

Auto-Archiving Documents From Strata Master

Report Options

Where ever you see the check box named **Save report** or **Save notices to file** on screen in Strata Master this means that you are able to automatically archive a copy of the document in **File Smart**.

Users with permission in **File Smart** to publish documents to the portal will be prompted to select whether the document should be published to the portal. The publishing options will be Owner, Executive, both or none.

Listed below is a guide as to the folders in which the reports are saved, and any notes which are included when archiving the documents.

See this article for more information on Strata Master & fileSMART Integration "Conversion from the Internal Document Register"

Strata Master Functionality	Folder in File Smart	Doc Type in File Smart	Default Portal Description	Notes Included When Archiving
Levy Processing > Print Levy Notices	Individual Lots	Levy Notice	Month-YYYY e.g. March 2016	Delivery Method = Printed
Levy Processing > Email Levy Notices	Individual Lots	Levy Notice	Month-YYYY e.g. March 2016	Delivery Method = Email, and the recipients email address
Levy Processing > Issue Invoices	Individual Lots	Levy Notice	Month-YYYY e.g. March 2016	Owner Invoice
Levy Processing > Issue Submeter Invoices Accounting > Submeter Invoicing	Individual Lots	Levy Notice	Month-YYYY e.g. March 2016	Owner Invoice
Levy Processing > Debt Recovery	Individual Lots	Levy Notice	Stage Name e.g. Stage-1	
Levy Wizard > Issue Individual Statement	Individual Lots	Levy Statement		
Reports > AGM Preparation	Owners Corp	AGM Reports	Financial Reports to Month YYYY	FYto201207 (where the year-end is 30/06/2017)
Reports > Interim Reporting	Owners Corp	Interim Reports	Interim Reports to Month YYYY	
Reports > Tax Reports	Owners Corp	Tax Reports	Tax Report for YYYY	Tax Report for 2017 (where the year selected is 2017)

Wizards > Bulk Bank Reconciliation	Owners Corp	Bank Reconciliation	operating Account or Investment Account	
Wizards > bank Statement Filing	Owners Corp	Bank Statements	Operating Account - Month YYYY or Investment Account - Month YYYY	Month of Statement and Operating or Investment depending of the selection in the wizard
Meetings > Agenda Wizard	Owners Corp	User selects from document types in Owners Corp folder	User selects portal description as setup in fileSMART	
Meetings > Minute Wizard	Owners Corp	User selects from document types in Owners Corp folder	User selects portal description as setup in fileSMART	
Reports > GST Reports	Owners Corp	Business Activity Statement	Report Period e.g. 01/07/2016 - 31/09/2016	
Accounting > Opening Balance Entry	Owners Corp	Opening Balances		
Accounting > Invoice Management Fees	Payments / Maintenance	Invoices	Month - YYYY e.g. September 2016	Management_Fee_Invoice_Month

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