explains changes made to and enhancements available in this release of NetFirm CS.

ENHANCEMENTS

Next-generation NetFirm CS administration

NetFirm CS Ideas Community

Through the NetFirm CS Ideas Community, next-generation NetFirm CS administrators can now submit suggestions to the NetFirm CS Development team, view suggestions from other NetFirm CS administrators, and vote on suggestions. NetFirm CS Development will listen to the community and see which ideas are most important to firms based on votes and comments.

To access the NetFirm CS Ideas Community and create an account, click the Utilities button in the navigation pane and then click the Suggestions icon.

Note: If you already have an account for the Practice CS Ideas Community, you can use the login credentials for that account to access the NetFirm CS Ideas Community.

Email templates for NetFirm CS notifications

With this release, next-generation NetFirm CS administrators can customize the notification email messages that NetFirm CS sends. Administrators can customize the following items in most email notification templates.

- Sender name
- Sender email address
- Subject
- Body text
- Header and footer, including adding an image

In addition to the items above, NetFirm CS administrators can also customize most email notifications to:

- Specify email addresses to copy and/or blind copy on all messages
- Add variables to messages

After customizing notifications, NetFirm CS administrators can send test notifications to themselves to see how the messages will appear to recipients.

To learn more, see the Customizing email notification messages help topic.

Next-generation NetClient CS and NetStaff CS

Working in the Home Dashboard

With this release, NetClient CS® and NetStaff CS® users can add and remove widgets from the Home Dashboard. Users can add the following new widgets to the Home Dashboard.

Note: The widgets that correspond to modules are available only if the module has been enabled for the user.

- **Recently Visited.** Includes links to the last five screens the user visited.
- **Most Visited.** Includes links to the five screens that the user visits most often.
- **Stock Quotes.** Displays all stocks that the user entered in the Stock Quotes module.
- **News.** Displays the top three news items from the News module, with the most recent item listed first.
- **Account Aggregation.** Displays the total value of each portfolio.
- **Virtual Office CS.®** Displays icons for all applications that are available to the user through Virtual Office CS. NetStaff CS users can drag and drop icons to rearrange them. **Note:** Any application icons that NetStaff CS users hid in the Virtual Office CS screen will not appear in this widget.
- **Links.** Displays all links from all Links modules.

To learn more, see the Customizing the Home Dashboard help topic.

Viewing files in NetClient CS users' personal and shared File Exchange folders

As in previous releases, NetStaff CS users who have access to File Exchange and NetClient CS administration can view files that are in NetClient CS users' shared and personal File Exchange folders. With this release, NetStaff CS users can enter any part of the NetClient CS user's name or login in the **File Exchange View** field to locate a specific NetClient CS user. For detailed information, see the Viewing files in a NetClient CS user's personal or shared File Exchange folders help topic.

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 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.