

ProSystem fx[®] Portal (SaaS)

Release 2010-1

December 2010

ProSystem fx Portal (SaaS) Release Bulletin

This bulletin provides important information about the 2010-1 release of the ProSystem fx Portal (SaaS). Please review this bulletin carefully prior to installation. If you have any questions, please call Customer Support at **1-877-977-9PFX (9739)** or contact support on line at <http://support.cch.com/suite>.

The following website provides important information about this release: <http://support.cch.com/Suite/ReleaseNotes/>

By accessing this site you can view such helpful information as:

- ◆ Release Bulletins
- ◆ ProSystem fx Suite Support Calendar

Please visit the [Suite-SaaS Application Status](#) webpage to view in real time the current status of any of our SaaS applications. The Application Status webpage is updated every 15 minutes. Customers may visit at any time, including when support is closed.

NEW IN THIS RELEASE

ProSystem fx Portal

Redesigned Portal Login page so that users can access help and information right from the login page. The new login page features the following sections:

- ◆ Account Login: Verifies if Silverlight is installed, prompts to install if not, provides a link to the Simplified Portal Login page.
- ◆ System Messages displays system status and notifies users if the Portal is available or not.
- ◆ Today's Hot Topics provides useful information about using the Portal.
- ◆ Help & Support: FAQs for Client End Users and Firm Users, Knowledge Base Search, How-to Videos & Webinars.

Portal Home Page Enhancements – Several enhancements and customizations for the Portal Main Screen.

- ◆ Added three (3) new information panels
- ◆ Customize information panels such as a reminder panel, tasks and notifications.
- ◆ Display in a Notifications panel instead of receiving emails.

Portal Password Reset feature allows users four attempts to login before locking the account for 20 minutes. Users can now use the Forgot my Password option to reset their password and unlock the account at the same time, so that they do not have to wait the 20 minutes to unlock their account.

Batch Assign Access Groups to Portals when using the Batch Portal Creation Wizard allows you to quickly grant portal access to groups of portal users when using the Batch Portal Creation Wizard.

Portal Renewal Notifications will send an email notification to firms 30 days and 15 days prior to the account's Portal renewal date.

Portal Renewal and Licensing Utility will renew and make available licenses for portals that were deleted in the prior renewal period. This utility will also allow firms to delete unnecessary portals and client areas and recover the licenses from those deleted portals and client areas. Firms can also delete unnecessary files to recover storage space.