

ProSystem *fx*[®] Suite

Release Bulletin

Release 2010-4.2


August 2011

Welcome to ProSystem *fx* Portal

This bulletin provides important information about the 2010-4.2 release of ProSystem *fx* Portal. 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 online at <http://support.cch.com/suite>.

NEW IN THIS RELEASE

This version of Portal includes many enhancements requested by our customers, including the following new features:

- ◆ Your clients can now use the same email address to access their portals with multiple firms.
- ◆ You can now create, edit, delete, and secure custom folders in the collaboration area of the portal. You can also set the color of the folders. To create a custom folder, right-click the Files and Folders area, and then select **Create Custom Folder**. Right-click a folder to rename, change the color of, delete, or secure a custom folder.
- ◆ The portal list can now be sorted in either alphabetical or last-accessed order.
- ◆ You now can create an End User License Agreement (EULA) that your clients must accept before they can log into their portal. You also can view a report listing users who have accepted or declined to accept the EULA.
- ◆ Firm users and client portal users can create security questions and answers to be used if they forget their passwords. By answering the security questions, users can reset their passwords without waiting for an email with a temporary password. To set up security questions and answers, click the  button next to your name at the top right of the Portal screen and then, select Edit Profile. Select the Edit personal questions tab and enter the responses.
 - Firm administrative users can now reset passwords for client portal users and for other firm users.
 - CCH Support can now reset passwords for firm users and client portal users.
- ◆ Portal has been upgraded to support Silverlight 4, which provides the framework necessary for future enhancements.