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fileSMART Workflow for REST Professional

fileSMART Workflow changes the way you move documents around your business. From the time that the document is received by your Agency, until it is archived away, fileSMART will manage the workflow of the document.

REST Professional & fileSMART Integration

To enable the fileSMART workflow feature, REST Professional & fileSMART must be integrated.

For more information see Setting Up Enhanced Integration REST Professional and fileSMART

Processing your Documents using the Workflow Feature of fileSMART

fileSMART has four different workflow modes to choose from:

- **Ad-hoc Workflow** - Used to pass documents to others in your office

- **REST Invoice Workflow** - Used to pass & process invoices in your office

- **REST Barcode Invoice Workflow** - Used to pass & process Barcoded or QR coded invoices in your office. Archiving and invoicing details auto-populate with information from REST Professional.

- **REST Owner & Tenant Water Invoicing Workflow** - Specifically designed to process Water Rates notices. This workflow combines the process of creating the creditor disbursement to pay the water supplier with the process of invoicing the tenant for water charges. This workflow is available with REST Professional Version 14.5.

For detailed instructions on how to use workflow, see fileSMART for Property Management Workflow Setup and Use Guide

For information on Barcode Setup, see Creditor Barcode Template Changes for fileSMART Creditor Disbursements in REST Professional

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