CPA
Practice Advisor

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NetClient CS Portals

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Suite applications, can be installed on-premise or delivered as SaaS or by using Virtual Office CS.

NetClient CS Portals includes a mobile app that works with both Android and iOS devices, making it easy for both staff and clients to access and upload documents from anywhere. Fully functional, the mobile app provides access to documents such as tax returns, allows users to upload vital document, and provides access to account detail and messages. The mobile app also includes a time entry option as well as access to payroll data such as check stubs and W-2s.

NetClient CS Portals includes up to 1,000 base portals, making it easy to create a custom portal for each client, with the portals fully customizable to reflect firm branding. When used with Accounting CS Payroll, clients that are provided with payroll services can use the portal to enter payroll information, eliminating the need for manual data entry methods. Portal access is through the firm's website, with all clients provided with an initial login and password to access the portal. Once they are in the portal, they can change their password if desired.

NetClient CS Portals includes the ability to mass-create portals with the same structure, or customize portals based on client needs. All portals are bi-directional, for easy file exchange. Users can easily upload multiple files to the portal simultaneously, and the NetClient CS Message Center provides an alert to all interested parties when a file is uploaded or downloaded. The product also includes a File Exchange option that allows multiple users to access any document that is currently being worked on. NetClient CS Portals supports files up to 2 GB in size, and supports a variety of file formats including Microsoft Office files, client accounting files, and payroll files. Unless they are being worked on, all documents are stored as a PDF in a read-only format to prevent unauthorized changes to the document.

All documents stored in the NetClient CS Portals are encrypted both during

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Web Client Organizer, clients can transmit their tax documentation via the portal, making it easy to keep all relevant documents together in a single, secure location. Integration with Accounting CS Payroll and the Employee Self-Service feature allows clients and their employees to access payroll data via the portal, as well as have ready access to payroll related tax documents at year end. When used with Practice CS, firms can easily transfer files and request electronic signatures. Other modules available include Account Aggregation, which allows clients to pull financial information directly into their private portal from more than 3,000 financial institutions, and the Legal and Business Forms module provides clients with access to a library of commonly used legal and business forms. NetClient CS also offers seamless integration with Microsoft Office applications including Word, Excel, PowerPoint, Publisher, OneNote, and Outlook.

Thomson Reuters Customer Care Center offers users a variety of help and support option including access to the comprehensive Help and How-To Center, which includes a searchable knowledgebase. Product downloads and other resources can also be accessed from the Customer Center. Help is available throughout the application as well. Both standard and custom training options are available from Thomson Reuters, with consulting services offered as well. Toll-free support is included in the cost of the application, with support offered during regular business hours. Users can also request support via mail if desired.

NetClient CS Portals from Thomson Reuters offers tremendous value to accounting firms using other CS Professional Suite applications, allowing easy sharing of documents with clients, and easy portal accessibility from other CS Professional Suite applications. 1,000 base portals are included in the monthly fee, with those interested able to request additional information and a custom price quote directly from Thomson Reuters.

2019 Rating: 4.75 Stars

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