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PORTALS

2013 Review of Thomson Reuters NetClient CS

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Thomson Reuters — NetClient CS

800-968-8900

cs.thomsonreuters.com

Best Fit: Firms who use the Thomson Reuters professional accounting and tax software, especially those who work with client bookkeeping on the Accounting CS platform or those who store their documents in FileCabinet CS. Also, firms who want to publish invoices, tax returns, payroll items, and documents to clients through integrated portals from other applications.

Strengths

- Tight integration with a range of Thomson Reuters products, including FileCabinet CS, GoFileRoom, Accounting CS, the web organizer for UltraTax CS, Virtual Client Office, Practice CS, and Virtual Office CS.
- The NetClient CS mobile app released in late 2012 can be branded with firm logos, and gives iOS and Android users a mobile tool for interacting with clients.
- A “To Do” list called the Task Center prompts clients to provide missing items, and data collection through tools like electronic tax organizers can be facilitated by NetClient CS.
- Easy to use interface with customizable firm branding which supports drag and drop into most web browsers.

- Optional Employee web portals allow remote users to enter time and permit the firm and clients to deliver paychecks and other confidential data to employees.
- Clients can receive invoices from Practice CS and pay online with merchant services from InterceptEFT from within the client portal.

Potential Limitations

- Some of the integration points with the Thomson Reuters CS Professional Suite use the data stored in FileCabinet CS to present to the client. NetClient CS users who do not utilize FileCabinet CS may have less integration with some parts of the Thomson Reuters CS Professional Suite.

Detailed Observations

NetClient CS is the Thomson Reuters portal offering for users of the CS Professional Suite of applications for accounting professionals. The service offers good integration with other CS Professional Suite products, and has especially tight integration with the FileCabinet CS document management application.

A wide range of files and forms can be delivered to clients and returned electronically using the portal, including tax organizers, online invoicing, to do lists, stock quotes, and other news and information.

NetClient CS is also integrated with Virtual Client Office , which allows clients to input checks, bills, invoices, and other activity into their client bookkeeping records. Client Employees can use optional Employee Self-Service portals, which allow the firm to automatically post pay stubs, W-2's, and other items confidentially to employees, and the employees can enter data such as tax withholding elections on form W-4, hours worked, and other items.

These portals are very inexpensive (in almost all cases, less than \$0.50 per employee, per month), and can result in less spending on postage and supplies.

The application is hosted from Thomson Reuters secure data centers. Although this facility received a security assessment by a third party in the past, the most recent report is from September 2011. Management reports that a SOC 2 report is currently in progress.

A NetClient CS mobile app for iOS and Android allows clients to interact with firms using smartphones and tablets. Users can access tax returns, financial statements, and other documents securely. While the user downloads a generic Thomson Reuters

NetClient CS application, the app is branded with the firm's name and logo after the client logs into the app for the first time.

The portal features a "Task Center" which reminds clients about questions or missing items. This list of items appears whenever the client logs into the portal, and will not go away until the task is performed or the firm removes the item. Invoices from Practice CS can be posted directly to NetClient CS, and clients can pay using a credit card through an optional InterceptEFT merchant processing account.

Summary & Pricing

Plans start at \$175 per month (\$2,100/yr) for up to 1,000 client portals.

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