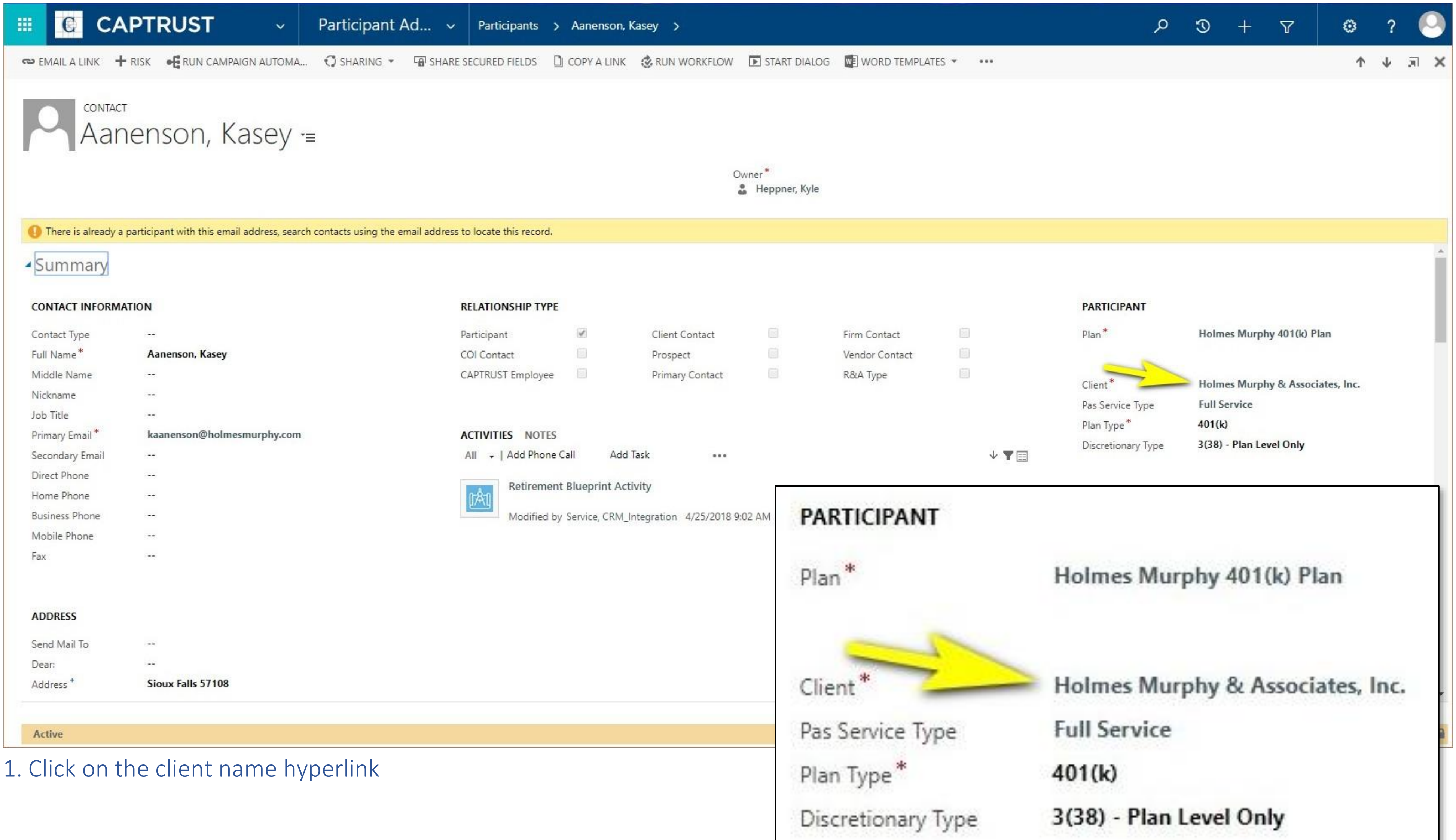
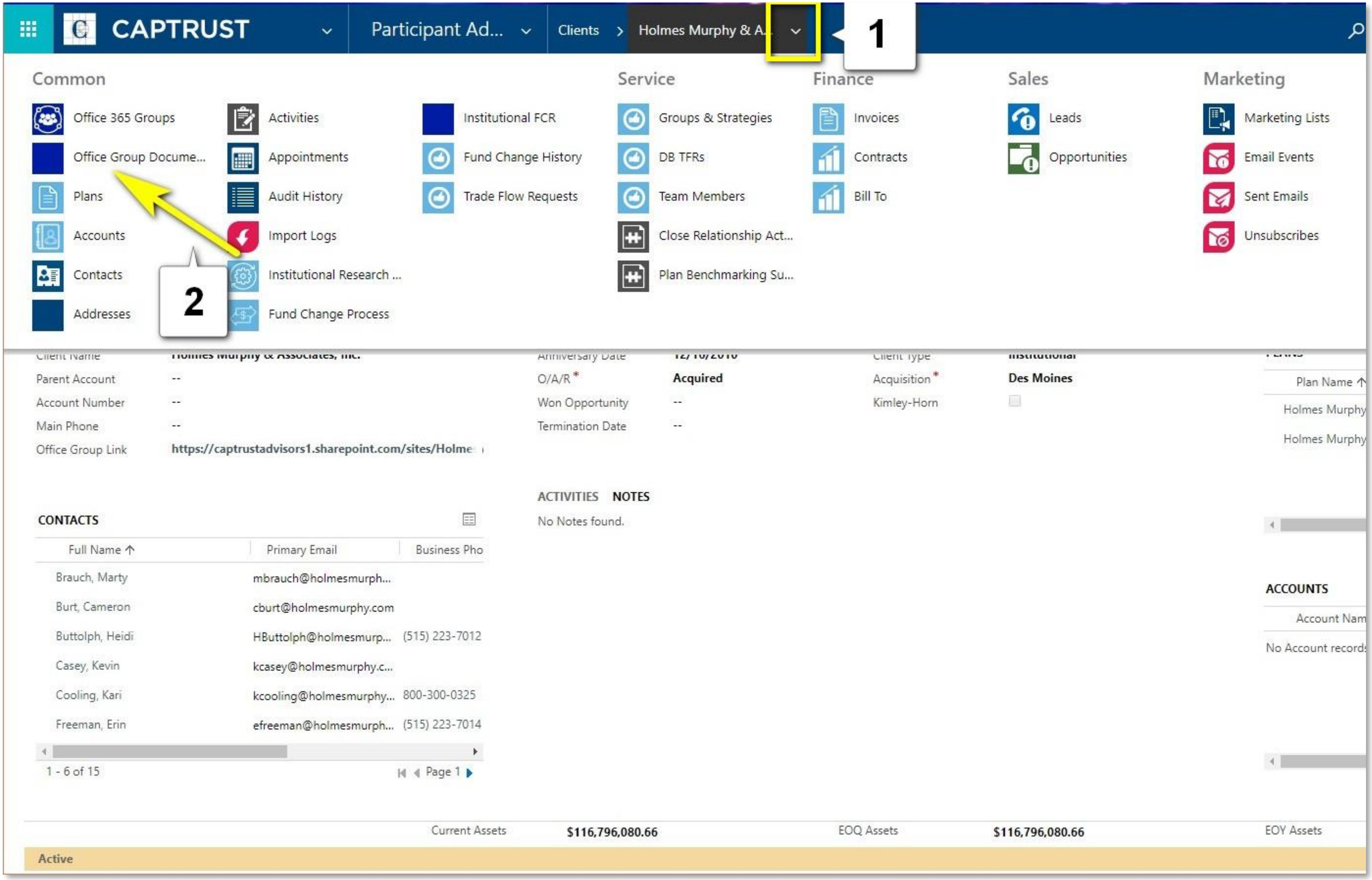
How To Access Client Files in CapConnect



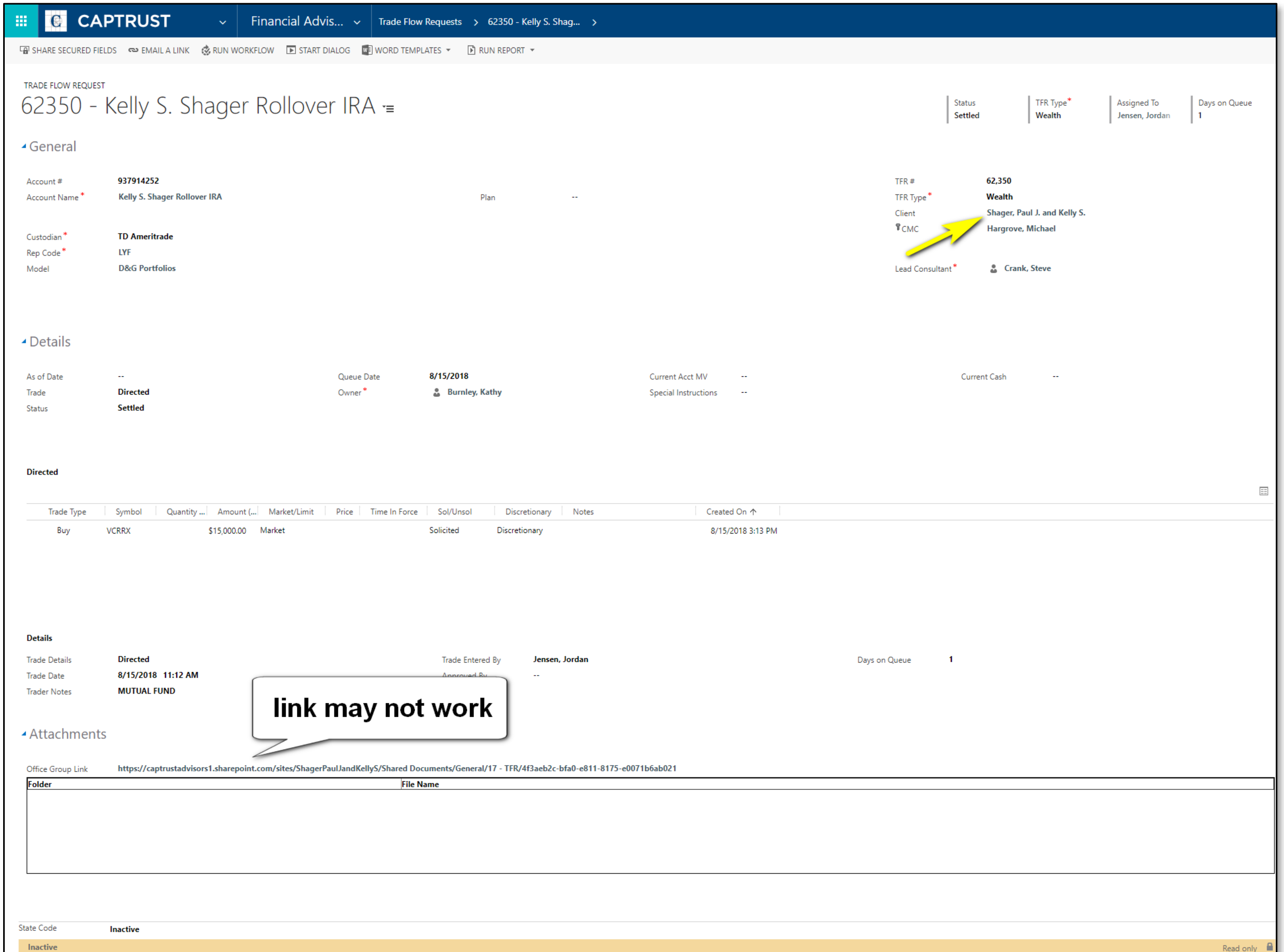
1. Click on the client name hyperlink



2. (above) Click on the down arrow in uppermost nav bar next to client name to reveal expanded menu and then click on Office Group Documents on the left.

3. (above) Select the folder on the left to reveal a listing of files within on the right.

The process is similar with Trade Flow Requests:



1. Click the client name hyperlink in upper right
2. Continue via 2-3 above