

## Sending Documents to Your Advisor

MyMerrill's Document Sharing feature allows you to send documents securely and easily.

Once logged into the app, tap Menu and select send a document to your advisor. A New message will appear with two options...Scan document or Select document.

Let's first review Scanning a document. This is when you want to take a picture of the document you want to send your advisor

- After tapping the option, a welcome message will appear
- Tap continue
- A popup will appear
- Select 'ok' to allow the app access to your device's camera
- You can begin to capture the image by bringing the page into focus and tapping the blue circle
- The next screen allows you to edit the page by adjusting the yellow frame to the appropriate spots on the image. You also have the ability to rotate the page or retake the image.
- Tap next once you are satisfied with the image. You have the ability to name the pages and add more pages if needed.
- When you have captured all of the pages, tap Create Document to send. A pop up will appear tap continue for the app to convert the document into a PDF.
- On the next screen, tap the 'to' field and select your advisor's name, tap next and type a message if needed and click send

Now, let's look at selecting a document. You would do this when the document you want to send is already on your device

- Tap on Select Document and a popup will appear to permit the app to have access to your device's file system.
- Choose the file to be shared.
- On the next screen, tap the 'to' field and select your advisor's name, tap next and type a message if needed and click send.

These features makes it convenient to share documents with your advisor!

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