

Invoice Hub | Approver Configuration

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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 approvers are based on the Office Bearer records and will specifically use the email address recorded to send communication and notifications to. Please ensure that information in Office Bearers is accurate.

Any changes made in [Office Bearers](#) will trigger an automatic synchronisation to ensure that any updated details are reflected on the Invoice Hub and StrataMax Portal. Other screens in StrataMax that will also trigger this automated synchronisation include:

- Roll
- Bank Account Setup
- Proxy Managers
- Building Information

Office Bearer Record

To add or edit an office bearer record, refer to the article on [Office Bearers](#).

Non-owner Office Bearer Approvers

A non-owner office bearer, that is, an office bearer who does not own a lot, such as a building manager, can be configured to approve invoices uploaded to the Invoice Hub. Their details can be added using the instructions found in the [Office Bearer](#) article.

They must have a StrataMax Portal Account to log in and approve invoices. When an invoice is uploaded to the Invoice Hub with a non-owner office bearer as an approver, the first time this occurs, StrataMax will send an email with instructions to invite that approver to create a StrataMax Portal Account.

If they no longer have access to the old email address to access their online account, or if it is a different Non-Owner Office Bearer/Caretaker, etc., then you will need to resign them in [Office Bearers](#) and either update their contact card with the new e-mail address, or if it is a different person, create a new contact card and add them again as a Non-Owner Office Bearer. This new office bearer will then need to be added again in [Invoice Hub](#) > [Options](#) > [Approver Defaults](#), which will create and send an email to create a new account.

For further information on how an office bearer/committee by providing the following link to them:

Configuring Approvers

Office Bearers will only see the Invoice Hub tab on the StrataMax Portal once an invoice has been uploaded for the approver to approve.

Each building has a configuration to specify which office bearers will be required to approve invoices. Each approval condition must be configured depending on the approval limit configuration and the number of layers. Once the default approvers have been set, if the 'minimum number of approvers required' is a reduced number of approvals required, for example, 4 approvers and only 2 out of the 4 are needed to approve, this can be set in this area.

1. Search or select **Invoice Hub**.
2. Select the *Options* menu > *Approval Defaults*.
3. From the *Layer 1* area, tag the appropriate office bearer(s) and enter the *Minimum number of approvers required*.
4. Click *Save*.
5. If there is a second approval layer, tick the *Second approval layer*. Tag the appropriate office bearer(s) and enter the *Minimum number of approvers required*.
6. Click *Save*.

An approval limit exists. One layer of approvers:

Invoices below the approval limit will require the *Below* limit approvers to approve them, and invoices above the limit will require the *Above* limit approvers to approve them.

Default Approvers

☒ Enable Invoice Hub for this building

Approval Limit ☐ Second approval layer

Below \$200

Layer 1 Minimum number of approvers required: (1 selected)

	Name	Office Held	Email for Invoice Hub	Portal Account
<input type="radio"/>	ABC Strata	Body Corp. Manager	info@abc.com	
<input checked="" type="radio"/>	Building Manager	Building Manager	buildingmanager1@gmail.com	
<input type="radio"/>		Chairperson		Pending
<input type="radio"/>		Treasurer		
<input type="radio"/>		Secretary		

Above \$200

Layer 1 Minimum number of approvers required: (1 selected)

	Name	Office Held	Email for Invoice Hub	Portal Account
<input type="radio"/>	ABC Strata	Body Corp. Manager	info@abc.com	
<input type="radio"/>	Building Manager	Building Manager	buildingmanager1@gmail.com	
<input type="radio"/>		Chairperson		Pending
<input checked="" type="radio"/>		Treasurer		
<input type="radio"/>		Secretary		

Add Creditor Override Save Close

No approval limit exists. Two layers of approvers:

Invoices will be sent to the First layer of approvers, and once they have approved them, they will be sent to the Second layer of approvers. Email notifications are not sent to the second layer until the first layer of approvers has approved the invoices.

Default Approvers

☒ Enable Invoice Hub for this building

Approval Limit ☒ Second approval layer

Layer 1 Minimum number of approvers required: (1 selected)

	Name	Office Held	Email for Invoice Hub	Portal Account
<input type="radio"/>	ABC Strata	Body Corp. Manager	info@abc.com	
<input checked="" type="radio"/>		Chairperson		Pending
<input checked="" type="radio"/>		Secretary		

Layer 2 Minimum number of approvers required: (1 selected)

	Name	Office Held	Email for Invoice Hub	Portal Account
<input type="radio"/>	ABC Strata	Body Corp. Manager	info@abc.com	
<input type="radio"/>		Chairperson		Pending
<input checked="" type="radio"/>		Secretary		

Add Creditor Override Save Close

An approval limit exists. Two layers of approvers

Invoices below the approval limit will be sent to the First layer, Lower limit, and then to the Second layer, Lower limit. Once the lower limits have approved the invoices, it will go to the First layer Upper limit, and then to the Second layer Upper limit before they are approved for payment.

Default Approvers

☒ Enable Invoice Hub for this building

Approval Limit

☒ Second approval layer

^

Below \$500

Layer 1
 Minimum number of approvers required:

 (1 selected)

<input checked="" type="checkbox"/>	Name	Office Held	Email for Invoice Hub	Portal Account
<input type="checkbox"/>	ABC Strata	Body Corp. Manager	info@abc.com	
<input checked="" type="checkbox"/>		Chairperson		Pending
<input type="checkbox"/>		Secretary		

Layer 2
 Minimum number of approvers required:

 (1 selected)

<input checked="" type="checkbox"/>	Name	Office Held	Email for Invoice Hub	Portal Account
<input type="checkbox"/>	ABC Strata	Body Corp. Manager	info@abc.com	
<input checked="" type="checkbox"/>		Chairperson		Pending
<input type="checkbox"/>		Secretary		

^

Above \$500

Layer 1
 Minimum number of approvers required:

 (1 selected)

<input checked="" type="checkbox"/>	Name	Office Held	Email for Invoice Hub	Portal Account
<input type="checkbox"/>	ABC Strata	Body Corp. Manager	info@abc.com	
<input checked="" type="checkbox"/>		Chairperson		Pending
<input type="checkbox"/>		Secretary		

Layer 2
 Minimum number of approvers required:

 (1 selected)

<input checked="" type="checkbox"/>	Name	Office Held	Email for Invoice Hub	Portal Account
<input type="checkbox"/>	ABC Strata	Body Corp. Manager	info@abc.com	
<input checked="" type="checkbox"/>		Chairperson		Pending
<input type="checkbox"/>		Secretary		

Add Creditor Override

Save

Close

Creditor Override | Single Layer

You can use the *Add Creditor Override* function if a specific creditor requires different approvers. Whatever the minimum number of approvers is set to, the same number of approvers must be included for the override. A typical scenario would be if a building manager is an approver, and a different set must approve their invoices.

1. Search or select **Invoice Hub**.
2. Click *Options > Approver Defaults*.
3. If not already set within *Layer 1*, tag the approver (s) and enter the *Minimum number of approvers required*.
4. Click *Add Creditor Override*, and select the creditor that requires approval from a different approver. Click *OK*.
5. From the *Override* area, tag the approver approving this creditor.
6. If any other creditors require a similar override, repeat steps 4 and 5.
7. Click *Save*.

Default Approvers

☒ Enable Invoice Hub for this building Approval Limit ☐ Second approval layer

Layer 1 Minimum number of approvers required: (1 selected)

<input checked="" type="checkbox"/>	Name	Office Held	Email for Invoice Hub	Portal Account
<input type="checkbox"/>	ABC Strata	Body Corp. Manager	info@abc.com	
<input checked="" type="checkbox"/>	Building Manager	Building Manager	buildingmanager1@gmail.com	
<input type="checkbox"/>		Chairperson		Pending
<input type="checkbox"/>		Secretary		

(Override for 08200058 Building Manager) ✖

Layer 1 Minimum number of approvers required: (1 selected)

<input checked="" type="checkbox"/>	Name	Office Held	Email for Invoice Hub	Portal Account
<input type="checkbox"/>	ABC Strata	Body Corp. Manager	info@abc.com	
<input type="checkbox"/>	Building Manager	Building Manager	buildingmanager1@gmail.com	
<input type="checkbox"/>				Pending
<input checked="" type="checkbox"/>				

Add Creditor Override Save Close

Creditor Override | Double Layer

1. Search or select **Invoice Hub**.
2. Click *Options > Approver Defaults*.
3. If not already set, tick *Second Layer Approval Layer* and tag the approver(s) in each layer, entering the *Minimum number of approvers required* on each.
4. Click *Add Creditor Override*, and select the creditor that requires approval from a different approver. Click *OK*.
5. From the *Override* area, tag the approver(s) approving this creditor.
6. If any other creditors require a similar override, repeat steps 4 and 5.
7. Click *Save*.

Default Approvers

☒ Enable Invoice Hub for this building
 Approval Limit
☒ Second approval layer

Layer 1 Minimum number of approvers required: (1 selected)

<input checked="" type="checkbox"/>	Name	Office Held	Email for Invoice Hub	Portal Account
<input type="checkbox"/>	ABC Strata	Body Corp. Manager	info@abc.com	
<input checked="" type="checkbox"/>	Building Manager	Building Manager	buildingmanager1@gmail.com	
<input type="checkbox"/>		Chairperson		Pending
<input type="checkbox"/>		Treasurer		
<input type="checkbox"/>		Secretary		

Layer 2 Minimum number of approvers required: (2 selected)

<input checked="" type="checkbox"/>	Name	Office Held	Email for Invoice Hub	Portal Account
<input type="checkbox"/>	ABC Strata	Body Corp. Manager	info@abc.com	
<input type="checkbox"/>	Building Manager	Building Manager	buildingmanager1@gmail.com	
<input checked="" type="checkbox"/>		Chairperson		Pending
<input checked="" type="checkbox"/>		Treasurer		
<input type="checkbox"/>		Secretary		

(Override for 08200058 Building Manager)

Layer 1 Minimum number of approvers required: (1 selected)

<input checked="" type="checkbox"/>	Name	Office Held	Email for Invoice Hub	Portal Account
<input type="checkbox"/>	ABC Strata	Body Corp. Manager	info@abc.com	
<input type="checkbox"/>	Building Manager	Building Manager	buildingmanager1@gmail.com	
<input type="checkbox"/>		Chairperson		Pending
<input checked="" type="checkbox"/>		Treasurer		
<input type="checkbox"/>		Secretary		

Layer 2 Minimum number of approvers required: (2 selected)

<input checked="" type="checkbox"/>	Name	Office Held	Email for Invoice Hub	Portal Account
<input type="checkbox"/>	ABC Strata	Body Corp. Manager	info@abc.com	
<input type="checkbox"/>	Building Manager	Building Manager	buildingmanager1@gmail.com	
<input checked="" type="checkbox"/>		Chairperson		Pending
<input checked="" type="checkbox"/>		Treasurer		
<input type="checkbox"/>		Secretary		

Approval Override - Two Layers

If an invoice must bypass a layer, for example, layer one does not need to approve the invoice; only the approvers in layer two do. The below instructions will assist with the upload process. If the invoice is currently uploaded, it will need to be [retracted](#) first before it can be [resubmitted](#) with the changes to approvers. If this is done first, follow steps 2 onwards.

An example where you may wish to override a layer for a specific invoice may include a query from an approver to change the transaction code where the first approver has already approved it. This would allow the approver who raised the query to re-approve the change without requiring the first approver to re-approve.

1. Search or select **Invoice Hub**.
2. Click *Invoice Submission Wizard*. If the Welcome screen displays, click *Next*.
3. Tag Invoice(s) that require approval from one layer. Click *Next*.
4. From the Approvers 1 list, tag the required approvers. Click *Next*.

Approvers 1 ?

Officers List 1 Number of approvals required Save

<input type="checkbox"/>	Name	Office Held	Email for Invoice Hub	Portal Account
<input type="radio"/>		Body Corp. Manag		
<input type="radio"/>		Building Manager		Active
<input type="radio"/>		Chairp'n/Secretary		
<input type="radio"/>		Committee Memb		Active
<input type="radio"/>		Committee Memb		
<input checked="" type="checkbox"/>		Committee Memb		Active
<input type="radio"/>		Committee Memb		

1 Selected

Back Next Cancel

5. From the Approvers 2 list, untag all approvers and click into the *Number of approvers required* and enter 0. Tab out of this field. Click *Next*.

Approvers 2 ?

Officers List 0 Number of approvals required Save

<input type="checkbox"/>	Name	Office Held	Email for Invoice Hub	Portal Account
<input type="radio"/>		Body Corp. Manag		
<input type="radio"/>		Building Manager		Active
<input type="radio"/>		Chairp'n/Secretary		
<input type="radio"/>		Committee Memb		Active
<input type="radio"/>		Committee Memb		
<input checked="" type="checkbox"/>		Committee Memb		Active
<input type="radio"/>		Committee Memb		

0 Selected

Back Next Cancel

6. Click *Finish*.

Changes to Existing Approvers

Sometimes you will need to change the default approvers in Invoice Hub, or you may need to add another approver. Complete the following steps before submitting invoices for approval.

- If an *Office Bearer* who was critical for the approval of invoices has resigned, and no other approvers have been set up in *Approver Defaults*, StrataMax will automatically retract invoices that require approval. You will need to review the *Approver Defaults* before the Invoices can be sent back to the Invoice Hub.
- If a new approver is added, they will only see invoices that are uploaded to the Invoice Hub from that moment onward. If they need to approve any invoices that were already submitted, those invoices will need to be retracted and then resubmitted so the new approver can see them.

1. Search or select ***Office Bearers***.
2. Update the relevant *Office Bearer* record with the information provided and *Save*.
3. Search or select ***Invoice Hub***.
4. Select the *Options* menu > *Approver Defaults*. Update your default approvers, then click *Save Officer Selection* and then *Close* to exit.
5. [Submit your invoices \(from defaults\)](#).

Suppose you temporarily redirect approvals from a Non-Owner Office Bearer (e.g., the Building Manager is on leave for a month). In that case, you should create a 'temporary' Non-Owner Office Bearer record and update your default approval instructions accordingly. When the original Non-Owner Office Bearer Approver returns, you can update the approval defaults again (and 'resign' the temporary approver if applicable).