

> Sharefile User Guide



How to log in

- 1) Visit www.bluestonemortgages.sharefile.com
- 2) Enter your username (email address) and the password that you set when you received the ShareFile link.

A screenshot of the login page for Bluestone Mortgages. The page has a light gray background with a subtle wave pattern. In the center is a white login box. At the top of the box is the Bluestone Mortgages logo. Below the logo are two input fields: "Username" and "Password". Below these fields is a green "Log In" button. Under the button is a checkbox labeled "Remember me". At the bottom of the box is a link that says "Forgot password?".

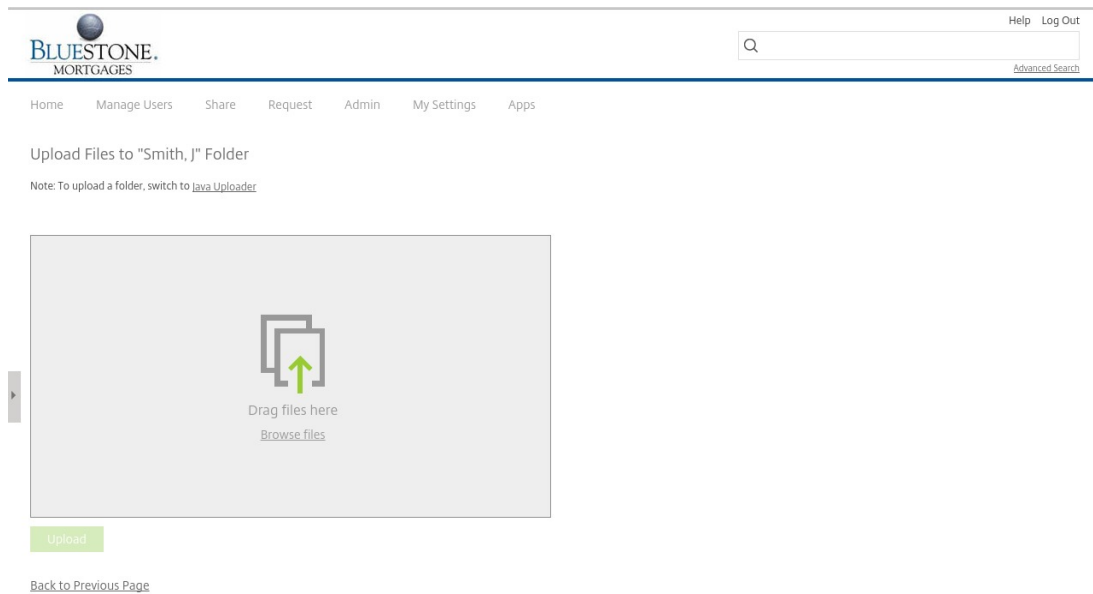
Creating folders for your documents

We've set you up with a folder where you can store your own individual customer folders and upload documents. On right hand side of screen click on "create folder" then name it - Surname followed by first initial eg. Smith, J and click the green "create folder button".

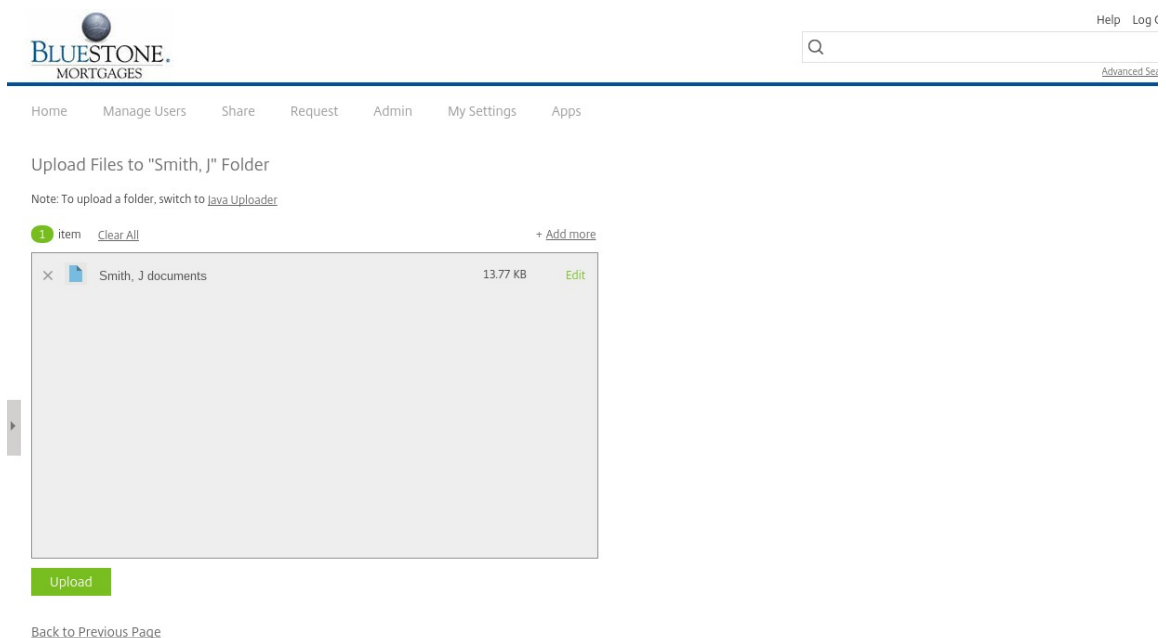
A screenshot of the "Create Folder" dialog box. The dialog box has a title bar with the text "Create Folder" and a close button (X). Inside the dialog, there is a section labeled "* Required". Below this, there is a label "Name: *" followed by a text input field containing "Smith, J". Below the name field is a label "Description:" followed by a large, empty text area. At the bottom of the dialog, there is a label "Apply Template:" followed by a dropdown menu showing "Do not apply a template" and a help icon. At the very bottom of the dialog are two buttons: a green "Create Folder" button and a gray "Cancel" button.

Uploading documents

Select your customer folder where you'd like to upload documents. Click the upload folder button on the right of the screen. You can either drag files into the grey box or click on the "Browse Files" button to search for them. Please make sure you title documents correctly as this will make it easier for us to find them eg. Smith, J Bank Statements.



Once you've selected the file you want to upload, you can upload it by clicking the green "Upload" button or add further documents by selecting "add more". We'll be notified each time you add a document. If you've uploaded a document by mistake, please let us know and we can delete this for you.



bluestone.co.uk | T: 0800 368 1833

Lines open 9.00am - 5.30pm Monday to Friday. Calls may be recorded.

Bluestone Mortgages Limited is authorised and regulated by the Financial Conduct Authority.
Registered in England and Wales No. 02305213 at First Floor, Melbourne House, Aldwych, London WC2B 4LL

BM27 09/15