

Document Scanning

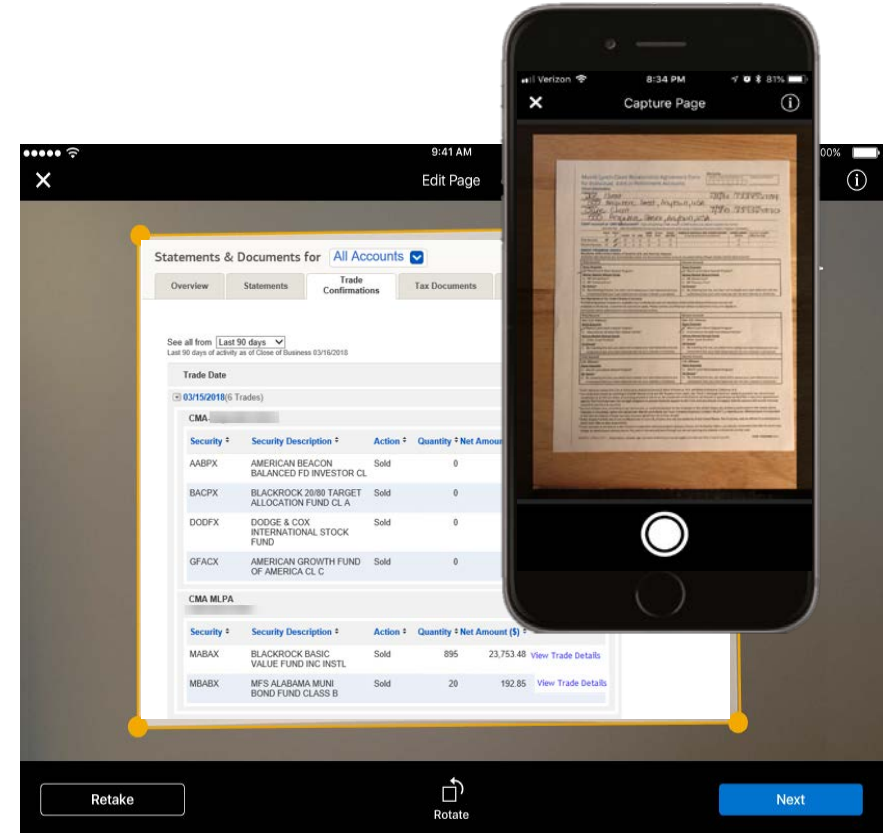
Easy way to capture and send documents



Document scanning on the MyMerrill mobile app provides users with the ability to scan documents using the camera on the mobile device and send via Secure Message Center.

The tool can capture multiple pages (paper or digital) in black & white with the ability to re-order and delete pages as well as straighten and rotate images.

The feature may be accessed by tapping on the Menu icon, Secure Message Center or Contact Us within the apps.



Note: First time users will be asked to review and accept terms & conditions and enable their camera within the app (per device)

For assistance please contact: **1.800.MERRILL (637.7455)** and speak **“MyMerrill”**.

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Are Not FDIC Insured

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May Lose Value

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Scanning a document

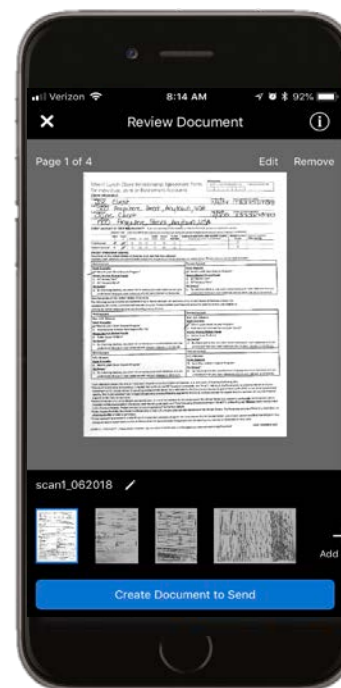
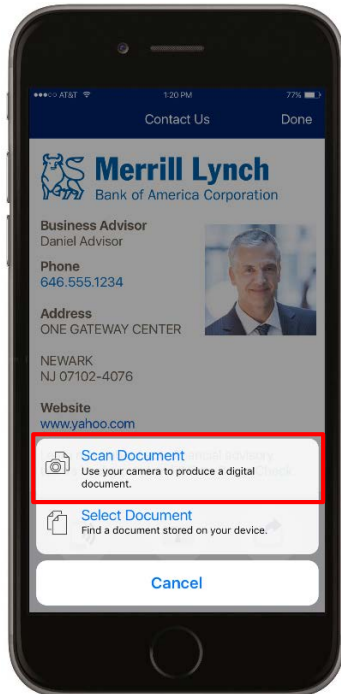
Tap 'Scan Document'.

Tap the white circle to take the picture.

Confirm the image and rotate if needed.

Name the document and re-order if needed. Tap 'create document to send' when ready

Secure Message Center opens with attachment. Select advisor and other office personnel to send attachment.



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Edit pages



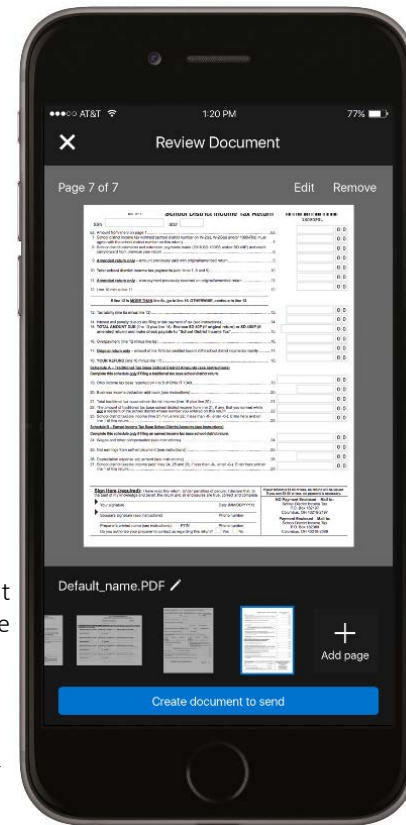
Circle corner 'anchors' allow for manual adjustments to auto-edge detection

Back to retake image (last screen)

Rotate image

Approve page and move on to Document Review screen

Review document



Remove pages

Edit page in focus

Returns to camera view to add another page

Completes image capture and builds PDF, attaches to SMC message

Pinch out to zoom in on page

Client can edit default file name

Client can scroll through the pages in carousel

Tap, hold and drag to re-order

Tapping on a page brings that page into focus above

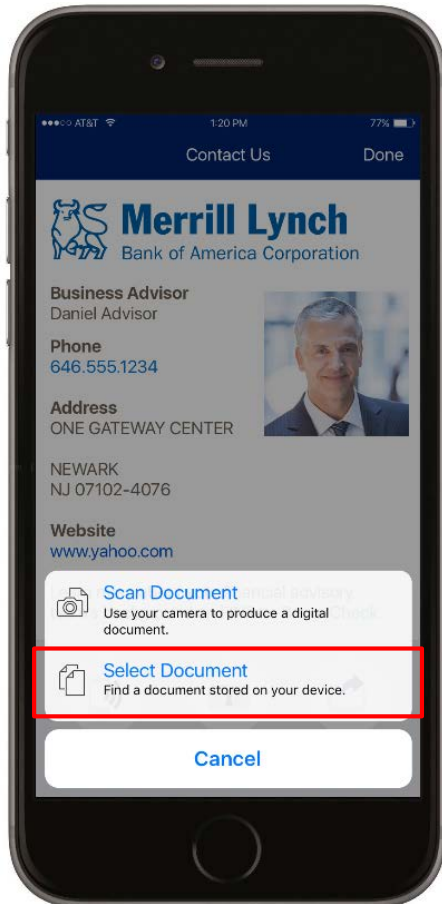
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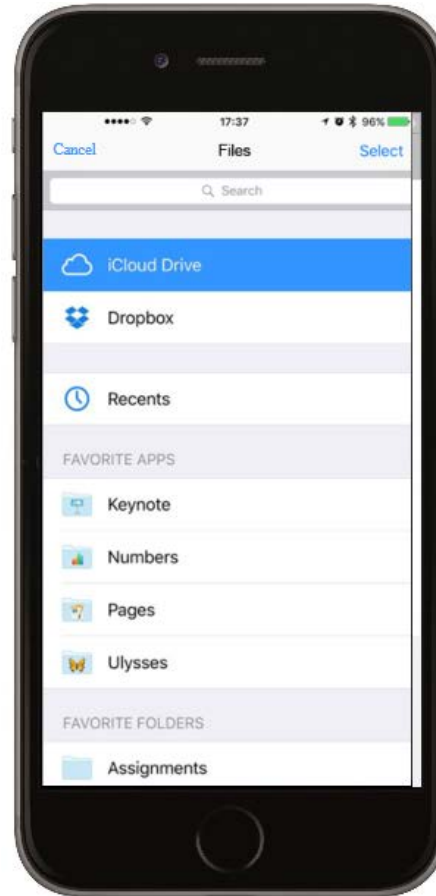


Selecting a digital file from device

Tap 'Select Document'



Choose the location of the file



Secure Message Center opens with attachment. Select advisor and other office personnel to send attachment.

