Mobile Upload to Vault

This training guide will how to upload files into your Vault from your Mobile Personal Financial Website.

The **Vault** is where you can access all previously uploaded files as well as upload new files. Accessing your vault is simple, click the Menu on the upper left of your screen and select Vault.

You have permission to upload into two folders: My Documents or Shared Documents. Use My Documents for personal items, as this folder is not visible to our staff. The Shared Documents folder is where you should upload any files that will be useful for our team.

Upload a File:

To upload a file, click in to either the My Documents or Shared Documents folder.

Next, click the **Upload Files** button. You will then have the option to Take Photo or Video from your phone's camera, or choose from your Photo Library. Taking a Photo using your camera will save directly into the Vault and not in your device storage.

Most common file types are supported. The individual file size limit is 30mb.

MENU WMS	Vault	w Folder Upload Files
Vault New Folder Upload Files	Files > My Documents > Bi	rth Certificates
	search by name	Search
Files	Name 🔺	Shared
search by name Search	Usage: 1.47 MB (0 B are private)	
Name Shared	The ability to electronically retrieve or store your documents is provided for your convenience. These documents are not original, legal documents or official records nor are these documents intended to replace your original, legal documents or official records. Neither your representative nor any of their affiliates, agents, or employees provide legal, tax, or accounting advice.	
My Documents 0 Files, Created 8/23/2017 at 3:1		
	Take Photo or Video	
Shared Documents 14 Files, Created 8/23/2017 at 3:	Photo Library	
Usage: 1.47 MB (0 B are private)	Browse	

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