

Split Owners

Statements for up to 9 split owners (v5.6.7) will be auto archived to their individual Owner Alphas by fileSMART AutoArchive.

If an Owner Invoice (or any other document type to be collated) has only been archived to one of the split owners, then only that owner will get a copy of the document along with their statement.

If each of the split owners requires copies of these supporting documents, there are 3 ways around the current limitation:

1. Archive another copy of the invoice for each of the additional owners (print the scanned copy to the fileSMART Archive printer to get an additional copy).
2. If only one copy of the supporting document is being archived and the owners are being emailed, in the Contacts screen add the email addresses of the additional owners to that of the owner to whom the single copy of the document has been archived. If this is the solution the customer wants to use, it would be a good idea for their Document Management Policy to specify that the email addresses will be added to the primary owner so if a single copy of the document is being archived, it should be to the primary owner.
3. If one or more of the split owners is being printed it will be necessary to set the primary owner to 'Print, do not Email' or 'Email and Print' as required then, when the collation is finished, go to the 'Processed' list, choose the primary owner and use the 'Print Selection' button to reprint the required number of copies. Or just photocopy the supporting documents the required number of times.

02/02/2016 10:42 am AEDT