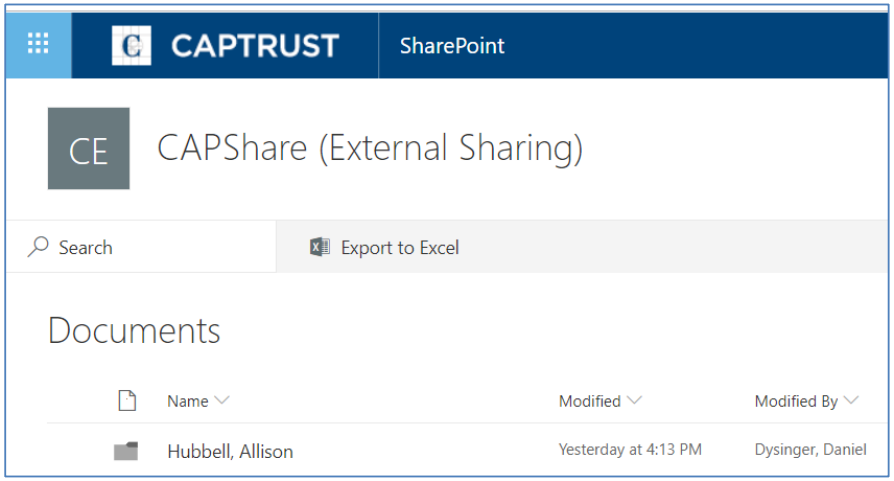
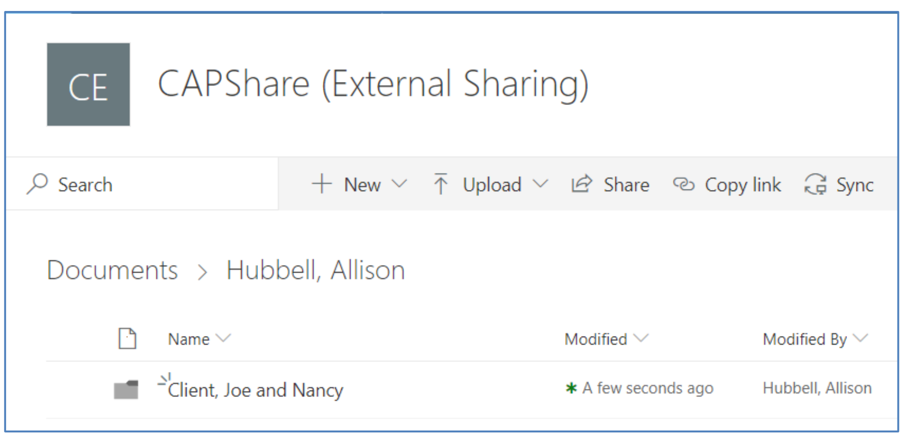
- **Click on this link to get to your personal ShareFile folder:**
    - https://captrustadvisors1.sharepoint.com/sites/CAPShare/Shared%20Documents/Forms/AllItems.aspx
    - You should see a folder with your name on it:

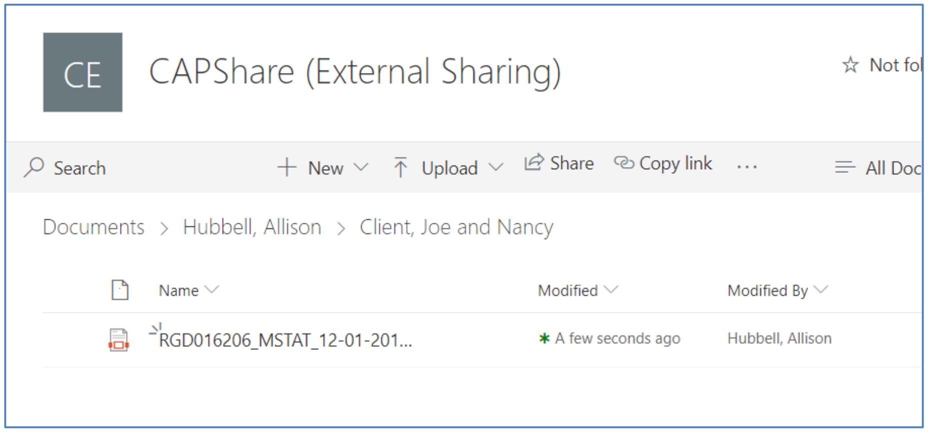


- **Click on your name:**
    - This is where you will create custom folders for your clients to house shared files

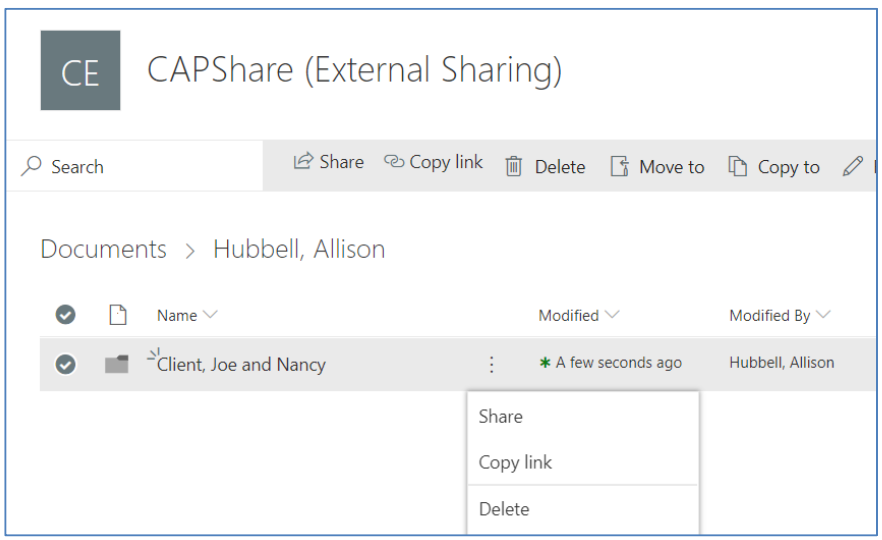
- **Click on "+New" to make a folder for your client:**



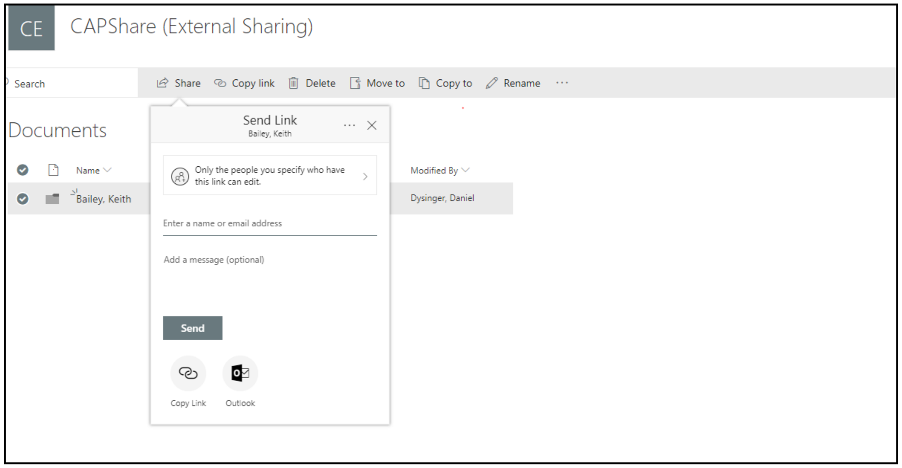
- **Click on the client folder:**
  - Drag and drop any files to this folder intended for the client to view and download:



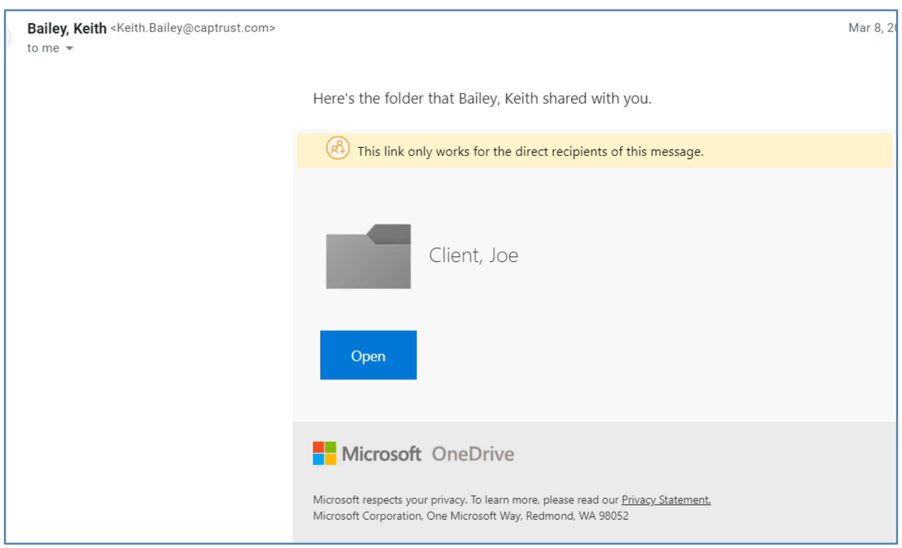
- **Click back out to your main folder and then click on the three dots to the right of the Client name:**



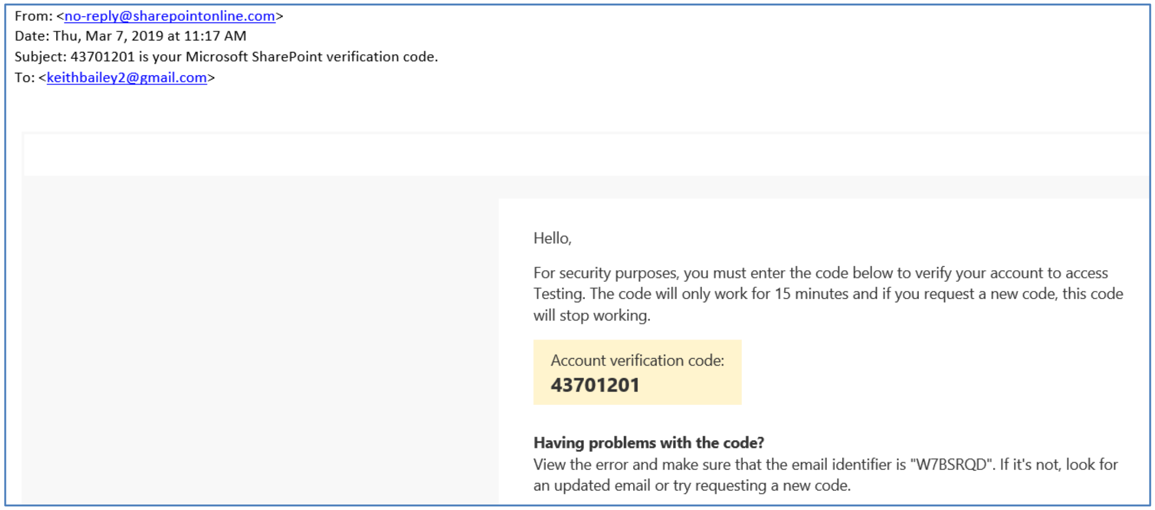
- **Click "Share":**
- **IT IS IMPORTANT THAT YOU <u>ONLY</u> SHARE THE CLIENT'S FOLDER WITH THE CLIENT, <u>NOT YOUR ENTIRE FOLDER</u>**
  - A window will pop-up to allow you to add your client's email address and a message
  - Be sure to tell your client to that they will receive a verification code when they click the link and that they should check their Spam folder in case the code email goes there



- **Hit "Send" and your client will get an email:**



- **Once your client clicks "Open" in the email, another email will be generated with a verification code:**


From: <no-reply@sharepointonline.com>
Date: Thu, Mar 7, 2019 at 11:17 AM
Subject: 43701201 is your Microsoft SharePoint verification code.
To: <keithbailey2@gmail.com>

Hello,

For security purposes, you must enter the code below to verify your account to access Testing. The code will only work for 15 minutes and if you request a new code, this code will stop working.

Account verification code:
43701201

Having problems with the code?
View the error and make sure that the email identifier is "W7BSRQD". If it's not, look for an updated email or try requesting a new code.

- **They will enter the verification code and be taken into the ShareFile folder and can view and download the files**