Invoice Hub Process

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Before you can submit invoices to the Invoice Hub, you must first enable it for that specific building and configure some settings. This article provides a summary of the configurations required. Uploading invoices to the Portal will be done on a automated schedule which reduces the need to upload invoices. If you still wish to manually upload these, there is instructions below for this too.

See the *Invoice Hub Online Help Section* for guidance on enabling and setting up the Invoice Hub.

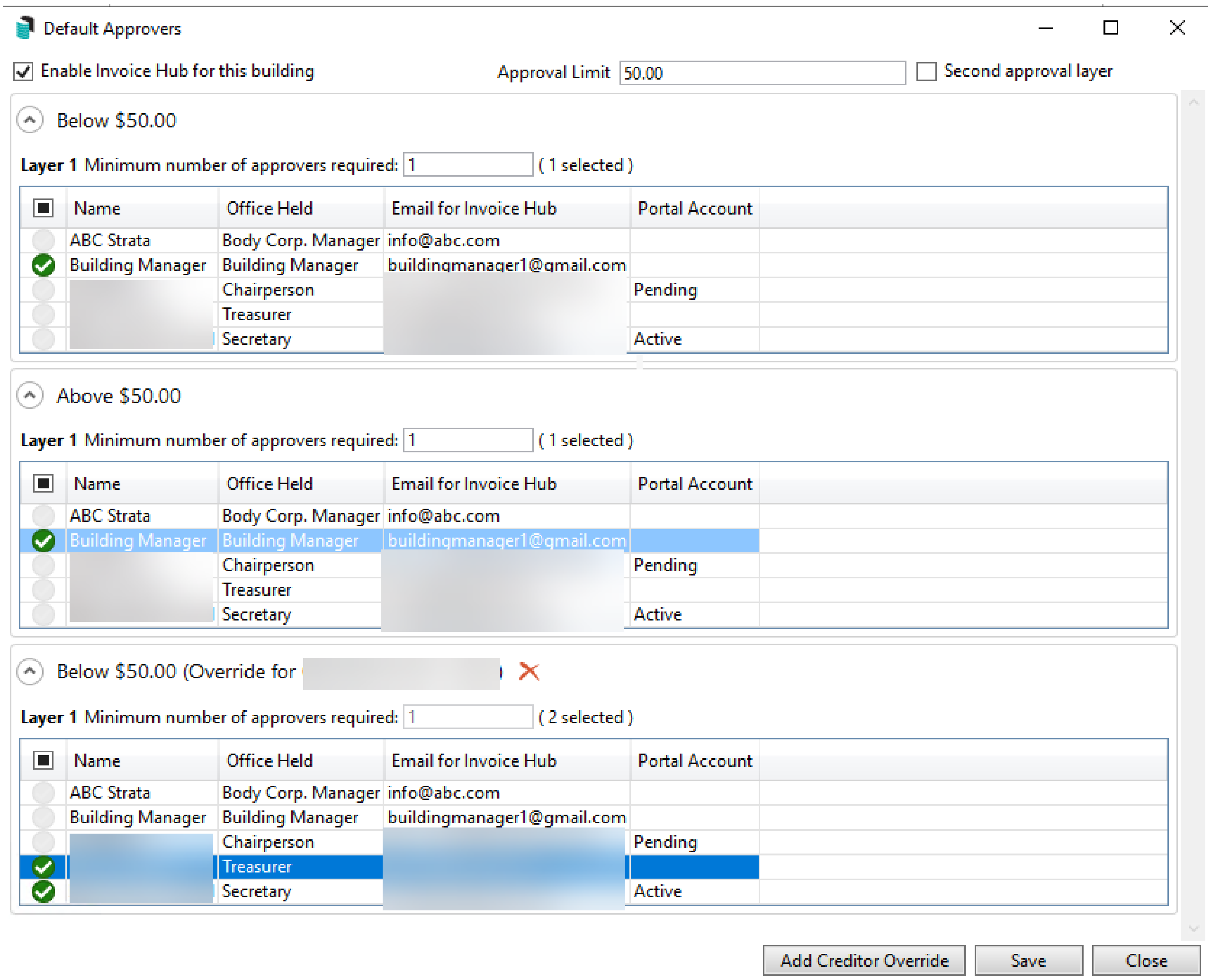
Building Information, Creditor Maintenance & Activating Invoice Hub

The three areas to configure before using the Invoice Hub include:

- ***Building Information***: Field *Auto OK To Pay Creditors* should be flagged with an N to ensure that all invoices for a building are NOT OK (On Hold) to pay in preparation for uploading to the Invoice Hub.
- ***Creditor Maintenance***: Review the local creditor setup and mark any creditors who may be an exception to not being OK to pay.
- ***Invoice Hub***: Options/ Configuration - setting *Active* to allow the building to use the Invoice Hub.

Default Approvers

Review the approver defaults to set which Committee Members will approve the invoices uploaded. This is done via Invoice Hub / Options / Approver Defaults. Both Layers and approval limits can be configured here. If there are any Creditor Overrides to apply, this can also be configured in this screen.

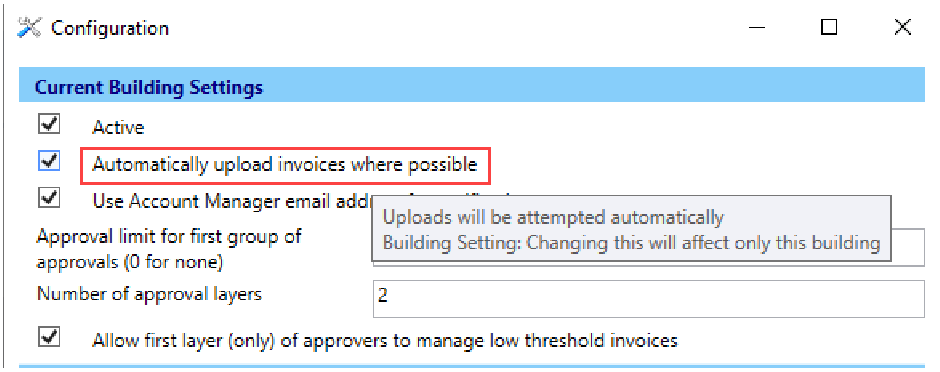


Uploading Invoices to the Invoice Hub

Once an invoice has been saved in ***Creditor Invoices***, it is ready to be uploaded to the Invoice Hub. An automated schedule will run daily at approximately 4.30 pm AEST, eliminating the need to upload invoices manually. This is a per-building setting and will be configured by default. If this is not required, review those buildings and untick the setting. Any new buildings loaded into StrataMax will have this configured by default. The manual method, if needed, can still be applied by manually uploading invoices. Process instructions are below.

Automated Configuration for uploading invoices

1. Search or select ***Invoice Hub***.
2. Options / Configuration / Automatically upload invoices where possible.



Either the automated or manual method triggers an email to the approver during uploading, confirming that invoices are awaiting approval. In the instance of a building using the Invoice Hub for the first time, on the first upload, the approver will see the Invoice Hub tab on their Portal account, ready to approve the invoices. If two layers of approval are required, the second approver will receive their email once the first layer has approved the invoices.

Manually upload invoices

Invoice Submission Wizard

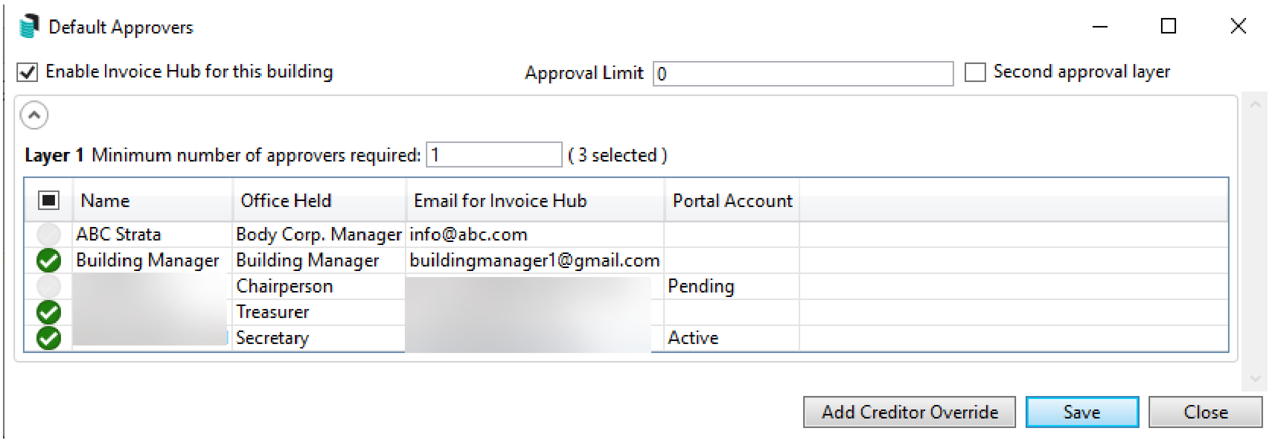
To use the *Invoice Submission Wizard,* where the invoices to be uploaded are selected, and then the committee members approve those invoices are confirmed. Approvers will automatically be tagged based on the 'Approver Limits' and 'Approval Layers' set in the *Approver Defaults*. However, the *Invoice Submission Wizard* allows changing these defaults for the selected invoices.

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.

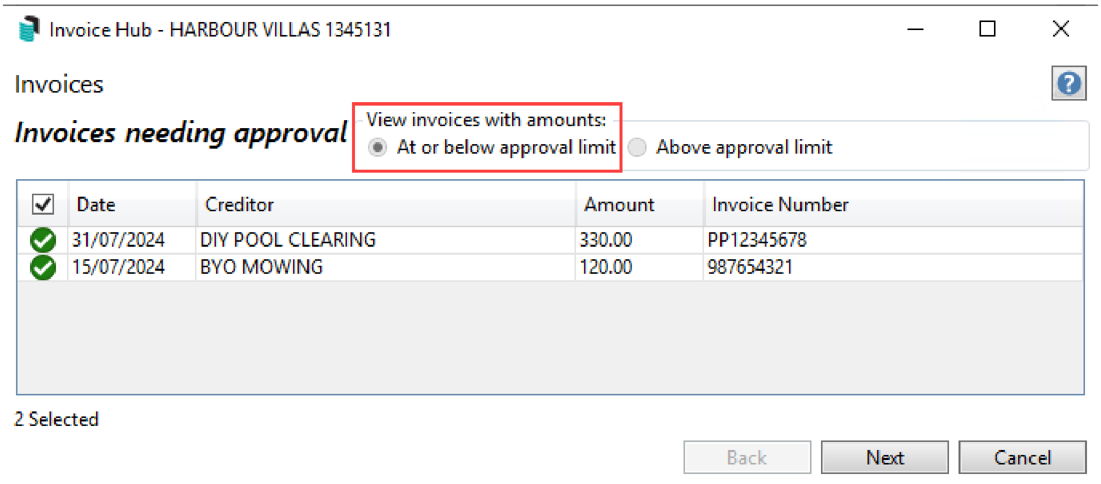
One Approval Layer - No Invoice Approval Limit Set

In this example, the building does not have an invoice approval limit and includes three Committee members configured as the defaults. Out of these three, a minimum of one approver is required to approve the payment to the creditor. This can be amended in the Default Approvers area or when reviewing the approvers set before uploading 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*.

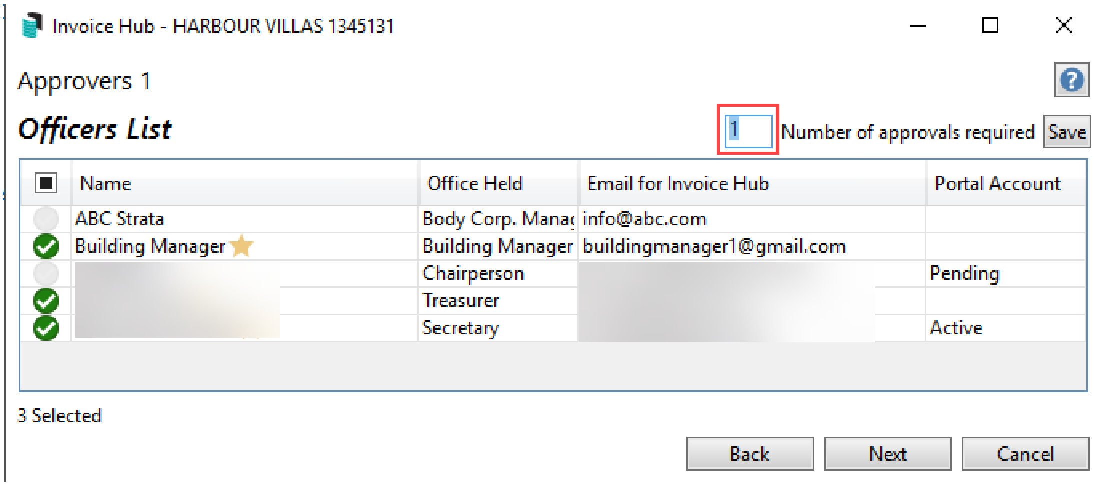
In this screenshot, the Approval Limit radio buttons are inactive because no limit is configured in the Default Approvers screen as above.



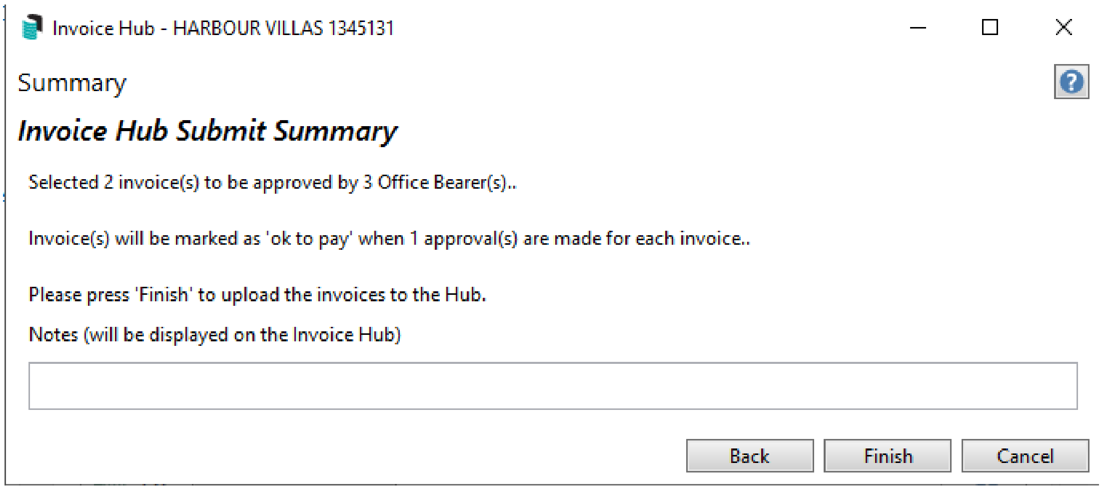
4. The list of 'Approvers' will be displayed. Committee members who approve these invoices will be tagged automatically based on the configured Approver Defaults, but these can be amended as required.

Optional - Adjusting the minimum number of approvers required

If an adjustment is required per batch of invoices on how many approvals are required this can also be done at the Approver screen as shown below. It can be set as the default by clicking *Save*.



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.

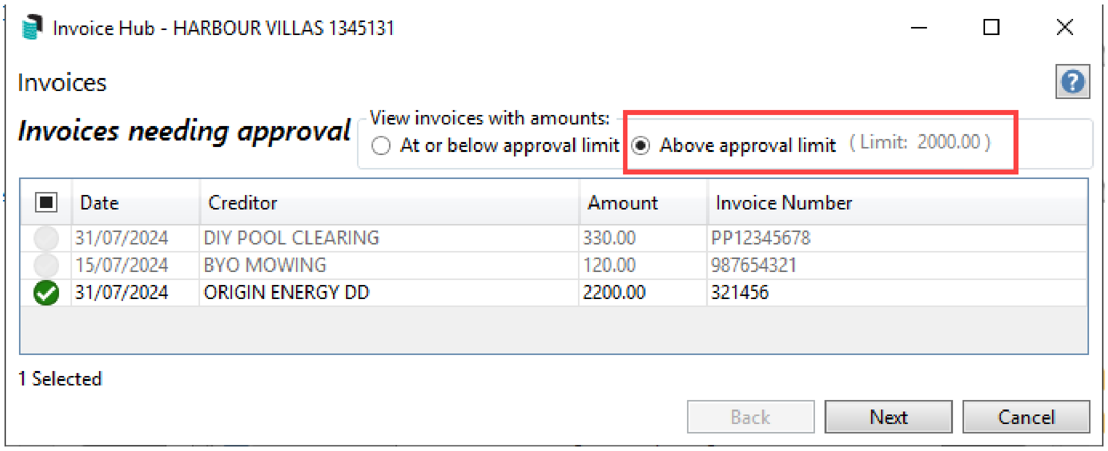


Two Approval Layers – An Invoice Approval Limit Set

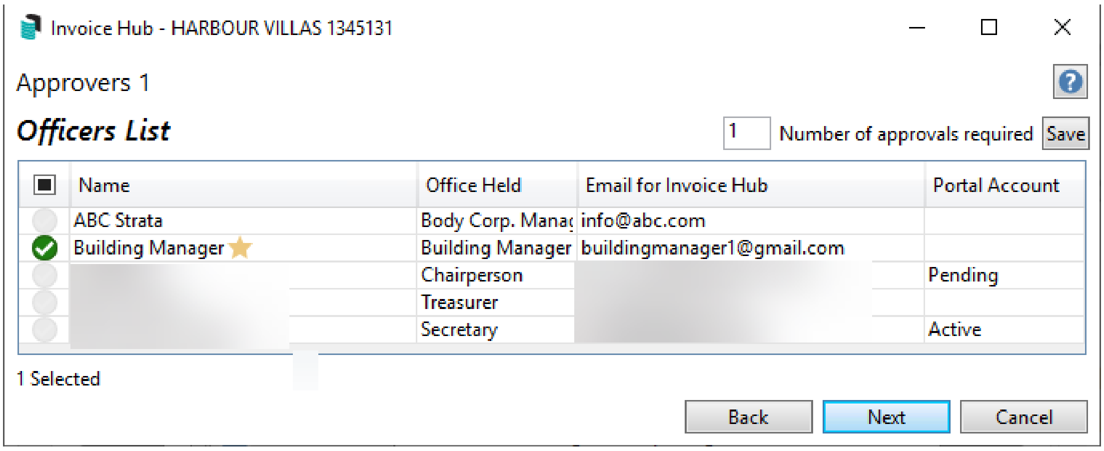
In this example, the committee would like all invoices over $2000.00 to be approved by the building manager, and then the committee for approval once the building manager has approved.

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.



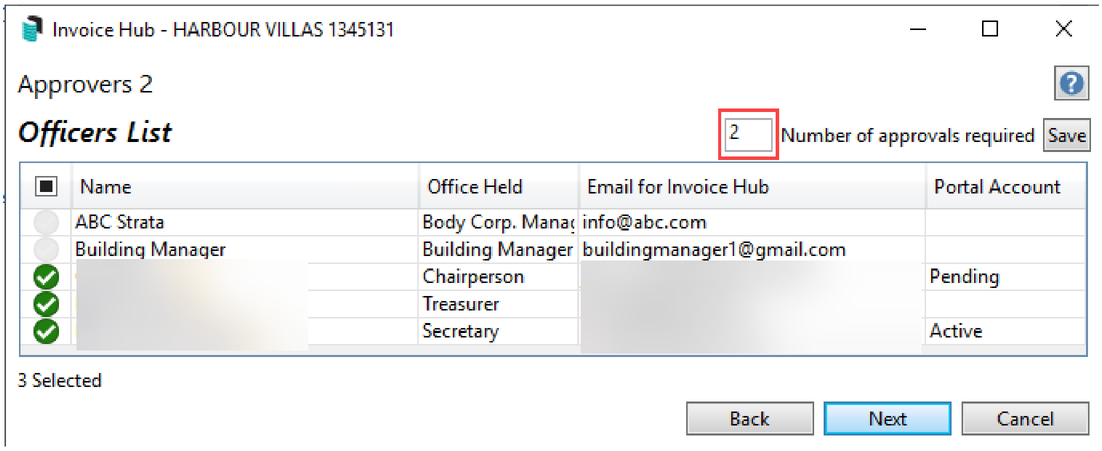
5. The Building Manager (Approval Layer 1), who is configured as the default, will be automatically tagged.



6. Click *Next*.
7. The Committee Members (Approval Layer 2) who are configured as the defaults will be automatically tagged.

Optional - Adjusting the minimum number of approvers required

If an adjustment is required per batch of invoices on how many approvals are required, this can also be done at the Approver screen, as shown below. It can be set as the default by clicking *Save*.



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.

Auto Invoice Submission From Defaults

To upload it, use *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. The alternative and recommended method is to configure the building from Options / *Automatically upload invoices where possible*, which will apply a scheduled task to upload any invoices at approximately 4.30 pm AEST daily.

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 manually adjusting the configuration.

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.

Invoice Hub Log Viewer

Using either the automated or manual upload process, the Log Viewer can provide details about any failed uploads, and using a saved search to identify any errors is good practice. It can also be added as a dashboard for desktop visibility.

1. Search or select ***Log Viewer***.
2. Add fields of restriction for category of InvoiceHub and also the additional category of ERROR.LOG.

3. Click *Refresh* to see the results.
4. To provide a quick retrievable search for regular use, click *Save Search As* and enter a *Name* for this search. If you would like to add this search to your dashboard, click *Add to My Dashboard* and set the dashboard paramters.