





CLIENT PORTAL USER GUIDE

ProSystem fx Portal

Portal is a simple and easy to use Web application that facilitates **secure file transfers and continued access** between MacKay Brehm & Smith, Chartered Accountants, Professional Corporation and our clients. For our clients, Portal is a web-based interface that only requires the installation of Microsoft Silverlight for use.

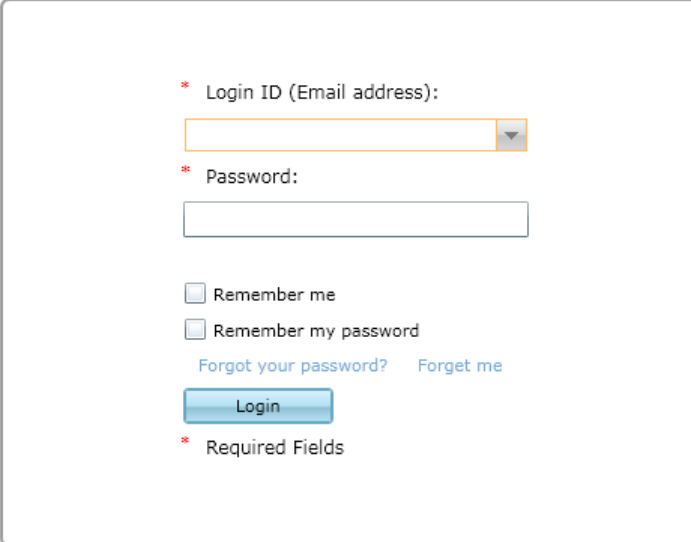
Icon Legend		Keys	Quick reference to the key aspects of a particular function
		Tip	Best practice tips and shortcuts
		Notes	Informational notes about functions
		Warning	Important warnings about a function

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 MacKay Brehm & Smith, Chartered Accountants, Professional Corporation's record retention and portal use policies.

QUICK START GUIDE

Portal Login

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

A screenshot of a web login form. At the top, it says "* Login ID (Email address):" followed by a text input field with a dropdown arrow on the right. Below that is "* Password:" followed by a text input field. There are two checkboxes: "Remember me" and "Remember my password". Below the checkboxes are two links: "Forgot your password?" and "Forget me". At the bottom is a blue "Login" button. At the very bottom, it says "* Required Fields".

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?](#)"

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.*

