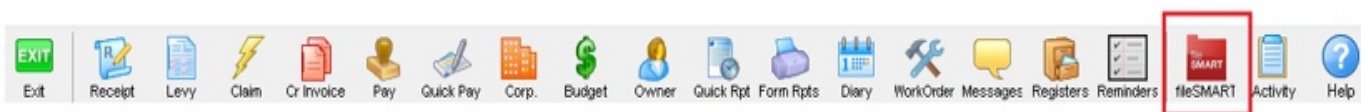




Using fileSMART Integration with STRATA Master

Open fileSMART from STRATA Master

When the configuration has been completed in STRATA Master, a fileSMART Icon will be displayed on the main toolbar.



When you click on the fileSMART Icon if you have not logged into fileSMART for the day, you will be prompted to login.

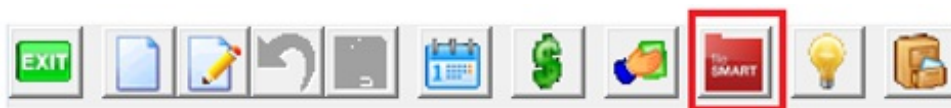
If you already logged into fileSMART, clicking the Icon will bring fileSMART to the front of your screen.

NOTE: If you auto-archive a document directly from STRATA Master, the fileSMART login screen will be displayed, and you will be required to login even if you have already opened fileSMART for the day. The second login checks your publishing permissions as configured in the Manage fileSMART Archive User screen.

Searching for Documents

fileSMART Icon in Corp Screen

Now that you have configured fileSMART as your default document management system the icon displayed in the Corp screen has changed from the folder icon to fileSMART.



When you click on the fileSMART Icon, it will open the search screen in fileSMART for the Owners Corporation, with the plan number prepopulated.

If you haven't logged in to fileSMART for the day, you will be prompted to log in at that time.

Publishing Documents from fileSMART to the Portals

- Any existing document in fileSMART can be published to the portals by selecting the relevant checkbox in fileSMART Archive.

- Single or multiple documents can be updated in fileSMART to be displayed on the portals.
- Bulk editing of documents can only be performed by users with Bulk Edit permissions.
- To remove documents from being displayed on the portals simply uncheck the owner/executive box for the relevant document in fileSMART Archive.
- fileSMART Version 6.5 onwards allows administrators to setup default document descriptions which can then be selected in fileSMART to be shown on the portals. Where descriptions are set in fileSMART they will not be displayed until the options has been saved in the STRATA Master Configuration Tool.

See this article for more information on STRATA Master & fileSMART Integration "[fileSMART Creditor Invoicing \(FSCI\) Screen](#)"

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