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ProSystem fx Portal Client User Guide – Simplified User Interface

Last Updated: 3/27/2013

What is a Portal?

Portals are web-based applications that allow for the encrypted, bi-directional transmission and storage of electronic data. In other words, you have instant access to documents and information wherever and whenever you want. A portal, is a place where files can be uploaded, downloaded, stored and shared in a safe and secure environment — 24/7. Why is my accountant using a portal?

- It's easy to use — This user guide contains simple instructions, but if you've ever used online banking or email, you'll find your portal to be intuitive and easy to learn. Once we create your portal you will receive a few introductory email notifications with additional information and your specific login credentials.
- It's secure — Portals are the most secure way to exchange documents electronically. With identity theft on the rise, portals provide you with peace of mind knowing that the only person who can access your files is you and anyone you designate.
- It's convenient — Whether you want to locate last year's tax return or need to urgently upload a file to send our way, you can do so – anytime, anywhere, thanks to 24/7 access. You won't have to wait for the postal service or make a trip to our office — just log in and get to work. Share PDF files, Web pages, hyperlinks, Microsoft® Excel® spreadsheets, Microsoft® Visio® diagrams, Microsoft® Word documents, PowerPoint® presentations and financial software data files — and more!

How Else Can I Use My Portal?

You have the capability to grant portal access to anyone — such as a banker who you may collaborate with on a regular basis. Prior to convenient portal exchange, options to share information included email, fax, CD-ROM or paper. In many cases, you had to request the information from our firm before you could provide it to the bank, and vice versa. Portals have significantly reduced the time and resources spent on trading information.

Your portal will also allow you to:

- Easily upload documents of all sizes
- Designate files as read-only or read-write — having the option to disable others from overwriting changes, for added security
- Check out documents to prevent other users from editing while they are being updated
- Search, filter and display documents based on a variety of characteristics
- View each action performed to a file in the document history

A portal will not only safely transmit your information but it will also help us foster better service, expanded communication and faster/easier access to the information you seek, at anytime.

The Portal Interface

The interface is suitable for use on any computer and even your mobile/tablet devices. It provides a basic, web-based interface that allows you to use the core features efficiently, such as adding and downloading files.

A link to your portal is here: <https://portal.prosystemfx.com/sui>

Once you login, you'll be directed to your personal, customized portal home page.

Login

* Required Fields

* Login ID (Email address):

* Password:

☐ Remember me
☐ Remember my Password

[Forgot my password?](#) [Forgot me](#)

Login Screen

Portal Home Page

Your portal home page is where you will exchange documents with us.

CCH ▶ CCH Training Client, Inc.

Firm Administrator (Firm Admin)
[Reset Password](#) | [Logout](#)

1

Up One Level Back Reload Download Upload

Select portal to view files

Click on a file to download it or click on a folder to open the folder

2

CCH Training Client, Inc.
Jake Able

3

Collaboration

CCH Training Client, Inc.

	Name	Expiration Date	Date Modified	Modified By	Size (KB)
	Client Provided Files		07/14/2010	Firm	
	Correspondence		07/14/2010	Firm	
	Misc.		07/14/2010	Firm	
	Perm Documents		07/14/2010	Firm	
	Tax Returns		07/14/2010	Firm	
<input type="checkbox"/>	2008 Form 1040.pdf	12/31/9999	07/14/2010	Sven.Thiessen@wolterskluwer.com	53

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Portal Home Page

Home Page Key Features

- | | | |
|---|--------------------------|--|
| 1 | Menu Bar | Used to navigate through Portal |
| 2 | Navigation Pane | Access a portal by clicking the portal name |
| 3 | Files and Folders | View the list of folders, and files within the folders |

Menu Bar Key Features

- | | |
|---------------------|---|
| Up One Level | Move up one folder level within the files and folders |
| Back | Return to the previous screen |
| Reload | Refreshes the portal to reflect recent changes |
| Download | Click to download the selected file. Multiple files are downloaded as a single ZIP file.
Select files to download by clicking the box to the left of the file name |
| Upload | Click Upload to add a file to the selected portal |

Download Files from Portal

A simple and easy way to download (view or save) a file is to double-click on the file. The **file download prompt** appears enabling the file to be saved or viewed.

Add Files to Portal

Click **Upload** in the menu bar to begin the process of adding files to the portal.

Select a destination folder to store your files
CCH Training Client, Inc. > Collaboration Area > Tax Returns

File Name	Size	Progress	Status
2008 Form 1040.pdf	52.28KB	Uploaded 0%	<button>Remove</button>

☐ Overwrite existing file

1 **2** **3**

Browse Upload Clear

Add Files to Portal

Steps to add files to Portal

1. In the folder selection pane, select the destination folder in Portal.
2. Click **Browse** and select file(s) to upload from your computer or network.
3. Verify the file location and click **Upload** to add the file(s) to Portal.