Blair & Company, A.C.
CERTIFIED PUBLIC ACCOUNTANTS AND CONSULTANTS

ProSystem fx Portal Client User Guide

Getting Started

March 1, 2013

QUICK START GUIDE
Also see Advanced Features Guide

About ProSystem *fx* Portal

Portal is a simple and easy to use Web application that facilitates secure file transfers and continued access between Blair & Company, CPAs and our clients. For our clients, Portal is a web-based interface that only requires the installation of Microsoft Silverlight for use.

Your Portal User ID and login information will be provided via email. All documents made available for continued access such as a tax return or financial statement will remain on your portal for a stated period of time in accordance with the firm's record retention and portal use policies. At this writing, we anticipate retaining at least three (3) years' information. We will contact you prior to deleting information, unless it is clearly inconsequential or temporary in nature.

System Requirements

- Portal relies on the Microsoft Silverlight 3 platform and a user may be prompted to install Silverlight from Microsoft's website the first time they login. The install is completely safe and typically takes less than a minute and just a few clicks.

- Portal will support all browsers on PC and Mac that are compatible with Microsoft Silverlight 3.

- A complete list of browsers and operating systems that support Silverlight 3 can be found at
  http://www.microsoft.com/silverlight/get-started/install/default.aspx

- Mac computers with Intel processors are able to access Portal.

- If you are a Mac user, browse to the link below to verify your computer's processor type.
  http://support.apple.com/kb/HT1531

| Icon Legend			
		Keys	Quick reference to the key aspects of a particular function
		Tip	Best practice tips and shortcuts
		Notes	Informational notes about functions
		Warning	Important warnings about a function

Internet Explorer

Portal can be used with Internet Explorer version 7 or higher. Although not required for the use of ProSystem *fx* Portal, changing the following settings may allow for even easier use:
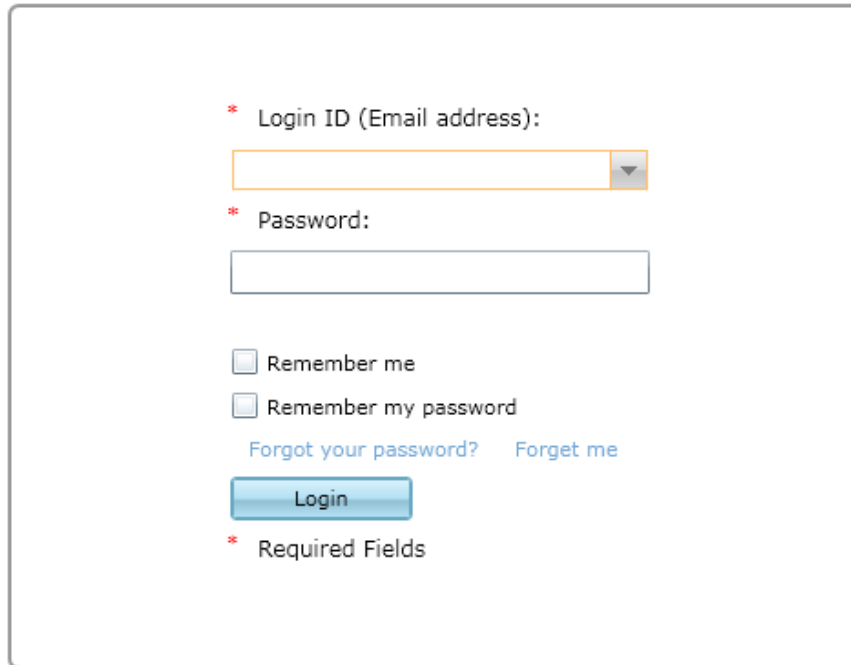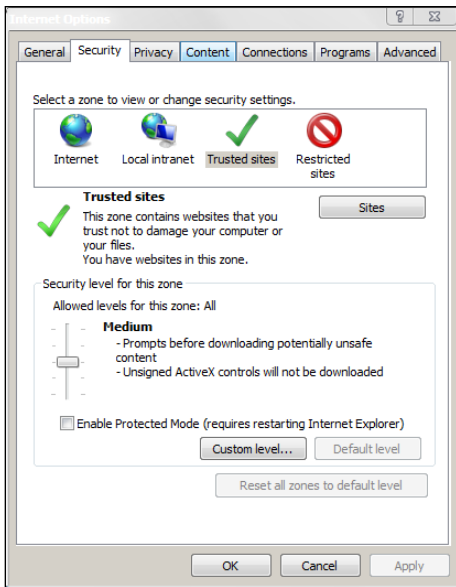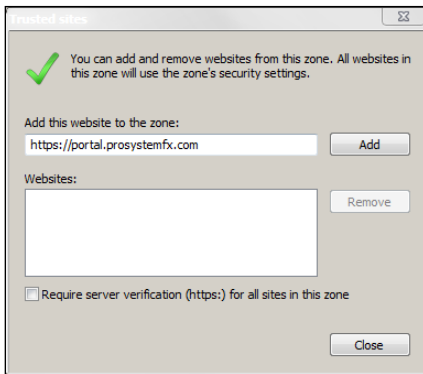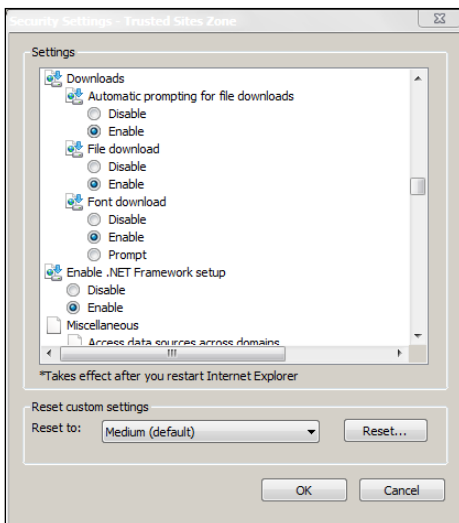
Internet Explorer Settings

1. Open Internet Explorer and browse to https://portal.prosystemfx.com/portal

2. In Internet Explorer: select **Tools, Internet Options**, click on the **Security** tab, click **Trusted Sites**, and then click on the **Sites** button.

Internet Options

3. Click **Add** to move the Portal URL to the Trusted sites zone, then click close.

Trusted Sites

4. Click **Custom level**.

5. Click **Enable** for Automatic prompting for file downloads.

6. Click **Enable** for File Download.

7. Click **OK** to save the changes.

Custom Level

Quick Start Guide

Portal Login

Launch your Web browser and browse to https://portal.prosystemfx.com/portal
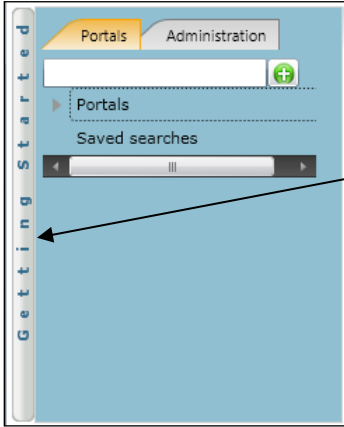

Portal Login

 Login Tips

- Refer to the emails received from the firm for login information.

- The Login ID (email address) is not case sensitive; the temporary password provided via email is case sensitive.

- For security reasons, you are required to change your password upon logging in for the first time.

- Your new password may be from 8 to 32 characters, must contain at least one alpha character, one numeric character, one special character (e.g. !, @, #, etc.) and is case sensitive.

- Your password may be reset at anytime by clicking "Forgot your password?"

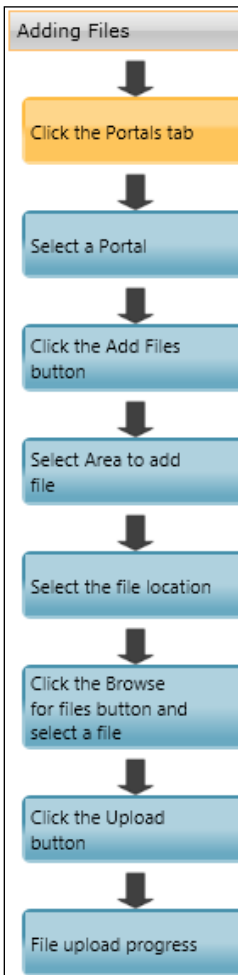# Getting Started

Getting Started ribbon

A short "**Welcome to the Portal!**" message will be presented to each user upon their initial login to Portal. The welcome message simply directs users to the expandable/collapsible **Getting Started** menu. Click the **Getting Started** ribbon on the left side of the screen to expand and view this menu.
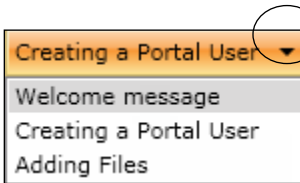
Menu Selection

Click the black arrow to view **Getting Started** menu options. Creating a Portal User will only be visible Portal Admin users. **The Welcome Message and Adding Files will be visible to all Users.**

Adding Files

Getting Started menu Key Features

- When clicking on the buttons, the respective feature in Portal will begin to flash in order call attention to it.

- Perform the suggested (flashing) step, and then click on the next step to easily perform each step required to add files to Portal.

- This feature is not only for informative purposes, it may be used to add files to Portal for the firm to view (e.g. Returns, Financial Statements) are added to Portal.

Also see the Advanced Features User Guide
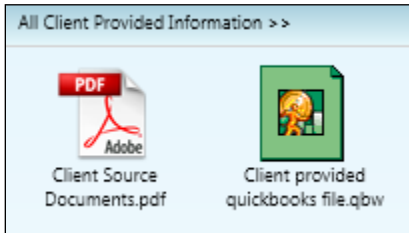
http://www.blaircpas.com/info_center.html

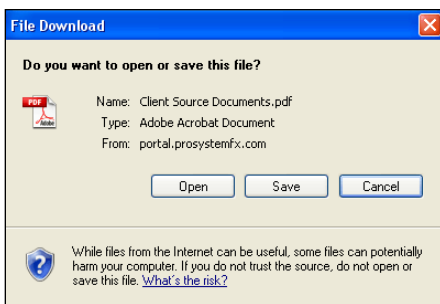# *Download files from Portal*
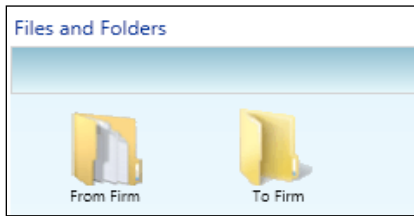
Files and Folders

Folders are used to organize files on the portal. Simply double-click on a folder to view your files.

Portal Documents

A simple way to view or save a file is to double-click on the file name. Double-clicking on a file will display the **File Download Box**, displayed below.

File Download Box

Click **Open** to view the file or **Save** to download/save a copy to your computer or network. When a file is downloaded, a copy is created and does not delete or affect the file on your portal. If the file download screen does not display due to your browser's security settings, a small window will appear in the lower right portion of the screen allowing you to access the file.

The File Download example displayed above refers to Internet Explorer. Other Web browsers may respond differently when you double-click on a file name, however, this will not affect your ability to access the file.

It is recommended to download (save) a copy of your deliverable items from Portal, as most files will not remain there indefinitely. The firm can provide more detail regarding how long files will be accessible via Portal.
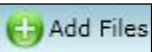
Add Files to Portal

Add Files

Steps to Add Files to Portal

On the Portal Home page; click to display the Add Files screen, (above).
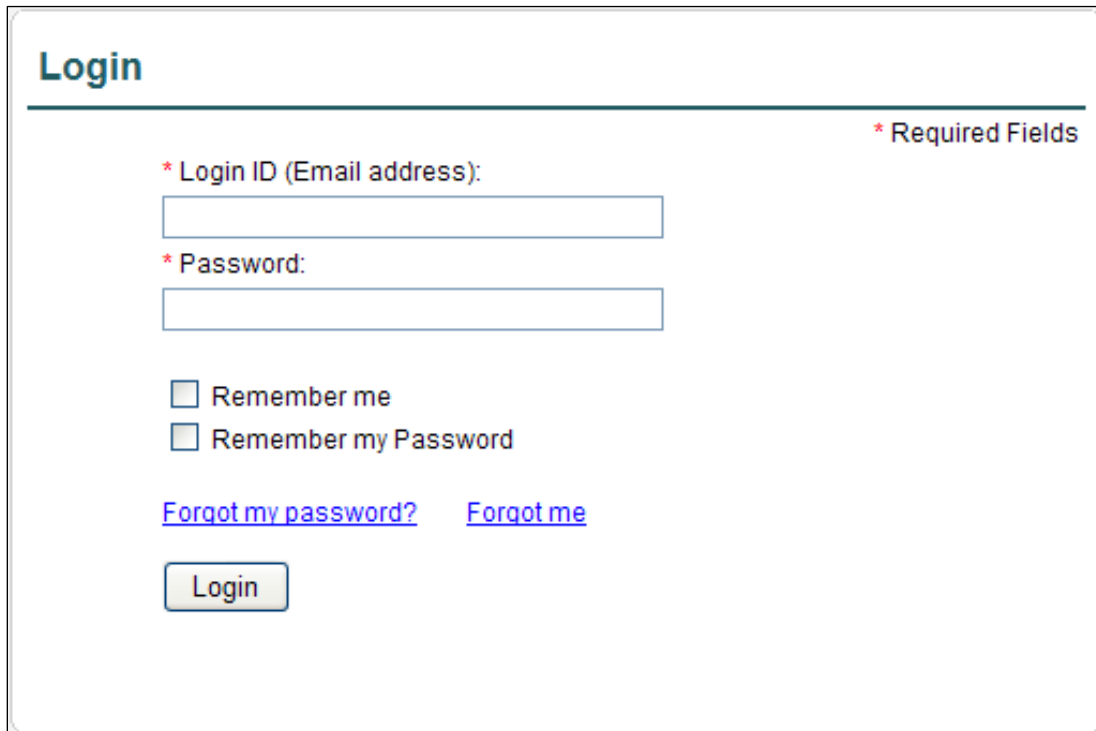
1. Select a portal (only for those users that have access to multiple portals)

2. Set the file location (destination folder within the Portal)

3. Click "**Browse for files**" and select file(s) via Windows Explorer

4. Click "**Upload**" to add the file(s) to Portal

5. Click "**Back**" to return to the User Homepage

Simplified User Interface

 The Simplified User Interface (SUI) is a basic, HTML interface designed for portal users who are not able to access Microsoft Silverlight. The functionality is limited. However, the core features of Portal are available, such as adding and downloading files.

Login to Portal

Login to the SUI using the following URL: https://portal.prosystemfx.com/sui

Figure 1 - SUI Login
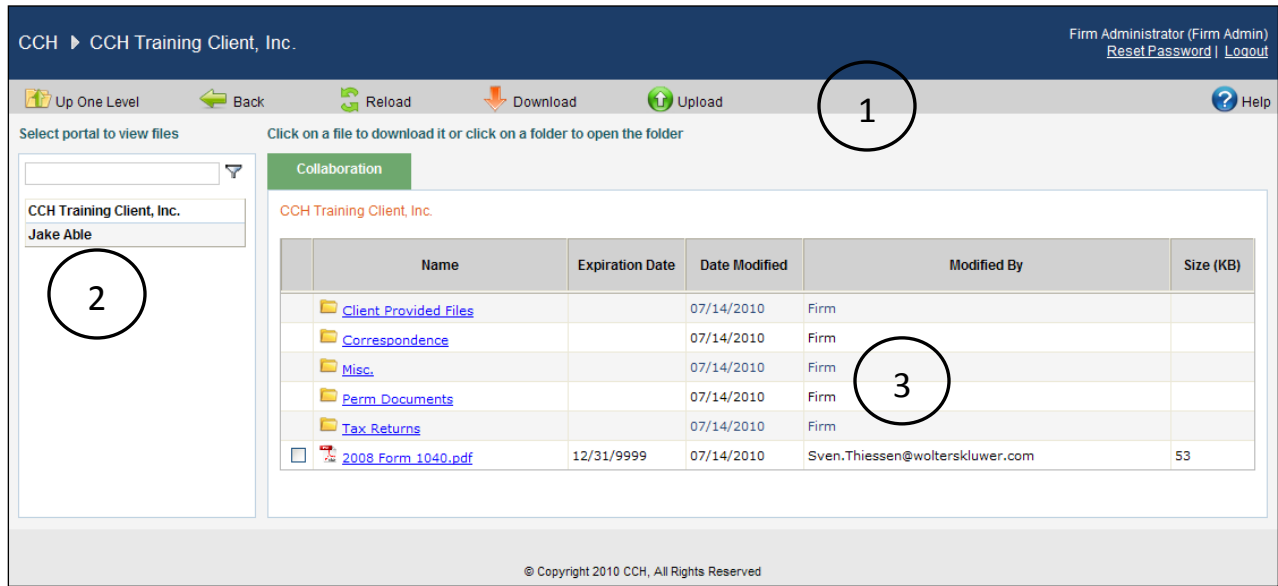
Portal Home Page

Figure 2 – Portal Home Page
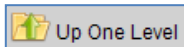

Home Page Key Features
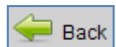
1   **Menu Bar**   Used to navigate through Portal functionality.

2   **Navigation Pane**   Access a portal by clicking the portal name.

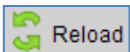**3**   **Files and Folders**   View the list of folders, and files within the folders.
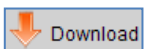

Menu Bar Key Features

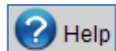|	
Up One Level	Move up one folder level within the Files and Folders.
Back	Return to the previous screen.
Reload	Refreshes the portal to reflect recent changes.
Download	Click to download the selected file. If multiple files are selected, a zip file containing the selected files is downloaded. Select files by clicking the box to the left of the file name.
Upload	Click Upload to add a file to the selected portal.
Help	Access Portal help files by clicking this icon.

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 Box** appears enabling the file to be saved or viewed.

Add Files to Portal

Click [⬆ Upload] in the menu bar to initiate the add files process.
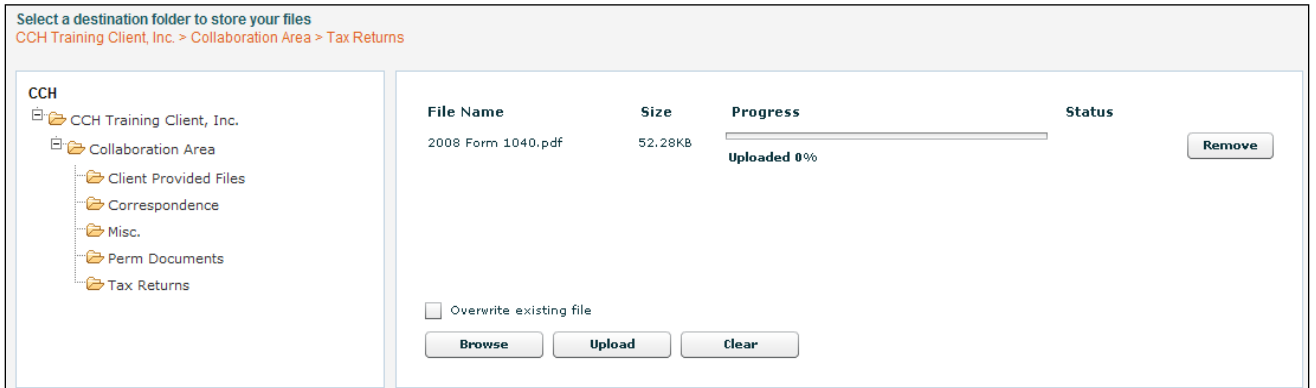

Figure 3 - Add Files to Portal

Steps to add files to Portal

1. In the Folder Selection Pane, select the File Location (destination folder in Portal).
2. Click [Browse] and select file(s) to upload via Windows Explorer.
3. Verify the File Location and Click Upload to add the file(s) to Portal.