



Enhancement Tools for the Paperless World!

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Trial User 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 a positive experience with your CPA SafeMail Trial License.

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. 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

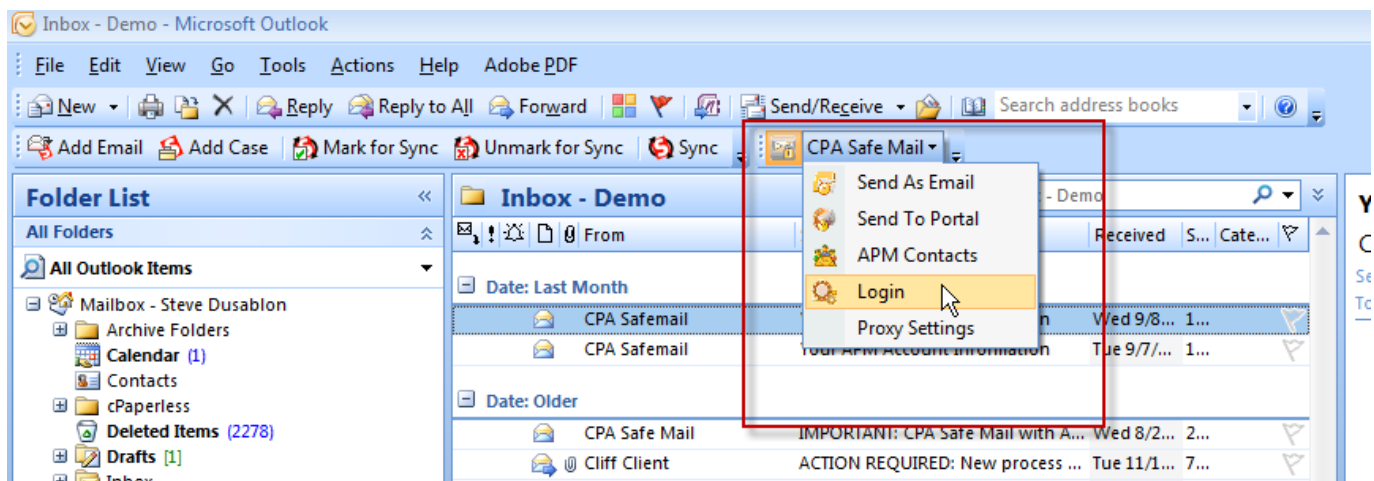
IV. Download and Install The CPA SafeMail Trial:

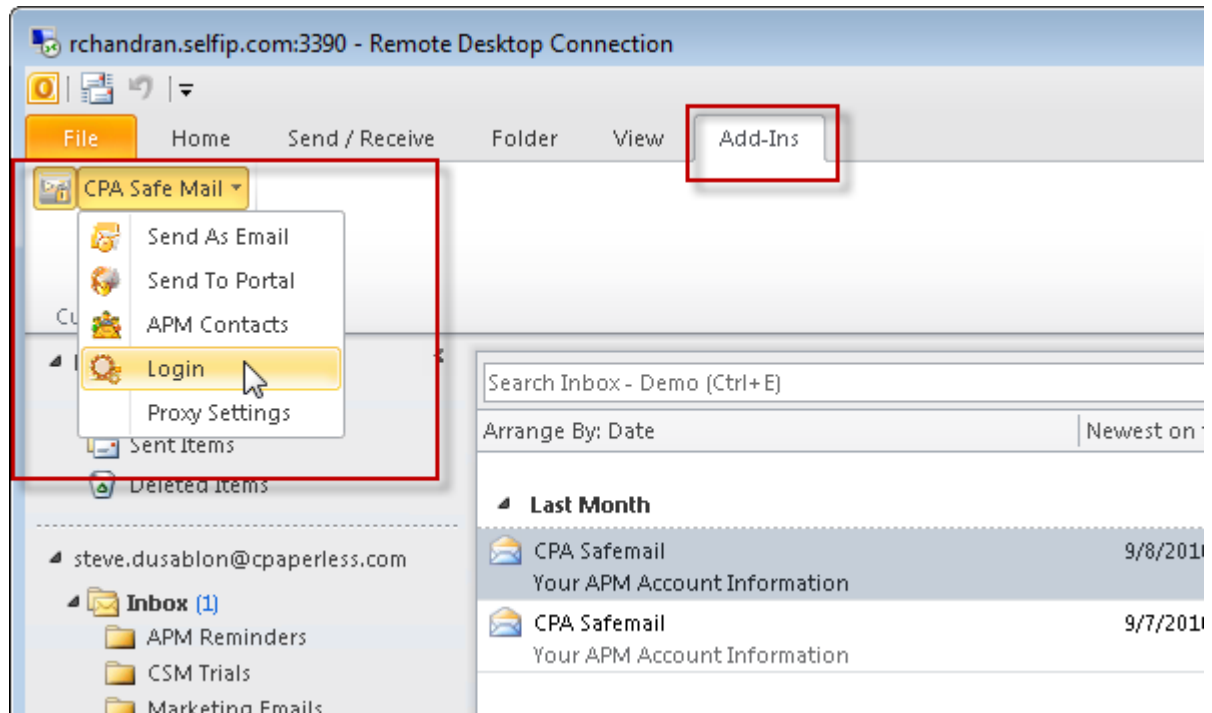
1. **Exit Outlook**
2. Go to www.cPaperless.com
3. Select "Download Trials" from the Home Page Menu Items
4. Select the "CPA SafeMail" sub menu
5. Read the onscreen instructions
6. Download and install the software that corresponds to your version of Windows

V. Launch Outlook and Login to CPA SafeMail:

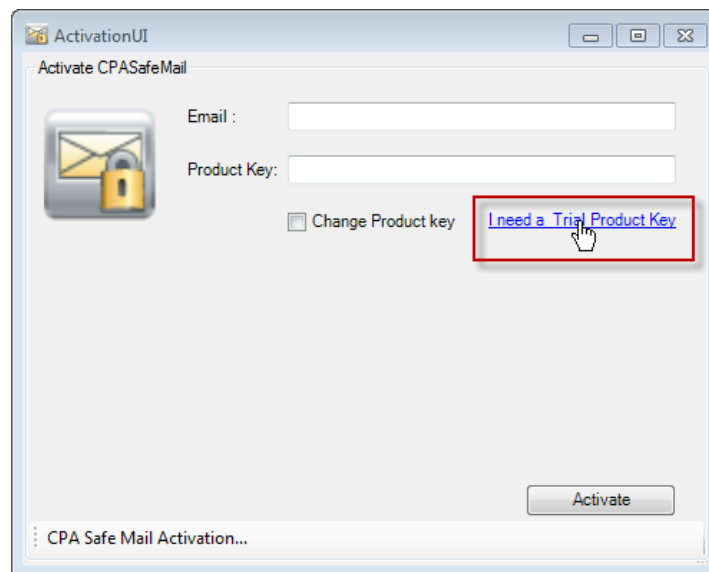
1. Launch Outlook
2. From your Outlook Home Screen, select the CPA SafeMail drop down menu
3. Select "Login"

Outlook 2007:



Outlook 2010:

4. Select "I need a Trial Product Key"



5. Register by completing the Form and select "Submit and Register". **WARNING:** If you provide fictitious User information your trial license will be deactivated immediately.

TrialRegistration

Please Register with CPA Safe Mail to get your FREE Trial Key
All Fields are mandatory

First Name: Steve

Last Name: Dusablon

E-Mail: test5@cpaperless.com

Password: *****

Confirm Password: *****

Phone Number: 8007162558

Company Name: cPaperless

Number of Employees: 12

Product Key: 63ad7740-9fa5-41a8-a5a6-4f2ffb4ad31a

Cancel Submit and Register

6. Ensure that “Remember Me” is selected and then select the “Login” button.

ActivationUI

Activate CPASafeMail

Email : test5@cpaperless.com

Product Key: 63ad7740-9fa5-41a8-a5a6-4f2ffb4ad31a

Change Product key

Password: *****

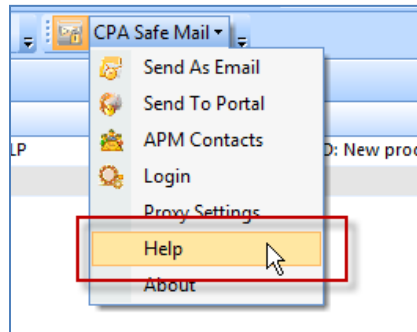
RememberMe

Login

CPA Safe Mail Activation...

VI. Watch Online Training Videos:

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

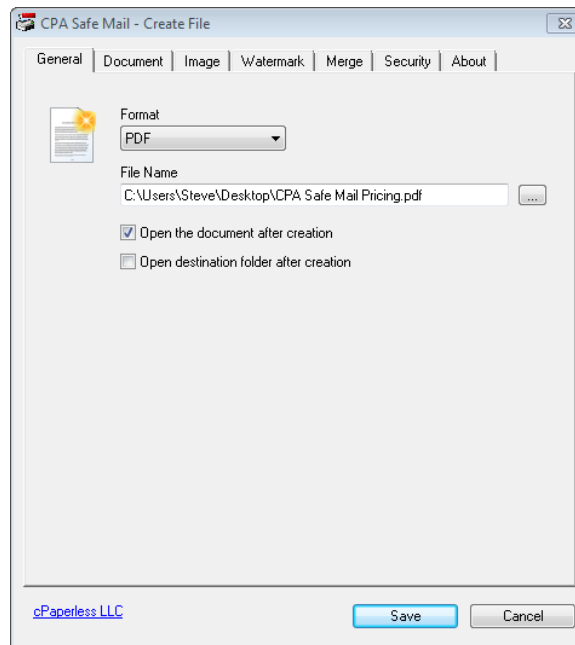


VII. Known Issue:

There is one known issue in using CPA SafeMail V 2.0. The issue is caused by bioPDF, which is the 3rd 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.



VIII. 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 and selecting the “Download Trials” tab. We would appreciate if you can refer a friend by sending them a link to our website.

