CPA
Practice **Advisor**

planning to use other Thomson Reuters applications.

Mary Girsch-Bock • Oct. 20, 2017

NetClient CS Portals

Thomson Reuters

800-968-8900

https://tax.thomsonreuters.com/cs-professional-suite/netclient-cs/

NetClient CS Portals are part of the CS Professional Suite from Thomson Reuters.

hours worked or access payroll related information such as paystubs or W2's.

NetClient CS Portals offers bundled portals, with larger firms able to select in the thousands, so firms can easily set up a portal for each of their customers, which can be branded with the firm logo and contact information. Each portal created can be further customized by adding additional modules such as Remote Payroll Data Entry and Employee Self-Service, which provides clients and their employees with access to payroll data via the portal. Clients can access the portal directly from the firm's website using the login and password provided to them. Once they have access, clients can customize their password as desired.

NetClient CS Portals offers drag and drop functionality, making it easy for both accountants and their clients to easily access, upload, and download files via the portal. Firms with multiple clients can easily mass-create portals, and users can easily upload multiple files to the portals simultaneously.

NetClient CS Portals was designed to be used in conjunction with other CS applications such as Ultra Tax CS or FileCabinet CS, as documents created in related applications are automatically sent to the portal for client access. The portals also work with Accounting CS Client Access as another module, allowing firms to host their clients' bookkeeping.

NetClient CS Portals supports files up to 2 GB in size, with users able to also upload multiple files to the portal at any time. All documents are uploaded and shared as read-only documents to prevent unauthorized changes to the documents. Accountants can create documents from just about any source and make them available to their clients via the portal. The client portals are bi-directional, so files can be shared or exchanged between parties as needed.

NetClient CS Portals uses 128-bit encryption for all documents during exchange or

expand system functionality, including Remote Payroll Data Entry, Remote Check Printing, and an Employee Self-Service module, which provides payroll clients with the ability to offer system access to their employees. Also available in the NetClient CS suite is an Account Aggregation module, which provides clients with account information from a variety of sources. Also available is a Legal and Business Forms module that accesses an online legal and business form library to provide basic forms and instructions for everyday legal issues. The product also offers integration with Microsoft Office applications including Word, Excel, PowerPoint, Publisher, OneNote, and Outlook.

The CS Professional Suite support options include the Help & How-To Center, along with access to product downloads, welcome services, and access to product support. Users can easily access help options from within the application or from the Help & How-To Center. A searchable knowledgebase is available for users, as are a selection of videos that can be accessed on demand. Toll-free support is available during regular business hours, and users can also request support via the Thomson Reuters product website. Standard and custom training options are also available, and custom consulting services are available upon request.

Designed to work specifically with CS Professional Suite or other Thomson Reuters products, NetClient CS Portals would be an excellent addition to offices already utilizing Thomson Reuters products. The product includes 1,000 base portals in the monthly fee, with plans starting at $200 per month. NetClient CS also offers a series of add-on modules that are priced separately.

2017 Rating 4.75 Stars

Firm Management

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