



**NetFirm CS, NetStaff CS, and NetClient CS, v. 2013.4.0
User Bulletin 8027: Update**

November 20, 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

Internet Explorer 7

As explained in our [Support for Internet Explorer 7 is ending](#) blog post and [sample letter for clients](#), which we published on September 25, 2013, we no longer support NetFirm CS, NetStaff CS, or NetClient CS when run in Internet Explorer 7. If you use Internet Explorer 7, please update to the latest version of [Internet Explorer](#) or to the latest version of [Google Chrome](#) or [Mozilla Firefox](#).

Note: To determine which version of a browser you're using, visit <http://whatbrowser.org/>. Although you can install the latest versions of several browsers from this page, we recommend that you do not attempt to run NetFirm CS, NetStaff CS, and NetClient CS in any browser that is not listed above.

File Exchange

- To prevent accidental deletions, NetStaff CS users can no longer delete shared folders from the top-level File Exchange screen.
- NetStaff CS users can no longer add top-level shared folders. To add top-level shared folders, you must open the File Exchange permissions screen for a NetClient CS or NetStaff CS user or group and click the Add Folder button.
- We moved the Delete Selected button to the top of the screen. The button is available only after you mark a checkbox for a file or folder.
- We added a clock to the icon for temporary folders 🕒.
- We added an Expiration date column within all temporary File Exchange folders. This column contains the date on which NetFirm CS will delete the file from all portals.

Remote Payroll Entry

In the Enter Time screen for timesheets that your firm exports from Accounting CS,™ we changed the name of the Complete button to Complete Payroll and we changed the name of the Enter button to Save. We also changed the name of the Enter button to Save in the Employees screen.

Web organizers

- When NetClient CS users open their web organizers, the NetClient CS navigation pane closes and the organizer navigation pane and screens take up the entire window. To return to the NetClient CS Dashboard, users must do one of the following.
 - Click the Home button.
 - Hover the mouse pointer over the left side of the browser window. When a black bar with a Restore tag appears, click the Restore tag.
 - Click the Save & Close button.

- Click the Complete button.
- When NetClient CS users click the Send to Preparer button or the Save & Close button in their web organizers, NetClient CS now displays a confirmation dialog that provides information about the option they chose and what will happen next. For example, the Save & Close confirmation dialog informs a user that he chose not to send his organizer to his preparer, and that the preparer will not be able to retrieve the information from the organizer until he clicks the Send to Preparer button.
- In the Tax Organizer widget in the NetClient CS Dashboard, the status of the organizer now appears in color. For example, the “Pending” status is displayed in bold, red text.
- We moved the Uploaded Tax Documents folder into the tax organizer screen. NetClient CS users can now attach files to their tax organizers by clicking the Uploaded Tax Documents folder in the Tax Organizer Index pane.

File names for files that staff members send to NetClient CS from UltraTax CS

UltraTax CS version 13.1.0, which will be released in late November, will allow you to send federal tax returns, state tax returns, and action required documents to NetClient CS as PDFs. As a result, we added the {State} variable to the default naming convention for tax returns and tax return action items documents.

Notes

- For federal returns, NetFirm CS will replace the {State} variable with “US.” For state returns, NetFirm CS will replace the {State} variable with the two-letter state abbreviation.
- The {State} variable will be included in the document names if you leave the **Print separate PDF files for federal and state return** checkbox marked. This checkbox is marked by default.
- The {State} variable will not be included in file names for documents that are sent to NetClient CS from UltraTax CS version 12.x.x or older.
- You cannot send tax returns from 2013 UltraTax CS to NetClient CS until the federal tax products are released in December.

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](#).

NetFirm CS variables in UltraTax CS email message templates

In UltraTax CS version 13.1.0 and higher, you will be able to edit the entire text of the NetClient Delivery Greeting and the NetClient Organizer Greeting email messages, including the registration text, the header text, and the footer text. In addition, the text of the message will include NetFirm CS variables. All NetFirm CS variables appear in single square brackets — for example, [PORTAL LOGIN PAGE] and [USER LOGIN].

Important! Do not make any changes to the variable names in the message templates. If you change the variable names, the values will break when UltraTax CS sends the email messages.

ENHANCEMENTS

Portal registration

When you add NetClient CS and NetStaff CS portals through the **Single user – automatic notification** method or the **Multiple users – automatic notification** method, you can now require clients and staff to enter the last four digits of their EINs or SSNs when they register their portals. If you create portals through UltraTax CS® for clients whose EINs or SSNs have been entered in UltraTax CS, the clients will be required to enter the last four digits of their EINs or SSNs to register their portals.

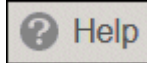
Uploading files to File Exchange from Dropbox

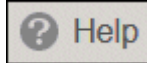
With this release, users can upload files to File Exchange from Dropbox.™ To do this, click Choose from Dropbox at the bottom of the file upload dialog. NetClient CS or NetStaff CS opens the Dropbox folder online, and the user can select the files he wants to upload.

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.