Invoice Hub | Troubleshooting

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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*.

For any areas that require troubleshooting, please review the below to understand how to approach the scenario.

Invoice Approvers Troubleshooting

Troubleshooting tips for Invoice Hub approvers is available here Invoice Hub Approvers Troubleshooting.

Unable to See an invoice on the 'Review Invoices' Screen

You are able to apply filters to the *Review Invoices* screen, to filter by building or status. Please also note the default date range that applies to this screen when first viewed, which is 30 days prior to today.

Uploading Invoices to the Hub | System Requirements and Timing

There is a system/technical specification requirement for your office in order to ensure that the upload process is able to run to acceptable performance levels. Testing is able to be done by StrataMax to identify any potential issues or risks in this regard, and should have been conducted prior to this facility being enabled for you. If you observe any performance issues, please let us know. We have also identified some trends towards the upload process being impacted on the 1st and/or 2nd day of each month due to end-of-month uploads running. If you try to manually upload intra-day at this time, you may notice reduced performance times or errors; again, please feel free to contact us about this.

There is an automated daily schedule that will upload pending invoices to the ***Invoice Hub*** at 4.30 PM AEST and reduces the need for manually uploading invoices.

Non-Owner Office Bearers (Caretaker, Facilities

Manager etc.)

When you create a 'Non-Owner Office Bearer' record, the notification email that provides that log in credentials is sent to them when you upload the first invoice for approval.

Create the ***Office Bearer*** record, configure them as an approver, and the upload the invoice. The Non-Owner Office Bearer will get a notification email to create a User Account on the StrataMax Portal.

Multiple email addresses for Office Bearers

More than one email address can be recorded for a Contact. Ensure the Email Address to be used for any Invoice Hub approvals is marked in the Contact via ***Office Bearers*** or the ***Roll*** as 'Invoice Hub' in the email address field.

Loading of Creditor Commitments

If you are using the ***Invoice Hub***, then you must create the invoice via the ***Creditor Invoices*** entry screen. You cannot use any of the bulk/multi invoice functions available in other parts of the system.

Uploading of Invoices to Approvers

The ***Invoice Hub*** upload process is entirely separate from your regular nightly property data uploads (where reports/documents are updated/uploaded to the StrataMax Owners Portal). There is an automated daily scheduled task that will upload any pending invoices to the Invoice Hub at approximately 4.30 PM, and removes the need to manually upload data.

Changes to Approval Defaults

If you change the approver defaults (number of layers, specific approvers etc.) StrataMax may automatically retract any invoices if there is an insufficient amount of remaining approvers to approve any uploaded invoices. Refer to our article on ***Office Bearers*** for more information.

Approval Override for 2 layer approvals

If a setup is for 2 layers and a particular invoice requires only 1 layer to approve it, an override can be applied in these one-off instances. This information here will detail how to complete this.

‘StrataPay Only’ Setting – Building Information

This field setting is to be used when you want to exclude one or several plans on your portfolio from being able to access the Owners Portal/StrataMax website for whatever reason. This setting WILL prevent approvers from being able to view Invoices requiring approval on the Hub. It will let them login, and even select the Invoice Hub menu (to see the number of payments requiring approval) however, when they then click to go and actually approve invoices, it will kick them back out to the login screen. If applicable, the ‘Y’ needs to be removed from this field in Building Information, and the building uploaded again, which will restore access / functionality for the end user / approver on the Owners Portal.

Lost Buildings

If you have a property that you are no longer managing, you need to ensure that there are no invoices awaiting approval on the Hub. You can either actively push for any outstanding invoices to be approved prior to the date you have lost management, or alternatively delete the Invoice Hub approvals before you ‘close off’ the building or property record.

Transferred Buildings

When a building is transferred from one manager to another that uses StrataMax; the invoice hub active flag will be unticked and the invoice hub configuration and approvers will need to be setup if required. Historical invoices approved on the invoice hub will still be available to approvers once these steps are done.

Automated Emails

Initial notifications to approvers are emailed when you submit invoices for approval via the Invoice Hub menu. There is an automated schedule that will send reminder emails every 7 calendar days for any invoices that remain unapproved (including ‘On Hold’ invoices, although querying an invoice to put it ‘On Hold’ will reset the scheduler on the 7 day follow up notification).

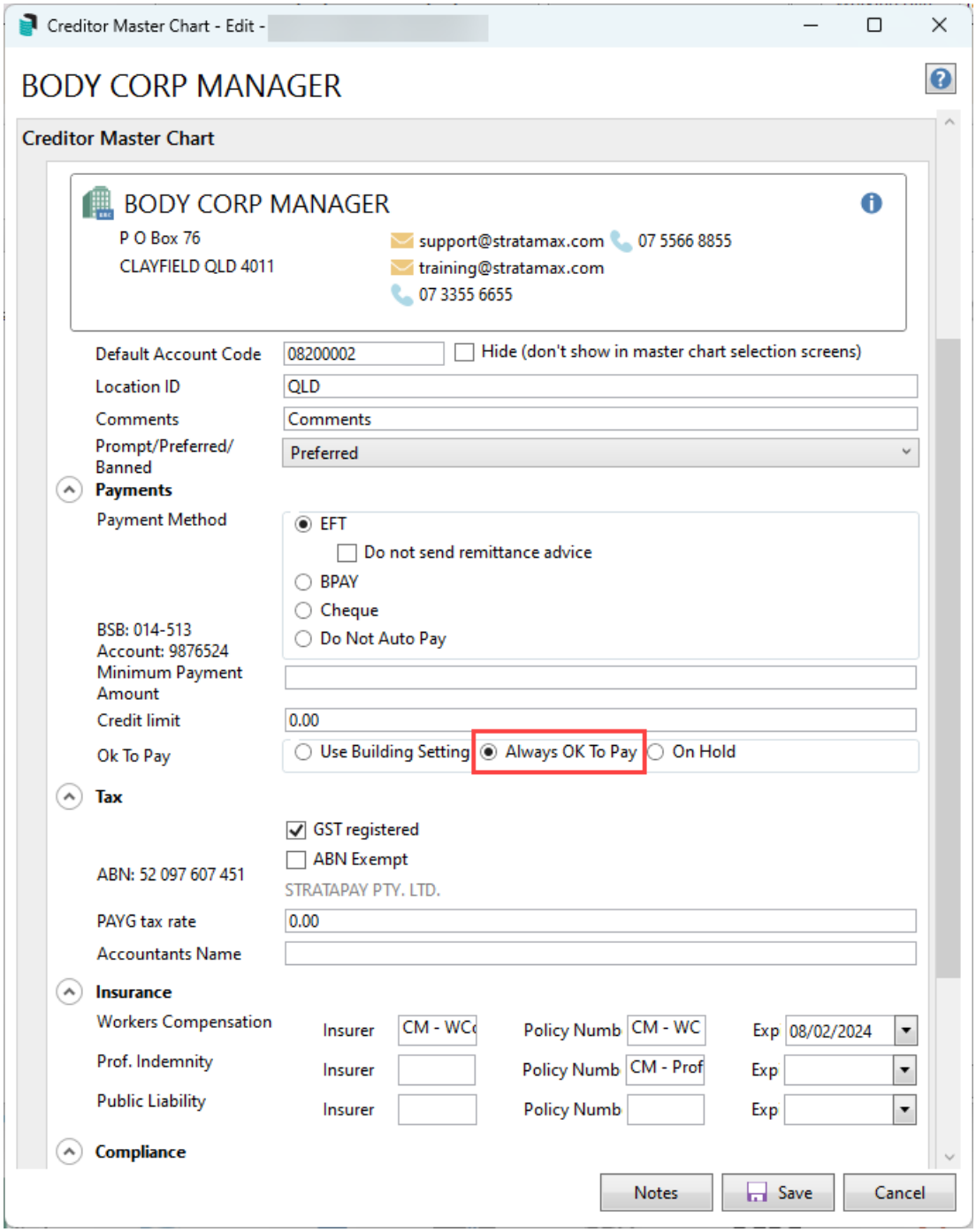
Popup Blockers

The following browsers are supported for the Invoice Hub and Owners Portal (Internet Explorer, Chrome, Firefox and Safari). The following link may be sent to approvers if they are not able to view invoices online using the supported browsers. http://www.stratamax.com/PopUpHelp.aspx

My Management Fees

You must check your 'Auto OK to Pay Creditors' setting in the***Creditor Maintenance*** record and the ***Building Information*** field *Auto OK to Pay Creditors*for that property. If you have a 'No' in this field, your Management Fee payments will automatically go into the ***Creditors Management*** area for hold when processed in that Building.

If you would like to have the Management Fees and Recoveries paid without being subject to approval, mark the ***Creditor Maintenance*** Master Chart record as *Always OK to Pay*.



Historical invoices

Invoices for a building's current and previous financial year will be available on the invoice hub, provided the invoice hub was used during that time. If the history area is not available, there are a few things to consider which may be affecting this:

- Invoice details and invoice images are only available for the current & last financial year for Invoice Approvers. See below, StrataMax Portal Access to Historical Invoices for information about uploading invoices to the portal for any configured number of years.
- Invoice Hub history is available for newly appointed approvers.
- Restoring data in StrataMax can also cause history to be lost via the Invoice Hub approver's user account, and also in the StrataMax / ***Invoice Hub*** / Review Invoices area.

StrataMax Portal Access to Historical Invoices

It is recommended that invoices be uploaded to a StrataMax Portal Group so Owners & / or Committee Members can access invoices as required. A portal group will need to be setup; information on how this is done is available on the StrataMax Portal Reports & Documents page.

When Owners & / or Committee Members access invoices on the portal, they will see the document name based on the Title field from DocMax. To avoid manually updating the title it is recommended to use merge fields in the Title field. Information on the use of merge fields in DocMax is available here.

FAQs

Q. If an Approver queries an invoice on the Invoice Hub, do other Approvers see the query and response from the Strata Manager?
A. Emails from the invoice hub go to the Manager (or account manager, depending on configuration), but other Approvers can see all notes (including queries) on the invoice if they log in to the Portal, regardless of who created them. The only caveat would be that a layer two approver will not yet be able to see the invoice if they are still awaiting approval on layer 1. Once the first layer approval is complete, and they can see the invoice in the portal, then they will be able to see the query.

Q. Why do some invoice approvers see StrataMax branding rather than our own?
A. If an invoice hub approver is approving invoices for multiple buildings that have different managers; the branding will default to use the StrataMax branding as the invoice hub approval screen allows viewing invoices for multiple buildings at once.