

Quick Start Guide

Overview

CapLinked integrates secure workflow and files for enterprise sharing.

CapLinked's intuitive, cloud-based platform makes it easier to manage and complete business transactions. Coordinate on asset sales, financings, mergers & acquisitions, legal compliance, and other types of complex deals and projects with a secure workspace from CapLinked.

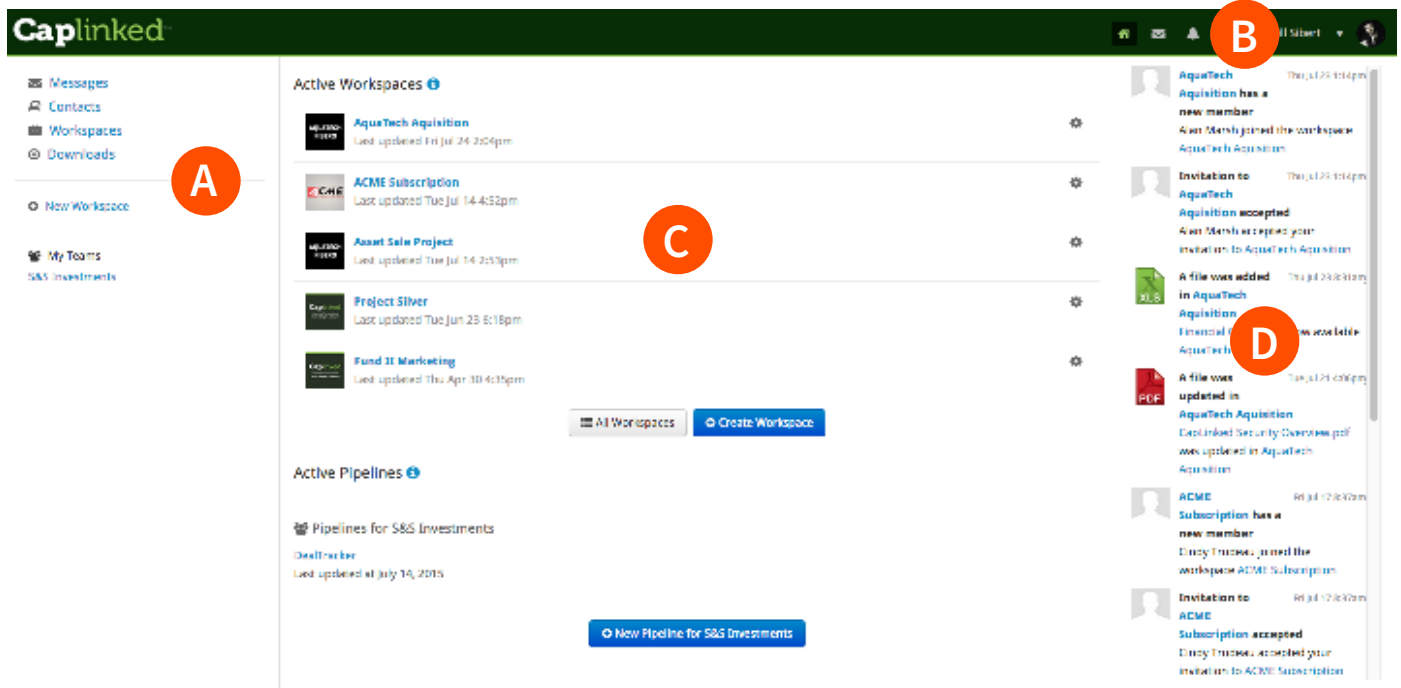
This guide is designed to help workspace administrators set up a workspace: add files, invite members, send updates and more.



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Get to Know Your Dashboard

The Dashboard is your hub for all recent and important activity on CapLinked. Create a workspace, manage your contacts, and read notifications — all from the Dashboard.

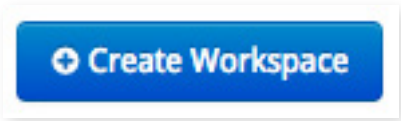


- A Your Sidebar:** Access your workspaces, manage contacts, and send messages all from the sidebar on the left-side of the Dashboard.
- B Notifications:** Receive alerts when files are added, people try to connect with you, and many other important events occur.
- C Active Workspaces:** Displays the 5 most recently updated workspaces. Click on the gear icon to access files and updates with one click.
- D Notification Feed:** See all activity related to your workspaces

Creating a Workspace

Creating a workspace is the first step in getting the most out of CapLinked. Workspaces offer tools to manage an M&A, capital raise, sell an asset, investor relations, and many other secure business transactions that have been historically managed using email and spreadsheets. Manage your workspaces on the go with full iPad and tablet compatibility.

- A** Click **Create Workspace** on your Dashboard.

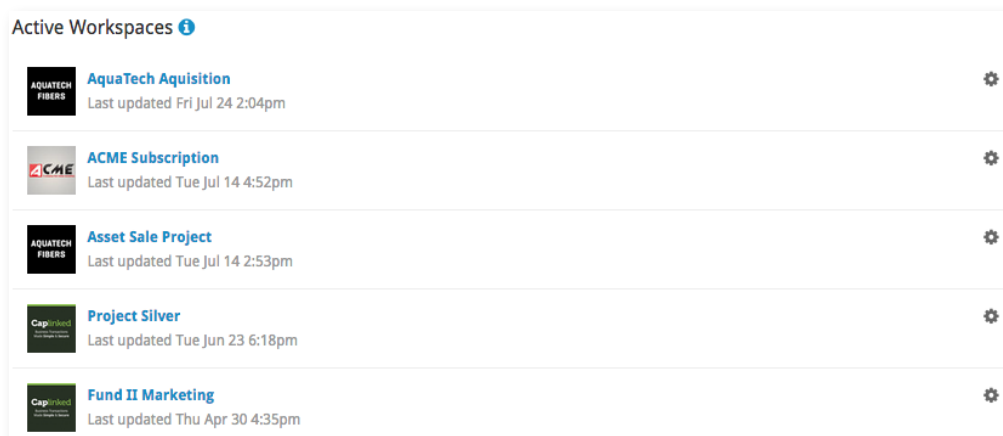


- B** Enter a **Workspace Name**.

Create New Workspace

Workspace Name

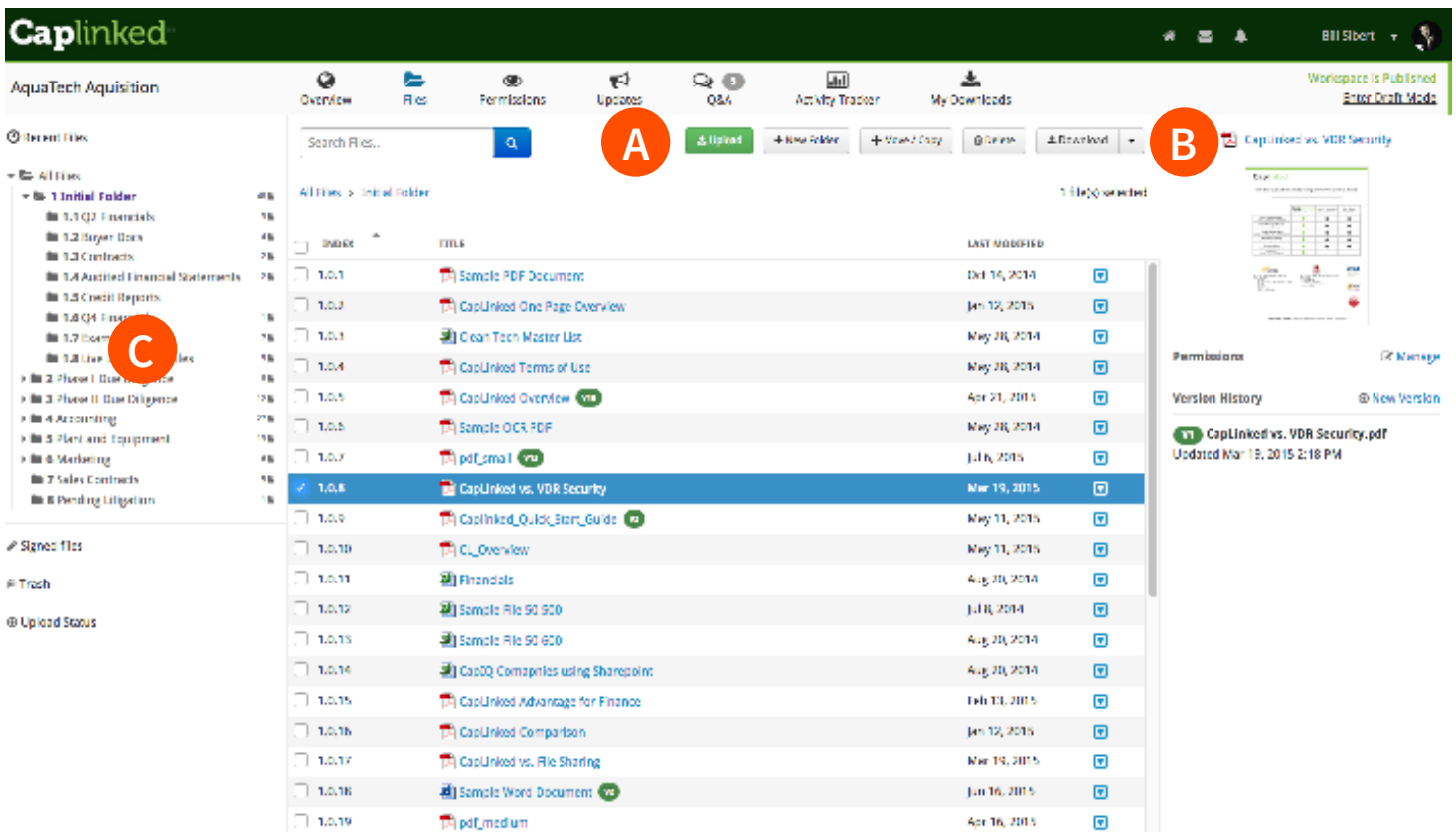
- C** Quickly access all of your active workspaces from the Dashboard.



Uploading & Managing Files

CapLinked allows you to upload multiple files at once with our easy drag-and-drop interface. Permissions can be set so that your important files are only seen by those who should have access.

- A** Add manually or drag & drop multiple files at a time to upload them to your workspace. All file types are accepted, and common file types are viewable in the web viewer: PDF, Microsoft Word, Excel, and Powerpoint, and images.
- B** Easily **download** selected or all workspace files for quick access.
- C** Use the **files tree** to quickly navigate all folders within the workspace. Access the **Upload Status** page to see what's been uploaded previously.



Managing Members & Permissions

Share your files and updates with others by inviting them to a workspace. Use the Permissions page to set each member's access to specific files and folders in the workspace. Make another member an Admin so that they can help you manage the workspace.

The screenshot shows the Caplinked workspace interface for 'AquaTech Aquisition'. The left sidebar lists various groups: All Members (19), Admins (8), Bankers (4), Bidders (2), IT Consultant (1), Legal (1), Prospects (3), and Test (0). The main area displays the 'Group Bidders' page with a table of members:

Name	Status	Last Accessed
Eric Marquez ericrod+em Marquez@gmail.com	Pending	
Eric Test erodriguez+hernandez@caplinked.com	Active	3/17/2015 6:35 pm

Annotations A through E highlight key features: A points to the '+ New Group' button; B points to the 'Admins' group; C points to the '+ Invite Members to Bidders' button; D points to the 'Send Reminder' button; and E points to the 'Enable DRM' button in the Digital Rights Management settings panel.

- A** **Create a group** to organize users who you would like to invite to the workspace, e.g. by firm or role in the workspace.
- B** If you want a member to have full admin rights (manage files, manage members, see reports, etc.) add them to the **Admin group**.
- C** **Invite** new members to a group. Group members will not be visible to other members anywhere in the workspace -- only workspace admins have that ability.
- D** See whether or not a workspace member has accepted his/her invite -- if they haven't yet accepted, **send a reminder email**.
- E** Activate **Digital Rights Management (DRM)** and/or **watermarking** for the selected group. *(DRM and Watermarking or optional features)*

Managing Members & Permissions (continued)



- A** Switch to the Folders tab to set which folders a member group can view, download from, and upload to.
- B** Click an icon to change it from red (denied) to green (allowed). If the icon is green, members in the respective group can do the associated action from that column.
- C** Click the view, download, or upload permission icons to apply the changes to all folders.

Sending Updates

Easily send an update regarding new documents, changed deadlines, and more with the updates feature. Select only certain groups or send to all members and ensure that it makes it into the right inboxes.

Send Update

Send notification to:

All Members **A**

Click tags to select only specific groups to receive the notification:

Test + IT Consultant + Team Admins + Bidders + Workspace Admins + Prospects + Legal + Bankers +

[Manage Groups »](#)

Subject

Message (When pasting content all formatting will be lost)

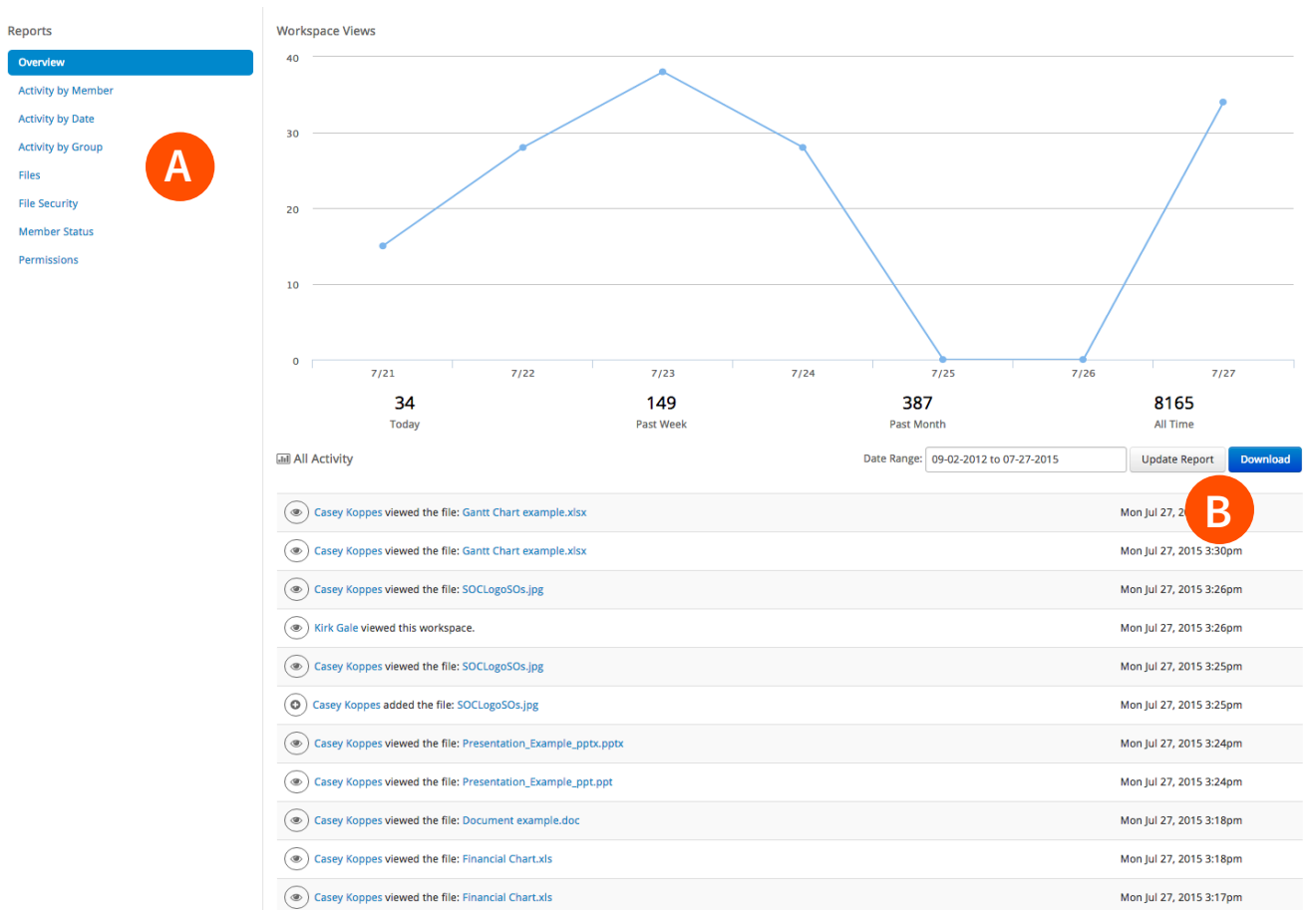
Send Update as an email

B

- A** Choose which group(s) to which you want to send the update -- by default it will get sent to All Members.
- B** Fill out the Subject and Message fields. If the box is checked next to **Send Update as an Email**, an email will be sent to the members you chose above, otherwise it will only be sent to their CapLinked inbox.

Tracking Activity

Know exactly who has been viewing the workspace, its documents, and when they are doing so. Quickly gauge interest in your deal and know which files are being viewed/downloaded.



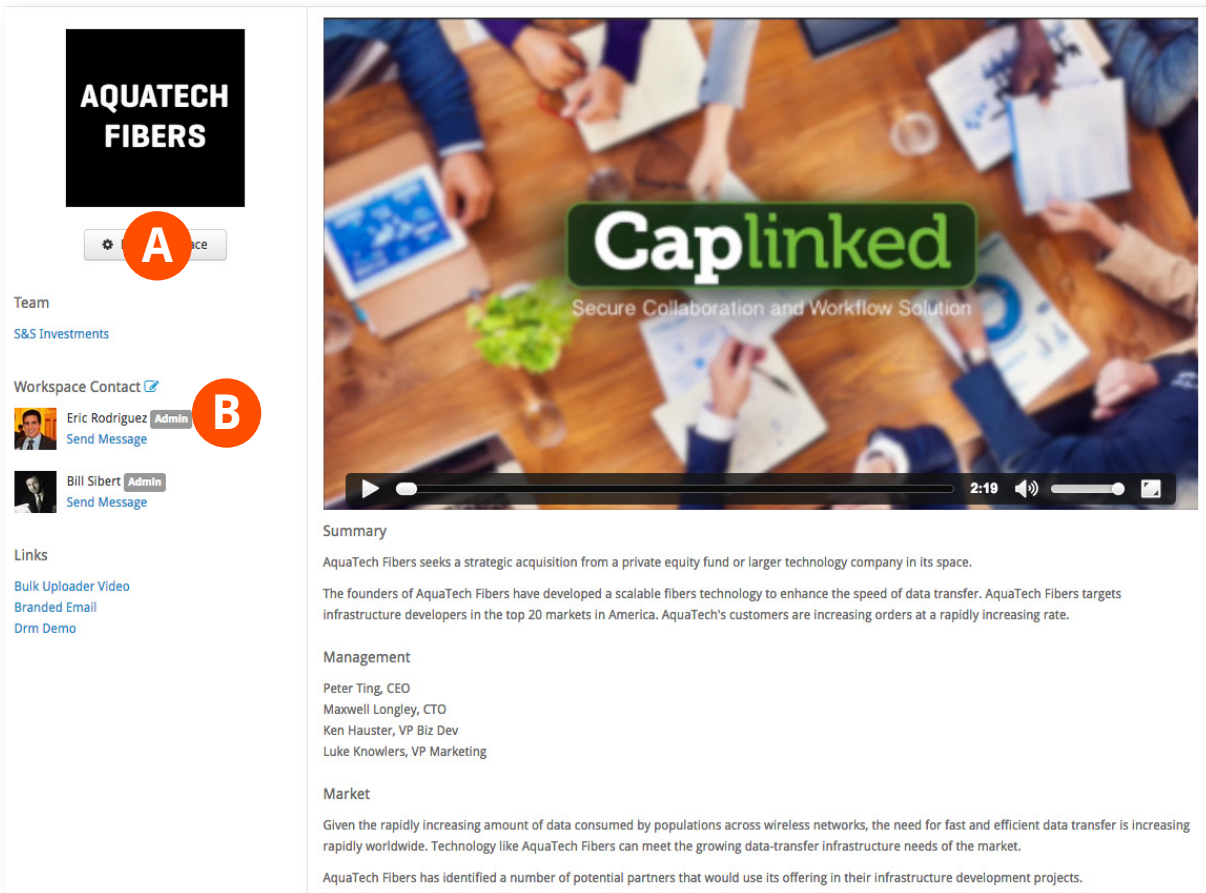
A Every event in the workspace is tracked in the Activity Tracker and displayed on the Overview report. Select other reports to see different useful views of the workspace events.

B Change the date range of the report and click 'Update Report' to see only events in that time period. Click 'Download' to download a CSV version of the currently selected report.

Workspace Options

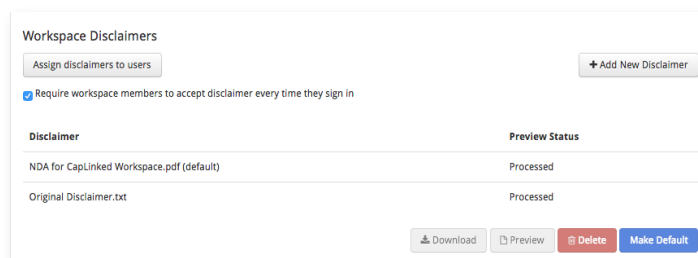
From the Workspace Overview, click ‘Edit Settings’ to customize the text, links, and videos on the Overview page and disclaimers.

- A** From the Workspace Overview, click Edit settings to customize the Workspace Overview text, links, and video.



- B** Edit the Workspace Contacts by clicking the edit icon next to the Contacts section.

- C** Click ‘Manage Disclaimers’ to decide what disclaimer(s) workspace member must sign before entering the workspace.



Additional Help

Please visit **support.caplinked.com** for additional information, including:

- FAQ
- Knowledge Base
- How To's
- Tutorial Videos

Customer Support Options



support@caplinked.com



1-888-799-6849

Enterprise customers receive a dedicated customer support representative; call or email us for more information and learn how CapLinked can help you.

