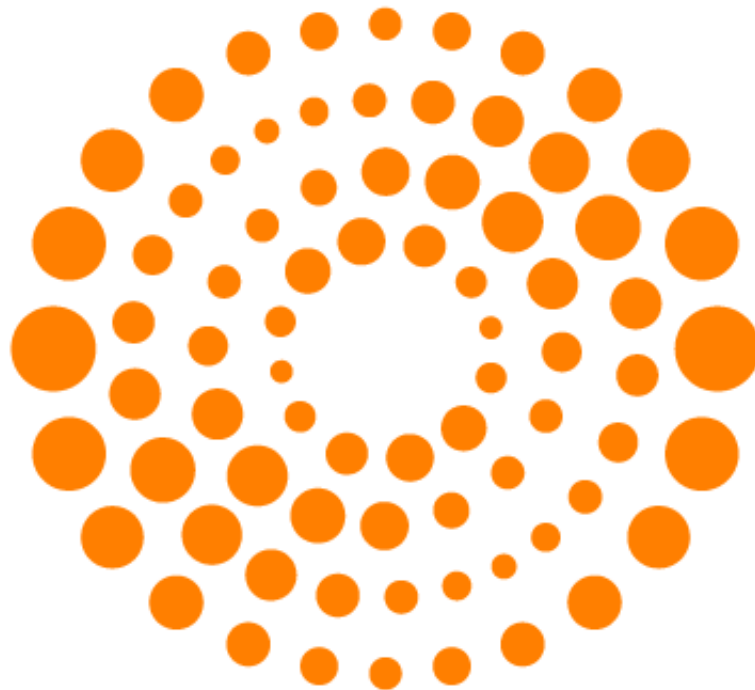


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**THOMSON
REUTERS**

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Base pricing includes 1,000 client portals (with the ability to add unlimited portals), with each customizable to client needs and the services offered by the firm. The system has tools that automate the creation of the portals. The system is designed to simplify the secure sharing of documents and other files between the firm and clients, in both directions, which is particularly useful for tax prep and payroll, but also in other service areas.

For firm staff, NetClient is accessed through the CS Professional Suite web interface, which integrates through all suite applications, making it easy to quickly add files to the portal. The applications within the CS Professional Suite are available either installed, or as a hosted solution. Clients can log into their portals from the firm's website. The program also has an available mobile app, for Android and iOS. Client-facing interfaces can be firm-branded, providing access to files, details and messages from the firm.

For tax season, the ability for clients to upload tax source documents is a great time saver, with data routed to review prior to import into the tax prep system. The firm can then securely upload completed returns for the client's use. Firms using the portal system in conjunction with Accounting CS Payroll are able to provide clients with secure upload of time entry and other employee change information. Data uploaded by clients can be directly imported into the payroll system. Firms can also extend the portals so their employer clients can provide their employees with access to personal payroll data, check stubs, YTD information and W-2s.

For clients that engage with your firm in Client Accounting and Advisory (CAAS), the NetClient CS portals also provides integrated client bookkeeping solutions. Optional Accounting CS Client Access provides clients with a full-featured, online small business accounting and live payroll application that's fully integrated with your firm. You and your clients share the same online database, the same user interface and the same real-time data. Adjustments and new data are available to you and your

clients instantaneously, with no imports, exports or updates necessary. And yet you

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CS Portals are encrypted both during transmission and when residing in the portal. Thomson Reuters uses industry-leading secure data centers. NetClient CS Portals natively integrates other Thomson Reuters applications including Accounting CS, Accounting CS Payroll, UltraTax CS, Workpapers CS, and FileCabinet CS. NetClient CS also offers integration with Microsoft Office applications including Word, Excel, PowerPoint, Publisher, OneNote, and Outlook. Optional modules are available for financial account aggregation and legal and business form templates.

Support and help options include the Thomson Reuters Customer Care Center, which houses the Help and How-To Center knowledgebase. Training options and consulting services are available. Toll-free phone and email support is available during business hours.

Client portals are an essential component of modern engagements, and NetClient CS Portals from Thomson Reuters provides a comprehensive solution especially well-suited to firms using the tax, payroll or other components of the CS Professional Suite. Pricing is dependent on several factors, including users and other applications, so firms should contact Thomson Reuters for a quote.

2020 Rating: 4.75 Stars

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