



## How to Use Gates, Moore & Company's ShareFile

- 1) Visit Our ShareFile website:  
<https://gatesmoore.sharefile.com>
- 2) Login: Your email address  
Temporary Password: Enter CL followed by your client number. For example, if your client number is 1234, your password will be: CL1234

After logging in, you have the option to change your password if you choose.

Welcome

Please confirm your name and choose a new password. Password must be at least 4 characters and at most 15 characters. To make your account as secure as possible, we recommend choosing a password that contains letters, numbers, and punctuation symbols.

First Name: *	<input type="text" value="Jane"/>
Last Name: *	<input type="text" value="Smith"/>
Company:	<input type="text"/>
Password: *	<input type="password"/>
Confirm Password: *	<input type="password"/>
Time Zone:	<input type="text" value="Eastern Time (GMT -5)"/>
	<input type="text" value="Observe Daylight Saving Time (US &amp; Canada)"/>
	<input type="text" value="Display date as month/day/year"/>
	<input type="text" value="Display time in 12-hour format with AM/PM"/>
	<input type="button" value="Save"/>

## To Download Files:

When files are uploaded to your folder, an automatic email notification is sent. Click on the download link to download the file.



Heather,

Nancy McConnell has created a new File called 'Sample.jpg' in folder 'Test'.

[Click here to download](#)

If you do not remember your login information, visit <https://gatesmoore.sharefile.com/cmd=p> for instructions to reset your password.

If the above link does not work in your e-mail software, copy and paste the entire link below into your web browser:

<https://gatesmoore.sharefile.com/d-191a30fa-c82a-45f9-9715-117eb0c27f62>

After clicking the "click here to download", you will arrive to the ShareFile login page. Login.

### Login

Email:

Password:

Remember me

Log In

[Forgot your password?](#)

When you click on the Download link via the email, after logging in you will arrive to the option to download the file. You will also be able to view any notes that have been attached to the file. Click Download.

### Download

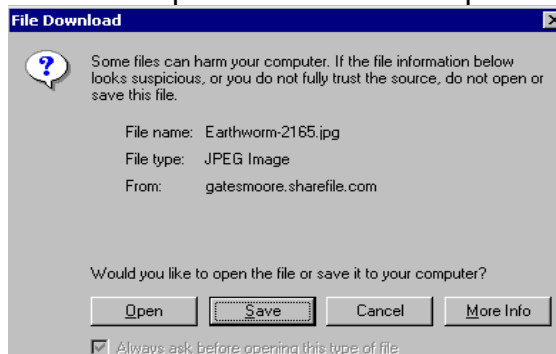


**Earthworm-2165.jpg**  
0.03 Mb

See picture of the Earthworm.

[Download](#)

You will be presented with the option of "opening" or "saving" the file.



## Re-Visiting ShareFile to Access Files

### How to Download Files:

After logging into ShareFile, you can download or upload any files at anytime.

To Download or to access selective files, click on your folder (without checking the box next to your folder).



Click the file of interest, and click "Download".

#### Test

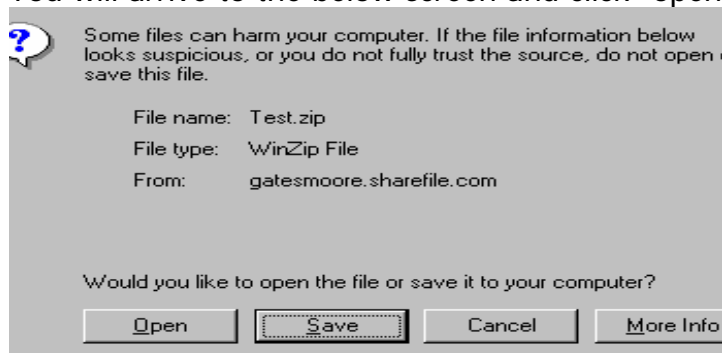


To Download ALL files, click the checkbox next to your folder, and click download.

#### My Folders

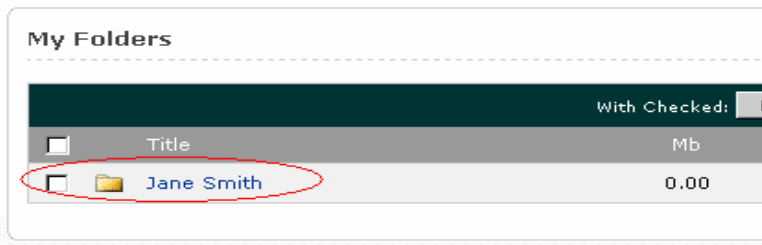


You will arrive to the below screen and click "open" or "save":

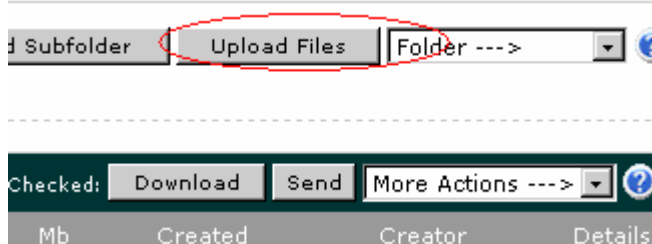


## How to Upload Files:

To Upload a File, click on the folder titled "Jane Smith" (i.e. your name or Practice name).



Next, click "Upload".



Click "Browse" to upload files of interest. Type text in "Title" to attach a custom title to the document. Type in the "details" section to add any notes of interest about the file you are uploading. Click "Send email notifications" so users that have access to your folder can be automatically notified a file has been uploaded..

To upload, click the 'Browse...' button and select files from the dialog window that pops up. To upload multiple files at once, click the 'add multiple files' link next to the file browse button. **NOTE: Maximum file size for a single upload is 2 gigabytes.**

Interested in uploading multiple files at once, uploading entire folders or drag and drop? [click here switch to the "Enhanced Java Upload"](#)

File: \*   [add multiple files](#)

Title: \*

Details:

Send email notifications when this upload finishes

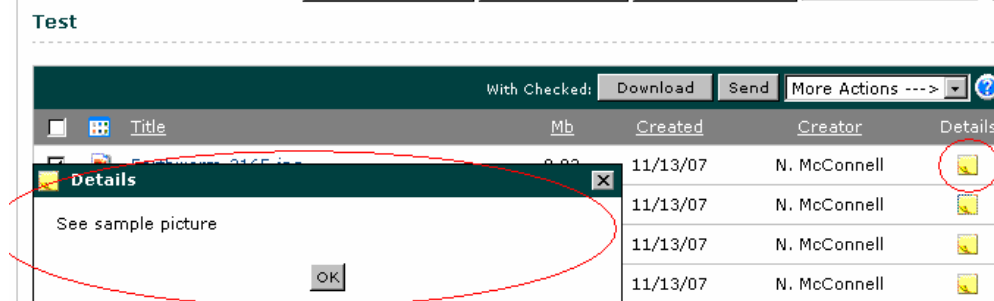
Overwrite files with the same name

The next screen "confirms" email notifications. Check the boxes of your Gates, Moore & Company team to enable an additional email notification.

<input checked="" type="checkbox"/>		Mark Estroff (Gates, M
<input checked="" type="checkbox"/>		Nancy McConnell (Gat
<input type="button" value="Send Notifications"/>		

## Viewing Notes Pertaining to Files:

To View any notes associated with a file, click on the "details icon".



That concludes how to use ShareFile. Please advise your Gates, Moore & Company team members if you have any questions. 404-266-9876.