

What should I do if I have multiple documents to upload?

Option 1: Scan & combine files using an phone app or Adobe program on your computer

Option 2: Combine files using CRF portal

Option 3: Add additional documents

Option 1

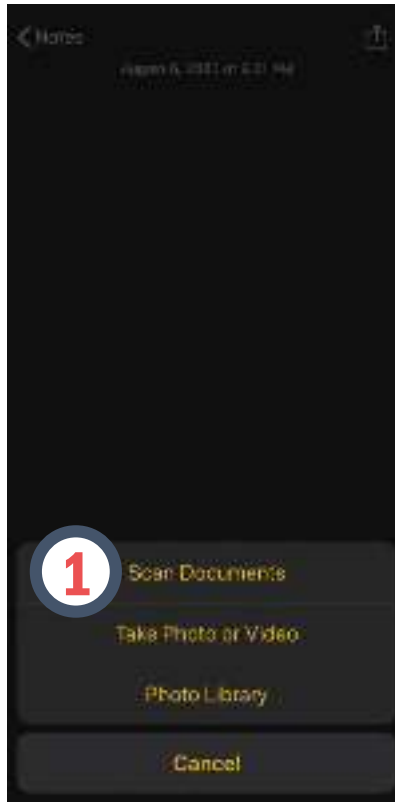
—

Scan & Combine files using a
phone app or Adobe program on
your computer

Using the iPhone Notes App



1. Open the Notes App on your iPhone (be sure you have the latest software update installed). Click on the camera icon and it will prompt you to the following options. Click “Scan Documents”



2. Take a picture of the document(s). You will be able to crop the pictures. When you are finished, click “Keep Scan”



3. You will be able to save, email etc. the documents in bulk by clicking the share icon located on the top right.



Use an app such as Genius Scan or CamScanner

Download the app from the App Store or Google Play

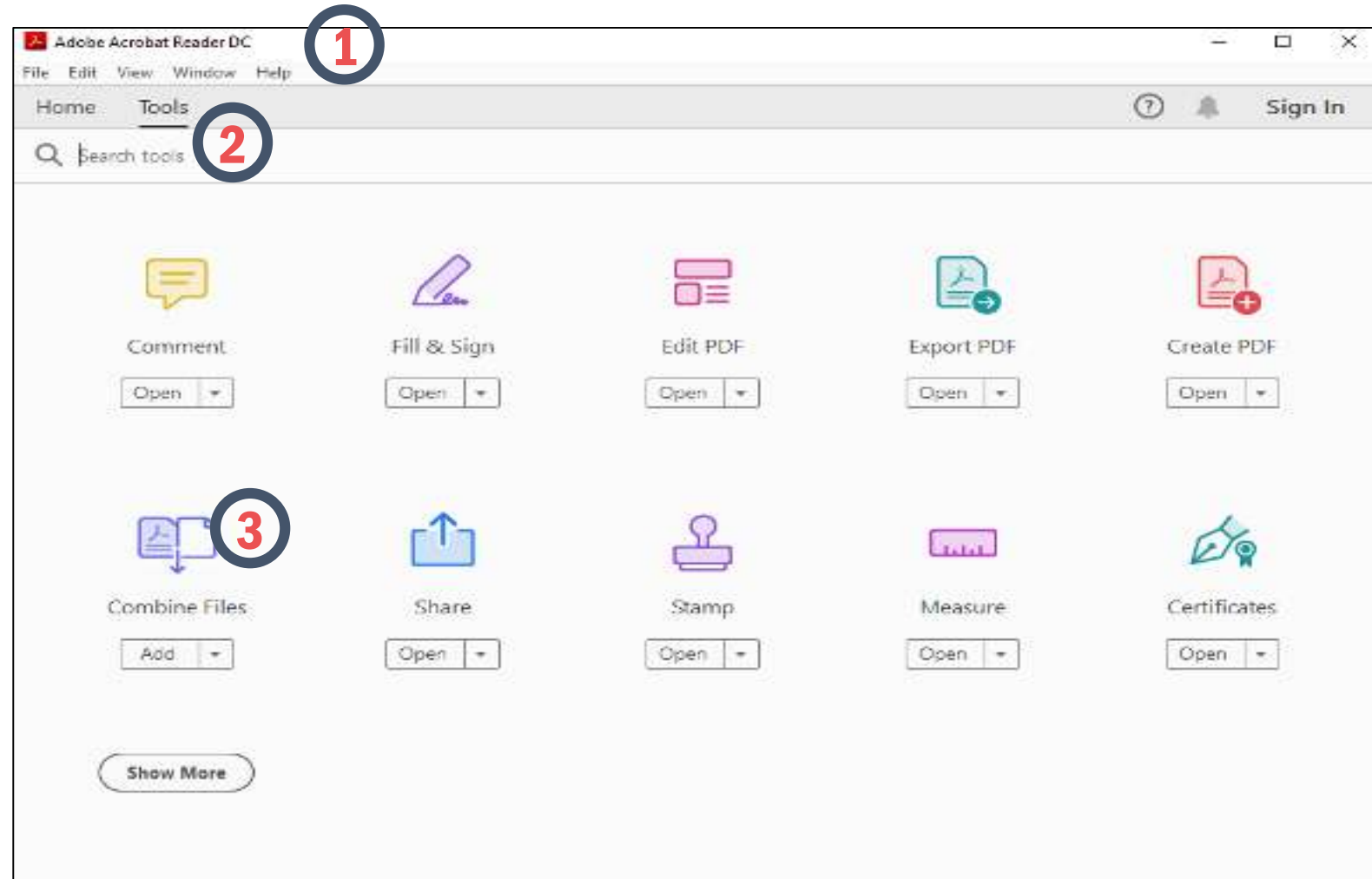
Follow prompts within the app to scan files

Send files to yourself via email, google drive, via USB cable, etc.



If you have Adobe Acrobat Reader Pro DC on computer

1. Open Adobe Acrobat Reader Pro DC on the computer
2. Click “Tools” in the upper right-hand corner
3. Click “Combine Files”



If you have Adobe Acrobat Reader Pro DC on computer

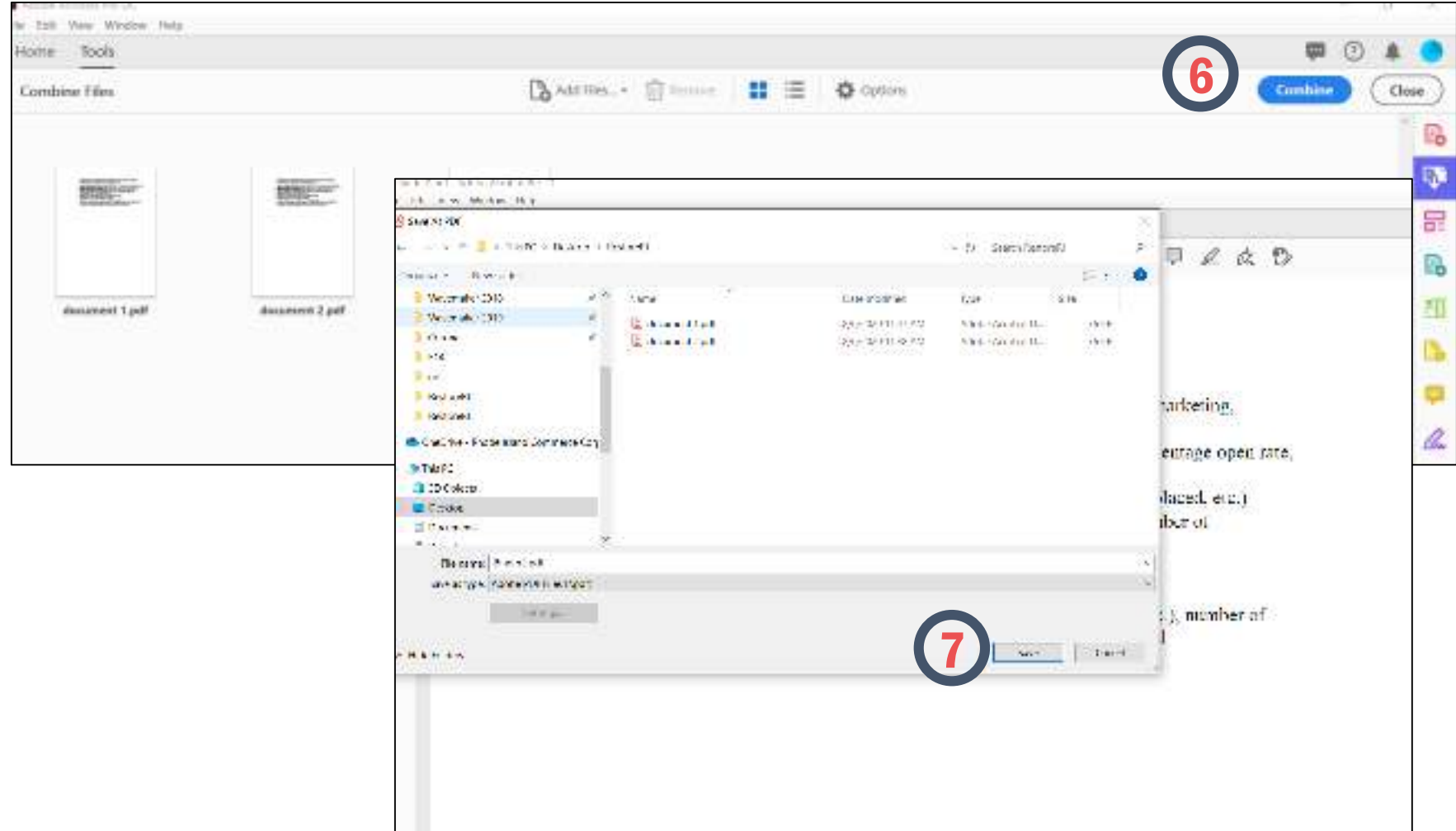
4. Click “Add Files”
5. Navigate to files on your computer. Select all files you’d like to combine and click “Open”

Note: Adobe Acrobat Reader Pro allows you to combine files of different formats.

The screenshot displays the Adobe Acrobat Pro DC interface. The main window is titled 'Combine Files' and features a toolbar with 'Add Files...', 'Remove', and 'Options' buttons. Below the toolbar, there is a large area with a document icon and the text: 'Add files by clicking the button below or drag and drop them here. You can also add the current open files from below.' Two buttons are visible: 'Add Files' (circled with a red '4') and 'Add Open Files'. A 'Help' link is also present. An inset window shows a file explorer with three files selected: 'Screenshot.jpg', 'Screenshot.pdf', and 'Screenshot.docx'. These files are circled with a red '5'.

If you have Adobe Acrobat Reader Pro DC on computer

- 6. Click “Combine”**
- 7. A new pdf file will open, titled “Binder1.” Click File, Save As, and retitle and save your combined document.**



Option 2

Combine files using CRF portal

Note: files combined in CRF portal must be the same format (all .pdf, all .doc, etc.)

Combine files



1

TestRhodyBiz20

Stage: Application

1. Click on
“Documents”
in the top left-
hand corner

2. Click on
“Upload”

Documents

Required Documentation

Recent Documents

Restore RI Document View

+ Add

Upload

^ Collapse

▼ Filter

≡ View

📁 Combine

🖨 Print

Search

2

Application

11 documents

Bank Statements

What is this? ?

⚙ Actions...

🔄 Replace file...

Uploaded by TestHannah1 TestMoore1
on 8/5/2020

Sensitive

Color Copy of Government Issued ID (ex. Driver License) for TestHannah20

TestMoore20

What is this? ?

⚙ Actions...


🔄 Replace file...

Uploaded by TestHannah1 TestMoore1
on 8/5/2020

Sensitive

Combine files

Home Requests Documents My Profile My Packages Sign Out

CRF USA 

TestRhodyBiz20
Stage: Application

Contacts

3. You may either drag and drop the files you wish to upload or click “Add files”

Bulk Upload

Upload Documents

Drag and drop your files here

You can drag and drop documents from your computer into this box. Or click the "Add files..." button and select the files you wish to upload.

3 + Add files...

Start Upload

Combine files

The screenshot shows a file selection interface. At the top right, there are links for 'packages' and 'Sign Out'. Below this is a table of files:

Name	Status	Date modified	Type	Size
PDF Bank statements - Dec 19 and July 20	✓	8/5/2020 11:32 AM	PDF File	182 KB
PDF Driver's License - Back	✓	8/5/2020 3:44 PM	PDF File	513 KB
PDF Driver's License - Front	✓	8/5/2020 3:44 PM	PDF File	513 KB
PDF Driver's License	✓	8/5/2020 11:29 AM	PDF File	182 KB
PDF Individual Tax Return 2019 - first page	✓	8/5/2020 11:31 AM	PDF File	182 KB
PDF TestRhodyBiz - Grant calculator	✓	8/5/2020 11:33 AM	PDF File	182 KB
PDF TestRhodyBiz - Income statement Q2 19	✓	8/5/2020 11:33 AM	PDF File	182 KB
PDF TestRhodyBiz - Income statement Q2 20	✓	8/5/2020 11:33 AM	PDF File	182 KB
PDF TestRhodyBiz20 - 941 Q1 2020	✓	8/5/2020 11:32 AM	PDF File	182 KB
PDF TestRhodyBiz20 Expense Documentation	✓	8/5/2020 11:34 AM	PDF File	182 KB
PDF TestRhodyBiz20 Expense Template	✓	8/5/2020 11:33 AM	PDF File	182 KB
PDF TestRhodyBiz20 tax return 2019	✓	8/5/2020 11:32 AM	PDF File	182 KB

Below the table, there is a text input field containing the names of the selected files: "Driver's License - Back" "Driver's License - Front". To the right of this field is a dropdown menu set to "All files". Below these are "Open" and "Cancel" buttons. A dashed box highlights the "Add files..." button and the "Start Upload" button below it. Text below the dashed box reads: "Or click the 'Add files...' button and select the files you wish to upload."

4. Select the documents you wish to upload. Click Open.

Combine files

Home Requests Documents My Profile My Packages Sign Out

CRF USA

Stage: Application

Contacts

5. Click "Start Upload"

Bulk Upload

Upload Documents

Drag and drop your files here

You can drag and drop documents from your computer into this box.
Or click the "Add files..." button and select the files you wish to upload.

+ Add files...

	File Name	File Size
Remove	Driver's License - Back.pdf	525.02 KB
Remove	Driver's License - Front.pdf	525.02 KB

5 Start Upload

Combine files



TestRhodyBiz20

Stage: Application

Contacts

6. Click "Combine"

Documents

Required Documentation Recent Documents **Unclassified**

6

All Unclassified Documents + Add Upload Collapse Filter View **Combine** Print

Search

▼ All documents

4 documents

Driver's License - Back.pdf

Uploaded by TestHannah1 TestMoore1 on 8/5/2020

Actions...

Replace file...

Driver's License - Back.pdf

Uploaded by TestHannah1 TestMoore1 on 8/5/2020

Actions...

Replace file...

Combine files

Home Requests Documents My Profile My Packages Sign Out

CRF USA

TestBiz18
Stage: Application

Contacts

Combine PDF Files

Select the documents you wish to combine into a single PDF file.

Search

Document Name
<input checked="" type="checkbox"/> Select Driver's License - Back.pdf
<input type="checkbox"/> Select Driver's License - Front.pdf

Next > Cancel

Driver's License - Front.pdf Uploaded by TestHannah1 TestMoore1 on 8/5/2020

Actions... Replace file...

+ Add

7. Select each file you wish to combine

8. Then click "Next"

Combine files

9. Click "Create PDF"
10. Save the file
11. Upload the file to the correct document using steps in the next section

Home Requests Documents My Profile My Packages Sign

CRF USA TestBiz18 Stage: Application

Contacts

Combine PDF Files

Order the selected documents and click **Create PDF** to create the PDF file.

Actions	Document Name
Remove	Driver's License - Back.pdf
Remove	Driver's License - Front.pdf

Create PDF 8

Driver's License - Front.pdf Uploaded by TestHannah1 TestMoore on 8/5/202

Actions... Replace file... Add

Option 3



Add additional documents

Add documents



1

TestRhodyBiz20

Stage: Application

1. Click on “Documents” in the top left-hand corner
2. Click on “Add”

Documents

Required Documentation

Recent Documents

Restore RI Document View

+ Add

Upload

Collapse

Filter

View

Combine

Print

Search

2

Application

11 documents

Bank Statements

What is this?

Actions...

Replace file...

Uploaded by TestHannah1 TestMoore1 on 8/5/2020

Sensitive

Color Copy of Government Issued ID (ex. Driver License) for TestHannah20

TestMoore20

What is this?

Actions...

Replace file...

Uploaded by TestHannah1 TestMoore1 on 8/5/2020

Sensitive

Uploading multiple documents

Home Requests Documents My Profile My Packages Sign Out

CRF USA

TestRhodyBiz20
Stage: Application

3. Begin typing the type of document you'd like to add.

4. Choose the document type (e.g. Bank Statements)

Add New Document
Use this form to describe the document that you will be uploading with the application.

What type of document are you adding?

Bank

3

Matching Documents (1) Close

Bank Statements

Bank Statements

Matching Document Types (1)

Bank Statements

4

Filter View Combine Print

Search

13 documents

Sensitive

Bank Statements

What is this? ?

Actions... Add file...

Bank Statements

What is this? ?

Actions... Replace file...

Uploaded by TestHannah1 TestMoore1 on 8/5/2020

Sensitive

Color Copy of Government Issued ID (ex. Driver License) for TestHannah20

Sensitive

Uploading multiple documents

Home Requests Documents My Profile My Packages Sign Out

TestRhodyBiz20

Stage: Application

CRF USA

13 documents

Sensitive

Bank Statements

Color Copy of Government Issued ID (ex. Driver License) for TestHannah20

What is this? ?

+ Add file...

Save or Cancel

Go Back

What is this? ?

Actions... + Add file...

Replace file...

Uploaded by TestHannah1 TestMoore1 on 8/5/2020

Uploaded by TestHannah1 TestMoore1 on 8/5/2020

Name	Status	Date modified
Bank statements - Dec 19	✓	8/5/2020 11:32 A
Driver's License - Back	✓	8/5/2020 3:44 PM
Driver's License - Front	✓	8/5/2020 3:44 PM
Driver's License	✓	8/5/2020 11:29 A
Individual Tax Return 2019 - first page	✓	8/5/2020 11:31 A
TestRhodyBiz - Grant calculator	✓	8/5/2020 11:33 A
TestRhodyBiz - Income statement Q2 19	✓	8/5/2020 11:33 A
TestRhodyBiz - Income statement Q2 20	✓	8/5/2020 11:33 A
TestRhodyBiz20 - 941 Q1 2020	✓	8/5/2020 11:32 A
TestRhodyBiz20 Expense Documentation	✓	8/5/2020 11:34 A
TestRhodyBiz20 Expense Template	✓	8/5/2020 11:33 A
TestRhodyBiz20 tax return 2019	✓	8/5/2020 11:32 A

- 5. Click "Add File"
- 6. Choose the document you'd like to upload.
- 7. Click "Open"

Uploading multiple documents

Home Requests Documents My Profile My Packages Sign Out

CRF USA

TestRhodyBiz20
Stage: Application

Contacts

8. Click "Save"

Your document will show up in the portal.

Add New Document
Use this form to describe the document that you will be uploading with the application.

What is this? ? Sensitive

Actions... Replace file...

8

Save or Cancel Go Back

Filter View Combine Print

Search

13 documents

Sensitive

Sensitive

Bank Statements