



December 18, 2011

TO

All NetStaff CS[®] users and NetFirm CS[™] administrators.

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

CHANGE

Prior to this release, each NetStaff CS portal that didn't have access to applications through Software as a Service (SaaS) or Virtual Office CS[®] included 200 megabytes (MB) of storage space. With this release, these NetStaff CS portals now include 500 MB of storage space. For more information about pricing, see the Pricing information help topic.

ENHANCEMENTS

Next-generation NetFirm CS administration

NetFirm CS administrators can now customize the User Accounts report to display the date on which temporary NetClient CS[®] portals are set to expire. (Note that temporary portals are created through Practice CS.[®])

Next-generation NetClient CS and NetStaff CS

Recently Downloaded widget in the Home Dashboard

The new Recently Downloaded widget includes links to the last seven files that each NetClient CS or NetStaff CS user downloaded. To learn how to add this widget to the Home Dashboard, see the Customizing the Home Dashboard help topic.

File Exchange and Document Presentation — Download all files


When a NetClient CS or NetStaff CS user navigates to a File Exchange or Document Presentation folder that contains files or subfolders, the user can click the new Download All button to create a ZIP file that contains all files within the folder and its subfolders. The user can then save the ZIP file to his computer or network.

Next-generation NetClient CS

My Tax Documents module

This release includes the following changes to My Tax Documents.

- NetClient CS users can view all of their tax returns through My Tax Documents — including returns that were previously available only through Document Presentation.
- The My Tax Documents screen now includes a Year column. This column indicates the tax year for each file that is available in the My Tax Documents screen.
- NetClient CS users can search for files by entering part of the file name or the tax year in the **Find** field at the top of the My Tax Documents screen.
- NetClient CS users can sort the list of files in the My Tax Documents screen by clicking a column heading.

- NetClient CS now places an alert  icon in front of all actionable files that are sent to NetClient CS from UltraTax CS during the transmission of tax returns or web organizers.

My Tax Documents widget in the Home Dashboard

With this release, NetClient CS users who have access to the My Tax Documents screen will also see a My Tax Documents widget in their Home Dashboards. This widget includes links to the first seven documents in the My Tax Documents screen.

Next-generation NetStaff CS

Message Center widget in the Home Dashboard

The Message Center widget now appears in the Home Dashboard for all NetStaff CS users. This widget includes information from the NetFirm CS Development team and links through which NetStaff CS users can access the following items.

- The current user bulletin
- Information for NetFirm CS administrators about getting started with NetFirm CS
- Archived user bulletins
- Information about the Web Services Transition Program, which helps to quickly educate firms about the basics of NetFirm CS

In the future, we plan to include in this widget information about upcoming releases, maintenance notifications, and more.

Sending 2011 tax returns to NetClient CS portals from UltraTax CS

If your firm is licensed for 2011 UltraTax CS[®] and you have installed UltraTax CS version 11.2, you can transmit all return types from UltraTax CS directly to NetClient CS portals.

NetFirm CS Ideas Community

With this release, NetFirm CS administrators and NetStaff CS users can submit suggestions to the NetFirm CS Development team, view suggestions from other firms, 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 Suggestions button that appears at the bottom of all NetFirm CS administration screens and at the bottom of all NetStaff CS screens.

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.

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.