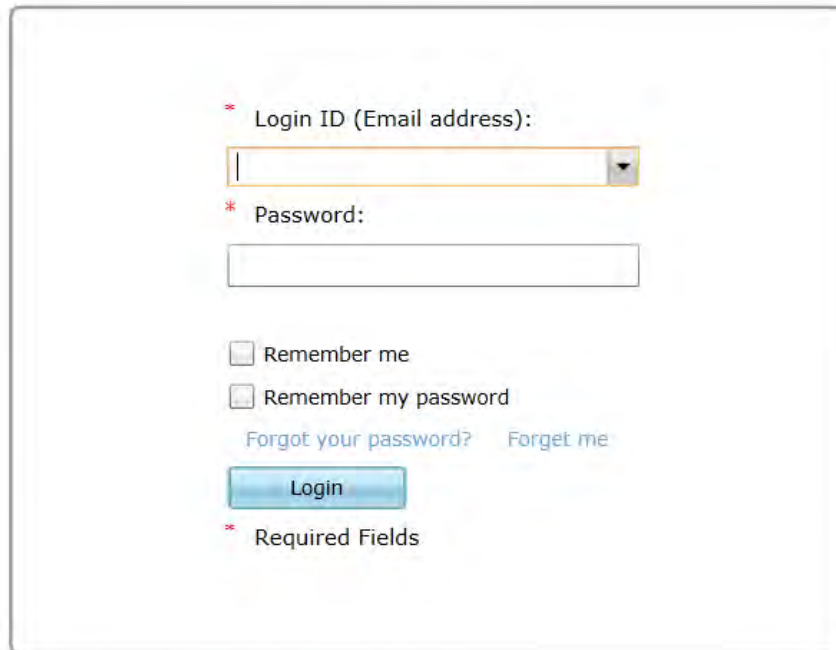


Accessing the Portal

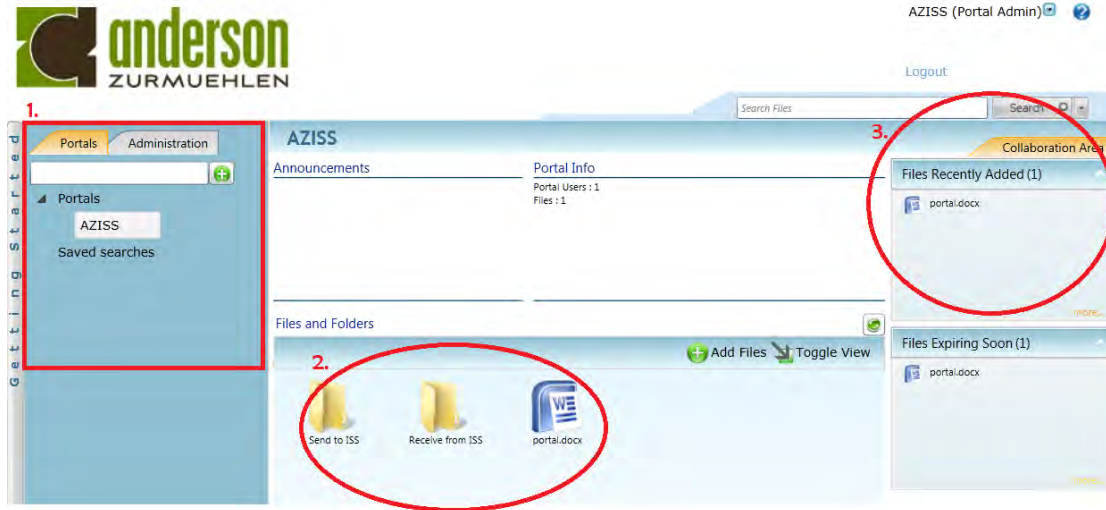
1. Go to the following website: <https://portal.prosystemfx.com/portal/#Default> (Ctrl + Click to follow this link)
2. Your Login ID is your **Email address**
3. You will receive an email with a temporary password (this will need to be changed the first time you login).
4. Password requirements - the new password you create must meet the following criteria for security purposes:
 - Number(s) (at least one)
 - Capital and lowercase letters
 - Symbol(s) (at least one)



The screenshot shows a login form with the following elements:

- A red asterisk (*) next to the label "Login ID (Email address):".
- A text input field for the Login ID (Email address).
- A red asterisk (*) next to the label "Password:".
- A text input field for the Password.
- Two checkboxes: "Remember me" and "Remember my password".
- Two links: "Forgot your password?" and "Forget me".
- A blue "Login" button.
- A red asterisk (*) next to the text "Required Fields".

Overview of the Portal screen



1. List of the portals that have been created for you. If you have multiple portals, move between them by left mouse clicking on the name of the portal.
2. Folders with the documents that have been uploaded by you (Send to Folder), and sent from your accountant (Received from Folder).
3. A list of recently Added Files and Files Expiring Soon.

*Note: All files are only available for 2 weeks.

Add files to the Portal:

1. Left mouse click on the Portal name on the left side of the screen

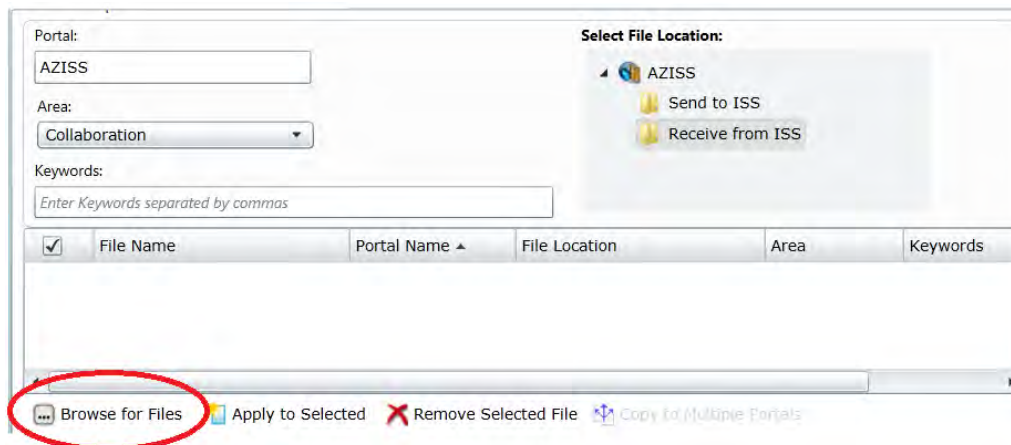


2. Left mouse click on the **Send to Folder**

3. Left mouse click on **Add Files**

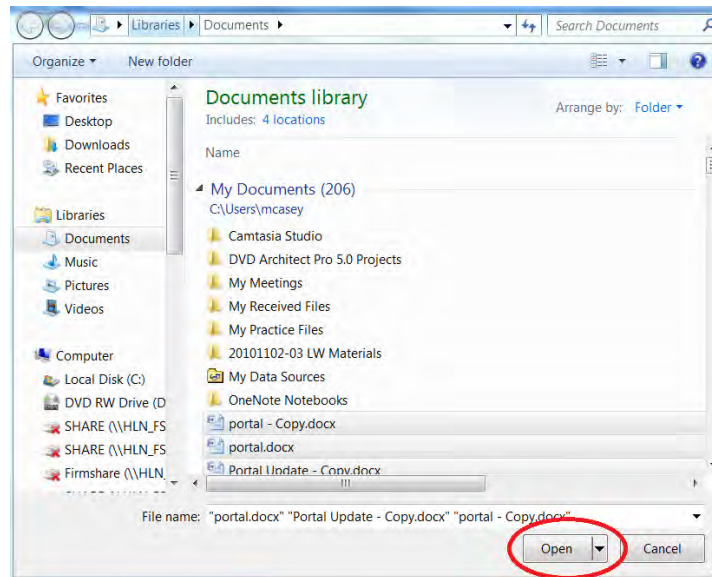


4. Left mouse click on **Browse for files**

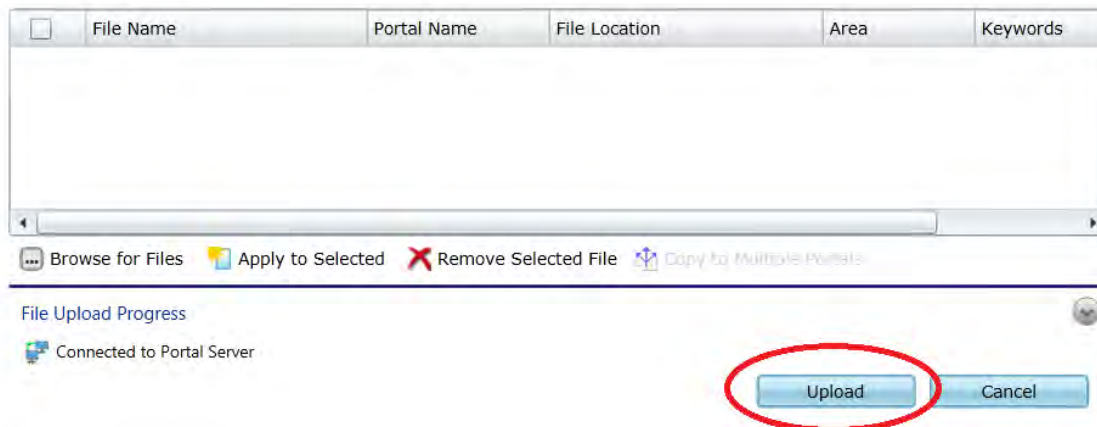


5. Select the file(s) to upload to the Portal and click **Open**

*To select more than one file, hold down the Ctrl button on your keyboard and left mouse click on the files to select them.

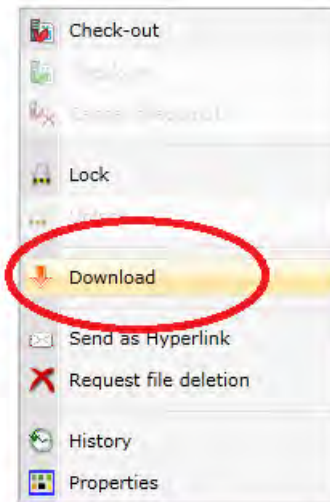


6. Left mouse click on **Upload**

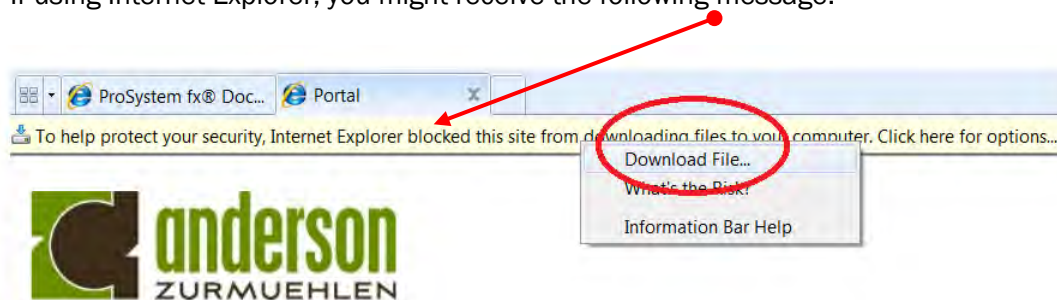


Open files from the Portal

1. Right mouse click on the file
2. Left mouse click on **Download**



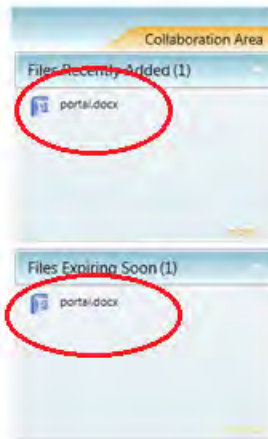
*If using Internet Explorer, you might receive the following message:



If so, right mouse click and select **Download File**

Open a Recently Added File or a File Expiring Soon

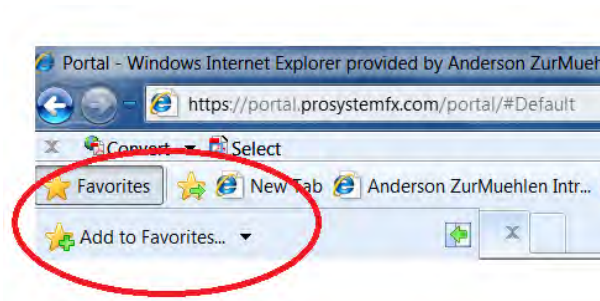
1. Left mouse click on the Document Name



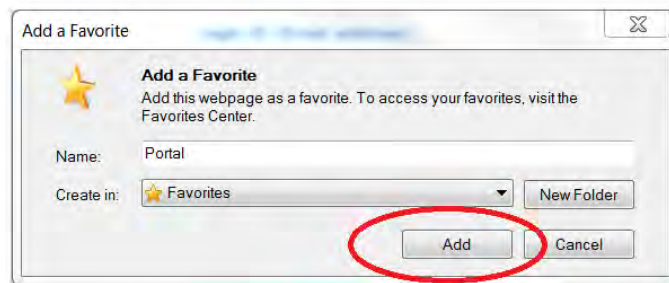
*If using Internet Explorer, you might receive the Download message shown in the "Open files from the Portal" section above. Follow the steps noted to download the file

Save the Portal to your favorites

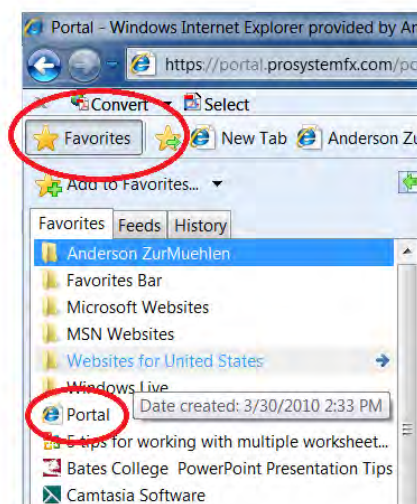
1. Select **Favorites** on your Internet Explorer toolbar
2. Click **Add to Favorites**



3. Click **Add**

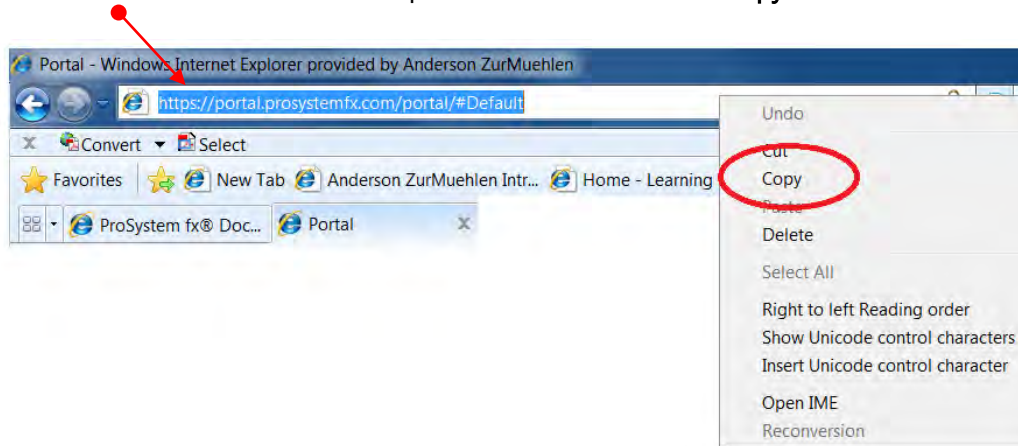


4. Access the Portal from Favorites
5. Left mouse click on **Favorites**
6. Left mouse click on **Portal**

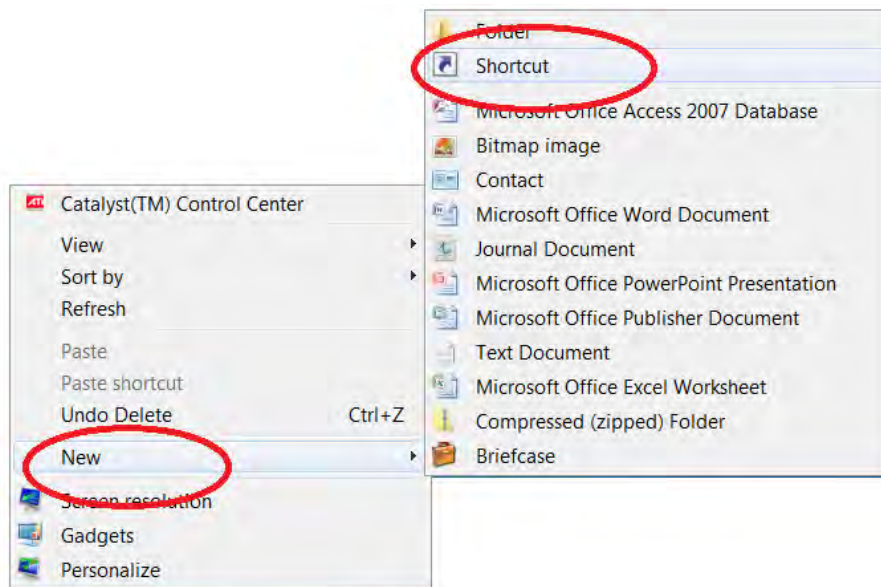


Create a Desktop Shortcut to the Portal

1. Right mouse click on the URL in the Internet Explorer window and select **Copy**

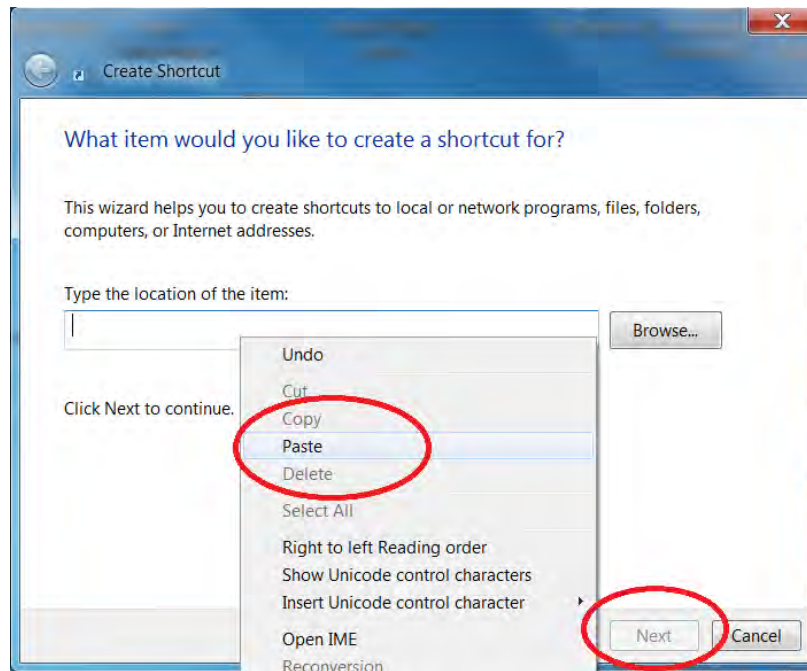


2. Right mouse click on the desktop
3. Select **New**
4. Select **Shortcut**



5. Right mouse click on the location field

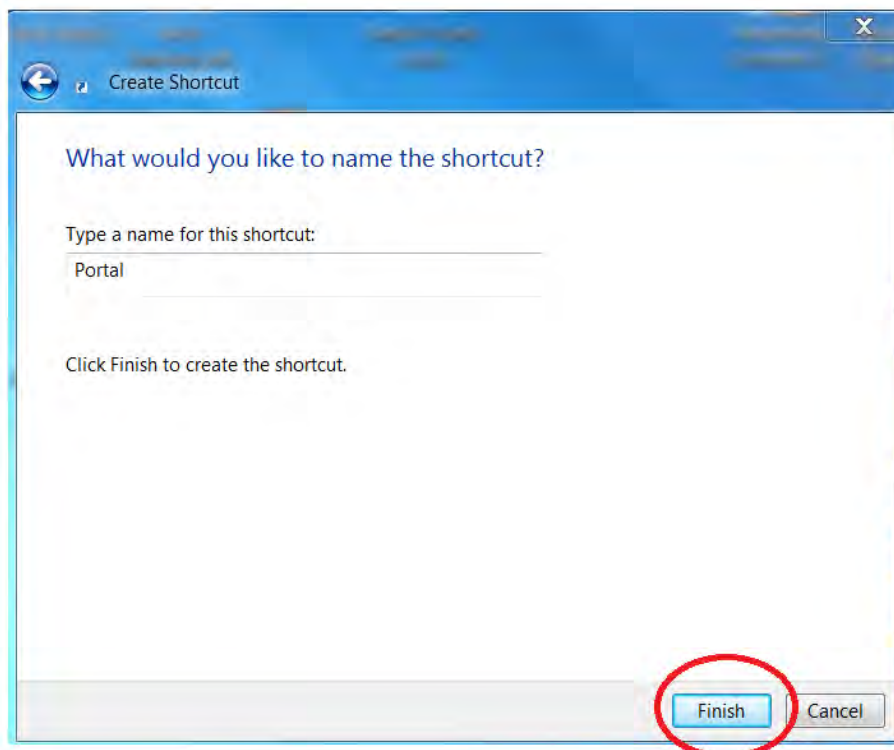
6. Select **Paste**



7. Click **Next**

8. Enter the name of the Shortcut

9. Click **Finish**



If you experience any problems with your portal, please call the Anderson ZurMuehlen help desk at 406-447-3045.