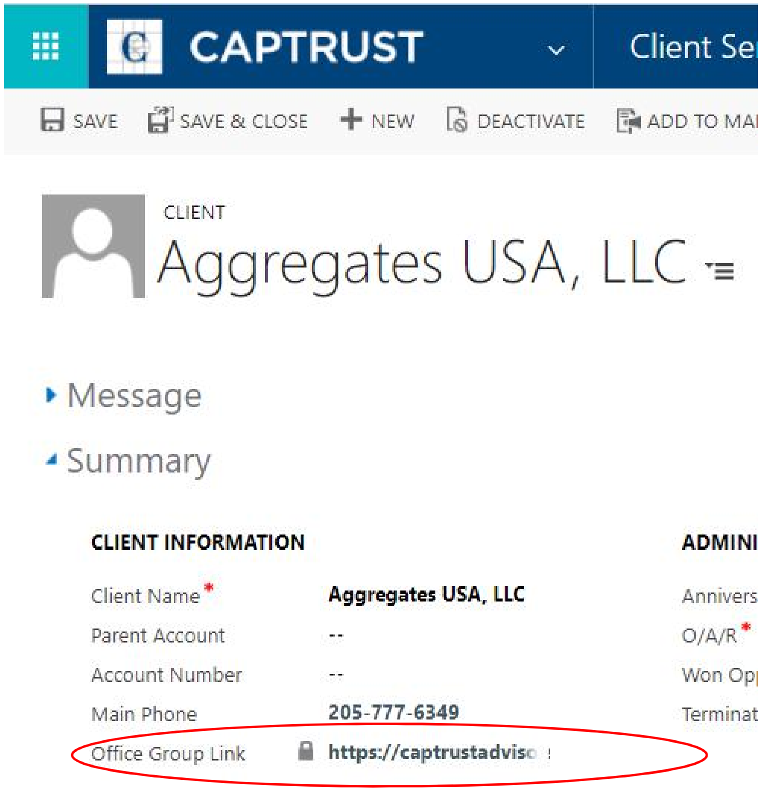
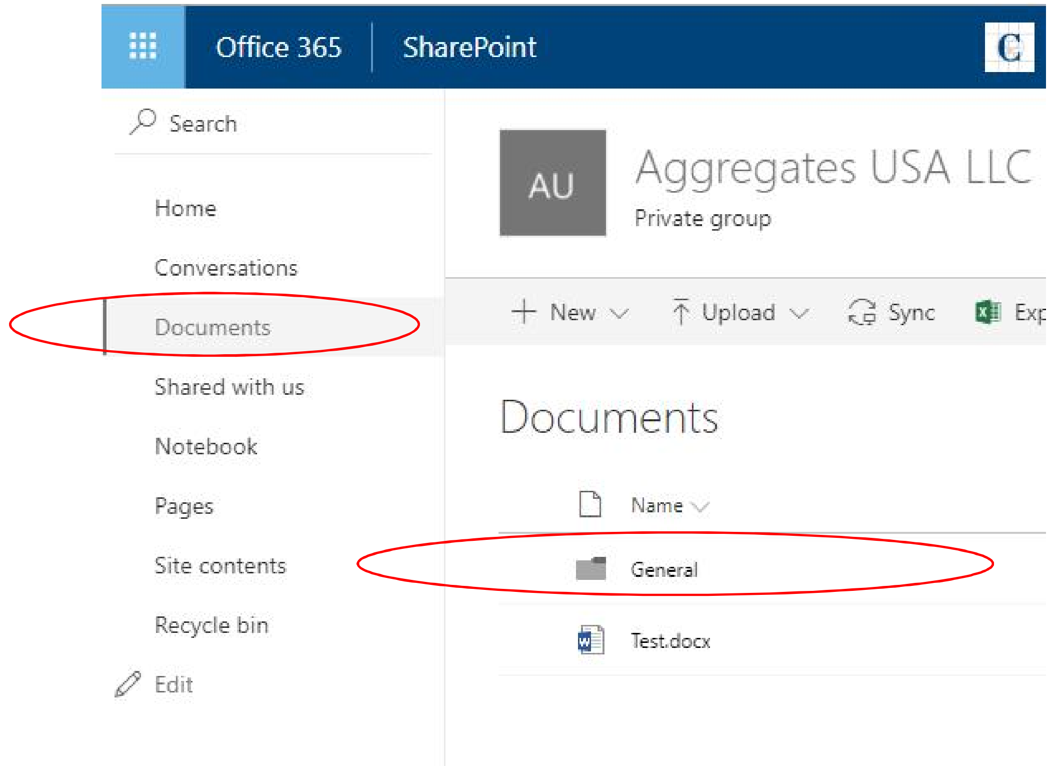
HOW TO SYNC CLIENT OFFICE GROUP FILES

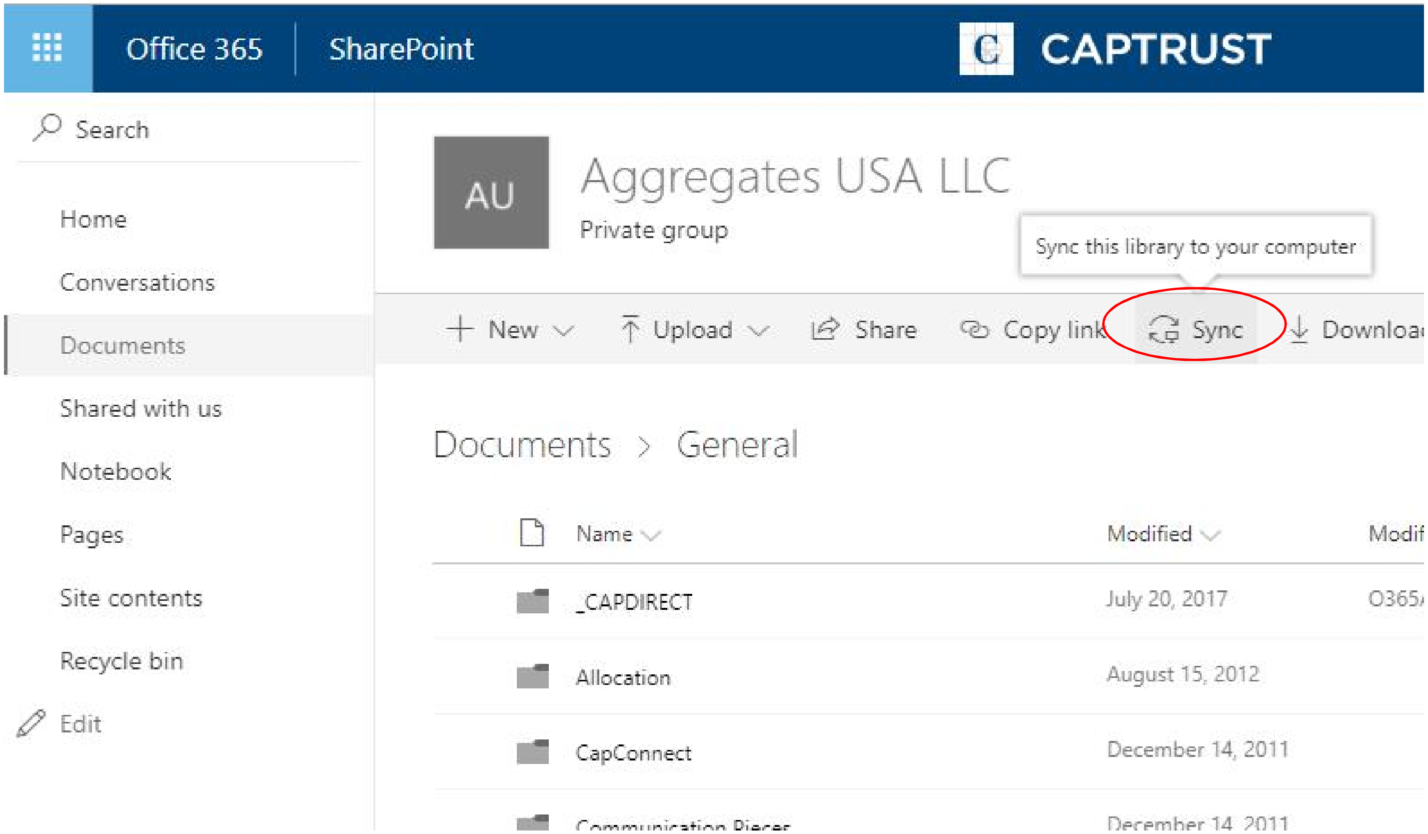
1. Go to CAPConnect and search for your client. Click on their Office Group Link.



2. Click on "Documents" and then click on "General"

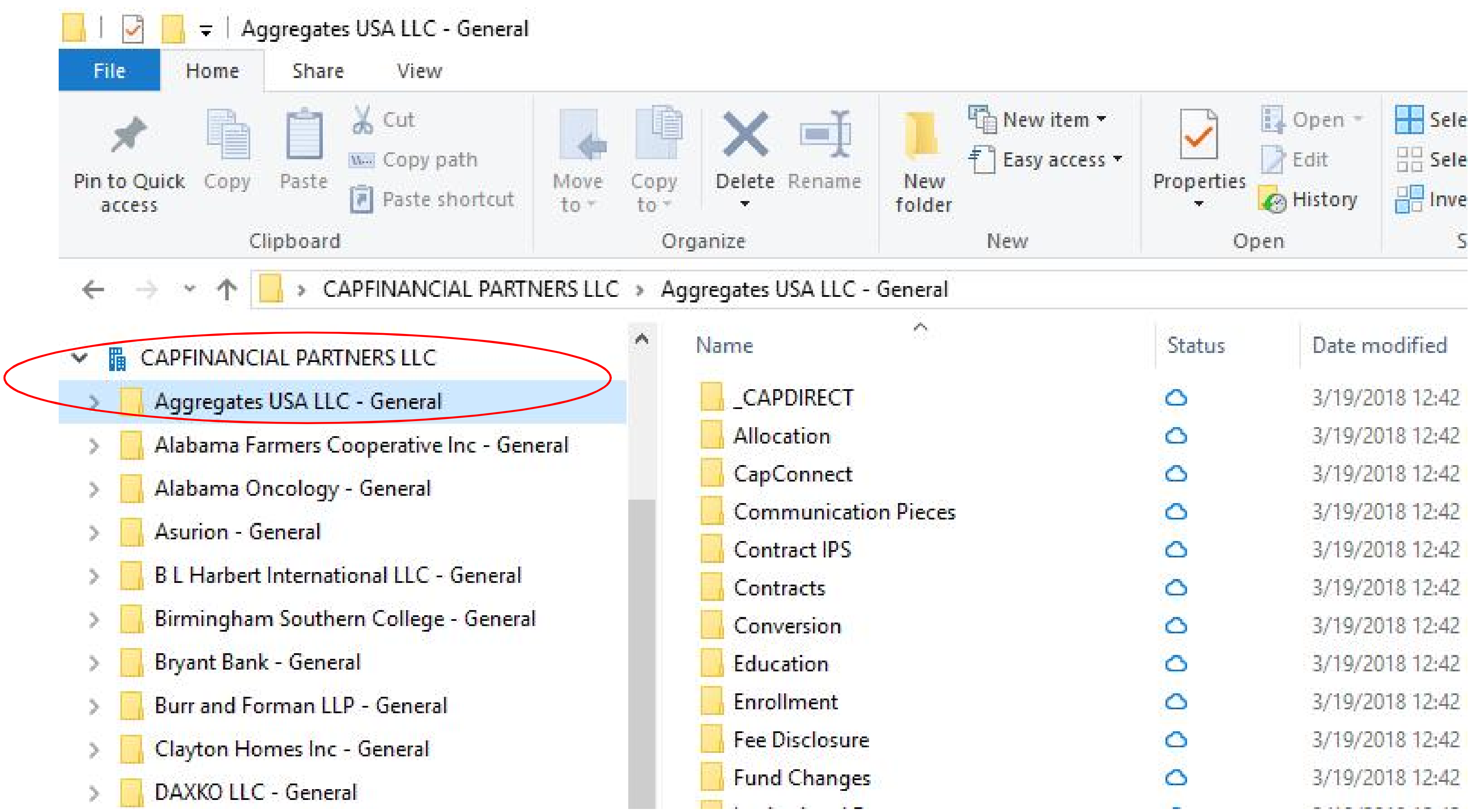


3. Click the "Sync" button in the toolbar. A window will pop up that confirms you are syncing to your PC. You can then close the window.



HOW TO SYNC CLIENT OFFICE GROUP FILES

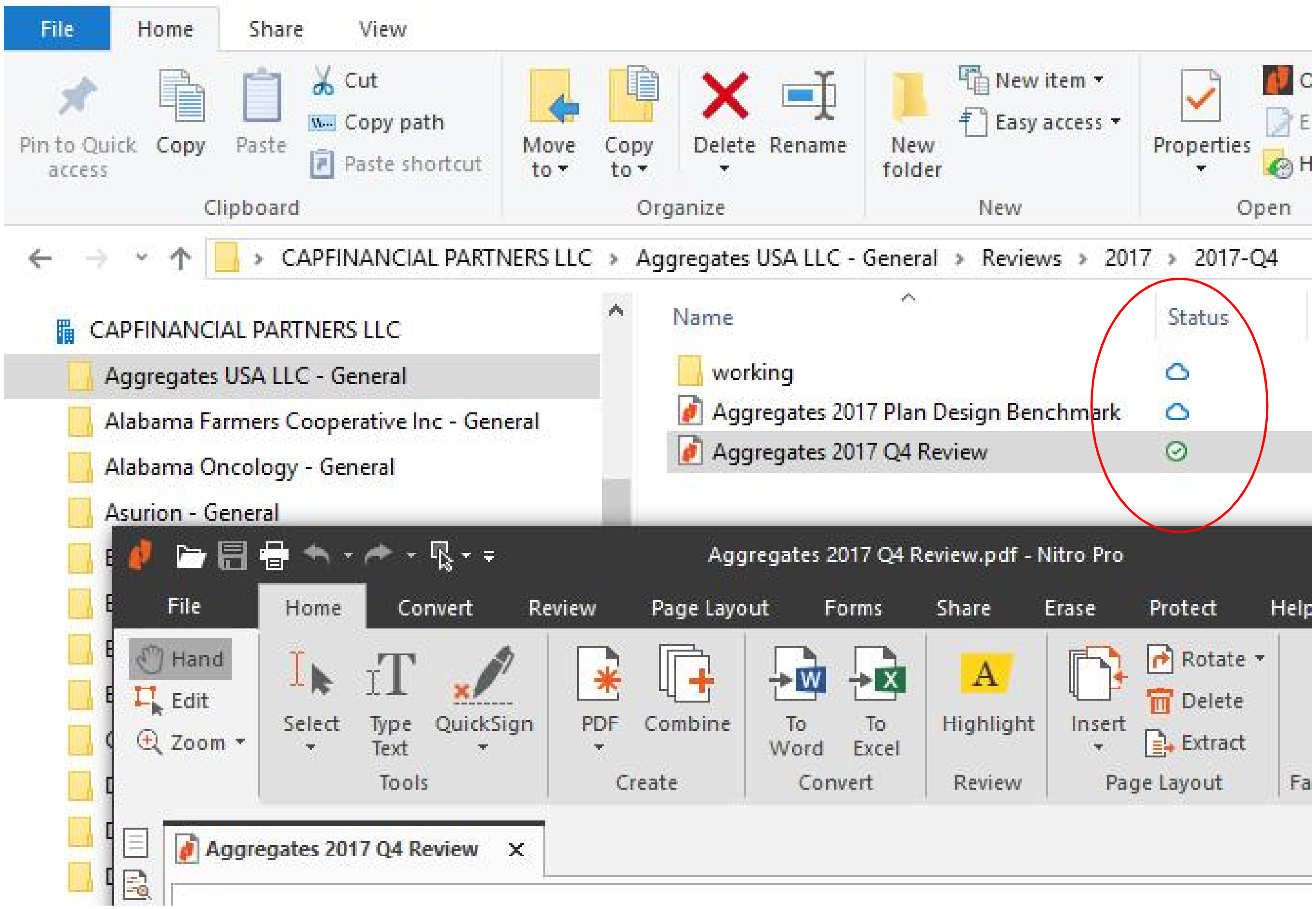
4. Open Windows Explorer and you should now see your Client folder appear under the "CAPFINANCIAL PARTNERS LLC" section. You may need to expand the section to see your folder. You can now, open, save, drag and drop, and delete from this folder and it will sync to OneDrive.



CAPTRUST

HOW TO SYNC CLIENT OFFICE GROUP FILES

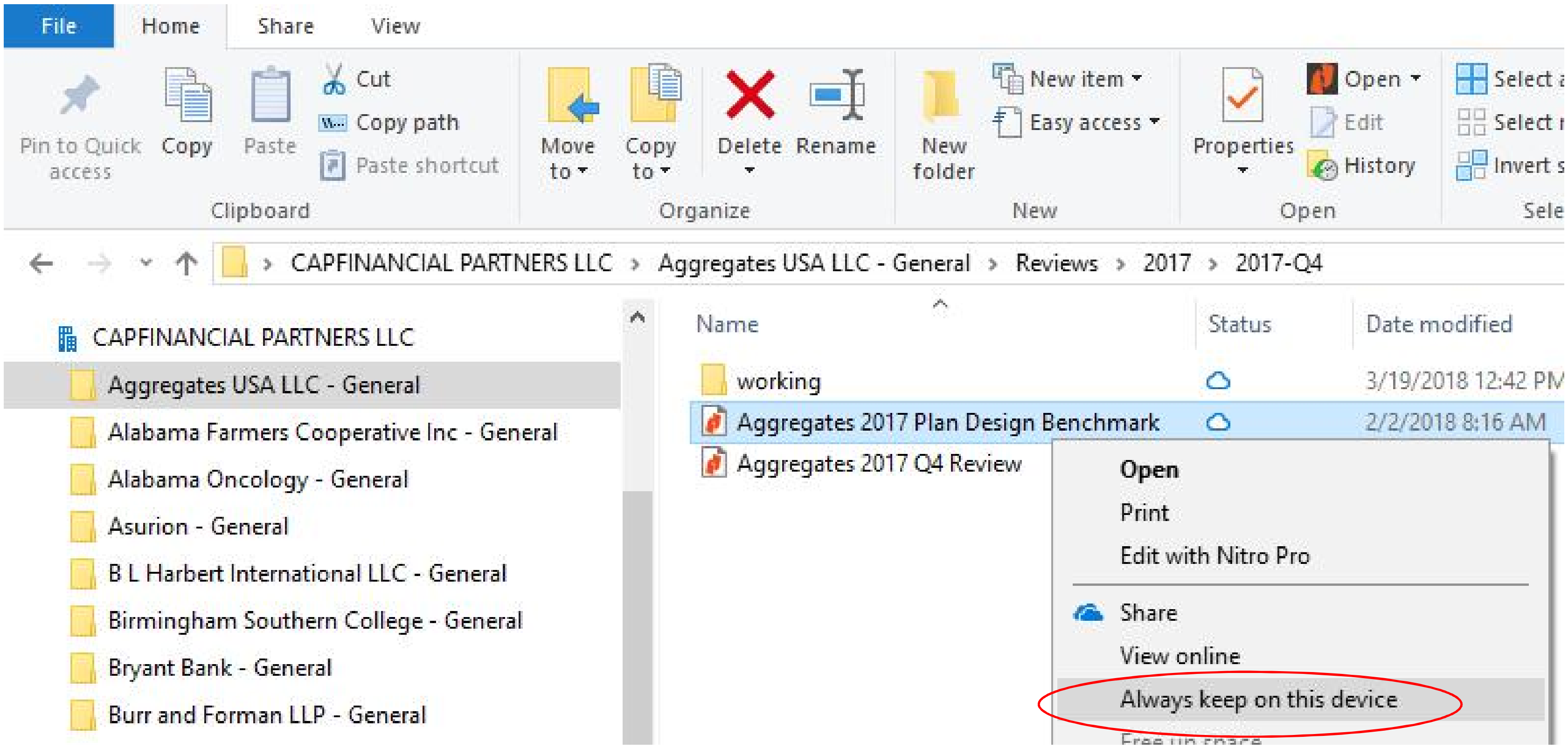
When the status window shows a blue cloud then the file is saved in the cloud only and not locally. When you open a file it downloads it to your machine and opens it, the status will change to a green checkmark in a white circle which tells you the file is now opened locally.



CAPTRUST

HOW TO SYNC CLIENT OFFICE GROUP FILES

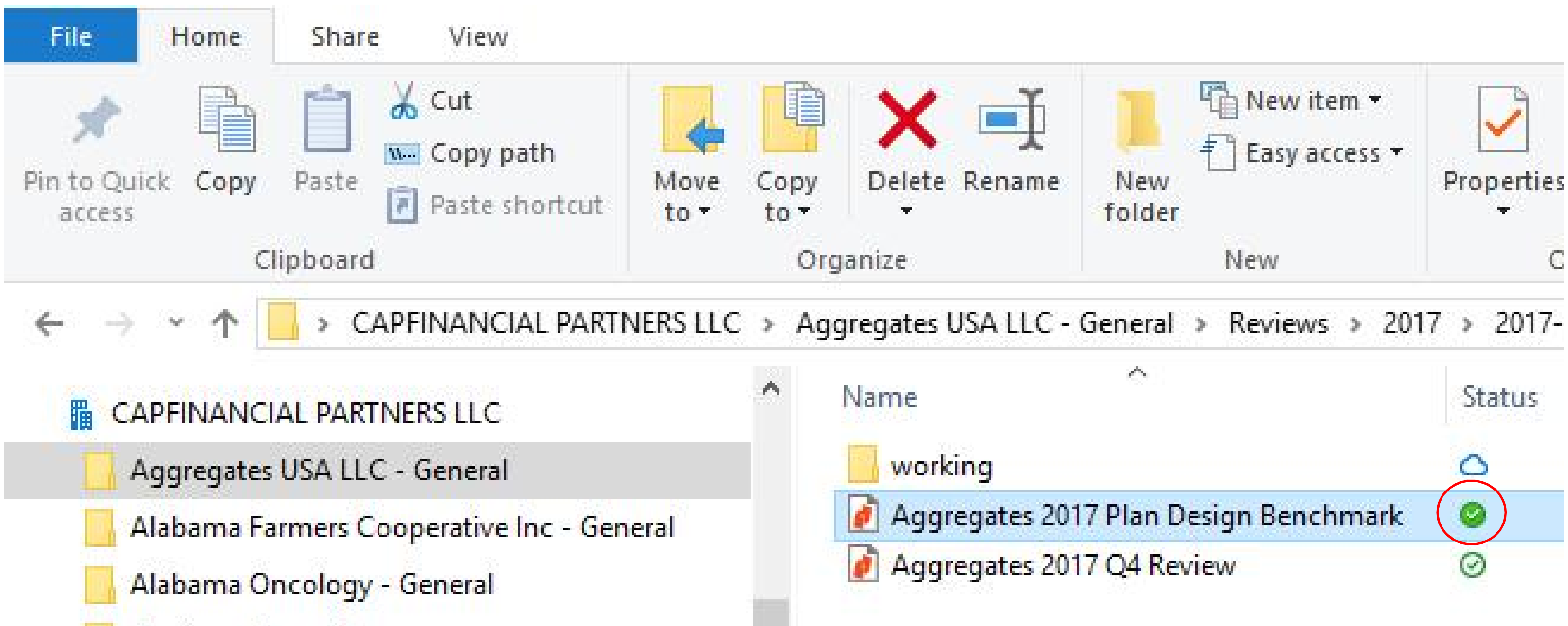
If you would like to work on a file(s) offline when you do not have access to the internet, you can download the file(s) to your machine. Right click on the file(s), select "Always keep on this device"



CAPTRUST

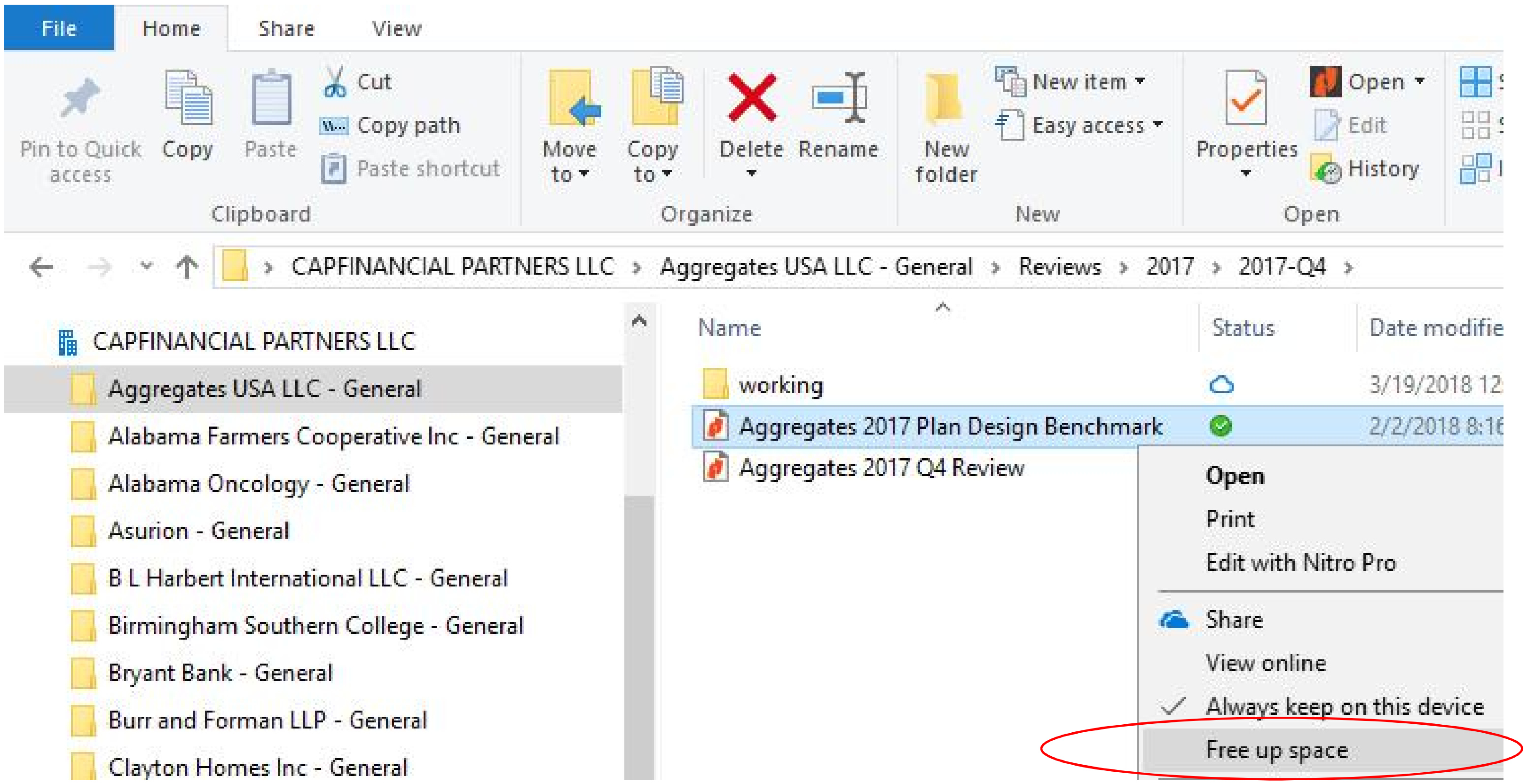
The file(s) will download and then the status will change to a green checkmark in a green circle. This indicates the file(s) is now saved locally. Any changes you make to the file(s) will sync to the cloud version once you connect again online.

Saving files locally will take up space on your machine, you do not want to save all your files locally, only those you need to work with while you are offline.



CAPTRUST

To stop saving a file(s) locally and change it back to only saving in the cloud, right click on the file(s), select "Free up space". The status icon will change from the green check back to the blue cloud indicating it is no longer saved locally on your machine.



CAPTRUST

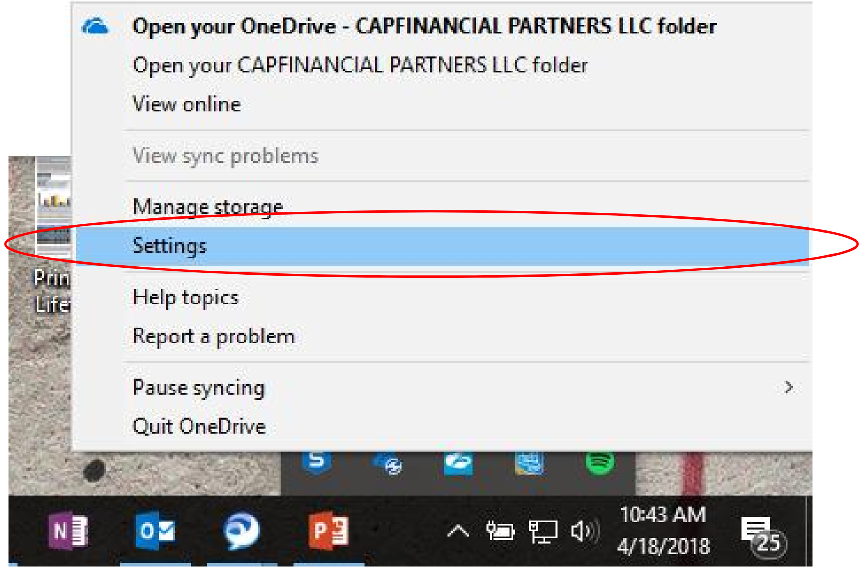
HOW TO UNSYNC CLIENT OFFICE GROUP FILES

Please note if you delete a file without unsyncing first it will delete from sharepoint!

If you would like to remove a synced folder from your file explorer you MUST first unsync the file.

Select the caret on your task bar and right click on the blue clouds.

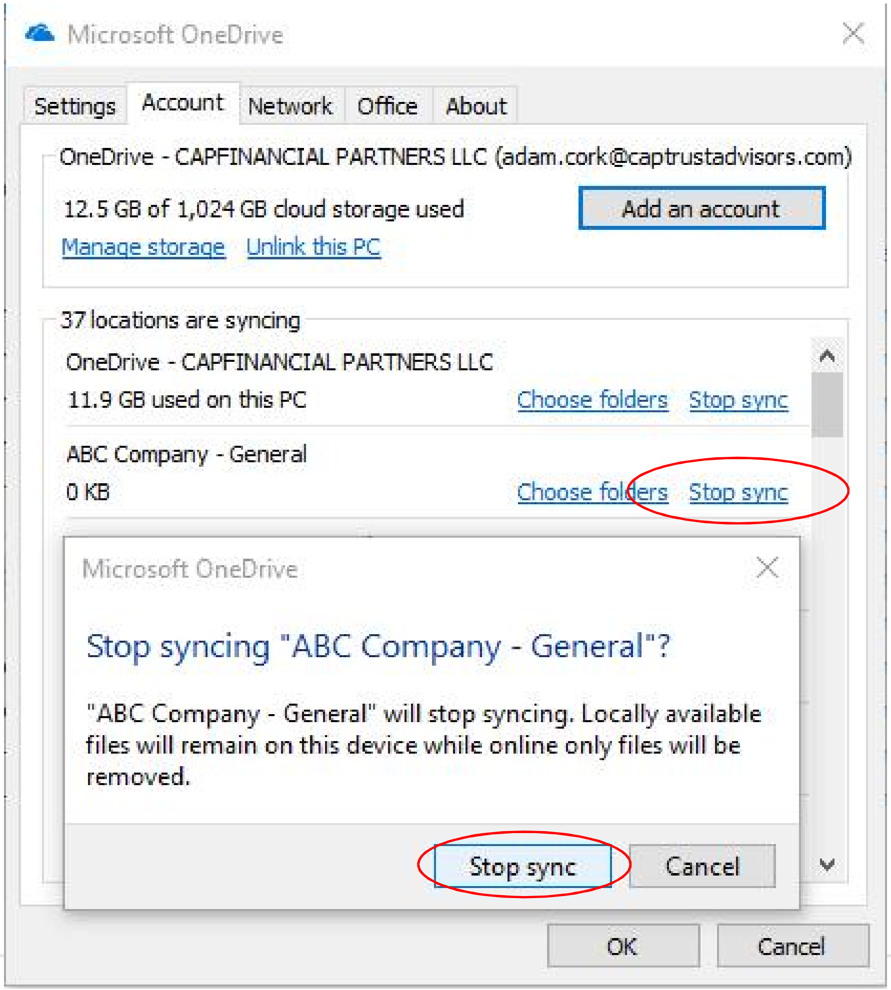
Click on the settings option.



HOW TO UNSYNC CLIENT OFFICE GROUP FILES

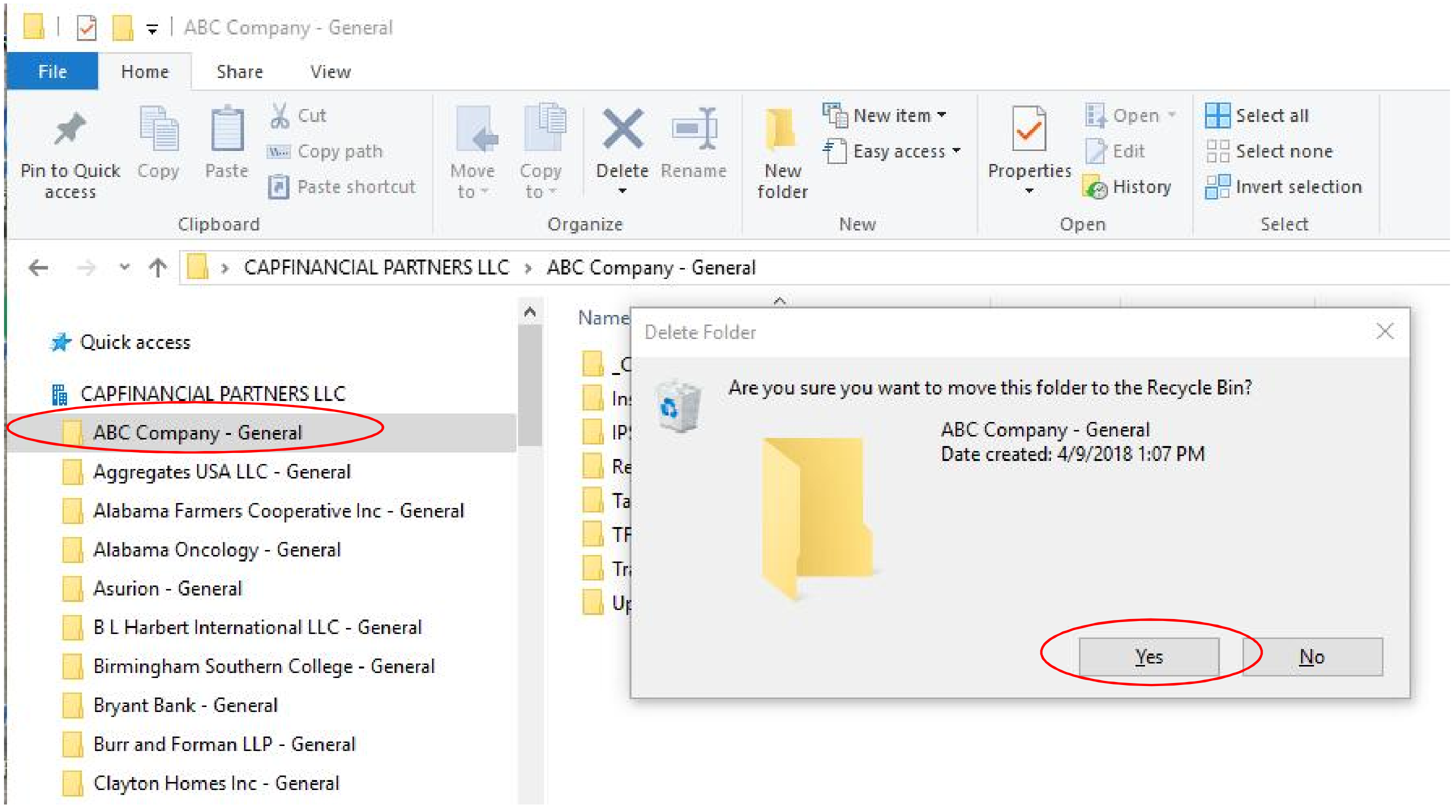
Wait approximately 10 seconds while the synced locations load under the Account tab.

Find the folder you would like to unsync and click "Stop Sync". A confirmation window will open and again click "Stop Sync".



HOW TO UNSYNC CLIENT OFFICE GROUP FILES

Now that you have unsynced the file you can go to your File Explorer and delete the folder. You should see the file now removed from your File Explorer.



CAPTRUST