



**NetFirm CS, NetStaff CS, and NetClient CS, v. 2013.3.0
User Bulletin 7995: Update**

August 25, 2013

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

Labeling of payroll features

Throughout the administration screens, we updated references to payroll features to indicate whether the features apply to CSA or to Accounting CS (ACS). We also updated appropriate references to Web Employee to read “Web Employee/ESS” so it’s clear when a feature or item applies to both Web Employee administered through CSA and to Employee-Self Service administered through Accounting CS.

Accounting CS Payroll notes

We released Accounting CS version 2013.1.0 on August 25, 2013. If you use an earlier version of Accounting CS and you import payroll data that contains payroll or employee notes that span multiple lines, the following characters will appear in place of the line breaks: #&xA. To resolve this issue, install Accounting CS version 2013.1.0.

NetClient CS invoices

With the release of Practice CS version 2013.2.0, Practice CS users will no longer be required to have an InterceptEFT account to send invoices to NetClient CS. For more information, search on **NetClient CS invoices** in the Practice CS Help & How-To Center after the release of Practice CS version 2013.2.0.

Disclaimer: InterceptEFT is an unaffiliated third party that some of our customers have engaged to provide direct deposit, tax payments, ACH processing, or credit card merchant services.

ENHANCEMENTS

Private NetClient CS portals

Your firm’s primary portal administrator can now create private NetClient CS portals. In the NetClient CS Users screen for private NetClient CS portals, only the primary portal administrator can view the information in the Identification section and the View Portal button.

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

To make an existing NetClient CS portal private, do the following.

1. Click the **Admin** tab in the navigation pane.
2. Click the **Users** link in the NetClient CS section.
3. Select a user in the NetClient CS Users pane.
4. In the Settings section of the pane on the right, click the Enable button for Private Portal.

5. Click Enter.

Note: If you later decide that the portal should not be private, your firm's primary portal administrator should repeat the steps above but click the Disable button in step 4.

To create a private NetClient CS portal, do the following.

1. Click the Admin tab in the navigation pane.
2. Click the **Users** link in the NetClient CS section.
3. Click the Add button at the bottom of the NetClient CS Users pane.
4. In the Add NetClient CS Users dialog, click either of the **Single user** options.
5. Enter the required information in the Single user dialog and click Enter.
6. In the Settings section of the pane on the right, click the Enable button for Private Portal.
7. Click Enter.

Additional File Exchange permissions available to NetClient CS users

In previous releases, NetClient CS users who had full access to File Exchange folders were able to view files in and upload files to those folders. With this release, these users can also delete files from and delete subfolders from File Exchange folders to which they have full access.

File Exchange permissions for NetStaff CS users

In previous releases, NetStaff CS users could view personal File Exchange folders only if they had access to NetClient CS administration. With this release, you can give NetStaff CS users access to both personal and shared folders through File Exchange permissions.

To give a NetStaff CS user access to personal File Exchange folders, a user who has access to NetStaff CS administration must do the following.

1. Click the Admin tab in the navigation pane.
2. Click the **Users** link in the NetStaff CS section.
3. Select a user in the NetStaff CS Users pane.
4. Click the Enable button for File Exchange.
5. With Personal selected in the Folder Types pane, mark the checkbox for a NetClient CS user whose personal File Exchange folders the NetStaff CS user needs to access.
6. In the Folder Settings pane, click the Selected button and mark the checkbox for each top-level folder that the NetStaff CS user needs to access. Note that only top-level folders are available in this list.
7. Repeat steps 5 – 6 until the NetStaff CS user has access to all of the appropriate folders.
8. Click Enter.

Note: NetStaff CS users who already have administrative permissions for all or for selected NetClient CS users will retain their current level of access to NetClient CS users' personal folders. To give any additional NetStaff CS users access to shared and personal folders, you must complete the steps described above.

File Exchange notifications for NetStaff CS users

NetStaff CS users whose portals have been set up to receive File Exchange notification messages can now specify the folders for which they receive upload notifications. To do this, NetStaff CS users must do the following.

1. Open the File Exchange screen.
2. Click the Manage Notifications icon at the top of the File Exchange screen.
3. With Personal selected in the Folder Types pane, click the Selected button and mark the checkbox for a NetClient CS user for whom they want to receive upload notifications.
4. In the Folder Settings pane, click the Selected button and mark the checkbox for each folder for which they want to receive notifications about file uploads. Note that only top-level folders are available in the list.
5. Repeat steps 3 – 4 until they are set up to receive notifications for all of the appropriate NetClient CS users and folders.

6. Select the Shared type, click the Selected button under Selection Type, and mark the checkboxes for all top-level folders for which they want to receive notifications about file uploads.
7. Click Enter.

For information about setting up NetStaff CS users to receive File Exchange upload notifications, see the [Notifying users when new File Exchange files are available](#) topic.

File Exchange integration with Workpapers CS

We released Workpapers CS™ version 2013.1.0 on August 25, 2013. With this release, you can download File Exchange files within the Workpapers CS application. For more information, see the Workpapers CS topic [Using the File Exchange Documents portlet](#).

Linked pay items in Accounting CS Remote Payroll

With the release of Accounting CS version 2013.1.0 on August 25, 2013, you can link “child” pay items to “parent” pay items. When pay items are linked, Remote Payroll users will see the following in the Enter Time screen in NetClient CS.

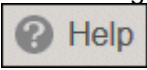
- The child pay items will be grouped under the parent items.
- The **Rate** field will be grayed for child items. The **Rate** field for child items will update only to reflect changes to the parent pay item.

To learn how to link pay items in Accounting CS, see the [Linking payroll items for an employee](#) topic in the Accounting CS Help & How-To Center.

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.