ProSystem *fx*® Portal

Welcome to ProSystem *fx* Portal 2011-3.5

This bulletin provides important information about the 2011-3.5 release of ProSystem *fx* Portal. Please review this bulletin carefully. If you have any questions, please call Customer Support at 1-800-PFX-9998 (1-800-739-9998), Option 9. Additional information is available on CCH Support Online.

NEW IN THIS RELEASE

The following features and enhancements are available in this release of Portal:

Right-click to Paste on the Login Screen

You can now right-click to paste your password on the login screen. This feature allows you to copy your temporary password, and then easily paste it into the password field. You can also use CTRL+V to paste text into the password field.

Email Notifications When Uploading Multiple Files

When you upload several files at the same time using the standalone version of Portal, the system now sends only a single email notification listing all the uploaded files. Previously, a notification email was sent for each uploaded file. This feature has not yet been implemented in the version of Portal that integrates with Document.

Search for Portals and Users by Email Address

You can now search for portals or other users by email address. On the Recent Portals tab, a drop-down list can be used to filter by portal name or email address. When you select "email address" as a filter, you can enter an email address, and then click the search button to display a list of all portals you have access to. If you have administrative rights, you can also search for portals by email address on the Manage Portal, Manage Firm Users, and Manage Portal Users screens.

Security Questions and Answers

The Security Questions and Answers screen has been updated with red asterisks to indicate required fields.

Send or Resend Welcome Email and New User Creation/Password email notifications

From the Manage Portal screen, firms can now resend the Portal Creation email notification to the administrator assigned to that portal. Similarly, from the Manage Portal Users screen, firms can now resend the Portal User Created – Welcome Email to the specified user. An Email Delivery Status field indicates if the email was sent successfully.

ADDITIONAL INFORMATION

You can learn more about ProSystem *fx* Portal by visiting our Web site here, or by contacting your local sales representative.

Please visit Customer Support Online to stay updated with the most current information, including updated system requirements, Knowledge Base articles, a complete list of known issues, and FAQs.