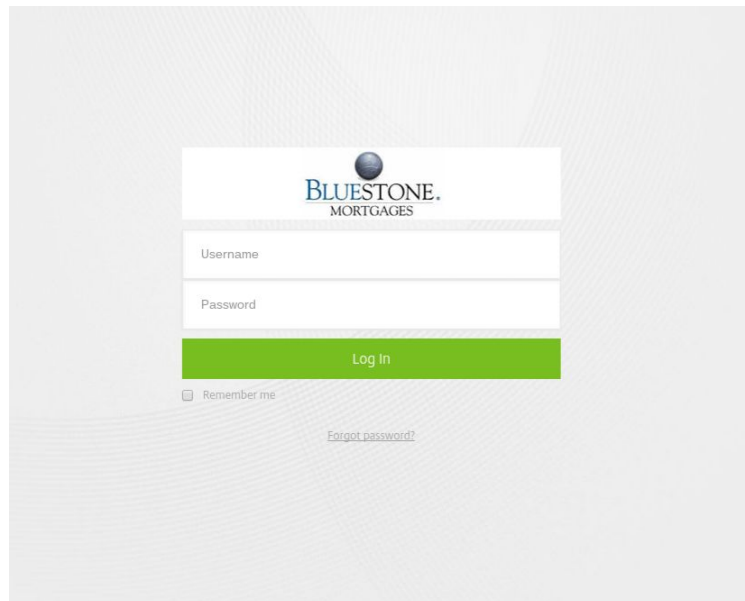


# Sharefile User Guide

## How to log in

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

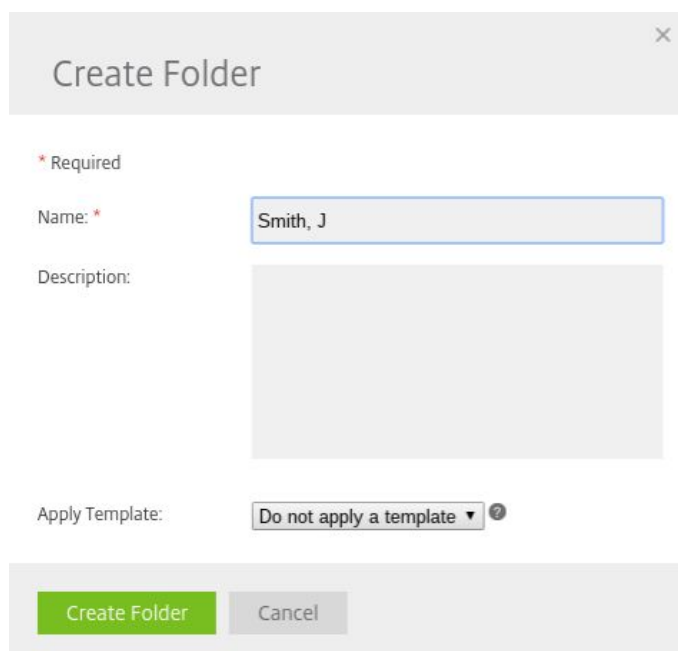


The image shows a login form for Bluestone Mortgages. At the top center is the Bluestone Mortgages logo. Below the logo are two input fields: 'Username' and 'Password'. A green 'Log In' button is positioned below the password field. Underneath the button is a checkbox labeled 'Remember me'. At the bottom center, there 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.

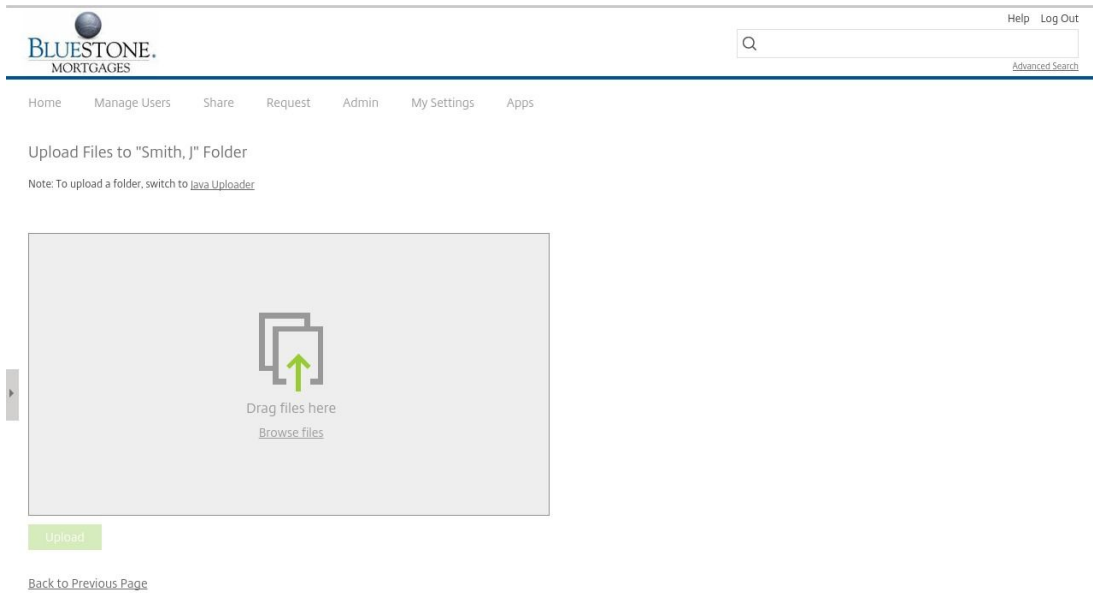
On right hand side of screen click on "create folder" then name it - Surname followed by first initial eg. Smith, J and click the green "create folder button".



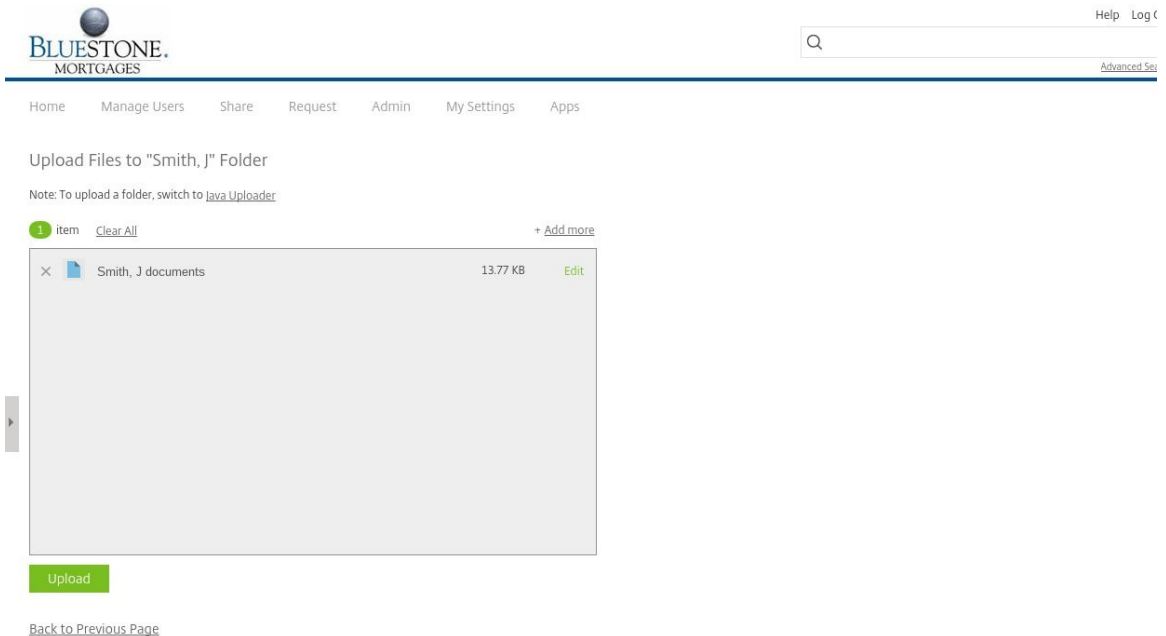
The image shows a 'Create Folder' dialog box. The title bar says 'Create Folder' with a close button (X) on the right. Below the title bar, there is a section for 'Name: \*' with a text input field containing 'Smith, J'. Below that is a 'Description:' label followed by a large empty text area. At the bottom, there is an 'Apply Template:' label with a dropdown menu set to 'Do not apply a template' and a help icon. At the very bottom, there are two buttons: a green 'Create Folder' button and a grey '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.



**W** [bluestone.co.uk](http://bluestone.co.uk) | **T** 0800 368 1833

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

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