

# WEB SERVICES [VIRTUAL OFFICE CS® OR SOFTWARE AS A SERVICE (SAAS)] PRODUCT TRANSITION TUTORIAL

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### READINESS CHECK

Here's a handy checklist of the tasks your firm should complete before you begin the data migration process.

- **Take the Welcome Services Tutorial (New customers)**—If you're new to the CS Professional Suite®, take this web-based tutorial session, which is a prerequisite for all of our transition tutorials.
- **Verify receipt of your Administrator login**—Make sure you have the NetFirm CS™ Administrator login we emailed to you after you licensed NetFirm CS.
- **Identify a product champion**—Identify a member of your firm who will be the “go-to” person for spearheading the move to Virtual Office CS or Software as a Service (SaaS). Your product champion can then attend the Web Services Transition Tutorial and view the free NetStaff CS® On-Demand course, plus attend all product training sessions.
- **Schedule a transition tutorial**—Register for the Web Services Transition Tutorial.
- **Review the CS Professional Suite system requirements and best practices**—To ensure a seamless software transition, be sure to review the Virtual Office CS / SaaS system requirements (available on our System Requirements page) before transitioning to Virtual Office CS / SaaS. For additional systems information, visit [Tax.TR.com/Welcome-Services](https://www.taxtr.com/Welcome-Services) (select the **About Your Products** link, then the **Web Services** tab).
- **Formulate a data migration plan**—Be ready to think about the specifics of your data migration plan—timing, processes, upload time, staff training, etc. The information covered in the Web Services Transition Tutorial will help in this process. If your firm uses FileCabinet CS®, you'll probably have a significant amount of data that needs to be migrated. Visit the Help & How-To Center and search for the **FileCabinet CS data migration guide for Virtual Office CS and Software as a Service** topic.
- **Set up portals, permissions, and features**—The NetFirm CS Administrator determines the features each user can access at the time the user's account is set up. As part of this process, the Administrator should become familiar with all of the features included in the base portal pricing and determine which fee-based features his or her firm might want to use. The **Getting Started with NetFirm CS** help topic contains links to setup information for NetStaff CS user accounts and descriptions of features.
- **Get help**—Our online Help & How-To Center offers quick access to the information you need while using Virtual Office CS or SaaS. From this one location, you can find information on new features, procedures for completing tasks, tips for increasing productivity or troubleshooting issues, alerts about timely issues and more. To learn more, see the **Finding answers to your questions about NetFirm CS** topic in the Help & How-To Center. You can also reach our support team via phone, email and chat. For more details, search for the **Contacting our Support team** topic in the Help & How-To Center.
- **Review your firm's training needs**—Visit the Training page in the Services section of our website or talk to your sales representative to determine which of our many training resources meet your firm's needs.