Store files on a contact record s

Each contact record has a file box where you can store contracts, spec sheets, proposals, and more. You can store any file that is under 10 MB in size. The files are date stamped and hyperlinked so that you can retrieve them easily while viewing the contact record.

Pro-Tip! If you are looking to do something outside of simply uploading and storing files to the filebox, ask the Infusionsoft Community about popular filebox integrations.

1. On the contact record, Click on the File Box tab located in the bottom row of tabs

		Sele	ect an action		
ursday, August 30), 2012 9:19 PM	Last Updated: Ma	rtin Cash Friday, May	/ 24, 2013 4:53 PM	
portunities	Orders	Service Tickets	Web Profile	File Box	

2. Click on **Browse** to find a file on your computer.

Tasks	Scored & Recent Activity	Follow-up Sequences	Campaign:
Attach N	lew File		
	Browse	Attach	
Attached	d Files		
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3. Click **Attach** to upload the file to the contact's file box.

	Attach N	ew File		
sab-alpha1.png Browse Attach	sab-alpha1.p	ong Browse	Attach	

You can view, delete, or rename files stored in the file box. If you need to update an existing file, make sure it has the same file name and file type (.doc, .xls, etc.) as the older version. When you upload the replacement file, Infusionsoft will ask you if you want to create a new file or replace the existing one.