

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 that does not own a lot, for example a building manager, can be configured to be an approver for 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 that has a non-owner office bearer as an approver, the first time that 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 create a new record for the new email address or Non-Owner Office Bearer. Then the new Office Bearer record will need to be added again in [Invoice Hub](#) > *File* > *Approver Defaults*, which will create and send an email to create a new account.

You can provide further instructions by providing the following link to them:

Configuring Approvers

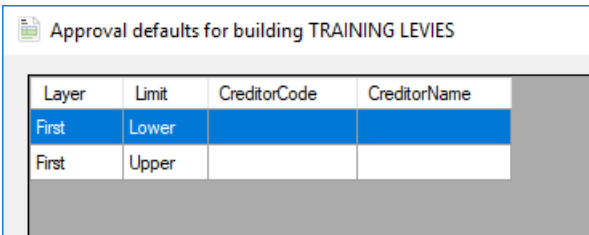
Office Bearers will only see the Invoice Hub tab on the StrataMax Portal once an invoice has been uploaded for the approver to approve.

There is configuration within each building to specify which office bearers will be required to approve invoices. Depending on the approval limit configuration and the number of layers, each approval condition must be configured. Once the default approvers have been set, if the 'number of approvals required' only requires a reduced number of approvals this can be set via the Invoice Submission Wizard. For example there are 4 approvers and only 2 out of the 4 are required to approval. These are explained below.

1. Search or select **Invoice Hub**.
2. Select the *Options* menu > *Approval Defaults*.
3. Highlight each layer/limit and then tag the appropriate office bearer, then click *Save Officer Selection*.
4. Repeat for each required layer/approval limit.

An approval limit exist, one layer of approvers

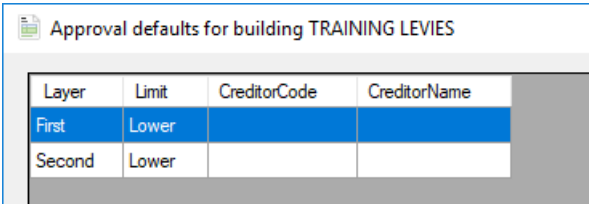
Invoice below the approval limit will require the Lower limit approvers, any invoices above the limit will require the Upper limit approvers to approve invoices.



Layer	Limit	CreditorCode	CreditorName
First	Lower		
First	Upper		

No approval limit exists, two layer of approvers

Invoices will be sent to the First layer of approvers, and once they have approved the invoice, it will then be sent to the Second layer of approvers.



Layer	Limit	CreditorCode	CreditorName
First	Lower		
Second	Lower		

An approval limit exists, two layers of approvers

Invoices below the approval limit will be sent to the First layer, Lower limit and then the Second layer, Lower limit. Any invoices above the approval limit will be sent to the First later Upper limit, then to the Second layer Upper limit before it is approved for payment.

Approval defaults for building TRAINING LEVIES

Layer	Limit	CreditorCode	CreditorName
First	Lower		
Second	Lower		
First	Upper		
Second	Upper		

An approval limit has been set to 4 approvers, and only 2 are required to be approved for payment. This can apply for 1 or 2 layer buildings.

Within each layer there may be multiple approvers included and the below refers to the defaults being applied and using the submission wizard to assign a reduced number of approvers required to be approved for payment.

1. After the defaults have been applied as per the steps above, an invoice should be ready to process with and will be required to access the Submission Wizard.
2. Click *Invoice Submission Wizard*, click *Next*, tag the required invoice (s)
3. Based on the *Approvers* area, each default approver will be tagged. Enter the *Number of approvers required* field. For example, 1 layer; 4 default approvers are set and only 1 is required to be approved for payment.
4. Click *Set as Default (below Limit)* if this is to be the standard approval process.
5. Repeat for any other layers.
6. Click *Next* and follow the prompts to finalise the upload of invoices.

Invoice Submission - Building

Steps
 Welcome
 Invoices
 Approvers
 Summary

Officer list (first approval level)

1 Number of approvals required Set as default (below limit)

Tag	Code	Name	Office Held	Email	Portal Status
✓	00000001		Body Corp. Manager		Active
	00000002		Treasurer		Active
✓	00000009		Building Manager		Active
✓	00000014		Committee Member		N/A
✓	00000015		Committee Member		Active
	00000016		Tenant Rep		N/A
	00000017		Special Person		N/A
	00000018		Tenant Rep		N/A
	00000019		Caretaker		N/A
	00000020		Chairperson		Active
	00000021		Secretary		Active
	00000022		Committee Member		Active
	00000023		Committee Member		Active

Cancel Back Next

Building last uploaded: 27-Jul-2022 14:01 Building: .

Creditor Override | Double Layer

If there is a specific creditor that requires a different set of approvers for their invoices, you can use the 'Creditor Override' function. A common scenario would be if a building manager is an approver, and their invoices need to be approved by a different set of approvers.

1. Search or select **Invoice Hub**.
2. Click *Options > Configuration*.
3. Set the 'Number of approval layers' to '2' then close the 'Configuration' screen.
4. Click *Options > Approval Defaults*.
5. Click the 'Add Creditor Override' button.
6. Select the creditor in the 'Select Creditor' list that appears and click *OK*.
7. Back in the 'Approval defaults' screen, highlight the 'First Lower' layer, then tag the Office Bearer on the right side.
8. Click the *Save Officer Selection* button.
9. Now highlight the 'Second Lower' layer, then tag the next Office Bearer on the right side.
10. Click the *Save Officer Selection* button.
11. Click the *Close* button to close the 'Approval defaults' screen.

Creditor Override | Single Layer

1. Search or select **Invoice Hub**.
2. Click *Options > Configuration*.
3. Set the 'Number of approval layers' as required, then close the 'Configuration' screen.
4. Click *Options > Approval Defaults*.
5. Click the 'Add Creditor Override' button.
6. Select the creditor in the 'Select Creditor' list that appears and click *OK*.
7. Back in the 'Approval defaults' screen, highlight the 'First Lower' layer, then tag the Office Bearer on the right side.
8. Click the *Save Officer Selection* button.
9. Now highlight the 'Second Lower' layer, and click the *Remove Selected Creditor Override* button.
10. Highlight the 'First Lower' layer again and click the *Save Officer Selection* button for the last time.
11. Click the *Close* button to close the 'Approval defaults' screen.

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 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 \(from defaults\)](#).

If you are temporarily redirecting approvals from a Non Owner Office Bearer (e.g. Building Manager is on leave for a month), then 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).