

How to Create a New Document Type in fileSMART Archive

fileSMART Archive comes with a standard list of Document Types. You are easily able to add, remove or edit document types to suit your offices' needs. We recommend that you review and set up your list of document types before you start using your fileSMART program. To create a new document type:

- 1. Log into fileSMART Archive an the Administrator.
- 2. Right click on the Archive Folder containing the Document Types you would like to add to.



- 3. Select Manage Document Types from the pop-up list.
- 4. Scroll to the bottom of the table and position the cursor on the blank line. You may need to click once to select the line and a second time to place the cursor.

	Description	<u></u>
	Tenant Correspondence Out	
	Tenant Direct Debit Request	
	Tenant Ledger	
	Tenant References	
	Tradesman Corrospondence	
	Vacates	
	Warranties	
	Work Order	
▶*		1
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- 5. Enter the new Document Type and click OK.
 6. Refresh the DocType list by changing to a different Archive Folder and back again.

U It may be necessary to exit fileSMART Archive and log in again if this does not work.

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