



## What's New in fileSMART Version 7.5

### Overview

fileSMART version 7.5 introduces further efficiency and controls in the area of Auto Archive, STRATA Workflow, STRATA plans listing, Search & Archive modes. The following enhancements has been added:

#### Additional REST Professional Reports Can be Auto Archived in fileSMART

A new feature has been introduced in which a user can auto archive the EFT Tenant debit list which will be saved into the PMAAdmin folder in fileSMART. Moreover, User can auto archive the Commercial Tenant Statements which will be saved in Property Management folder.

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REST Professional Software System (14.5.07) Date: 23/08/16 Page: 001  
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Rockend Training Centres  
ROCKEND REAL ESTATE TRUST ACCT

**EFT TENANT DEBITS LIST**  
Written to disk on 23/08/16

Tenant name	BSB	Account	Transaction reference	Amount
Jake Gyllenhaal	432-552	98684363	10750 Rent	1360.00
				1360.00

1 EFT debit transactions written to disk plus a credit transaction for the total.  
Tenant Debits file created and saved to C:\REST\WBC.AB1

Matt Damon  
Suite 2 / 10 Hudson Street  
ST LEONARDS NSW 2065

Date: 06/09/16  
Ref: DAMONM  
Page: 1

Owner: Alec Baldwin  
ABN: 54678987345  
Tenancy: Matt Damon  
Premises: Suite 2 / 10 Hudson Street, ST LEONARDS, NSW, 2065  
Manager: Lex Luthor

### Statement for May 2016

Description	Ref	Paid To	Rate	Per	Due Date	Credit	Due (GST Incd)	GST
Rent to May 2016		31/05/16	1049.99	M1	01/05/16	0.00	0.00	0.00
Outgoings to May 2016		31/05/16	158.35	M1	01/05/16	0.00	0.00	0.00
Repair to front gate TEST	101005		880.00		26/04/16	80.00	800.00	72.73
<b>Total Due NOW</b>							<b>880.00</b>	<b>72.73</b>

### Tax Invoices for June 2016

Description	Ref	Paid To	Rate	Per	Due Date	Due (GST Incd)	GST
Rent June 2016		31/05/16	1049.99	M1	01/06/16	1049.99	95.45
Outgoings June 2016		31/05/16	158.35	M1	01/06/16	158.35	14.40
<b>June Tax Invoice Total</b>						<b>1208.34</b>	<b>109.85</b>

## Support for Additional NZ Supplier Barcodes for REST Professional

Support for additional New Zealand supplier invoices for fileSMART workflow has been added. The new fileSMART workflow can handle the New Zealand barcode standard used for identifying creditors on a New Zealand invoice, such as council rates, water rates, energy bills and gas bills. Previously it was limited to two creditors Auckland Council and Watercare the version 7.5 fileSMART changes now cater for other creditor invoices that adhere to the same barcode standard used by Auckland Council and Watercare in New Zealand.

**NOTE:** that CRN number must be static otherwise like any other barcodes matching of the property.



WSLAC00363450200000018018

The above example of WSL is the Biller Id for Watercare barcoded invoices.



TELAC59208304941005302

The first 3 Uppercase Alphabetical characters for example 'TEL' above provide the biller id or creditor Id.

**NOTE:** The CRN used to match a Property record needs to be static otherwise the barcode will not work. The following New Zealand barcodes for the following creditors have now been successfully tested.

**REST Professional:**

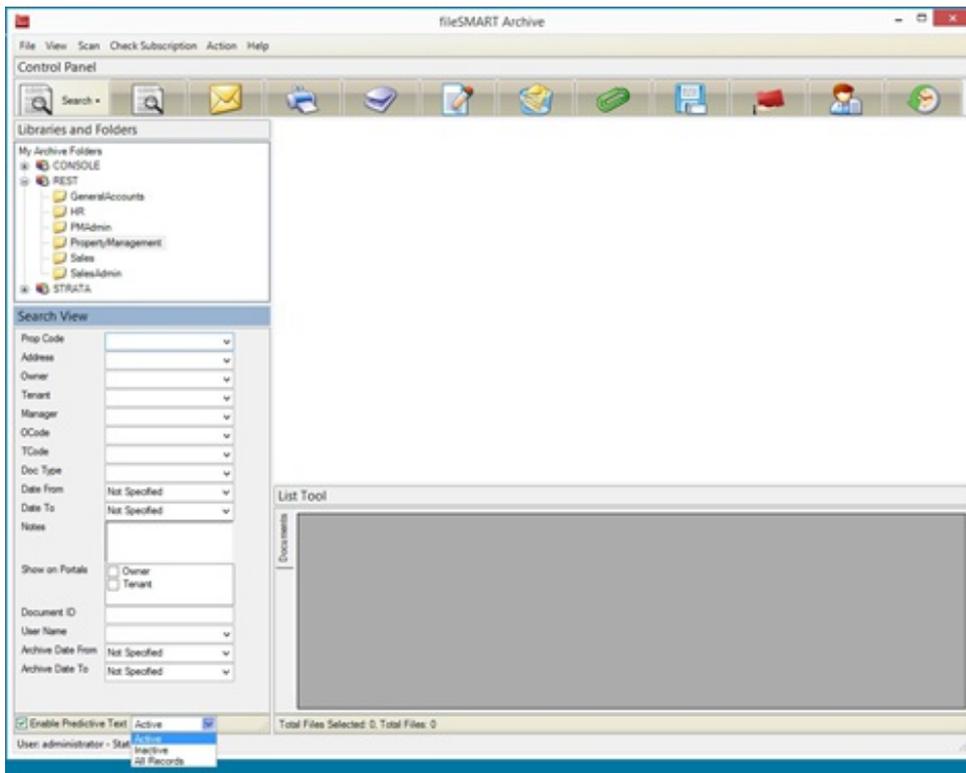
- Auckland City Council
- Watercare

**A New Filter Menu is Now Available in fileSMART for REST Professional**

A new filter is available in fileSMART for REST Professional Search and Archive to show only Archived (inactive), show Active or Show all (Archived and Active Properties). Now records can be segregated based on the selection drop down.

**fileSMART Search**

For fileSMART search the following filter menu will be provided.



The default filter option will be 'Active' records.

The following behaviour will occur based on the filter option selected

### Active

All active property codes and archived property codes up to the last 60 days will be shown in the main fileSMART 'Prop Code' drop down search menu.

### Inactive

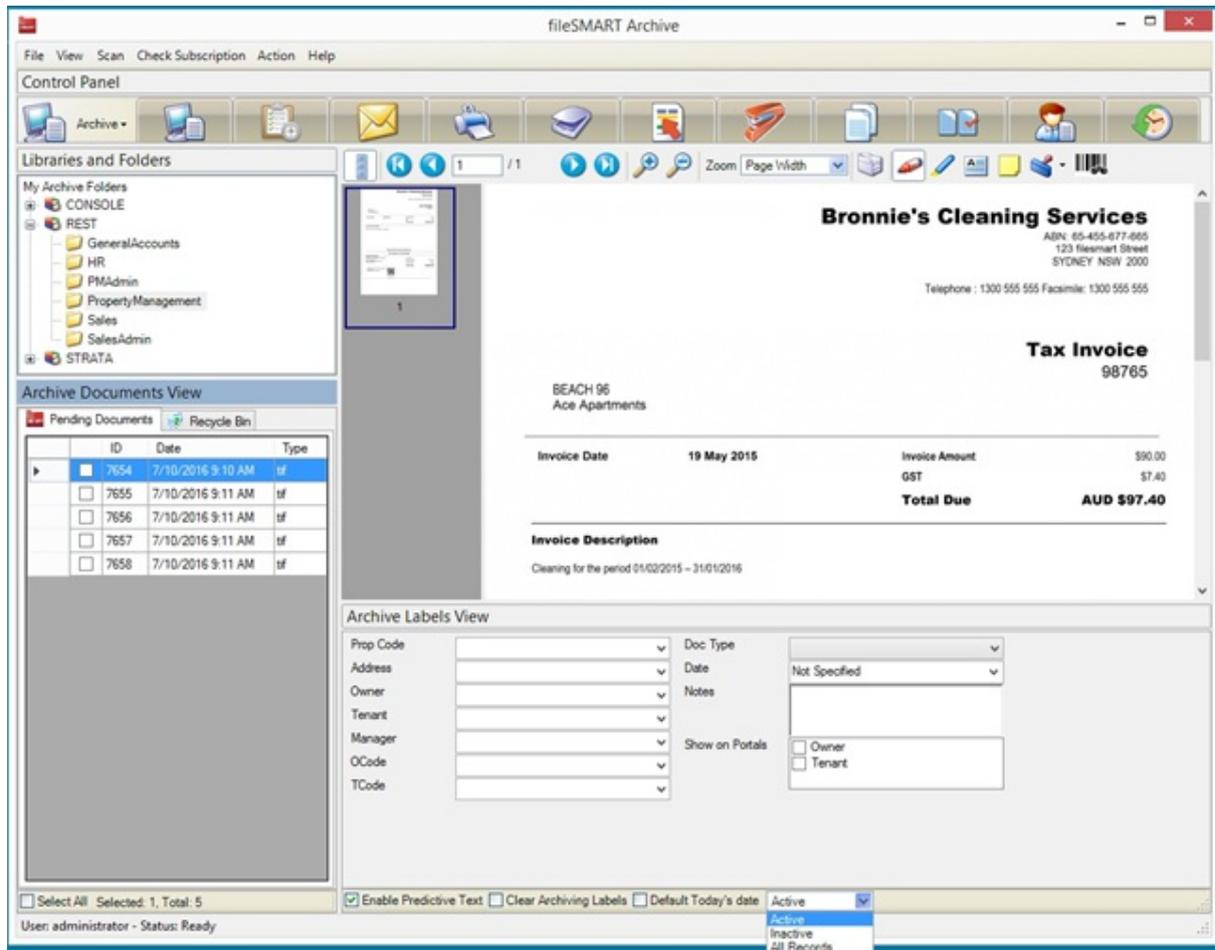
All Inactive Property codes that have been inactive for longer than 60 days will only be shown in the main fileSMART Prop Code drop down menu.

### All Records

All records both active or Inactive will be shown in the Prop code drop down search menu.

## fileSMART Archive

For fileSMART Archive the following filter menu will be provided.



The default filter option will be 'All Active' records.

The following behaviour will occur based on the filter option selected

### Active

All active property codes and archived property codes up to the last 60 days will be shown in

the main fileSMART 'Prop Code' drop down Archive menu.

## Inactive

All Inactive Property codes that have been inactive for longer than 60 days will only be shown in the main fileSMART Prop Code drop down menu.

## All Records

All records both active or Inactive will be shown in the Prop code drop down Archive menu.

## A New Filter Menu is Now Available in fileSMART for STRATA Master

A new filter is available in fileSMART for STRATA Master Search and Archive to show only managed, show only unmanaged or Show all (Managed and Unmanaged). Now records can be segregated based on the selection in the drop down menu.

## fileSMART Archive

The screenshot displays the fileSMART Archive application window. The interface includes a menu bar (File, View, Scan, Check Subscription, Action, Help), a Control Panel with various icons, and a sidebar with 'Libraries and Folders' and 'Archive Documents View'. The main area shows a tax invoice for 'Bronnie's Cleaning Services' dated 19 May 2015, with a total due of AUD \$97.40. Below the invoice is the 'Archive Labels View' section with various filters and a dropdown menu for 'Managed', 'Unmanaged', and 'All Plans'.

ID	Date	Type
7654	7/10/2016 9:10 AM	tf
7655	7/10/2016 9:11 AM	tf
7656	7/10/2016 9:11 AM	tf
7657	7/10/2016 9:11 AM	tf
7658	7/10/2016 9:11 AM	tf

**Bronnie's Cleaning Services**  
ABN: 65-655-677-665  
123 fileSMART Street  
SYDNEY NSW 2000  
Telephone: 1300 555 555 Facsimile: 1300 555 555

**Tax Invoice**  
98765

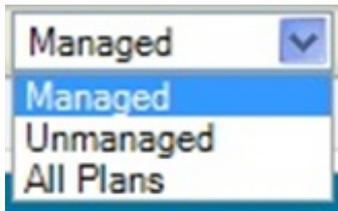
BEACH 96  
Ace Apartments

Invoice Date: 19 May 2015 Invoice Amount: \$90.00  
GST: \$7.40  
**Total Due: AUD \$97.40**

**Invoice Description**  
Cleaning for the period 01/02/2015 - 31/01/2016

**Archive Labels View**  
Plan Number: [Dropdown] Doc Type: [Dropdown]  
Address: [Dropdown] Date: Not Specified [Dropdown]  
Manager: [Dropdown] Notes: [Text Area]  
Show on Portals:  Executive  Owner  
Portal Description: [Dropdown]

Select All Selected: 1, Total: 5  
 Enable Predictive Text  Clear Archiving Labels  Default Today's date  
User administrator - Status: Ready



The default filter option will be 'Managed' records.

The following behaviour will occur based on the filter option selected

### Managed

Managed plan will be shown in the main fileSMART 'Plan number' drop down Archive menu.

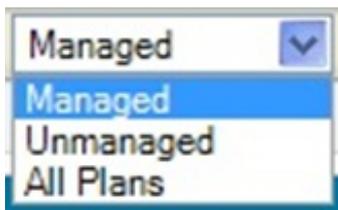
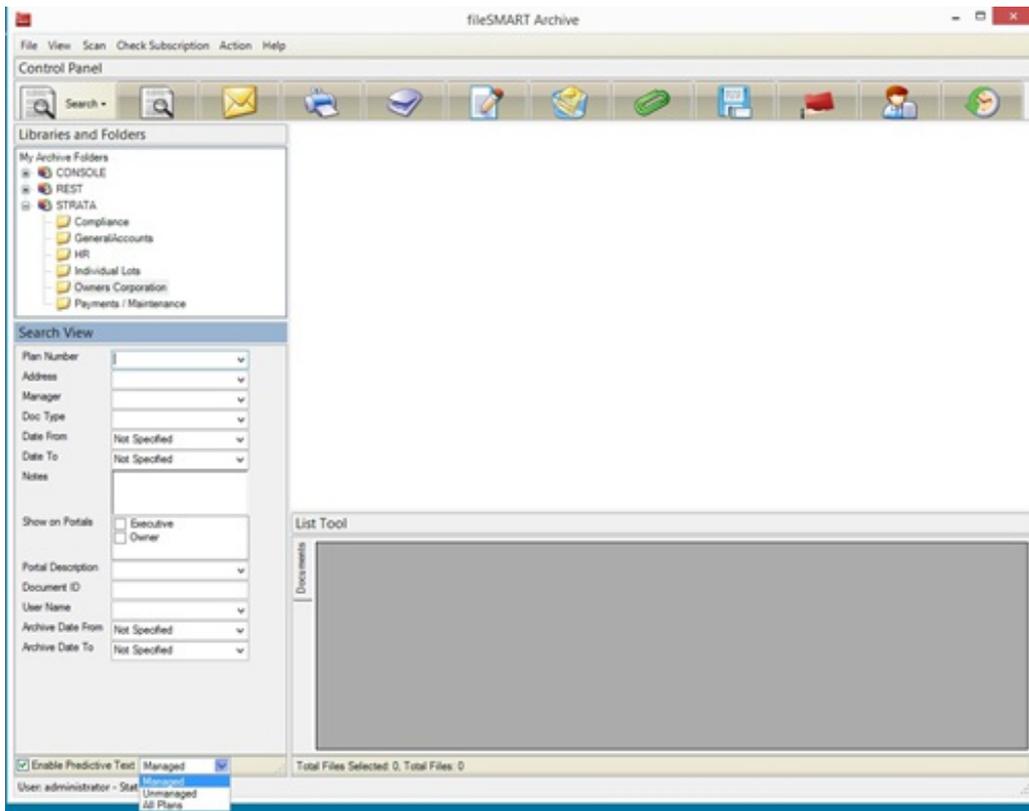
### Unmanaged

Unmanaged Plan that are no longer managed will be shown in the main fileSMART Plan number drop down menu.

### All Plans

All plans both managed or Unmanaged will be shown in the Plan dropdown Archive menu.

### **FileSMART Search**



The default filter option will be 'Managed' records.

The following behaviour will occur based on the filter option selected

**Managed**

Managed plans will be shown in the main fileSMART 'Plan' drop down search menu.

**Unmanaged**

Unmanaged plans will be shown in the main fileSMART Plan drop down menu.

**All Plans**

All plans both managed and unmanaged will be shown in the Plan dropdown search menu.

Support for Additional NZ Supplier Barcodes for STRATA Master

Support for additional New Zealand supplier invoices for fileSMART workflow has been added. The new fileSMART workflow can handle the New Zealand barcode standard used for identifying creditors on a New Zealand invoice, such as Council rates, Water rates, energy bills and gas bills. Previously it was limited to two creditors Auckland Council and Watercare, version 7.5 fileSMART now caters for other creditor invoices that adhere to the same barcode standard used by Auckland Council and Watercare in New Zealand.



The above example of MRP is the Biller Id for Mercury Energy barcoded invoices.



The first 3 Uppercase Alphabetical characters for example 'TEL' above provide the biller id or creditor Id.

Note that the CRN used to match a Plan needs to be static otherwise the barcode will not work. The following New Zealand barcodes for the following creditors have now been successfully tested.

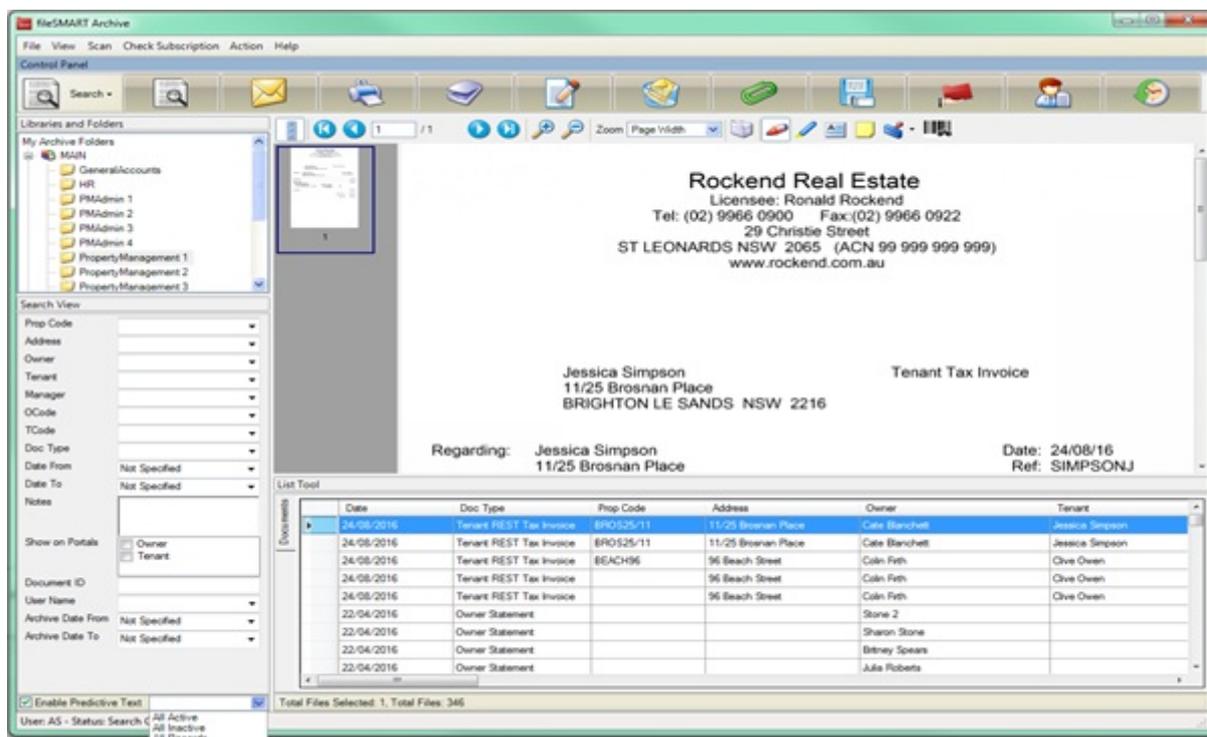
- Spark Digital
- Mercury Energy
- Sky Business
- Watercare

A New Filter Menu is Now Available in fileSMART for Console

A new filter is available in fileSMART for Console Search and Archive to show only Archived (inactive), show Active or Show all (Archived and Active Properties). Now records can be segregated based on the selection in drop down.

## fileSMART Search

For fileSMART search the following filter menu will be provided.



The default filter option will be 'All Active' records.

The following behaviour will occur based on the filter option selected

### All Active

All active property codes and archived property codes up to the last 60 days will be shown in the main fileSMART 'Prop Code' drop down search menu.

### All Inactive

All Inactive Property codes that have been inactive for longer than 60 days will only be shown

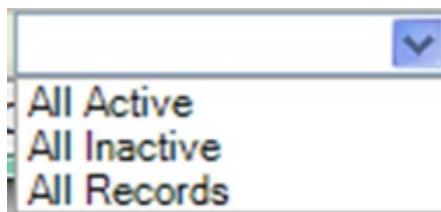
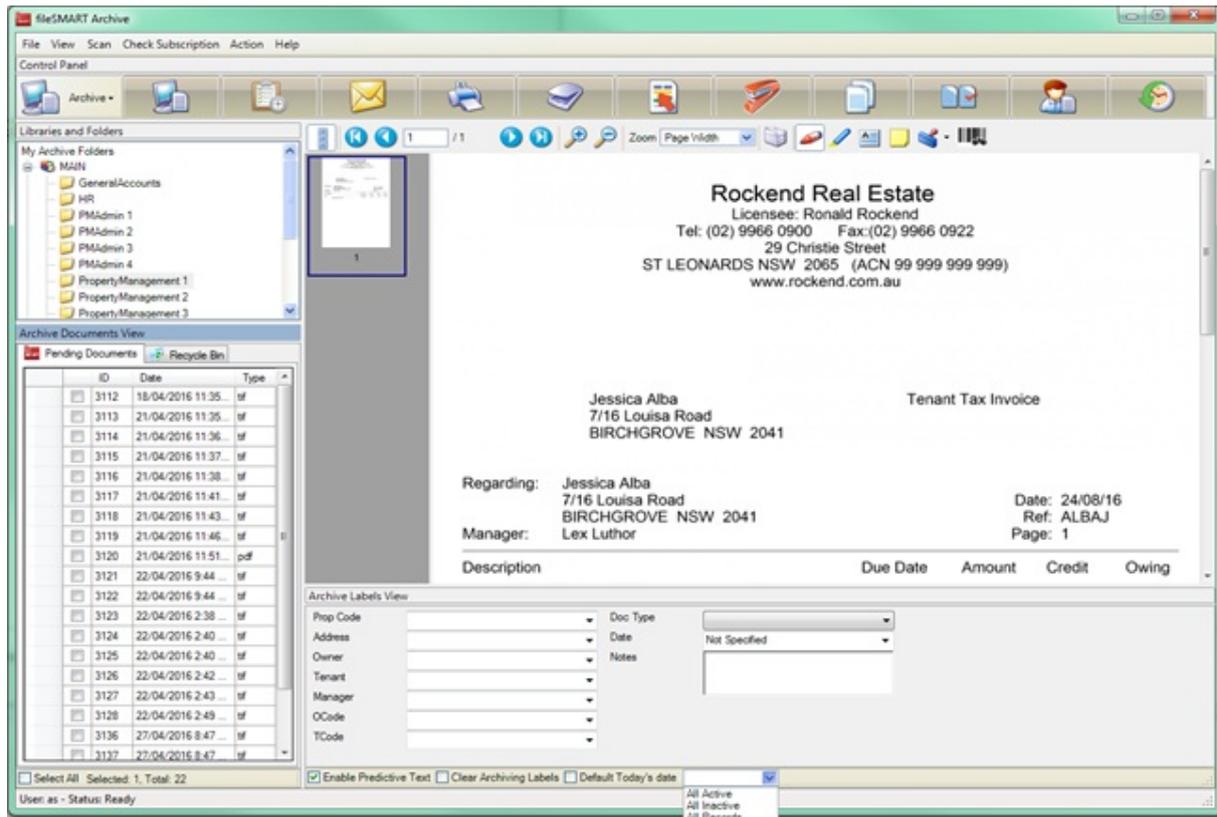
in the main fileSMART Prop Code drop down menu.

## All Records

All records both active or Inactive will be shown in the Prop code drop down search menu.

## FileSMART Archive

For fileSMART Archive the following filter menu will be provided.



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The following behaviour will occur based on the filter option selected

## All Active

All active property codes and archived property codes up to the last 60 days will be shown in the main fileSMART 'Prop Code' drop down Archive menu.

**All Inactive**

All Inactive Property codes that have been inactive for longer than 60 days will only be shown in the main fileSMART Prop Code drop down menu.

**All Records**

All records both active or Inactive will be shown in the Prop code drop down Archive menu.

24/11/2017 4:55 pm AEDT