

# Invoice Hub Process

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Before you are able to submit invoices to the Invoice Hub, you must first enable it for that specific building, and configure a number of settings. In this article there is a summary of these configurations required and in addition, the process on how to upload the invoices to the Invoice Hub, once a building has been configured.

See the [Invoice Hub Online Help Section](#) for guidance on enabling and setting up the Invoice Hub.

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## Uploading Invoices to the Invoice Hub

Once an invoice has been saved in [Creditor Invoices](#), the invoices are ready to be uploaded to the 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.

Both methods during the upload process will trigger an email to the approver confirming that there are invoices awaiting their approval. In the instance of a building using the Invoice Hub for the first time, on the first upload this is when the approver will see the Invoice Hub tab on their Portal account ready to approve the invoices.

## Invoice Submission Wizard

To use the *Invoice Submission Wizard* where the invoices to be uploaded are selected, and then the committee members to approve those invoices are confirmed. Approvers will automatically be tagged based on the 'Approver Limits' and 'Approval Layers' set in the [Approver Defaults](#), but using the *Invoice Submission Wizard* provides the ability to change these defaults for the selected 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

To upload using the *Auto Invoice Submissions From Defaults*. This will upload the invoices based on the 'Approver Limits' and 'Approval Layers' in the [Approver Defaults](#) without the ability to amend the approvers. This can be applied to one or more buildings and is a quicker, more efficient way of submitting invoices to the Invoice

Hub.

## Upload using the Invoice Submission Wizard

The Invoice Submission Wizard enables selected invoices to be uploaded to the Invoice Hub based on the 'Approval Limits' and 'Approval Layers' and can adjust the approvers if required. As the steps can differ slightly for different approval limits, we have provided two examples to use as a guideline.

### One Approval Layer - No Invoice Approval Limit Set

In this example, the building does not have an invoice approval limit and all invoices are to be approved by the Committee. Three members of the committee have been chosen to approve the invoices.

1. In the required building, search or select **Invoice Hub**.
2. Click **Invoice Submission Wizard**.
3. Tag the invoices requiring approval, then **Next**.

In this screenshot, the Approval Limit radio buttons are inactive as there isn't a configured limit in the Invoice Hub 'Configuration' screen. An Approval Limit can be set here by clicking the *Set Limit* button if required.

Tag	Date	Creditor	Amount	Invoice Number
✓	19/06/2013	STRATA MANAGER PTY LTD	\$2789.00	223
✓	21/05/2013	WILLSON WINDOW CLEANING	\$250.00	2
✓	23/11/2012	BCMAX DEMO	\$25.00	

4. The list of 'Office Bearers' will be displayed. Committee members who will be approving these invoices will be tagged automatically based on the configured Approver Defaults, but these can be amended as required.

## Optional - Adjusting the minimum number of approvers required

An option to allow a minimum number of approvers can be set through the Invoice Submission Wizard. For example, five committee members can be selected to receive a notification to approve invoices, however only require three out of the five to approve the invoice.

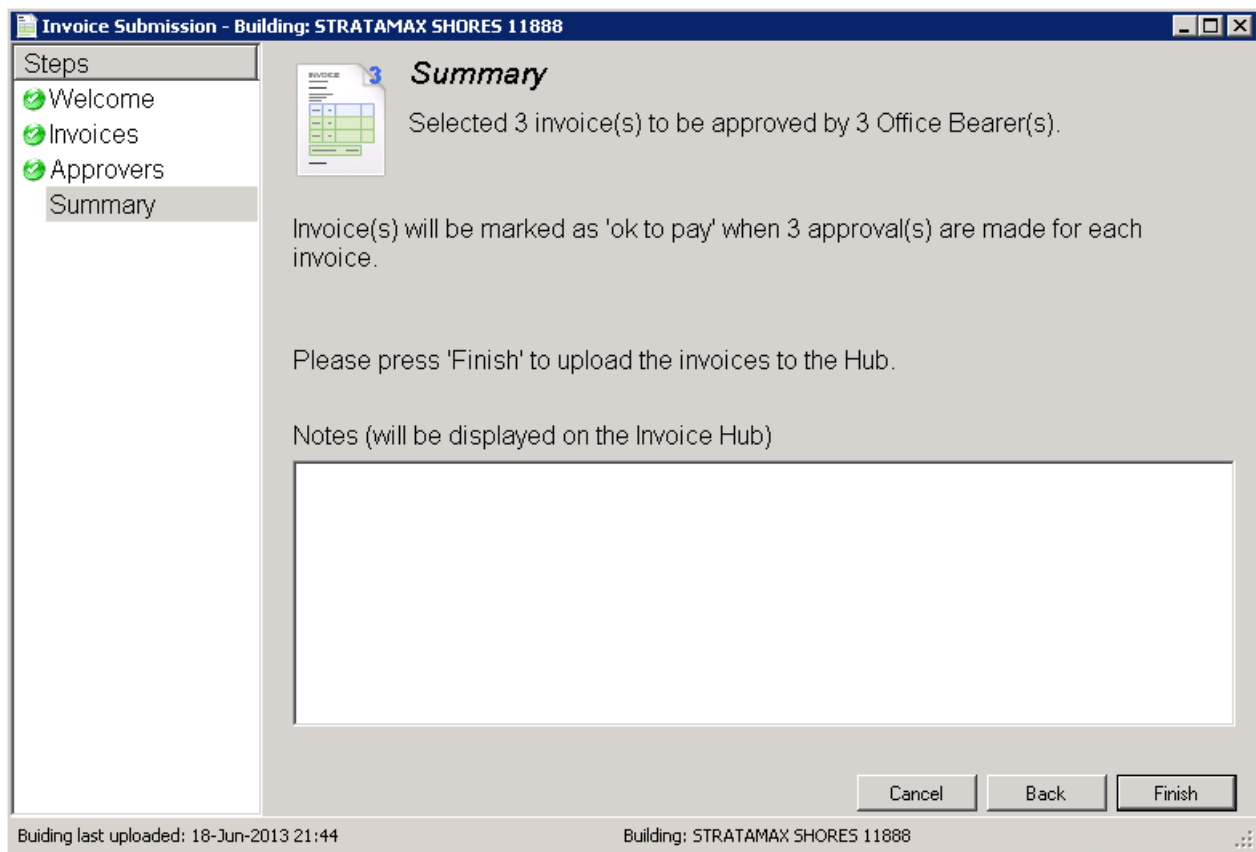
Once the committee members to receive notification has been confirmed, adjust the number in the 'Number of approvals required' field at the top before clicking *Next*. The invoice will become approved once three committee members have approved it the invoice.

If the 'Number of approvals required' needs to be set as the default for future approvals, click *Set as Default (below limit)* (below limit).

The screenshot shows the 'Invoice Submission - Building: STRATAMAX SHORES 11888' window. On the left is a 'Steps' sidebar with 'Welcome', 'Invoices', 'Approvers', and 'Summary'. The main area is titled 'Officer list (first approval level)'. At the top right, there is a 'Number of approvals required' field set to '3' and a 'Set as default (below limit)' button. Below this is a table titled 'Select authorisers' with columns: Tag, Code, Name, Office Held, Email, and Portal Status. The table contains six rows, with the first row (STRATA MANAGE...) having a grey background and 'N/A' status, and the other five rows having green backgrounds and 'Active' status. Checkmarks are visible in the first column of the five active rows. At the bottom right are 'Cancel', 'Back', and 'Next' buttons. The status bar at the bottom shows 'Building last uploaded: 18-Jun-2013 21:44' and 'Building: STRATAMAX SHORES 11888'. A red arrow points to the 'Set as default (below limit)' button.

Tag	Code	Name	Office Held	Email	Portal Status
	00000001	STRATA MANAGE...	Body Corp. Manager		N/A
<input checked="" type="checkbox"/>	00000014	ANISTON JENNIF...	Chair./Treas./Sec.	training@stratamax...	Active
<input type="checkbox"/>	00000015	JOANNE BLOGGS	Committee Member	vwillson@stratamax...	Active
<input checked="" type="checkbox"/>	00000016	JOLIE ANGELINA	Building Manager	joliepittclan@email...	Active
<input type="checkbox"/>	00000017	CHANGE OF OWN...	Committee Member	vwillson@stratamax...	Active
<input checked="" type="checkbox"/>	00000018	CRAIG JEFFCOAT	Other	craig.jeffcoat@strat...	Active

5. Once the approvers have been confirmed, and any minimum approvers have been set, click *Next*.
6. The 'Summary' screen will appear with the invoices to be uploaded. If a note is required for this group of invoices, enter details in the notes section.
7. Click *Finish* to upload the invoices to the Invoice Hub.

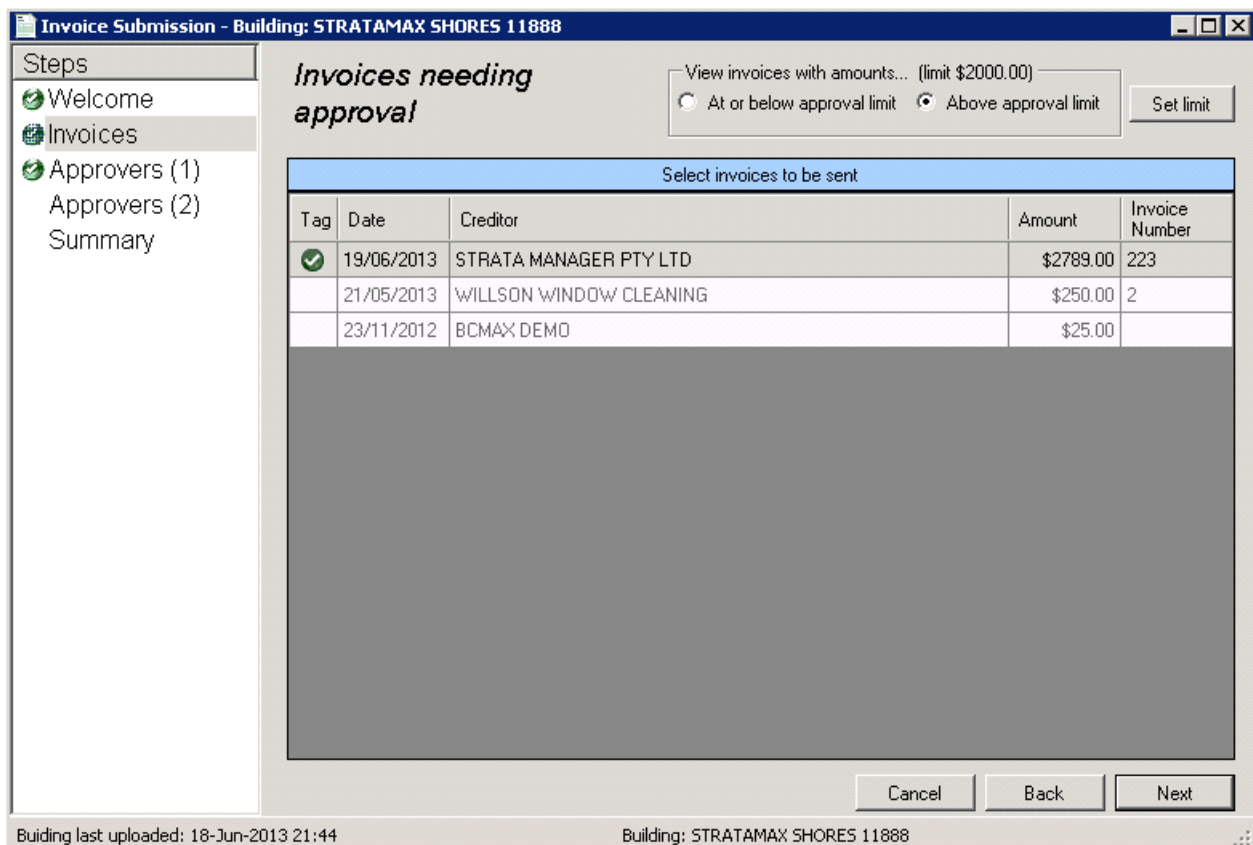


## Two Approval Layers – An Invoice Approval Limit Set

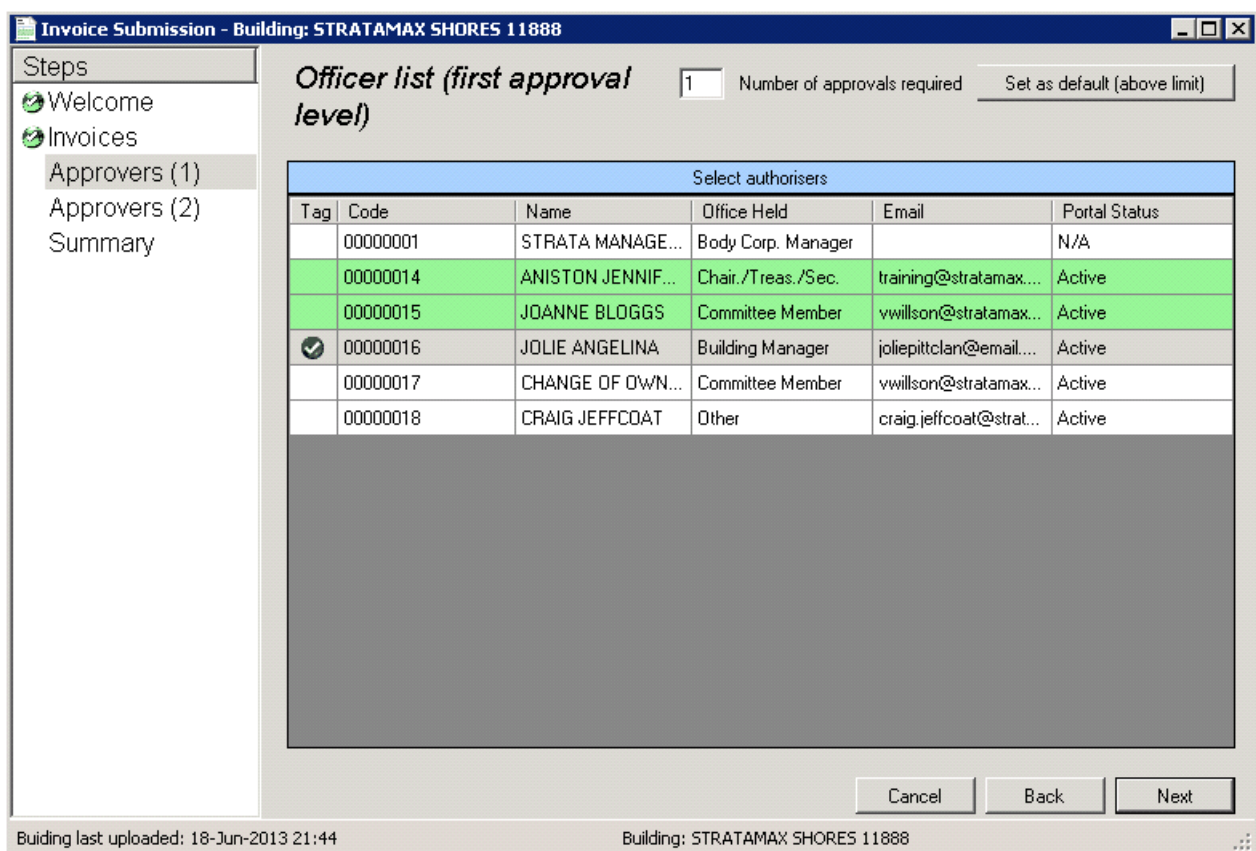
In this example, the committee would like all invoices over \$2000.00 to be approved by the building manager, and then the committee for approval once the building manager has approved.

1. In the required building, search or select **Invoice Hub**.
2. Click *Invoice Submission Wizard*.
3. Click the 'Above approval limit' radio button to select the invoices above \$2000.00.
4. Tag the invoices needing approval, then click *Next*.

Invoices under \$1000.00 cannot be selected.



5. Tag the Building Manager (Approval Layer 1).



6. Click Next.

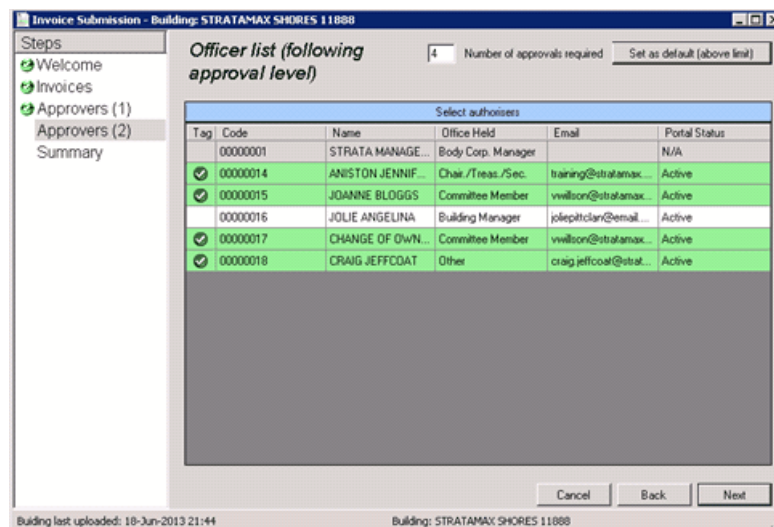
7. Tag the Committee Members (Approval Layer 2).

## Option

An option to allow a minimum number of approvers can be set through the Invoice Submission Wizard. For example, five committee members can be selected to receive a notification to approve invoices, however, only require three out of the five to approve the invoice.

Once the committee members to receive notification has been confirmed, adjust the number in the 'Number of approvals required' field at the top before clicking *Next*. The invoice will become approved once three committee members have approved it the invoice.

If the 'Number of approvals required' needs to be set as the default for future approvals, click *Set as Default (below limit)*.




8. Once the approvers have been confirmed, and any minimum approvers have been set, click *Next*.
9. The 'Summary' screen will appear with the invoices to be uploaded. If a note is required for this group of invoices, enter details in the notes section.
10. Click *Finish* to upload the invoices to the Invoice Hub.




## Upload using 'Auto Invoice Submission from Defaults'




*Auto Invoice Submission from Defaults* allows all invoices for one, multiple, or all buildings to be uploaded to the Invoice Hub. They will be submitted based on the default approval limits and approval layers, as well as the selected approvers without the need to manually adjust those configurations.

1. In the required building, search or select **Invoice Hub**.
2. Click *Auto Invoice Submission from Defaults*.
3. Tag one or more buildings to upload to the Invoice Hub, then click *OK*.
4. Click *X* to close.

It is recommended to review the logs for any errors after the upload has completed. Click on File / View Log and remove any building specific value.

 Search Logs

 Refresh    Export    Advanced

+	Field	Condition	Value
	Date/Time	is on or after	<input type="checkbox"/> Specific Dates   Today
	Category	is equal to	InvoiceHub
	Log Level	is equal to	Error