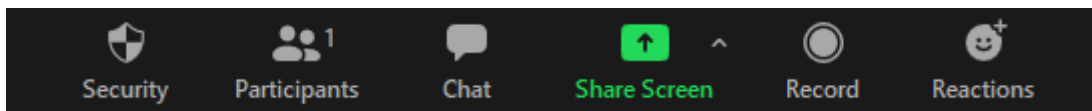




ZOOM: SCREEN SHARING

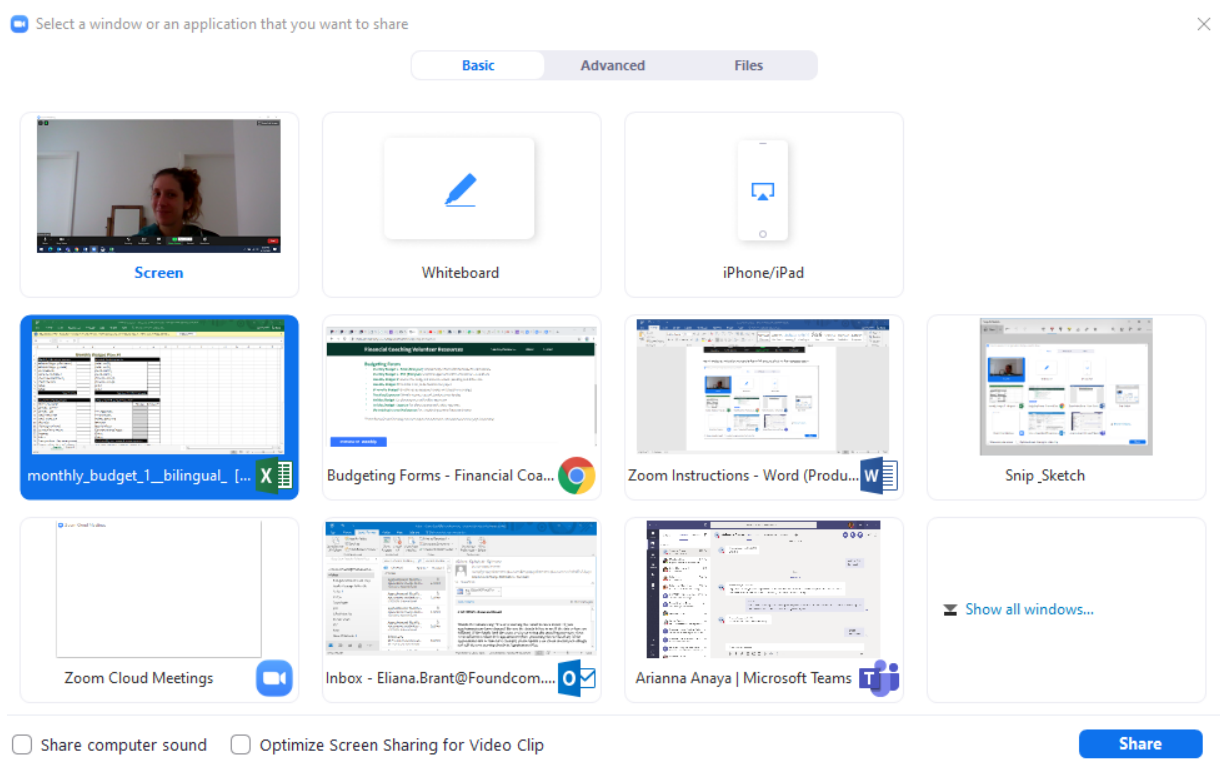
STEP 1

We suggest using screen sharing for activities you typically complete with clients in the office – showing them a website, reviewing a credit report, completing a budget, demonstrating how to set up an account or completing other forms & applications together. Clients can also share their screen in the same way so that they can get in the driver’s seat and show you anything on their end. To share your screen, click the green “Share Screen” option on the menu bar at the bottom of the screen.



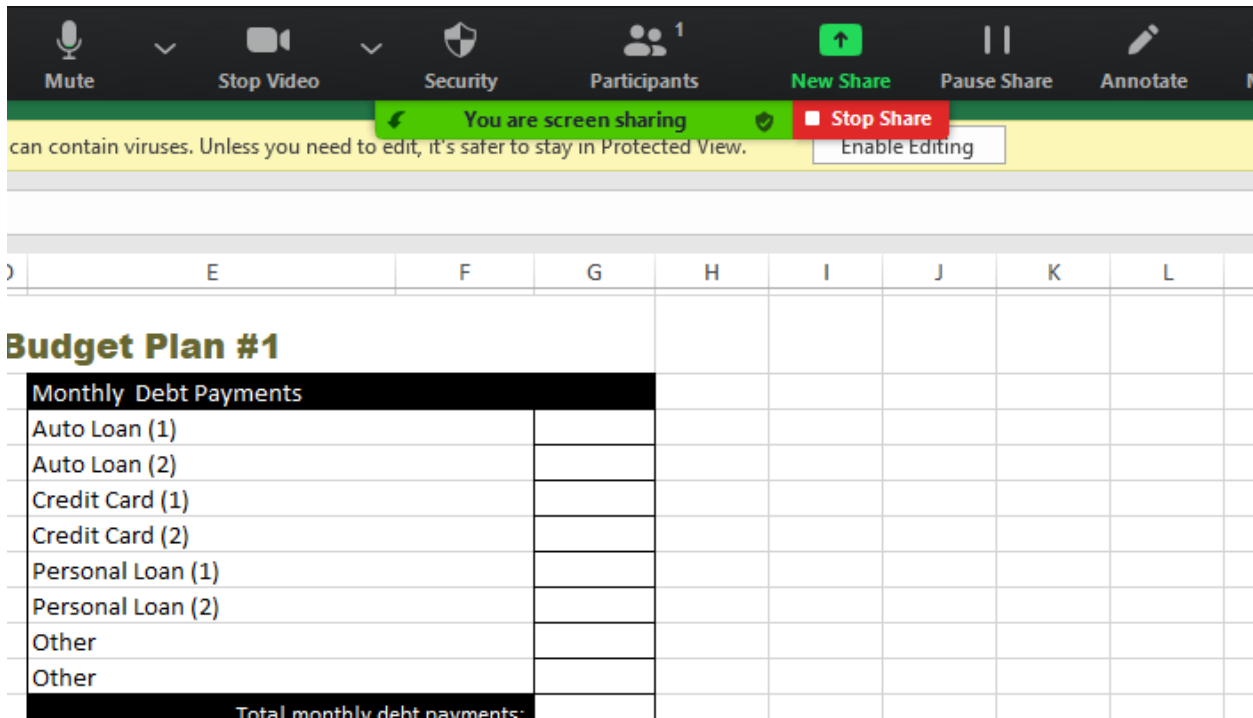
STEP 2

From there, you can either share your entire screen (by selecting “Screen”) or just a specific application or file that you have open. All of your open applications and files will be on display in the window. Click what you want to share, you’ll see it highlighted in blue and then click the blue “Share” button on the bottom right side of the screen. In this example, we chose “Monthly Budget 1” so that we can go through the budgeting form with the client.



STEP 3

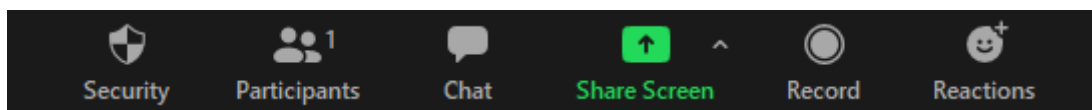
Once screen sharing begins, there will be a green message at the top of your screen that states “You are screen sharing.” From there, the client will be able to see what you’re doing on the screen or the specific application you chose. In this example, you can go through the budget together and they’ll be able to see as you plug in the various numbers. If you want to choose another application or file, you can click “New Share” on the menu bar. And if you want to stop sharing your screen at any point, click the red “Stop Share” button.



ZOOM: SENDING LINKS & FILES

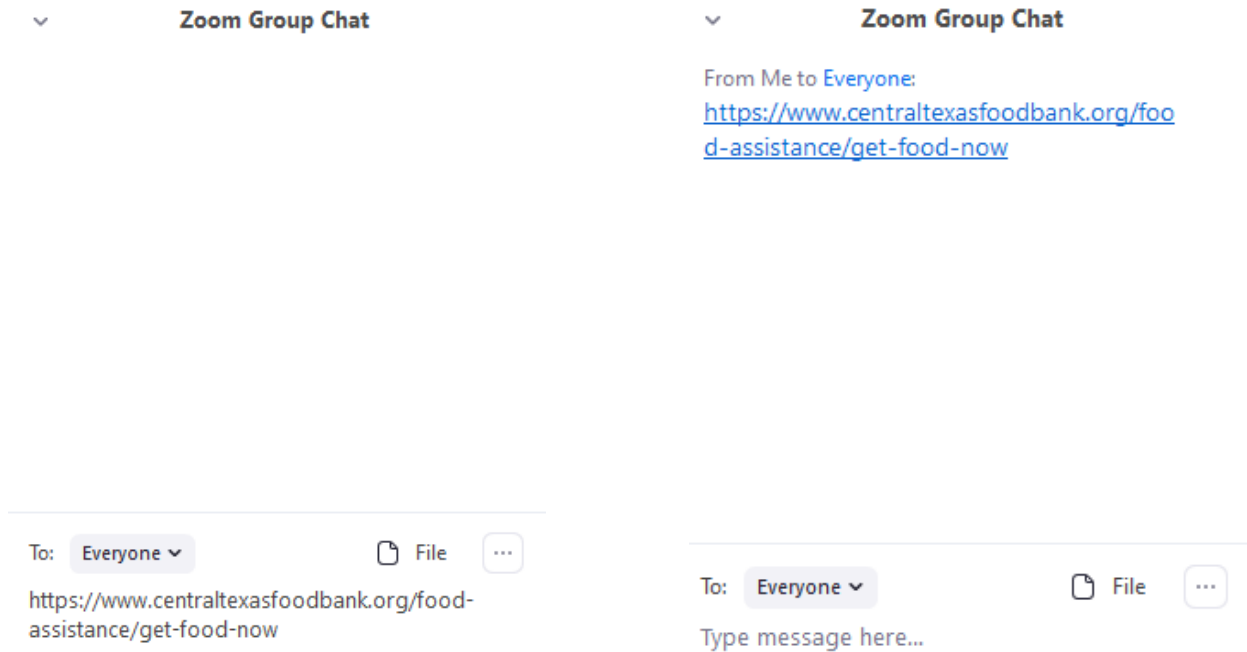
STEP 1

If you want to send website links or files to clients, the chat box is a great option. Click the “Chat” icon from the main menu.



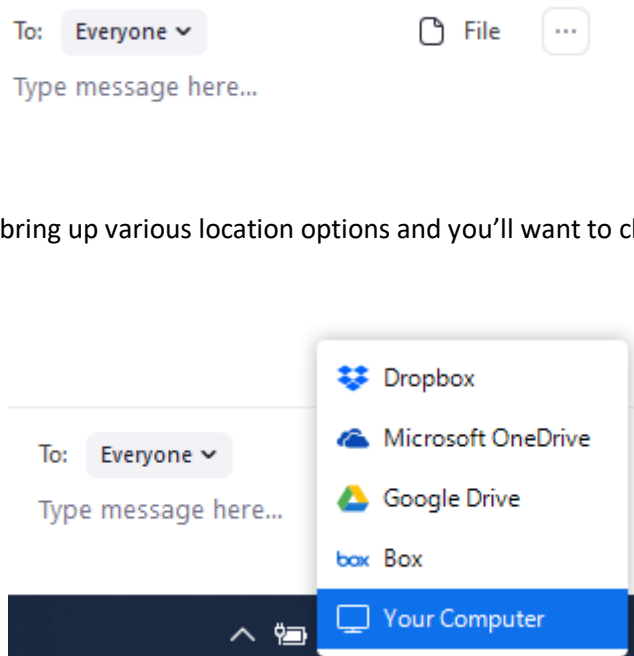
STEP 2 – SENDING LINKS OR TEXT

A chat box will then open on the side of the screen. In the bottom of the box you can enter a website link, upload a file or include any other text that you want to send. In the example below, we're sending a link to the Central Texas Food Bank. Whatever you send will then show up in the chat box for the client to see and potentially save on their phone or computer.



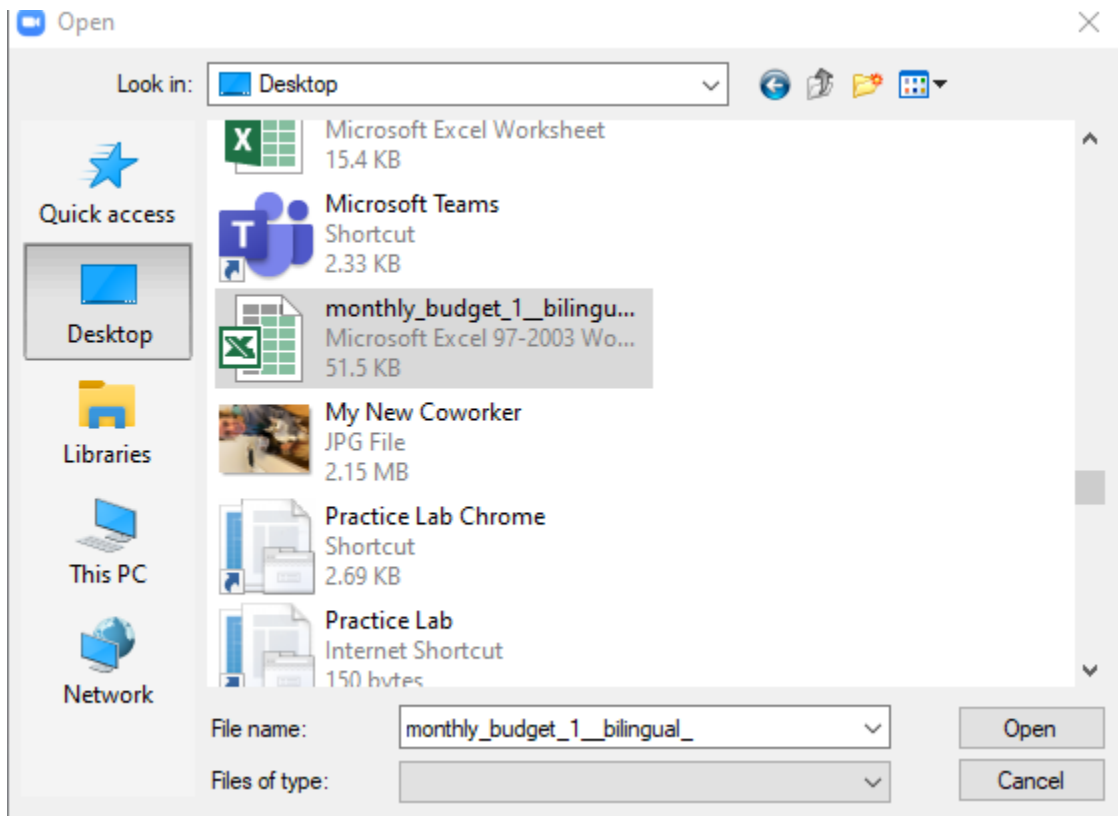
STEP 3 – SENDING FILES

If you want to send a file, hover over the "File" icon in the bottom of the chat box.



Zoom will then bring up various location options and you'll want to click on the one where the file is saved.

Choose the specific file you want to share. Click open and it'll then be added to the chat for you to send. It's helpful to ask clients what formats they might be able to open on their device. For example, they may not have access to open an Excel or Word file. You'll want to save files in a format that will be accessible to them prior to sending. PDFs are usually a safe bet for folks to open.



Once sent, the file will show up in the chat box and clients will have the option to download it and save it to their device.

