Subject: Attaching Files to Request and Client File	Product: Customer Loyalty Group	Approved on:

Purpose:
Attaching documents to a client's *Request File* and *Client File*.

Policy:
- Any document that is used to complete a Request must be in PDF format and attached to the *Request File*.
- Any document that doesn't require a request, must be in PDF format uploaded to the *Client File*.

Procedure:
1. To attach PDF documents *to Request File*
    a. Locate the *Request* that requires the document
    b. Click *Edit* next to the Request
    c. Click the *Request File* button
    d. Click the *Choose File* button
    e. Search folder on the left side to find saved file from computer
    f. Click the file
    g. Click the *Open* button
    h. Click the *Upload* button
    i. Close the Request Profile screen
    j. Add a note in the *Request* field
        i. Uploaded *document name* to the RF
    k. Click the *Save* button
2. To attach PDF documents to *Client File*
    a. Locate the related client's Client Page
    b. Click the *Client File* button
    c. Click the *Choose File* button
    d. Search folder on the left side to find saved document from computer
    e. Click the file
    f. From the *Select File Type* dropdown, choose the type of file that is being uploaded
    g. Click the *Upload* button

Exceptions:
None