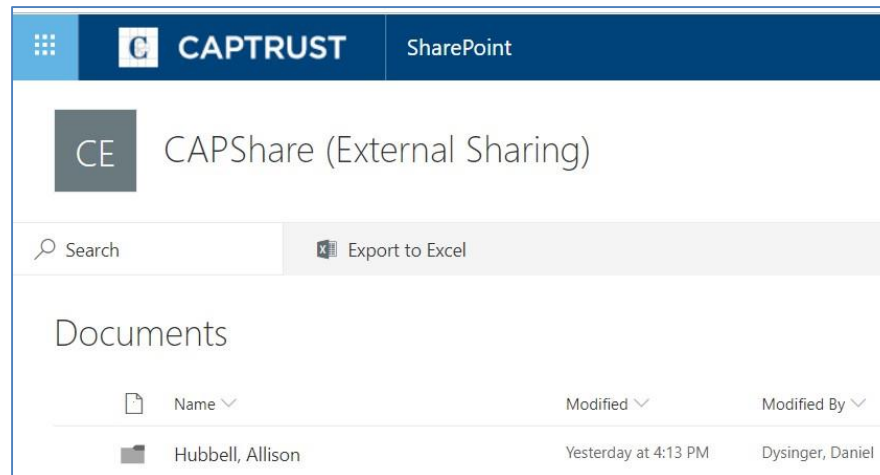
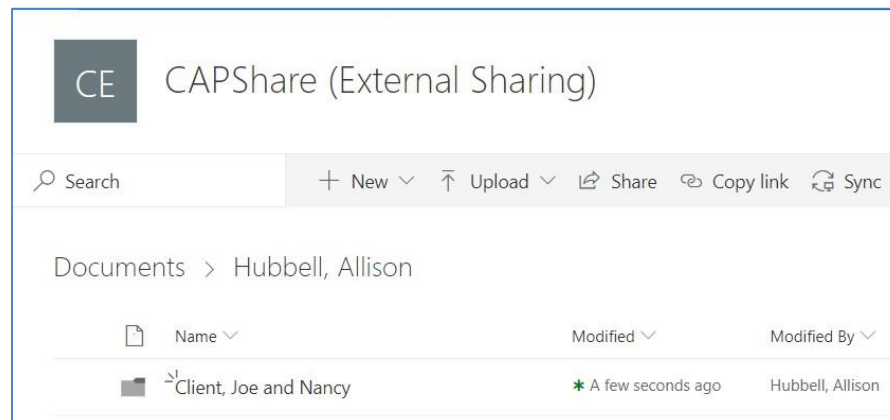


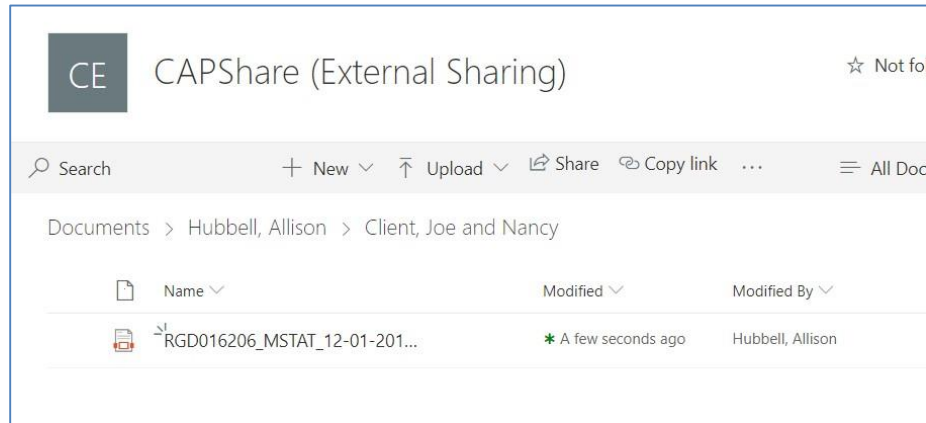
- **Click on this link to get to your personal ShareFile folder:**
  - <https://captrustadvisors1.sharepoint.com/sites/CAPShare/Shared%20Documents/Forms/AllItems.aspx>
  - You should see a folder with your name on it:



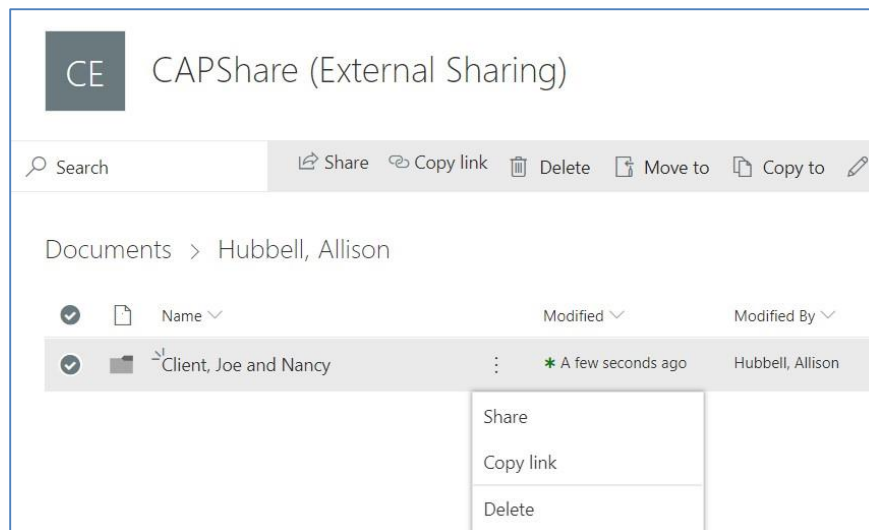
- **Click on your name:**
  - This is where you will create custom folders for your clients to house shared files
- **Click on “+New” to make a folder for your client:**



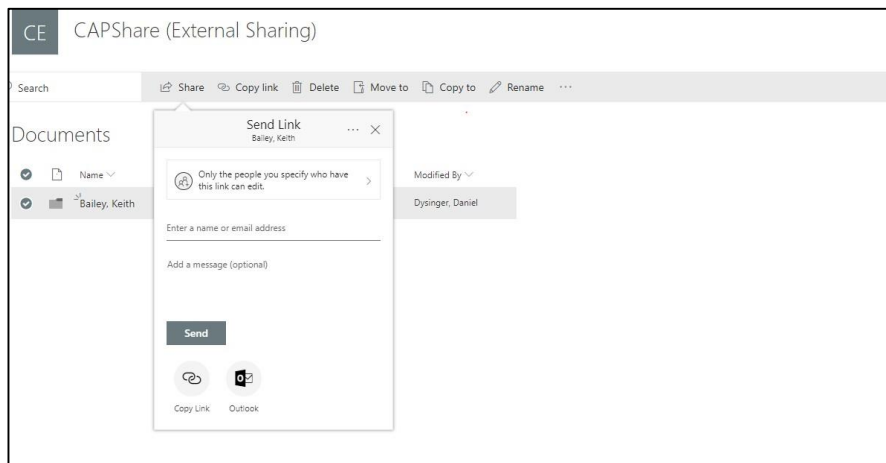
- **Click on the client folder:**
  - Drag and drop any files to this folder intended for the client to view and download:



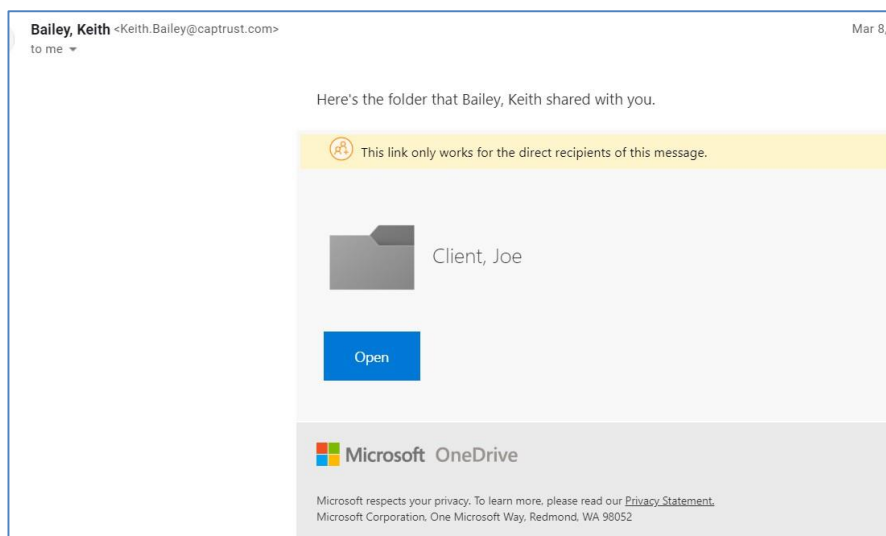
- **Click back out to your main folder and then click on the three dots to the right of the Client name:**



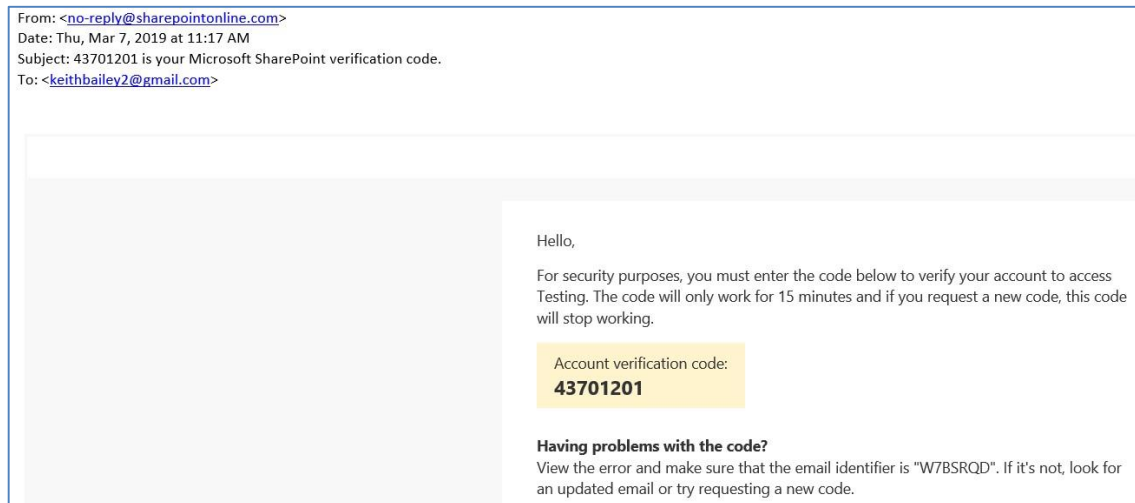
- Click “Share”:
- **IT IS IMPORTANT THAT YOU ONLY SHARE THE CLIENT’S FOLDER WITH THE CLIENT, NOT YOUR ENTIRE FOLDER**
  - A window will pop-up to allow you to add your client’s email address and a message
  - Be sure to tell your client to that they will receive a verification code when they click the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



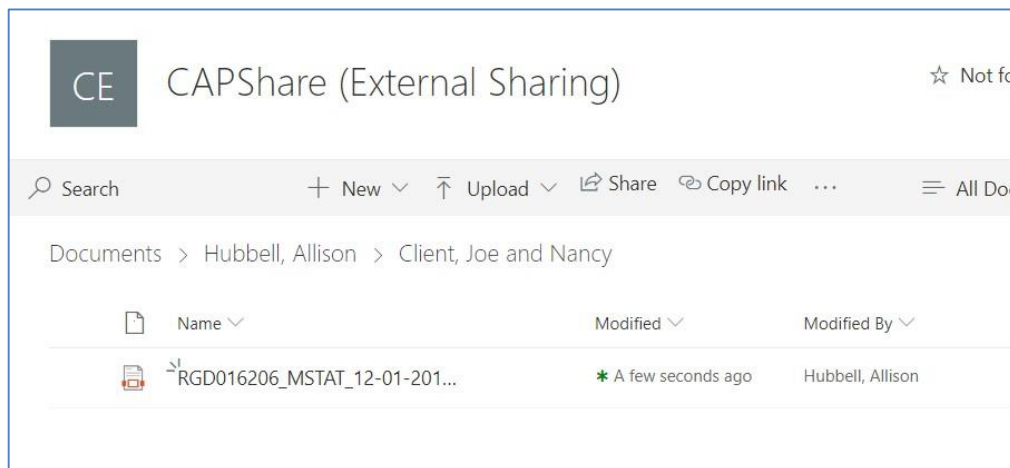
- Hit “Send” and your client will get an email:



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



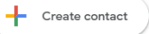
- They will enter the verification code and be taken into the ShareFile folder and can view and download the files




• **Troubleshooting – Verification code does not appear**

- Search for [no-reply@sharepointonline.com](mailto:no-reply@sharepointonline.com) in your email spam folder. This is the account that sends the verification emails.
- Add [no-reply@sharepointonline.com](mailto:no-reply@sharepointonline.com) to your email contacts to prevent it from being marked spam.

**EMAIL:**

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  Add a new contact in the bottom right corner. Click that, fill in the email address, and click Save.

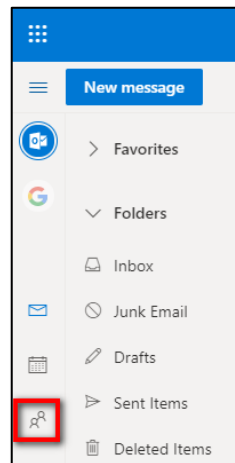



Figure 3- Hotmail Contacts

**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.

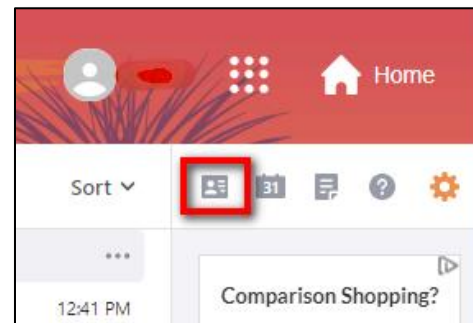


Figure 2- Yahoo Contacts

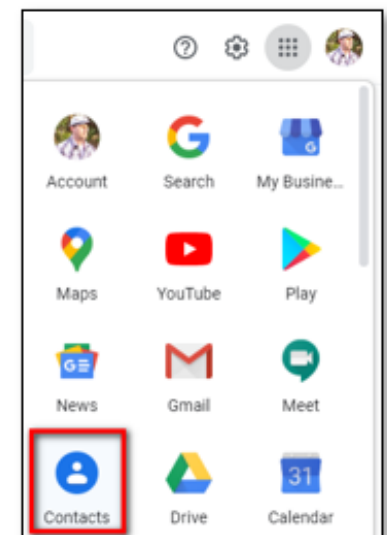


Figure 1- Google Contacts