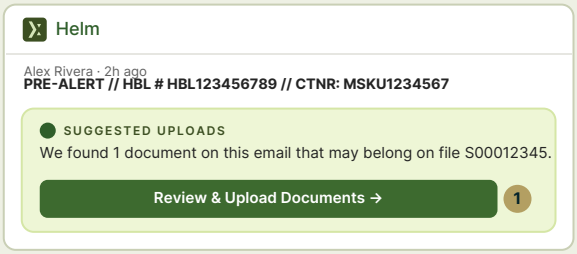
WHEN ONE ATTACHMENT HOLDS SEVERAL DOCUMENTS

Splitting a combined PDF.

Shippers often send one PDF with several documents inside. Split it in Helm so each one lands in the shipment's eDocs folder on its own, with the right type. You'll click Split twice: once in the Helm panel, then again in the window it opens.

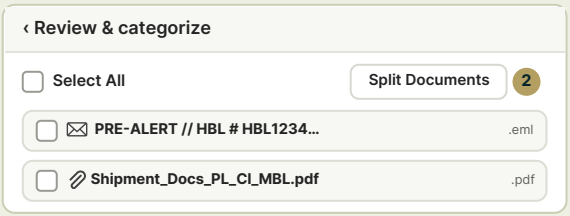
1 Click Review & Upload Documents

The green button on the Overview tab of the Helm panel.



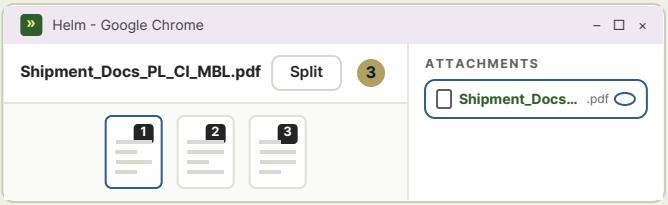
2 Click Split Documents

The first Split button, at the top of **Review & categorize**. A Helm window opens with the email and its attachments.



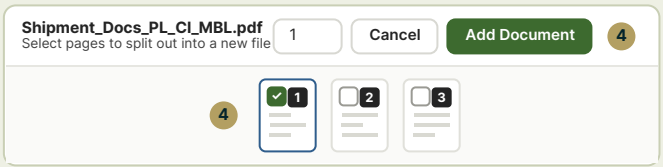
3 Click Split

The second Split button. In the Helm window, click **Split** at the top right of the preview. More than one attachment? Click its **eye** icon first.



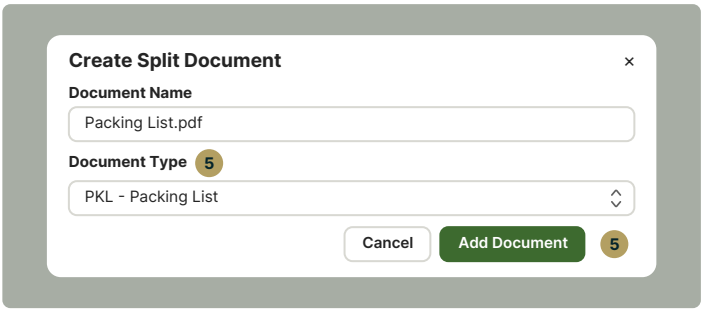
4 Select the pages

Tick the page(s) that make up **one** document, then click **Add Document** at the top.



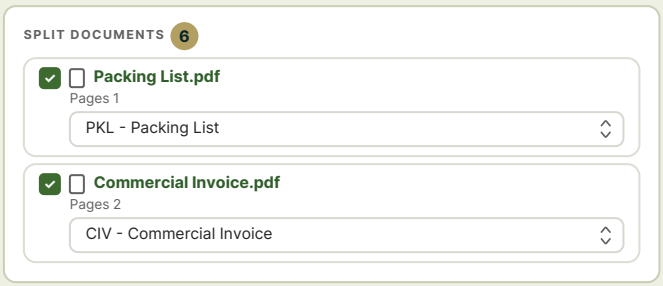
5 Name it and pick the type

In **Create Split Document**, rename it to your company's standard, choose the **Document Type**, and click **Add Document**.



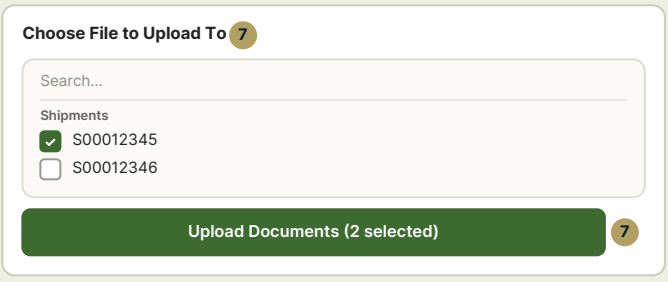
6 Repeat for each document

Each one appears under **Split Documents**, ticked and ready. Click **Split** again for the next document and repeat steps 3–5.



7 Choose the file and upload

Under **Choose File to Upload To**, tick the shipment(s). Then click the green **Upload Documents** button below it.



Good to know

Leave the original PDF unticked. Only ticked documents upload, so the combined file stays out of eDocs unless you want it there too.

Made a mistake? Fix the name or type under Split Documents, or remove a split with the trash icon.

Check a split before uploading by clicking its eye icon.

Not splitting? Refer to the Uploading Documents Quick Reference Card.