Attach a PDF to a Transaction

You can use this quick reference guide as a fast reminder of the basic steps for attaching a PDF file to a transaction.

1. Select the Transaction Management high-level task.

2. Click the Transaction List link.

3. On the list of transactions, click the Paperclip icon.

4. Click the Browse button.

5. Search and select the PDF file to attach.

6. Click the Open button.
7. Click the Attach button.

8. Click the PDF icon to open and view the attached PDF file.

Learn More: For more detailed information, refer to the Transaction Management web-based training lesson and user guide.

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