



## *Enhancement Tools for the Paperless World!*

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## New Customer Installation Guide

### CPA SafeMail Version 2.0



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## I. Welcome:

Please read this guide in its entirety prior to installing CPA SafeMail V 2.0. Doing so will help ensure you have positive experience in setting-up your CPA SafeMail account.

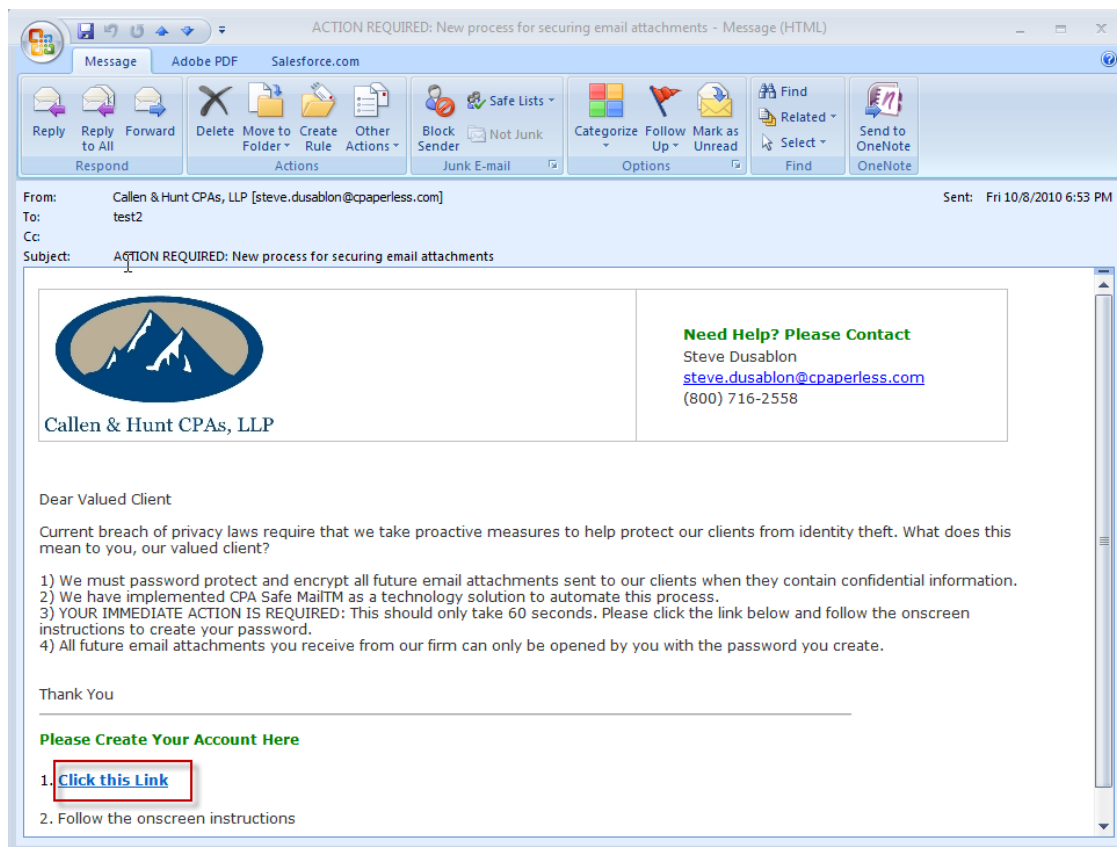
## II. System Requirements:

- **Operating System:** Microsoft Windows XP, Vista or 7. NOT Compatible with Terminal Server or Citrix.
- **Outlook Versions:** Outlook 2007 or Higher
- **Microsoft .Net Framework 2.0 or higher:** Required. Standard with most Windows XP operating systems or higher.

## III. Before You Install The Outlook Plug-In – Create Your Account:

**IMPORTANT:** Each licensed user (Staff & Firm Admin) MUST have a current account created to install the CPA SafeMail V 2.0 Outlook plug-in. A user has a valid account if they have a password created and their APM status is “Accepted”. If you do not have an account, please contact your Firm Administrator and have them add you as a user and send you an invitation to create your account.

1. Your Firm Administrator will add you as a user and send you an invitation to create your account. You should receive an email that looks something like the following. Click the Link to create your account.



2. In Step #1, confirm your contact information.

3. In Step #2, create three (3) security questions and select “Next”.

**Step #2 : Create Your Security Questions**

If you forgot your password you can retrieve it by entering your email address and answering these three Security questions

Security Question 1	Answer
Your Mother's Maiden Name <input type="text" value=""/>	<input type="text" value="jones"/>
Security Question 2 Your Favorite Color <input type="text" value=""/>	<input type="text" value="blue"/>
Security Question 3 City Of Birth <input type="text" value=""/>	<input type="text" value="los angeles"/>

4. In Step #3, create your password and select “Save & Close” to complete the account creation process. **IMPORTANT:** This must be in compliance with your firm’s password policy as displayed in the right hand panel.

1) Review Password Requirements

**Step #3 : Create Your Password**

Enter Password

Confirm Password

2) Create & Confirm password

**Password Requirements (IMPORTANT)**

**Minimum # Of Characters**

Minimum # of Characters

**Include Character Types**

Your password must include ANY combination of three (3) of the four (4) below listed requirements

1. Upper Case Letter
2. Lower Case Letter
3. Number
4. Special Character [View list of available special characters](#)

3) Complete Account Creation

#### IV. Uninstall Any Previously Installed CPA SafeMail Trial:

1. Windows XP and Vista Users
  - a. In Windows, select Start | Control Panel | Add / Remove Programs
  - b. Select CPA SafeMail and then Uninstall
2. Windows 7 Users
  - a. In Windows, select Start | Control Panel | Programs and Features
  - b. Select CPA SafeMail and then Uninstall

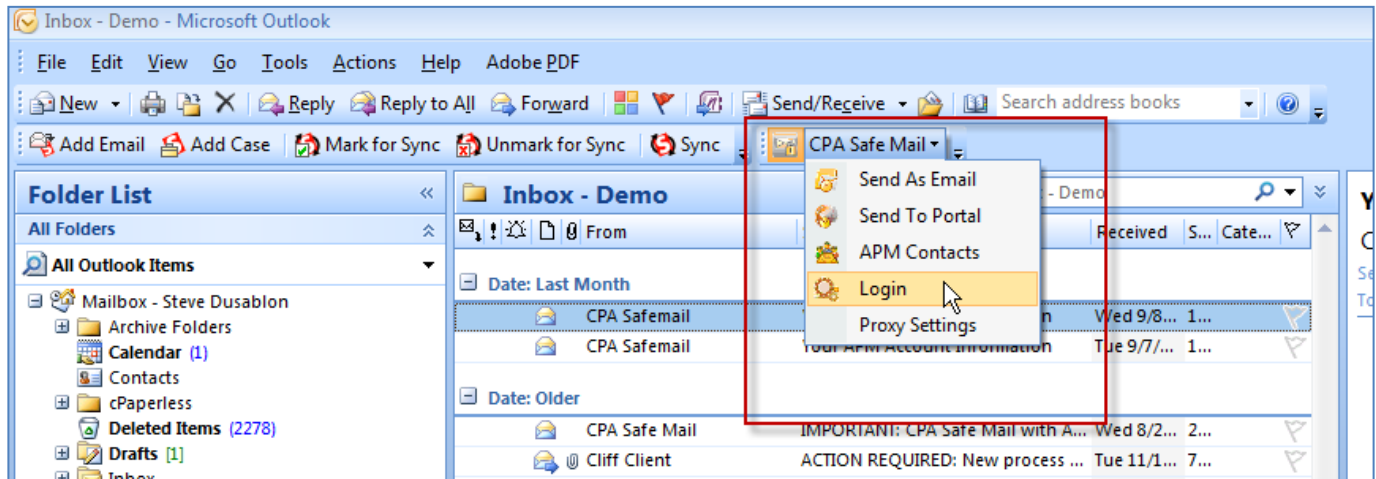
#### V. Download and Install CPA SafeMail V 2.0:

1. **Exit Outlook**
2. Go to [www.cPaperless.com](http://www.cPaperless.com)
3. Select “Download Trials” from the Home Page Menu Items
4. Select the “CPA SafeMail” sub menu
5. Read the onscreen instructions
6. Download and install the software that corresponds to your version of Windows

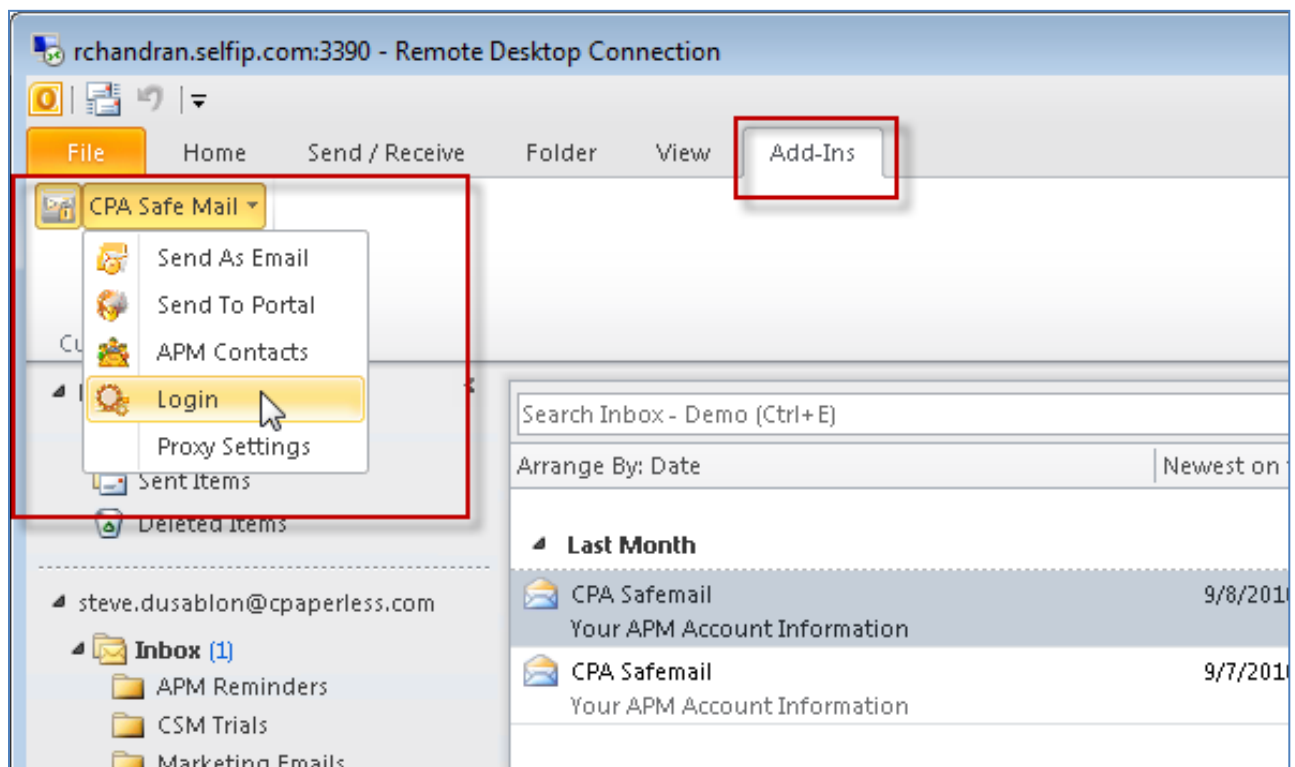
## VI. Launch Outlook and Login to CPA SafeMail:

1. Launch Outlook
2. From your Outlook Home Screen, select the CPA SafeMail drop down menu
3. Select "Login"

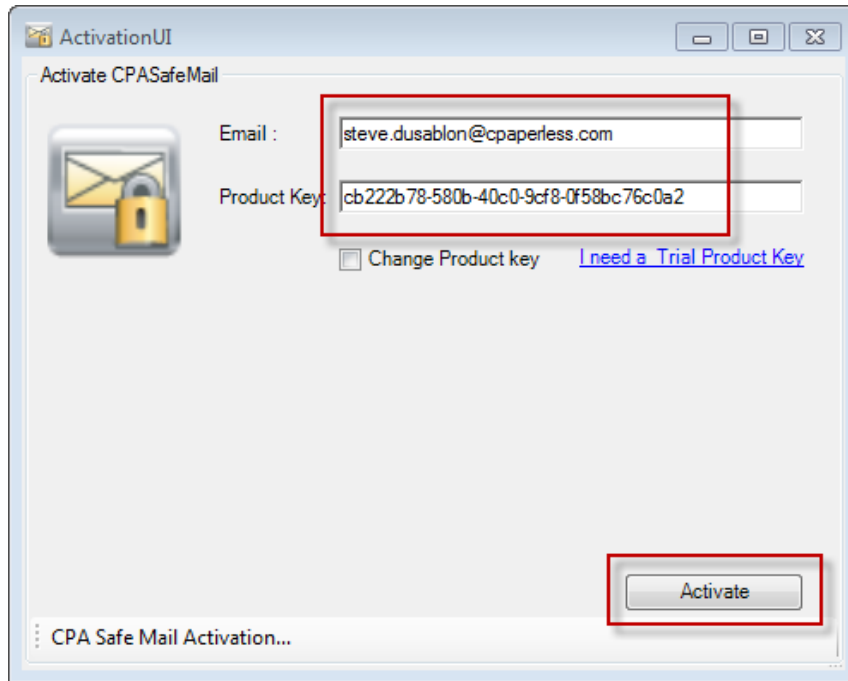
### Outlook 2007 Users:



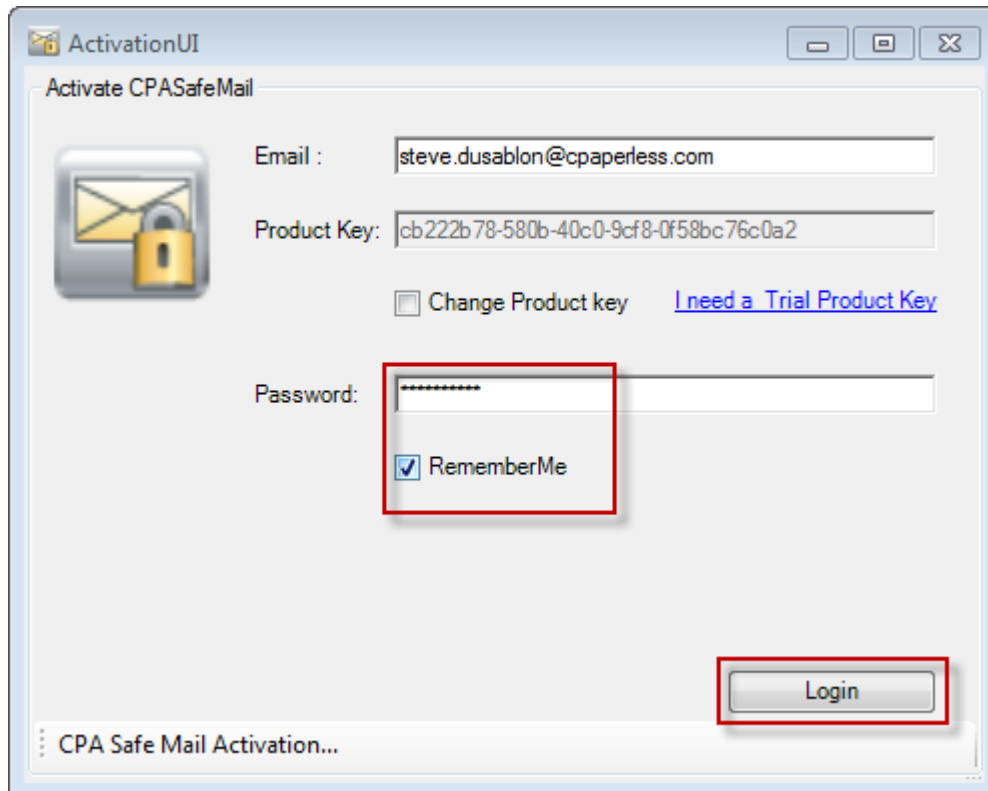
### Outlook 2010 Users:



- 4. Enter your email address and Product Key and select the "Activate" button. If you do not have your Product Key, please contact your Firm Administrator.

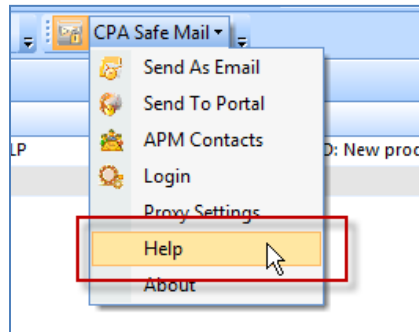


- 5. Enter your CPA SafeMail password, select "Remember Me" and select the "Login" button



## VII. Watch Online Training Videos:

Watch the online training videos by selecting the “Help” icon in the CPA SafeMail toolbar

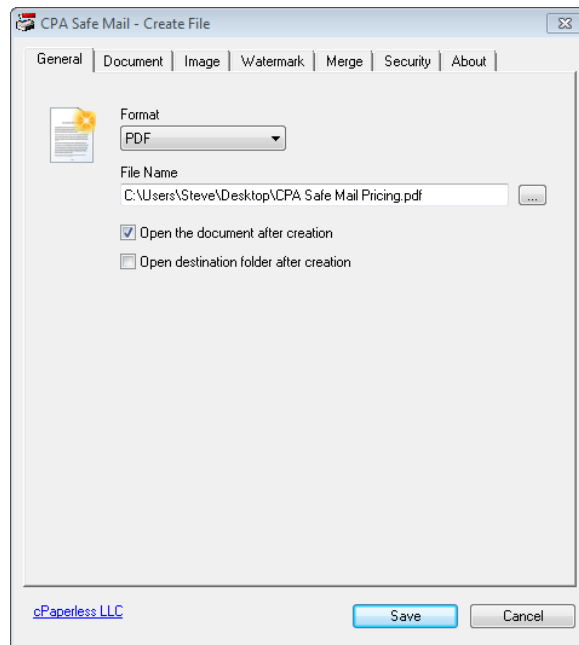


## VIII. Known Issue:

There is one known issue in using CPA SafeMail V 2.0. The issue is caused by bioPDF, which is the 3<sup>rd</sup> party print driver CPA SafeMail uses to convert information to PDF format.

This issue may occur when:

- It ONLY occurs when converting files to PDF format during processing
- Usually only occurs on certain files. When it does, it will continue to occur on that file if you try to process the same file again
- **WHAT DO YOU DO? NOTHING. LET CPA SAFEMAIL FINISH PROCESSING.**
- If you see the below window appear while converting files to PDF format, LET THE PROCESS COMPLETE. The files should process successfully and when completed, close the below window.



## IX. Refer a Friend:

We feel confident that CPA SafeMail V 2.0 will bring value to your firm and your every day working life. At cPaperless, we provide FREE 30 day trials of our software products to all accounting professionals. Anyone can download a FREE 30 day trial by going to [www.cpaperless.com](http://www.cpaperless.com) and selecting the “Download Trials” tab. We would appreciate if you can refer a friend by sending them a link to our website.