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cPaperless – CPA SafeMail

Isaac M. O'Bannon • Dec. 01, 2011

cPaperless – CPA SafeMail

2012 OVERALL RATING ★★☆☆☆



800-716-2558 ext. 100

www.cPaperless.com

2012 Overall Rating 4.25

Best Fit

Professional firms seeking a stand-alone system that will make it easy for their clients to send files to them, as well as securely share returns and other documents with their clients.

Strengths

- Simple for clients and firms to use
- Strong security customization options
- Customizable firm branding
- Two-way firm/client sharing and collaboration
- Dependable hosting, security and uptime

Potential Limitations

- Unique file structure on portal is not folder-based
- Little direct integration with outside programs

Summary & Pricing

CPA SafeMail takes a different approach to client collaboration and portals, basing it on the workflow of email, which makes it intuitive for firm users and, just as important, simple for clients. The system can be used alongside any tax, accounting and document management applications and was specifically designed for helping firms receive source documents from clients and deliver returns and other documents to their clients. Pricing is based on the modules chosen by the firm and the number of users. The Outlook Plug-In only, which offers direct, protected file sharing without the portals, costs \$100 per year for a single user and \$800 per year for a 10-person firm. The Outlook Plug-In plus the Automated Password Manager costs \$1,000 per year for a 10-person firm. Adding the Client Portals to the bundle brings the total to \$1,800 for the same number of staff. Additional users can be added with discounted rates; full pricing details are available on the vendor's website.

Firm User Experience 4.5

Client User Experience 4.25

Portal Capabilities 4.5

Technical Aspects 4.25

Help/Support 4

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