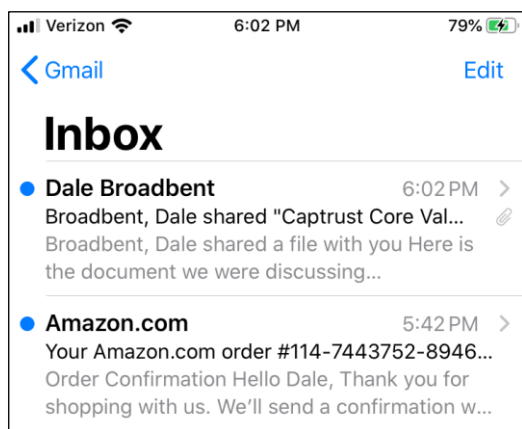


CAPSHARE QUICK REFERENCE GUIDE

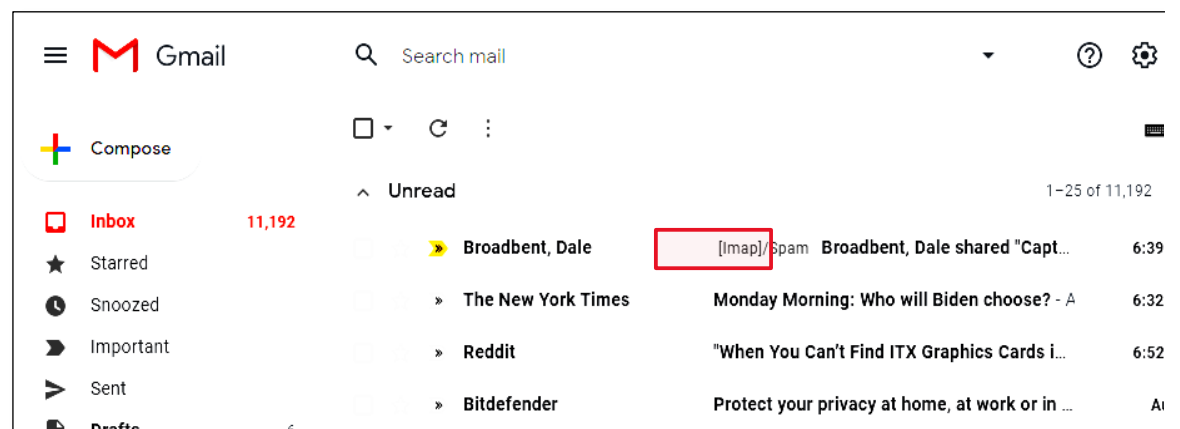
Thank you for using CAPShare! You and your Advisor (or Client Management Consultant) can use it to send files back and forth. To simplify your experience with CAPShare, please note the following tips:

1. THE FIRST EMAIL

- When your Advisor or Client Management Consultant wants to send files to you, he or she will send you an email.



Apple Mail



Gmail – notice it says “[Imap]/Spam”

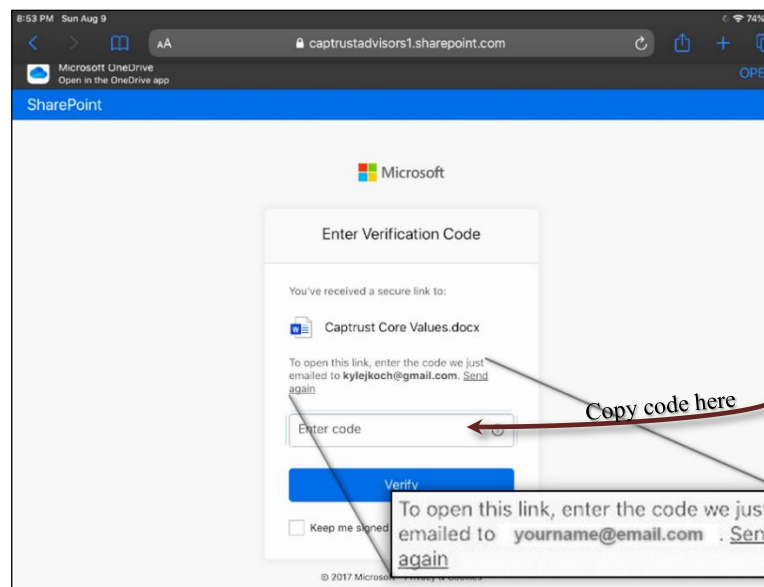
- The email may take a few minutes to receive.
- Please check your Spam folder if you do not see it come through. Gmail has a spam filter that often marks these emails as spam. See [Troubleshooting steps](#) at the end for some tips on what to do if you cannot find any of the emails sent to you.
- When you open the email, all you need to do is click on the blue Open button:

Open

2. Verify your identity

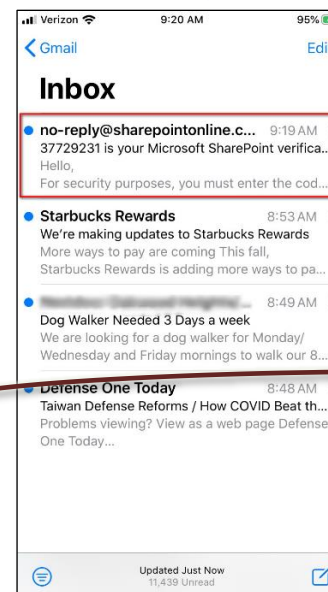
The minute you click Open, two things happen:

1. You are taken into CAPShare:

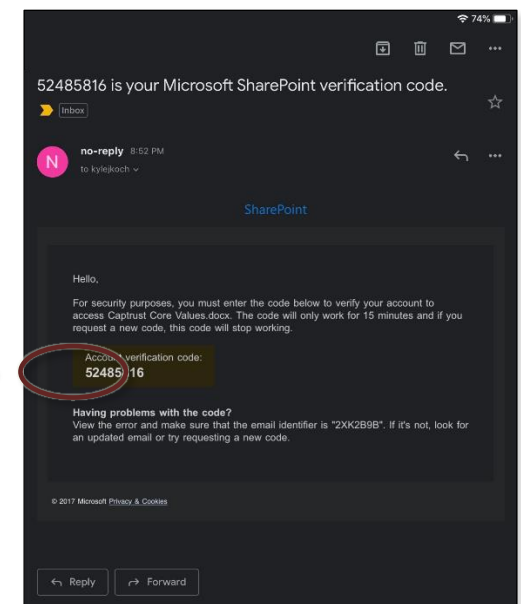


CAPShare code entry screen - Apple Mail (iPad)

2. A second email is sent to you from no-reply@sharepointonline.com with a verification code:



Verification code – (iPhone)



Verification code email – Apple Mail (iPad)

- Copy the verification code and click Verify
- If it is a folder, you will be able to upload files to it as well as view any documents already there.

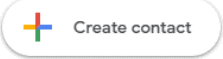
3. Troubleshooting – First email cannot be found

- Check for an email directly from your advisor (or Client Management Consultant) in the format first.last@captrust.com.
- If you cannot find the initial email sent from your advisor (or Client Management Consultant), please first verify with him/her that they have your email spelled correctly! It might seem obvious to you, but it may not be to them.
- Make sure you are checking the right Inbox - if you have more than one email address, you may be looking in the wrong place. Verify which email address you provided your advisor, and which inbox you are checking.
- If everything above checks out and you still cannot find the email, please check junk and spam folders.
- You may also add no-reply@sharepointonline.com and @captrust.com to your whitelist or contact list (see next section) to avoid these emails being marked as spam.

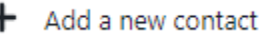
4. Troubleshooting – Adding to Your Contacts

- **Adding CAPTRUST to your contacts can keep emails from being sent to spam. Here is how to do this:**
- Search for no-reply@sharepointonline.com in your email spam folder.
- To prevent it from being marked spam, add no-reply@sharepointonline.com to your email contacts.

GMAIL:

Click the menu button next to your account avatar and select Contacts. In there, click  and choose “Create a contact.” Fill in the email address and choose Save.

YAHOO:

Click the Contacts button under the Home button. Look all the way to the bottom of the window and you’ll see  in the bottom right corner. Click it, fill in the email, and click Save.

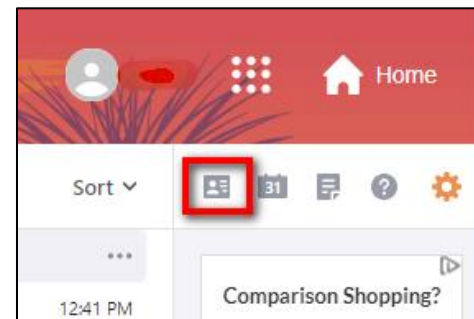


Figure 2- Yahoo Contacts

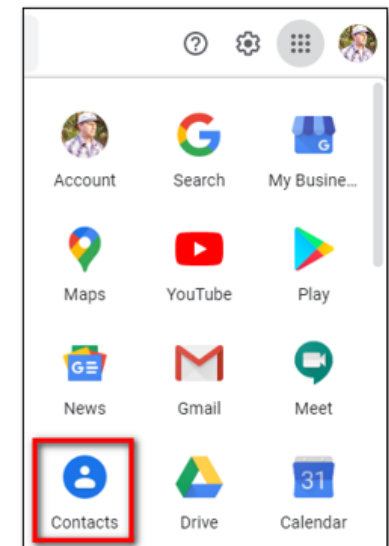
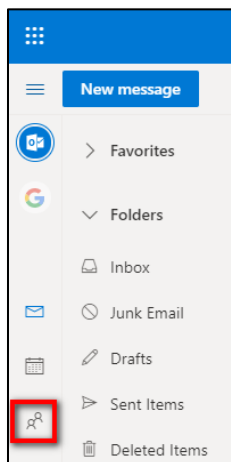


Figure 1- Google Contacts



HOTMAIL:


Click the Contacts button on the left edge of the left navbar and then the  button at the top. Fill in the email address and then click the Create button at the bottom.

Figure 3- Hotmail Contacts