Upload a file to a contact_%

This article applies to:

Upload files to a contact record so you never lose track of important information. You can store any file that is under 10 MB in size and download it from a contact record.

Upload a file

- 1. Navigate to a contact record
- 2. Click More

	Keap (555) 555-5555 michael.indrelunas@keap.co				
9 Text	E mail	P Tag	B Note	Fask	More
Contact activity					80

3. Click Upload a file

\$ Add payment, invoice, or quote	· >
🗅 Upload a file 👆	
Forms	>
ංසී Add to automation	

4. Select the file to upload

Access files

1. Click the File card in a contact's activity feed

Overdue		
+13 more quotes or invoices		
Files		B
Uploaded: Now		_
Tyler- BRPendo.csv		
+3 more files	£	
	-	
Fmails		

2. Locate the file, using search if necessary, and download the file or open the menu to rename or remove it

÷	Files Michael Indrelunas	File size limit is 10 MB	•
Q Se	earch files		
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Rename or remove files

- 1. Access the contact's files
- 2. Click the three dot button next to the file you want to delete or rename

÷	Files Michael Indrelunas	File size limit is 10 MB	•
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3. Select Rename or Remove

Q Search files			
Work outline.pdf Tue, May 26, 4.39 MB		⊻	
	Rename file		
	Remove		

4. Confirm your changes

Text	Image	Data	Audio	Video
.doc	.tif	.CSV	Audio	.qt
.docx	.tiff	.xlr	.wav	.mov
.log	.gif	.xls	.wma	.movie
.msg	.jpeg	.xlsx	.mp3	.hdmov
.pages	.jpg	.key	.mp4	.mnv

Supported file types

Te kt	ljiifage	DPARTSA	Accidio	Video
.txt	.jiff	.ppt		.f4p
.wpd	.jp2	.pptx		.hdv
.wps	.jpx	.xml		.divx
.err	.j2k			.mp4
.text	.fpx			.mp4v
.pwd	.pcd			.mpg
.notes	.png			.mpeg
.xdl	.pdf			.mpeg4
.wp	.bmp			.mpeg1
.wp4	.psd			.rm
.wp5	.pspimage			.vob
.wp7	.thm			.wmv
.wsd	.yuv			.wm
				.avi
				.m4v
				.gvi
				.m2ts