



April 25, 2012

TO

All NetFirm CS™ users.

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

ENHANCEMENTS

Updated portal login screen

We updated the portal login screen to a more modern look. You can now include your firm logo in the login screen. Please be sure to view your firm's login screen and modify it as needed.

Notes

- All web addresses for login screens will redirect to the new login screen.
- This enhancement does not affect users who log in through fields that you embedded in a web page.
- If your firm uploaded an image for use in the portal header, we automatically added this image and the text that you entered for the portal header to your firm's portal login screen.
- If your firm uploaded an image to replace the entire portal header, we did not add this image to your portal login screen because the image is too large to display correctly.

To learn more about uploading a logo image, the maximum width and height of images for the login page, and more, see Customizing the portal login screen.

Email notifications about new File Exchange files

If you set up NetClient CS® or NetStaff CS users to receive email notifications when new files are available in File Exchange, you'll notice the following changes with this release.

- When multiple files are uploaded to File Exchange, all files are now listed in a single email notification.
- Notification email messages now include a link that users can click to log in to NetClient CS or NetStaff CS and open the folder that contains the new files. (If the user isn't already logged in to NetClient CS or NetStaff CS, he will be prompted to do so.)

Note

- Some firms that have enabled next-generation features in administration modified the File Exchange email notification template in such a way that we were not able to implement this enhancement. If this enhancement was not implemented for your firm, please add the Folder Link variable to the New File Exchange Files email notification template. For more information, see Modifying templates for email notifications that are sent by NetFirm CS.
- For information about enabling File Exchange email notifications, see Notifying users when new File Exchange files are available.

Next-generation NetFirm CS administration

Preventing groups of NetStaff CS users from accessing client data or company data

With this release, you can hide client data or company data from groups of NetStaff CS[®] users. To learn how to do this, see [Hiding client data or company data from groups of NetStaff CS users](#).

Note: You can also prevent individual NetStaff CS users from accessing client data or company data. For more information, see [Hiding client data or company data from a NetStaff CS user](#).

Previewing email notification templates

In addition to sending test versions of email notifications, you can now preview email notification templates. For more information, see [Modifying templates for email notifications that are sent by NetFirm CS](#).

Removing tax documents from NetClient CS

You can delete a client's tax returns, action required documents (for web organizers or tax returns), tax source documents, and Schedules K1 from NetClient CS. With this release, you can either delete all of these documents for a client at once or you can delete only selected documents. For more information, see [Removing tax documents from NetClient CS](#).

Removing the expiration date from a temporary NetClient CS portal

If your firm is licensed for Practice CS[®] version 2011.2.0 or higher and its Client Management module, you can create temporary NetClient CS portals through Practice CS. NetClient CS portals that are created in this manner have expiration dates. From within NetFirm CS, you can now remove the expiration dates from temporary portals, which makes the portals permanent. To learn more, see [Removing the expiration date from a temporary NetClient CS portal](#).

Identifying which folder on the Virtual Office CS server belongs to a user

The **User Accounts** report now includes a Portal ID column that can help you to identify which folder on the Virtual Office CS[®] servers belongs to a user. For more information, see [Viewing the history of NetClient CS and NetStaff CS portals](#).

Giving Web Employee users access to News modules

You can now give Web Employee users access to NetClient CS News modules. For more information, see the following help topics.

- [Creating News modules](#)
- [Editing or deleting News modules or articles](#)

Manually linking Web Employee users to NetClient CS or NetStaff CS portals

If NetFirm CS was unable to link a Web Employee user to a NetClient CS or NetStaff CS portal during the Web Employee registration process, you can now create the link manually. For more information, see [Manually linking Web Employee users to NetClient CS or NetStaff CS portals](#).

With this release, you can also unlink a Web Employee user from a NetClient CS or NetStaff CS portal. For more information, see [Unlinking Web Employee users from NetClient CS or NetStaff CS portals](#).

Next-generation NetClient CS and NetStaff CS

Uploading files to File Exchange

If your Internet browser supports HTML 5, you can now upload files to File Exchange by selecting files in Windows® Explorer and dragging and dropping the files into the File Exchange screen. For more information, see [Uploading files to File Exchange](#).

Viewing location and department totals in Remote Payroll Entry

If your firm processes payroll through Accounting CS™ or Service Bureau Payroll CS® and payroll administrators at client sites enter time through Remote Payroll Entry, the location and department totals are now available to the payroll administrators in the payroll report. To learn how a payroll administrator can print the payroll report, see [Viewing the payroll report](#).

CHANGES


Creative Solutions Practice and Web Time Entry

We discontinued support for Creative Solutions Practice® on September 30, 2011. With this release of NetFirm CS, we removed the following items that are related to Creative Solutions Practice.

- For NetStaff CS portals that had access to Web Time Entry, we removed Web Time Entry modules.
- We deleted all Web Time Entry user portals. (These portals were for users who had access only to Web Time Entry.)
- We removed the **Web Time Entry** navigation link from the NetStaff CS tab for all portal users who have access to NetStaff CS administration.

Classic NetClient CS users who have access to Remote Payroll Entry through Accounting CS or Service Bureau Payroll CS

If your NetClient CS users have access to Remote Payroll Entry through Accounting CS or Service Bureau Payroll CS and you have not enabled next-generation features for their portals, NetFirm CS will automatically enable next-generation features the next time these users log in to their portals.

If NetClient CS users have questions about working in next-generation portals, please direct them to the NetClient CS help, which is accessible through the Help  button.

Next-generation NetClient CS

Providing ZIP codes for credit card transactions

When saving credit cards to CS Payment and when performing one-time credit card transactions, you and your clients are now required to provide their ZIP codes for verification.

Next-generation NetStaff CS

Viewing the access history of Documents Presentation files

To view the access history of Document Presentation files, NetStaff CS users must now click the **History** link to the right of the file name.

PPC's Reference Library in Virtual Office CS

After June 30, 2012, you will not be able to access electronic versions of PPC's guides in the Reference Library (DVD format) through Virtual Office CS. You can continue to install licensed PPC's Reference Library products on your local computer.

To continue accessing PPC's guides through Virtual Office CS, please consider licensing PPC's guides from Checkpoint Tools, the preferred tax and accounting online research platform. For more information about Checkpoint,® please contact PPC Sales at 800-431-9025 and press 1.

Next-generation NetFirm CS administration

Accessing classic administration through next-generation NetFirm CS administration

With this release, the **Classic Administration** link appears in the navigation pane only for your firm's primary NetFirm CS administrator.

Note: The primary NetFirm CS administrator is the person who was designated as your firm's NetFirm CS administrator on the purchase agreement.

Space Usage report

The Space Usage report is now updated on a weekly basis. NetFirm CS displays the date on which the report was last generated at the top of the report, on the right.

SUPPORT

NetFirm CS Help

For step-by-step procedures, click the **Help** button at the top of any NetFirm CS administration screen.

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.