

Attachments and files

Getting started

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Attachments and files

Attach scanned documents and images to any record, and manage them.

Beginner · About 5 minutes · Version 1.0 · Updated 17 November 2026

Overview

You can attach files, such as a supplier's invoice scan or a signed delivery note, to any record. They stay with the record so they are easy to find later.

Steps

1. Open the record.
2. In the left sidebar, click the **+** beside **Attachments**.
3. Click **Upload**, choose the file, or drag it in. You can also attach a link or take a photo on a phone.
4. Leave **Private** ticked unless the file must be public, then click **Upload**.
5. The file appears under Attachments. Click it to open it, or the small **x** to remove it.

Practical example

When goods arrive, the storekeeper photographs the supplier's delivery note and attaches it to the Purchase Receipt. Months later, a query about the quantity is settled by opening the record.

Important notes

- **Private** files are visible only to signed-in users with access to the record. **Public** files can be opened by anyone who has the link. Keep customer and financial documents private.
- Very large files may be rejected. Compress photos before uploading.
- Files count towards your storage.

Common mistakes

- Making a sensitive file public.
- Attaching to the wrong record. Check the record name first.

Next steps

Read Understanding document status.

Related documentation

- List views and form views
- Backups, logs and security