



**NetFirm CS, NetStaff CS, and NetClient CS, v. 2012.3.0  
User Bulletin 7788: Update**

October 24, 2012

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## **TO**

All NetFirm CS™ and NetStaff CS® users.

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

## **CHANGES**

### **Support for Internet Explorer 10**

We now support NetClient CS, NetStaff CS, and NetFirm CS administration in Microsoft® Internet Explorer 10.

### **Classic NetFirm CS administration**

With this release, classic NetFirm CS administration is no longer available.

## **ENHANCEMENTS**

### **Improved navigation**

With this release, you have quicker access to the features in your portal.

#### **Navigation pane**

- In previous releases, the navigation pane (on the left) included buttons that you clicked to reveal action icons. We removed the buttons and the action icons are now links that are available in the navigation pane at all times.
- In previous releases, setup icons were available in the navigation pane. We moved these items to the Setup menu near the upper-right corner of the window.
- The navigation pane now includes indicators when new files are available.
- File Exchange is now available under the Documents heading in the navigation pane.
- For NetStaff CS users who have access to NetFirm CS administration, click the Admin tab at the top of the navigation pane to access administration screens.
- For NetClient CS users, we combined Document Presentation and My Tax Documents; both are now available through links under the Documents heading in the navigation pane. The links are named by entity.

#### **Home Dashboard**

- We removed unnecessary widgets, such as Most Visited, from the Home Dashboard.
- For NetClient CS users, we added a Virtual Client Office™ widget, which allows them to open applications from the Home Dashboard.
- For NetStaff CS users, we widened the Virtual Office CS® widget.
- For NetStaff CS users, we moved the list of staff members and their statuses to the Staff Availability widget in the Home Dashboard.

## Miscellaneous

- We removed the Message Center widget from the NetStaff CS Home Dashboard. Messages are now available to both NetClient CS and NetStaff CS users through the Messages menu near the upper-left corner of the screen.
- For NetStaff CS users who have access to Staff Availability, you can now set your availability through the fields at the top of the menu that opens when you click your name. This menu is near the upper-right corner of the screen.
- The features that were available through the **My Account** link are now available through the commands (Edit Account, Update Password, and Set Security Questions) in the menu that opens when you click your name.
- We moved the **Log Out** link into the menu that opens when you click your name.
- The Help menu now includes a **Search for assistance** field. Simply enter a search term or phrase in this field and press ENTER to see a list of related topics. For more information on the Help & How-To Center, see the “Introducing the Help & How-To Center” section on page 4.
- The NetFirm CS Ideas Community is now available through the **NetFirm CS Ideas Community** command in the Help menu.

## Creating and updating passwords for NetClient CS and NetStaff CS

When NetClient CS and NetStaff CS users create or update their passwords, the application now displays a tooltip that outlines the password requirements your firm set in NetFirm CS administration. As users enter their passwords, the application displays the text for the requirements that the password meets in green text and it displays the text for the requirements that the password does not meet in red text.

To learn how to create a custom password policy, see [Establishing password requirements](#).

## Notification messages

This release includes several enhancements related to notification messages.

**Note:** To view detailed information about notification messages, see [Notification messages that are sent by NetFirm CS](#).

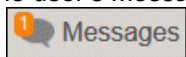
## Increased control over notification messages

In previous releases, NetFirm CS automatically sent email notifications when certain events occurred and administrators could not disable these messages. With this release, administrators can disable messages for most notifications. For more information, see [Disabling notification messages that are sent by NetFirm CS](#).

## Additional delivery methods

NetFirm CS administrators can determine the method by which users will receive each type of notification message. NetFirm CS can send notification messages via the following methods.

**Note:** NetFirm CS can send notification messages to classic NetClient CS users only via email. To enable next-generation features for NetClient CS users, see [Enabling next-generation features for NetClient CS users](#).

Delivery method	Details
Email	NetFirm CS sends the notification via email to the address that is in the <b>Email Address</b> field of the Admin > Users screen.
Direct message in the Messages menu	NetFirm CS adds the notification to the user's Messages menu and adds an alert to the Messages menu 

Delivery method	Details
Direct message in the Messages menu and in the Tasks widget	In addition to adding the notification to the Messages menu, NetFirm CS adds the notification to the Tasks widget in the user's Home Dashboard. The notification will remain in the widget until the user acts on it.
Notification in the NetClient CS mobile app	The NetClient CS mobile app is coming soon! After users download this app to their mobile devices, they will receive notifications through the app.

For more information, see [Specifying how users will receive notification messages](#).

### Notification messages in the Tasks widget on the Home Dashboard

As discussed above, you can set up notification messages to appear in the Tasks widget. NetFirm CS automatically adds messages to the Tasks widgets for the following items.

Item	Details
Action items	Action items from UltraTax CS <sup>®</sup> create messages in the Tasks widget. NetFirm CS will remove the messages when users open the documents that require action.
Password is about to expire	NetFirm CS adds a message to the Tasks widget three days before a user's password will expire. NetFirm CS will remove the message when the user resets his password.
New payroll worksheets	When you send a new payroll worksheet to a NetClient CS user through Accounting CS <sup>™</sup> Payroll or Payroll CS, <sup>®</sup> NetFirm CS generates a message in the Tasks widget. NetFirm CS will remove the message when the user clicks the Complete button in the payroll worksheet.
Security questions	NetFirm CS will add a message to the Tasks widget for any user who has not set up security questions. NetFirm CS will remove the message when the user sets up security questions.
New tax organizer	When you send a tax organizer to a NetClient CS user through UltraTax CS, NetFirm CS generates a message in the Tasks widget. NetFirm CS will remove the message when the user clicks the Send to Preparer button in the organizer.

To learn how to remove notification messages from users' Tasks widgets, see [Removing notification messages from users' Tasks widgets](#).

### Variables that reference website addresses in templates for notification messages

In previous releases, notification messages that included links to folders included those links as full website addresses. With this release, the URLs are inserted as linked text. For example, a link to a File Exchange folder named Bank Statements that previously appeared as "https://secure.netlinksolution.com/nextgen/#!/document-management/file-exchange/folder/xxxxxxx" will now appear as "Bank Statements."

Because you might have modified the template text for notification messages, we strongly recommend that you review the templates to ensure that the links to folders appear correctly. To do this, click the Admin tab in the navigation pane, click the **Templates** link, select the template, and then click either the Preview or the Send Test button. If needed, you can restore the template to the application default by clicking the Restore Default button.

### Notification messages about new files in Document Presentation

Notification messages about new Document Presentation files now link directly to the folders that contain the new files. After a user clicks a link to open a folder, he can follow the flags to the new files.

**Note:** If your firm modified the New Document Presentation Files template, you will not see this enhancement until you restore the default template. To reset the template, click the Admin tab in the navigation pane, click the **Templates** link, select the template, and click the Restore Default button.

### Changing folder names and file names for files that staff members send to NetClient CS from FileCabinet CS, GoSystem Tax RS, and UltraTax CS

NetFirm CS administrators who have access to Utilities can now change folder names and file names for files that staff members send to NetClient CS from FileCabinet CS, GoSystem Tax RS,<sup>®</sup> and UltraTax CS. The items that you can modify vary depending on the application from which staff members send files to NetClient CS.

Application	Items you can modify
FileCabinet CS	You can rename top-level folders. (The names of subfolders are determined by FileCabinet CS; you cannot change them.)
GoSystem Tax RS	You can rename parent folders, sub-folders, and file names. In addition to changing the text of the file names and folder names, you can add variables to them. You can remove subfolders from the folder structure.
UltraTax CS	You can rename parent folders, sub-folders, and file names. In addition to changing the text of the file names and folder names, you can add variables to them. You can remove subfolders from the folder structure. You can modify the naming convention for amended files.

For more information, see [Changing folder names and file names for files that staff send to NetClient CS from FileCabinet CS, GoSystem Tax RS, and UltraTax CS](#).

#### Notes

- For NetClient CS users, we combined Document Presentation and My Tax Documents; both are now available through links under the Documents heading in the navigation pane. The links are named by entity.
- NetStaff CS users can view Document Presentation files by clicking the **Document Presentation** link under the Documents heading in the navigation pane.

### Introducing the Help & How-To Center

The new Help & How-To Center provides one-stop access to the information you need while using NetStaff CS and NetFirm CS administration and while helping your clients work in NetClient CS. We've combined all content from the help system and the Support knowledgebase into a single repository that is hosted on our website and accessible directly from within NetClient CS, NetStaff CS, and NetFirm CS administration.

Because the Help & How-To Center resides on our website, we can update and expand the content between releases, based on your feedback, searches, and questions. In addition, the Help & How-To Center offers several significant enhancements.

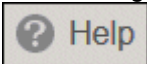
- A much more robust search engine that provides more relevant search results quickly.
- New search options that allow you to search all NetStaff CS and NetFirm CS administration topics at once, to limit the search by one or more subject categories, or to search for information on another application without having to open that application.

- Full compatibility with your preferred browser so that you can use your browser's regular features to navigate, search, print, and bookmark the topics you visit most often.

## HELP & SUPPORT

### Help & How-To Center

For answers to questions on using NetFirm CS, NetStaff CS, or NetClient CS, access the Help & How-To

Center by clicking the  button and selecting a topic. You can also use the field at the top of the Help menu to search for topics. For more information, including sample searches, see [Finding answers in the Help & How-To Center](#).

### Product support

From the [Support Contact Information page on our website](#), you can complete a form to send a question to our Support team. To speak directly with a Support Representative, call (800) 968-0600, press **2** for Product Support, and listen to the available options. Normal weekday support is available from 9:00 a.m. to 8:00 p.m. eastern time. For additional details (including extended support hours for tax season and hours for other applications), visit the [Support section of our website](#).

### Website resources and email subscriptions

Visit [our website](#) to access the ARNE Community (an online user forum), to learn about training courses, to view blogs and articles, and more.

We issue software update notices via email. You can sign up to receive these notices by visiting the [My Account section of our website](#). You'll need to create a web account (if you don't already have one) and then sign up for the Email Subscription service where you can indicate which notices you want to receive.