

Client Digital Capabilities: Step-By-Step Instructions

Document Scanning

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How to Scan and Send a document through the MyMerrill Mobile App using the Secure Inbox:

1. Log on to the MyMerrill® Mobile App
2. Tap on “Menu”
3. Scroll down and tap on “Send a document to your Advisor”
4. Tap on “Select Document” to choose a document already stored on your mobile device or tap on “Scan Document” to create a new document
 - If this is your first time using this feature, it may prompt you to provide permission to access your device’s camera
5. Using the camera on your device, take a photo of the document you wish to scan
6. On the next screen, use the circles to resize the frame around the photo ensure you have captured the entire document and tap “Next” to proceed
7. Tap the “+ Add Page” button to scan additional pages or tap on “Create Document to Send” to finalize the document
8. Tap “Continue” to proceed
9. Select who to send the document to by tapping in the “To” field
10. Provide a subject and any additional text in the e-mail
11. Tap “Send” in the top right corner to send the document as a secure e-mail

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