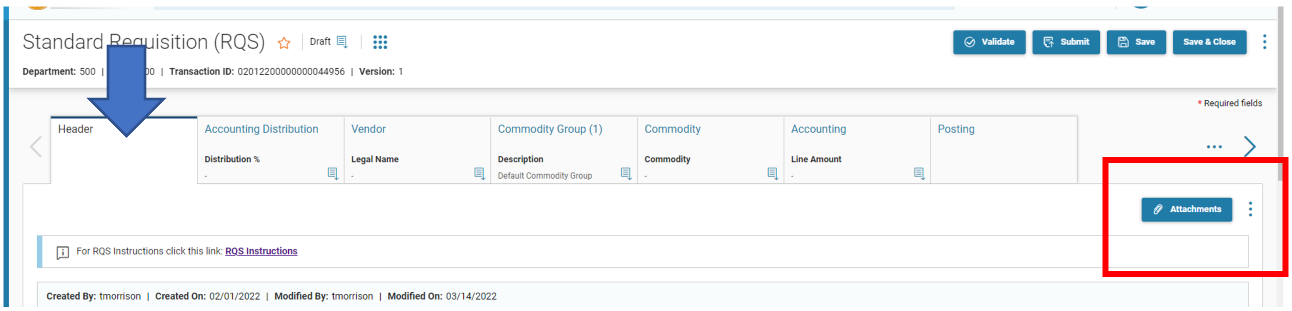
Add Attachments to Transactions

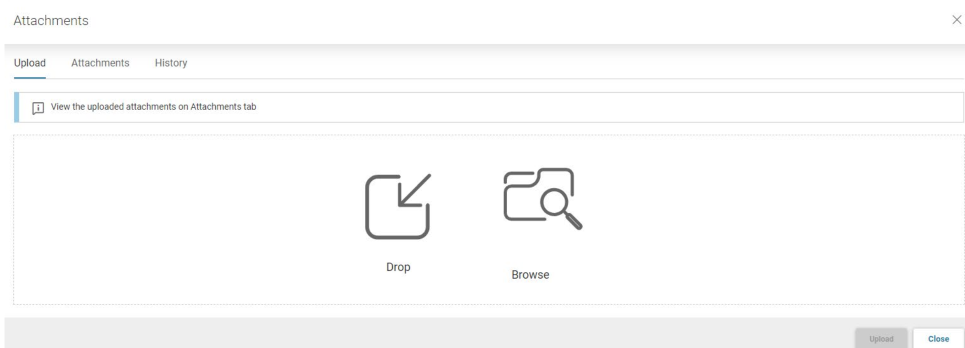
Attachments can be added to any ***draft*** transaction.

Click on the Attachments button on the Header section of the transaction.

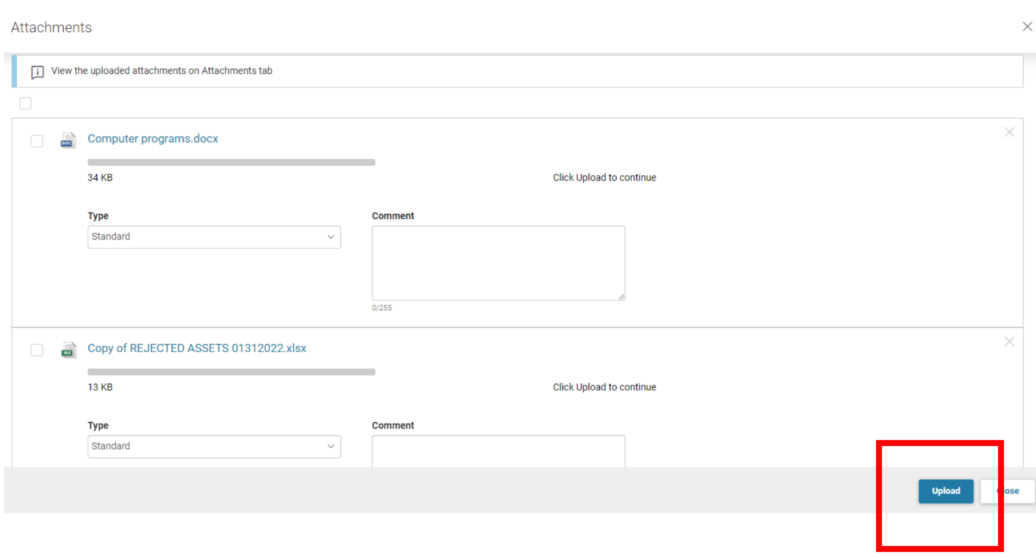


This will bring up a separate box where you can upload attachments two different ways:

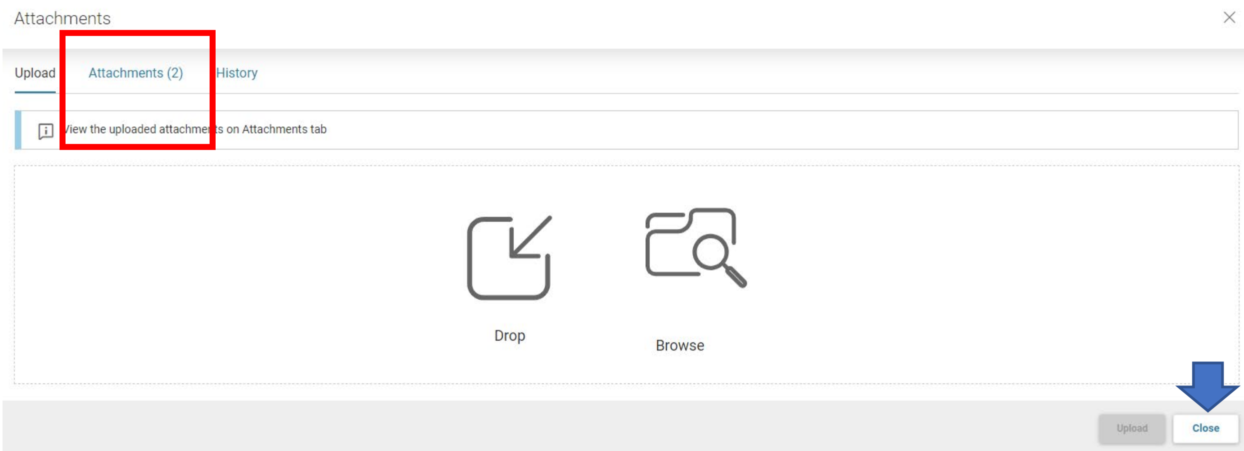
- Drag and drop file(s) into the box
- Click Browse and locate file(s) on your computer



You can add a comment if you want to in the Comment box, and the select Upload

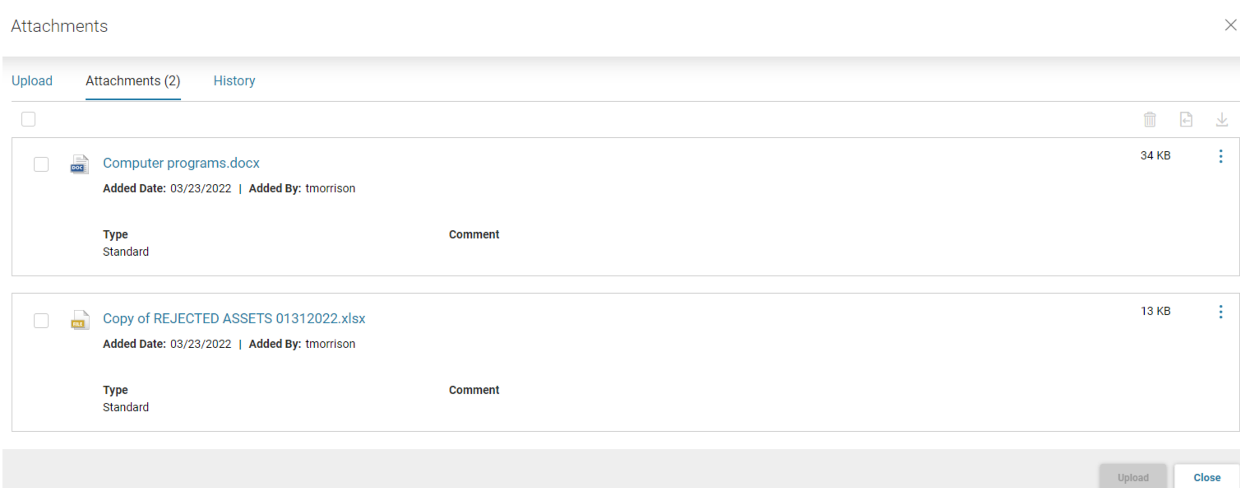


The Attachments tab will show the Attachment(s) have been uploaded. Click close to return to the transaction



On the Transaction Header, the Attachment button will now show the number of attachments on this transaction.

To view the attachments, click on the Attachments button, then click on the Attachments tab. All attachments associated with the transaction will be listed. Click on the document name to download and open the attachments



Click Close to return to the transaction.