

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 notice 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.

For the invoice upload process to run as quickly as possible it is recommended to upload invoices for approval first thing in the morning and have the invoice hub configuration setting 'Always upload the building' unticked.

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 then 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

It's important to understand that the **Invoice Hub** upload process is completely separate from your normal nightly property data uploads (where reports/documents are updated/uploaded to the StrataMax Owners Portal). You must upload invoices via the **Invoice Hub** using either 'Auto Invoice Submission From Defaults' or the 'Invoice Submission Wizard'.

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.

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*.

Creditor Master Chart - Edit -

BODY CORP MANAGER

Creditor Master Chart

BODY CORP MANAGER
P O Box 76
CLAYFIELD QLD 4011

support@stratamax.com 07 5566 8855
training@stratamax.com
07 3355 6655

Default Account Code: 08200002 Hide (don't show in master chart selection screens)

Location ID: QLD

Comments: Comments

Prompt/Preferred/Banned: Preferred

Payments

Payment Method: EFT
 Do not send remittance advice
 BPAY
 Cheque
 Do Not Auto Pay

BSB: 014-513
Account: 9876524
Minimum Payment Amount:

Credit limit: 0.00

Ok To Pay: Use Building Setting Always OK To Pay On Hold

Tax

GST registered
 ABN Exempt
ABN: 52 097 607 451
STRATAPAY PTY. LTD.

PAYG tax rate: 0.00

Accountants Name:

Insurance

Workers Compensation	Insurer	CM - WCC	Policy Num	CM - WC	Exp	08/02/2024
Prof. Indemnity	Insurer	<input type="text"/>	Policy Num	CM - Prof	Exp	<input type="text"/>
Public Liability	Insurer	<input type="text"/>	Policy Num	<input type="text"/>	Exp	<input type="text"/>

Compliance

Notes Save Cancel

Historical invoices

There are instructions for the Invoice Hub approver to access invoice approval history available [here](#). 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 up to 12 months for Invoice Approvers. See below StrataMax Portal Access to Historical Invoices for information about invoices uploading to the portal for any configured number of years.
- If the Invoice Hub approver becomes a non approval member and is removed from the **Invoice Hub / Options / Approver Default** area and then reappointed to be an Invoice Hub Approver again, any prior

history will be lost.

- The history area starts populating only when the approver has been configured for Invoice Hub, an upload of building data is completed, and the invoice is approved. Any earlier invoices that may have been approved by another or others will not be included.
- Restoring data in StrataMax can also cause history to be lost via the Invoice Hub approver's user account and also in StrataMax / **Invoice Hub** / Review Invoices area.

StrataMax Portal Access to Historical Invoices

It is recommended that invoices are 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 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 Portal, regardless of who created them. The only caveat to that would be that a layer 2 approver will not yet be able to see the invoice if they are still awaiting approval on layer 1. Once the layer 1 approval is complete and they are able to see the invoice in portal, then they will be able to see the query.