

₽

File Smart Configuration in Strata Master

This article only applies to those businesses that use File Smart as the document management system for Strata Master.

If you receive an error message referring to Configuration or settings, check these settings in Strata Master. These settings instruct Strata Master where to save documents.

Where to find Settings/Configuration for File Smart within Strata Master.

1. Select Configure in the top toolbar and select Agency



2. Select Option#3 tab

🛤 Agency Configuration - Read Only Mode				×
General Details Options #1 Options #2	Option #3 Trust Account	Bank Account Stationery	Management Fees Licensing	

3. Ensure that the radio button is beside File Smart

🖏 Agency Configuration - Edit Mode	×
General Details Options #1 Options #2 Option #3	Trust Account Bank Account Stationery Management Fees Licensing
Creditor compliance Not involved Managed by agency Managed by Trades Monitor	Occument management C Strata Master File Smart Lonhquie File Smart

4. Click to Configure File Smart and from te drop down options beside each field, select as shown below.

😂 Agency Configuration - Edit Mode	×
General Details Options #1 Options #2 Option #	3 Trust Account Bank Account Stationery Management Fees Licensing
Creditor compliance Not involved Managed by agency Managed by Trades Monitor SMS Provider RockendSMS SMS Service Tested Additional Contracts	Document management C Strata Master File Smart File Smart Lonninguration Library STRATA Owners corporation folder Individual lots Payments/Maintenance folder Payments / Maintenance V
Relational contacts Include additional contacts All additional email addresses recorded against a contact will be shown in bcc when the Email con or Messing is selected. All additional mobile phone numbers recorded against a contact will be shown in the preview screen when using the SMS functionality.	Levy Wizard messages Use default wording Select this option to automatically display messages on notices, statements and invoices issued from the Levy Wizard. To customise your agency and/or owners corporation default messages launch Configure > Levy Wizard Messages.



Once the settings above are correct, should you still receive an error message, log a File Smart Support case if the error arises when you are working in the File Smart screen, and with Strata Master Support if the error arises while working in the Strata Master screen.

30/12/2022 1:22 pm AEDT