

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.

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.

Default Approvers

Enable Invoice Hub for this building Approval Limit Second approval layer

Below \$50.00

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		Active

Above \$50.00

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		Active

Below \$50.00 (Override for) ✕

Layer 1 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 type="checkbox"/>		Chairperson		Pending
<input checked="" type="checkbox"/>		Treasurer		
<input checked="" type="checkbox"/>		Secretary		Active

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. The Strata Management office staff must manually upload invoices to the Invoice Hub. The frequency of uploading invoices is at the discretion of the Strata Management office and will vary depending on building or committee member requirements.

There are two methods to upload invoices to the Invoice Hub, each with its benefit.

Both methods trigger 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.

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.

Default Approvers

Enable Invoice Hub for this building Approval Limit Second approval layer

Layer 1 Minimum number of approvers required: (3 selected)

<input 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 checked="" type="checkbox"/>		Treasurer		
<input checked="" type="checkbox"/>		Secretary		Active

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.

Invoice Hub - HARBOUR VILLAS 1345131

Invoices ?

Invoices needing approval View invoices with amounts:
 At or below approval limit Above approval limit

<input checked="" type="checkbox"/>	Date	Creditor	Amount	Invoice Number
<input checked="" type="checkbox"/>	31/07/2024	DIY POOL CLEARING	330.00	PP12345678
<input checked="" type="checkbox"/>	15/07/2024	BYO MOWING	120.00	987654321

2 Selected

- 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.

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Approvers 1

Officers List

Number of approvals required Save

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

3 Selected

Back Next Cancel

- Once the approvers have been confirmed, and any minimum approvers have been set, click *Next*.
- 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.
- Click *Finish* to upload the invoices to the Invoice Hub.

Invoice Hub - HARBOUR VILLAS 1345131

Summary

Invoice Hub Submit Summary

Selected 2 invoice(s) to be approved by 3 Office Bearer(s)..

Invoice(s) will be marked as 'ok to pay' when 1 approval(s) are made for each invoice..

Please press 'Finish' to upload the invoices to the Hub.

Notes (will be displayed on the Invoice Hub)

Back Finish Cancel

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.

<input type="checkbox"/>	Date	Creditor	Amount	Invoice Number
<input type="radio"/>	31/07/2024	DIY POOL CLEARING	330.00	PP12345678
<input type="radio"/>	15/07/2024	BYO MOWING	120.00	987654321
<input checked="" type="radio"/>	31/07/2024	ORIGIN ENERGY DD	2200.00	321456

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

<input type="checkbox"/>	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		Active
<input type="radio"/>		Secretary		

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*.

Invoice Hub - HARBOUR VILLAS 1345131

Approvers 2 ?

Officers List 2 Number of approvals required Save

<input type="checkbox"/>	Name	Office Held	Email for Invoice Hub	Portal Account
<input type="checkbox"/>	ABC Strata	Body Corp. Manag	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 checked="" type="checkbox"/>		Secretary		Active

3 Selected

Back Next Cancel

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.

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

