



BOOKS

Filing Cabinet

Built-in document storage for receipts, invoices, contracts, and tax documents. OCR search, email-to-file, sharing.

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The Filing Cabinet is Books' built-in document storage — receipts, invoices, contracts, tax documents. Every attachment uploaded to a transaction also appears in the Filing Cabinet, plus you can upload standalone documents that aren't tied to a transaction.

What to Store

- Receipts for expenses (especially anything you might need for an audit)
- Invoices you issued to clients
- Vendor contracts and engagement letters
- Tax documents (1099s received, W-9s collected, prior-year returns)
- Bank statements (if you want to keep them with your books)
- Insurance policies, business registration documents

Uploading

- **From a transaction** — open the transaction, drag a file onto the attachments area
- **Direct upload** — go to **Filing Cabinet** → **Upload** and drag files in. You can tag them with a category and optional payee.
- **Email-to-file** — every Books account has a unique upload email (look in Filing Cabinet settings). Email receipts directly to that address; they appear in your Filing Cabinet automatically.

Organizing

Documents can be:

- **Tagged** with categories (Receipt, Invoice, Contract, Tax, etc.)
- **Linked to a payee** for filtering ("show me all Comcast documents")
- **Linked to a transaction** for cross-reference
- **Folders** — create folders for any organization scheme you like

Searching

Search by filename, by tag, by payee, or by transaction. Books also performs OCR on uploaded images and PDFs, so you can search by text inside the documents — useful for finding "that one Amazon receipt for the printer" without remembering when.

Retention & Backup

Documents are stored encrypted at rest. Free plan: 100 MB. Growth: 1 GB. Pro: 10 GB. When you cancel your subscription, you can export all documents (one ZIP per folder) for 90 days, then they're permanently deleted.

ADVISOR TIP

For tax-record-keeping, most jurisdictions require keeping receipts for 7 years (US: IRS recommends 7). Tag receipts by tax year (2025 - tax - year) for easy year-end export.

Sharing Documents

Each document has a **Share** button that generates a unique time-limited URL — useful for emailing a vendor a copy of their invoice, or sharing a year of receipts with your accountant. Share links expire after 7 days by default (configurable).