Invoice Hub | Introduction
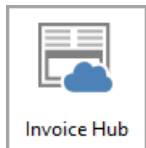
The instructions in this article relate to **Invoice Hub.** The icon may be located on your *StrataMax Desktop* or found using the *StrataMax Search*.

The *Invoice Hub* offers a controlled method for Strata Managers to upload invoices to the *StrataMax Portal* for committees that have requested to approve invoices prior to payment.

The *Invoice Hub* utilises the DocMax integration with the **Creditor Invoices** screen to attach an invoice, which is included in the upload, so that approvers can see the invoice on the StrataMax Portal.

Once an invoice is uploaded for approval, an e-mail is sent to the nominated committee member(s). The member(s) must then access the *Invoice Hub* via the StrataMax Portal to approve the invoice, which then allows the invoice to be paid by the Strata Manager in StrataMax.

Approver instructions are available *here*; We recommend sending this link to your committee members who will approve invoices.

> Strata Managers will only receive an email notification when an invoice is queried - not when it is approved!

Uploading Invoices to Invoice Hub

Uploading invoices to the Invoice Hub is a manual process, which needs to be carried out by the Strata Management office staff. The frequency of uploading invoices is purely at the discretion of the Strata Management office, and will vary depending on building or committee member requirements.

There are two methods to use for uploading invoices to the Invoice Hub, each with its own benefit.

Invoice Submission Wizard

When using this menu, it displays the invoices that are ready to be submitted to the Invoice Hub for this property. The *Invoice Submission Wizard* is where managers select the invoices to upload for approval, and select the committee members, or building managers, who will approve the invoices.

Within the *Invoice Submission Wizard*, an approval limit for invoices can be set for different committee members

to approve. For example if an invoice is under $1,000.00, it only need approval from the Treasurer. However, if it is over $1,000.00, then it may need all the committee members to review and approve the invoice. Default members of the committee can be configured to approve all future invoices.

Auto Invoice Submission From Defaults

The *Auto Invoice Submission From Defaults* menu is a quick method for selecting multiple buildings that have invoices waiting to be submitted to the Invoice Hub for approval. However, this menu uses the default invoice approval limit, which has been configured in the Invoice Hub *Configuration*, and the configured default members of the committee, which are set in the *Approval Defaults* menu.

Review Invoices

Once invoices have been submitted to the invoice hub, this screen is used by Strata Managers to see the status of each invoice. Review any notes that the Committee have submitted for a particular invoice and if invoices need to be retracted from the portal (e.g. to edit), you would manage this process from here.

StrataMax send an e-mail to the Strata Manager when an invoice is queried (see this article for details). However, notification e-mails are not sent when invoices are approved.

Options (File Menu)

Configuration
Configuring system settings and activating buildings to use the Invoice Hub.

Approver Defaults
Configuring approver defaults for each layer (maximum of two layers).

Change Building
Easy navigation to change building from within the Invoice Hub.

View Log
Activity that occurs within the Invoice Hub area is logged and the Time stamp, Log Level, Username, Description and the Building Number can be reviewed.

Report > Approved Invoices On Hold
This will produce a report for any invoices that are on the Invoice Hub for the selected building that are still on hold.