# Scan a Document on Mobile

If you need to upload a physical document to send to your accountant, you can use Canopy's scan-to functionality to transfer the document digitally. To begin, click **Add a file** on the **Files** tab.

 Please Note: While the instructions provided here are similar across iOS and Android, the Android process may be slightly different. Follow your phone's on-screen information to complete a scan.

1. Tap *Scan with camera.*

- Your phone's camera will open.
- If this is your first time using your camera in the Client Portal app, you may need to authorize Canopy to access your camera.
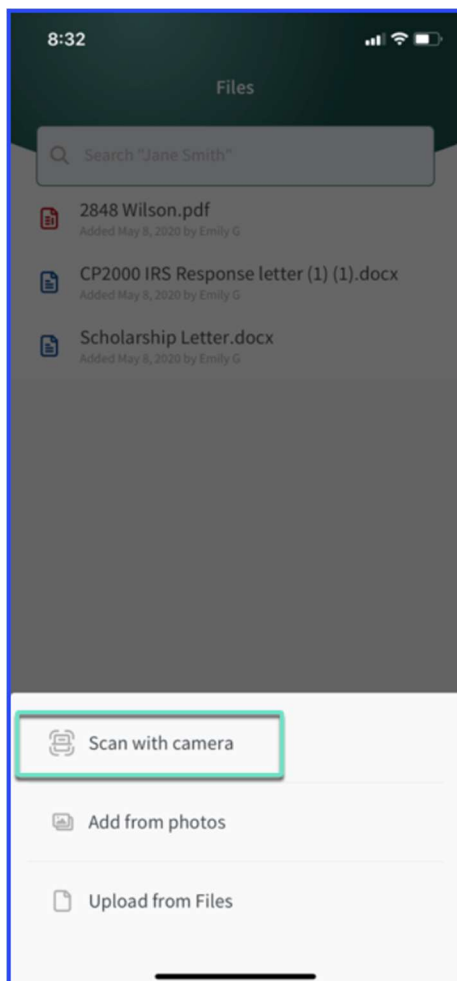
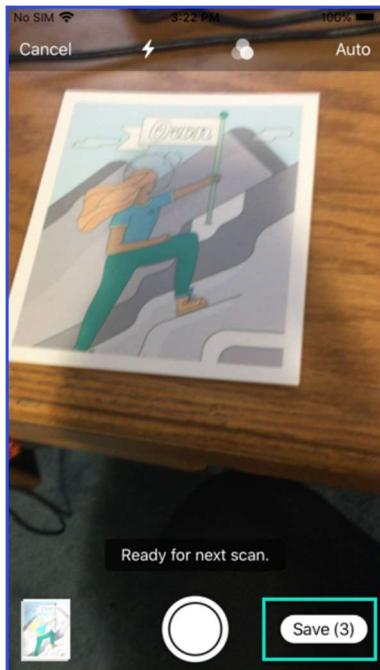## 2. Align your document with the blue scan box that appears.
3. Tap the *Shutter* button.

On iOS, the photo will automatically be taken when the box is lined up.

4. Continue taking photos of any additional documents.

5. When finished, click *Save (#)* where the # is replaced by how many photos you have taken.

6. Select the type of document you are uploading or input a new document type.

- The file name will default to **YYYY-MM-ClientName-FileType.pdf.**
- The document will appear in your files folder in the mobile app.
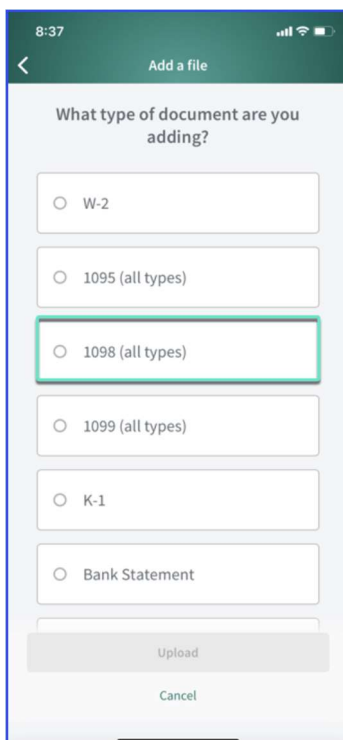
7. To delete the file, click the *Delete* icon.