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NetClient CS

Thomson Reuters

<http://cs.thomsonreuters.com>

From the **2018 reviews of client portal systems** for accounting firms.

NetClient CS, part of the CS Professional Suite from Thomson Reuters, is a good fit for accounting firms of any size that currently use other CS Professional Suite applications. Designed to be used with other CS Professional Suite applications,

NetClient CS offers accounting firms a secure way to share documents with their

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NetClient CS includes up to 1,000 portals in the initial bundle, making it easy to create a portal for all clients, if desired. The portal is customizable, so firms can brand the portal using a personalized logo and color schemes if desired. Users can also provide custom access levels, so clients that are provided payroll or other services can access payroll and related data using the portal. The portal is accessible via a firm's website, with clients able to access the portal using the login and password information provided to them by the firm. Once they log into the portal, clients can change their password and/or enable multi-factor authentication for added security.

NetClient CS allows firms with numerous clients to mass-create portals for client access, and multiple files can be uploaded to any or all created portals simultaneously. A File Exchange option is available for those working on a document, making it easy to share documents being worked on with clients. The portal allows users to easily upload multiple files at one time, and users can share or exchange files up to 2 GB in size. Documents not being worked on can be uploaded as a read-only document to prevent any unauthorized changes. NetClient CS portals ~~are~~ can be bi-directional, so documents can be easily exchanged between accounting firms and clients, as well as client employees when necessary.

NetClient CS ~~Portals~~ encrypts all documents stored on the portal as well as those that are in transmission. In addition, Thomson Reuters employs multiple data centers, with all stored data handled in a confidential manner.

As part of the CS Professional Suite of applications, NetClient CS Portals offers seamless integration with other Thomson Reuters applications such as UltraTax CS, FileCabinet CS, and Accounting CS. Conveniently, client source documents that are stored in FileCabinet CS can be automatically transmitted to NetClient CS portal. The portals also provide a way to simplify the year end exchange of data that takes place prior to tax preparation, with clients able to complete their client organizer,

then upload it to the NetClient CS portal for easy retrieval. Firms can also request

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provides convenient online access to such legal forms and instructions.

NetClient CS users can access the Help and How-To Center from the Customer Center available on the Thomson Reuters website. Other support options such as product downloads, and marketing tools are available as well. The Help and How-To Center offers a searchable knowledge base where users can enter search terms to obtain assistance. Users can also access help directly from the application interface at any time. Both product training and consulting services are available, and users also have access to some introductory product videos. Toll-free product support is available during regular business or users can request support online if desired.

NetClient CS from Thomson Reuters are a good fit for accounting and CPA firms of any size that currently utilize other Thomson Reuters applications such as CS Professional Suite. NetClient CS includes 1,000 base portals in the monthly fee, with pricing available directly from Thomson Reuters, with all add-on modules priced separately.

2018 Rating 4.75 Stars

Firm Management

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