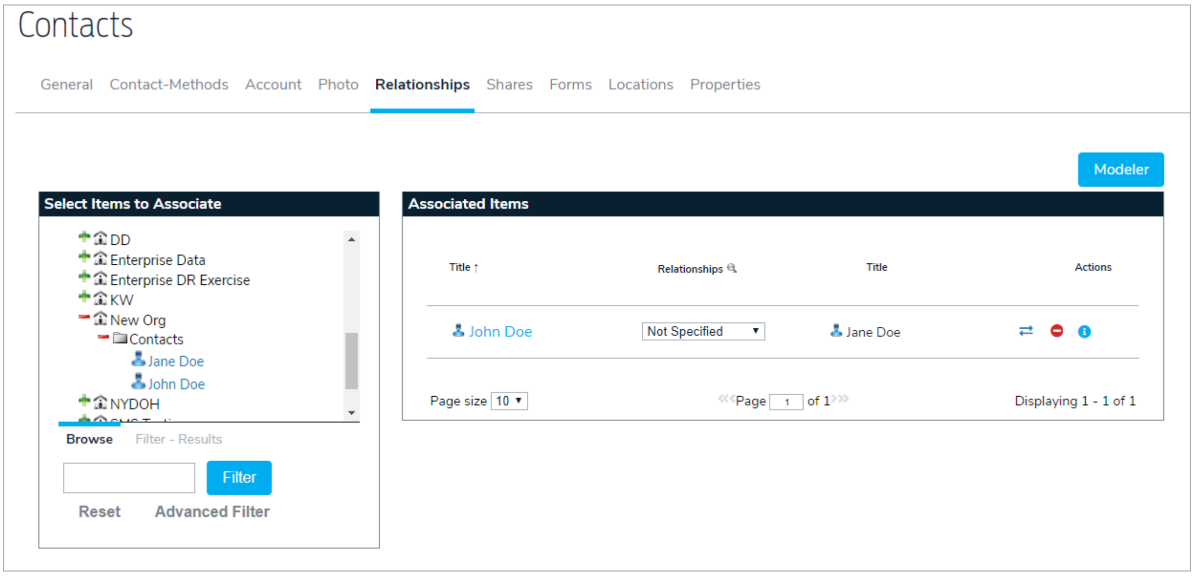
Document Relationships

You can create relationships between items and any record type (except for News & Updates).

1. To add a relationship to a record, open the record.
2. Click the Relationships tab.
3. Locate the item you wish to associate with the record, then click to add it to the Associated Items section.



Relationship types are defined in the Referential Data settings.