



Instructional Manual

Invoice Hub Approver



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Overview

The Invoice Hub Portal assists to facilitate the process of providing Committee Members with the ability to approve invoices waiting to be paid via the StrataMax Portal.

As an approver you will be able to view a scanned copy of the invoice, confirm the account code to be used for payment, raise a query with your Strata Manager to clarify further details or information, and approve the invoice for payment.

Below is a screenshot of the initial screen you will see when you login to the Online Owners Portal and select 'Invoice Hub':

Invoices Awaiting Your Approval

This will list all buildings that are linked to your StrataMax Login where you are an approver of invoices. Clicking on the building will take you to the buildings listing all invoices awaiting your approval. This will also list any invoices that are not totally approved, i.e. invoices that are part approved or have queries on them will display along with brand new invoices just submitted.

Manager Information Window

This is a short summary with general information about the Building/Plan, including Financial Statements and details of your Strata Manager.

Once your strata manager has submitted invoices to the Portal (website), each Committee Member that has been selected to approve the invoice will receive an email notification. After logging in and selecting the 'Approve' icon, the invoices waiting to be approved will be displayed. The status of the invoices will be one of the following:

- 'Awaiting Approval' - invoices that have not been approved by anyone, and awaiting your approval
- 'Part Approved' - invoices for which one or more Committee Members have approved the invoice, but which require further approval to be deemed 'OK to pay'
- 'On Hold' - invoices that have a query or question from Committee Members

Approve

This is another shortcut to the 'Approve Invoices' list, in a diagram demonstrating the approval process.

Summary

Shows current outstanding invoices requiring approval - you can approve invoices from here, however more designed for you to see invoices that you may have approved, that are still awaiting approval from other Committee Members.

History

This shows invoices that have gone entirely through the approval process, i.e. that have been approved for payment by the minimum required number of approvers. These will only be stored / evident for 93 days, as a means to confirm why you may have received an 'approval required' notification, but then found no invoices awaiting your approval. Once an invoice is entirely approved by the minimum number of approvers, this is the only place it will show.

Settings

Settings allows you to configure whether you receive email notifications for invoices awaiting approval

Approver for Multiple Buildings

Owners that are approvers for multiple buildings can access invoices for approval by two methods. From the initial screen all buildings with invoices 'Awaiting your Approval' will be listed under 'Invoices Awaiting Your Approval' where the building name and number of invoices will be displayed. By clicking on the Building Name, you will access invoices 'Awaiting Approval' for that specific building.

Approvers can also change between buildings they are approvers for by clicking on the drop down arrow at the top right of screen.

Approve

The Approve menu will take you to a list of invoice awaiting approval.

Icon Legend and Actions

Invoice Hub

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Approve Invoices

The below Invoices are outstanding and require action on your part. Queried Invoices will be displayed below until the Invoice is Approved.

Invoices Awaiting your Approval						APPROVE ALL NON-QUERIED
	Invoice Status	Creditor Name	Invoice Date	Invoice Number	Gross Amount	
⚠	Awaiting Approval	BYO Mowing	22-Aug-2015	1234567890	\$120.00	✔ 📧 📄 🔍
⚠	Part Approved	DIY Pool Cleaning	23-Aug-2015	PP12345678	\$330.00	✔ 📧 📄 🔍
⚠	Part Approved	Paving Paving Paving	23-Aug-2015	INV1012354	\$1,320.00	✔ 📧 📄 🔍
⚠	Awaiting Approval	Drains R Us	21-Aug-2015	#000112	\$55.00	✔ 📧 📄 🔍
⚠	Part Approved	Pipeworks Plumbing	22-Aug-2015	87	\$165.00	✔ 📧 📄 🔍
⚠	Awaiting Approval	Crime Security Gates	21-Aug-2015	65478	\$220.00	✔ 📧 📄 🔍
🛑	On Hold	Bumpy Driveway Repairs	22-Aug-2015	1000324	\$440.00	✔ 📧 📄 🔍

-  TICK – 'Approve' Invoice
-  QUERY – 'Raise a Query about this Invoice' OR on the left side indicates 'You have Raised a Query about this Invoice'
-  PDF – View 'Invoice'
-  MAGNIFYING GLASS – 'View Invoice Details' Creditor, Amount, Details, Account Code, Invoice No.
-  ATTENTION – 'Invoice awaiting your Approval' or 'Part Approved'
-  QUERY/ATTENTION – 'Manager has responded to a query you raised on this invoice'
-  BLUE DOT – 'View Details' This icon is found in the 'Summary' tab and will change to Green once selected

How to Approve Invoices

1. Select the 'Approve' menu
2. Select the PDF icon to view the invoice
3. Select the 'Magnifying Glass' to view the invoice details
 - Select the 'Line Items' tab to view the Account Number for this invoice
 - Select 'Notes' to view any notes for this invoice
4. Press 'OK' once you have viewed the invoice
5. To approve an invoice select the 'Tick' icon
6. The invoice/s you have selected will now be displayed under 'Confirm changes to Invoices'.
7. Select '**Submit Changes**' to confirm status update
8. A prompt will ask if you are sure you want to 'Accept X change' you have made, click Yes

How to Query an Invoice

Once you have viewed the invoice and details you may have a query. To submit a query to your Strata Manager proceed as follows.

1. Select the 'Query' icon
2. Add your query in the 'Query Reason' box
3. Click 'Confirm'
4. Any invoices that have been approved or queried will be displayed in the 'Confirm Changes' area
5. Click 'Submit Changes' to confirm status update
6. Click 'Yes' to 'Accept all Changes'

Summary

The Summary lists all invoices that are awaiting approval and allows you to review the status of each invoice which is either 'Awaiting Approval', 'Part Approved' or 'On Hold'. You can also use the 'Filter by Status' function to limit your list to a particular status only.

1. Select 'Summary' tab
2. A summary of the invoices will be displayed
3. Select the 'Blue Dot' to view the details (who has approved invoice or submitted a query)
4. By selecting a 'Part Approved' invoice, the approving Committee Members will be shown in 'Approval Details' at the bottom of the screen. By selecting an 'On Hold' invoice, the notes will be shown in 'Notes' at the bottom of the screen.

History

Invoices that have been approved or finalised will be temporarily listed in the 'History' tab to allow approvers to review any aspect of the invoice approval process. Note that you will only ever be able to view invoices that have been allocated to you as an approver. Click on the 'Blue Dot' to review the details of the invoice, which Committee Members had approved the invoice, and any notes that were submitted. . These will only be stored / evident for 93 days, as a means to confirm why you may have received an 'approval required' notification, but then found no invoices awaiting your approval. Once an invoice is entirely approved by the minimum number of approvers, this is the only place it will show.

Settings

This allows you to turn off your email notifications – this is only of benefit if you are logging in regularly, i.e. you will be checking these screens regardless of whether you receive an 'approval required' notification or not. Strong recommendation is to always have the notifications on. If you wish to turn off the notifications then:

1. Select the 'Settings' tab/menu
2. Un-tick 'Receive Email Notification'
3. Click on 'Save Settings'.

Invoice Hub Troubleshooting

1. The invoice is not appearing when I click on the PDF icon?

Refer to the below link for assistance with Popup Blockers. Please note the only browsers supported for the Invoice Hub or Owners Portal are Internet Explorer, Chrome, Firefox and Safari.

<http://www.stratamax.com/PopUpHelp.aspx>

2. I have approved the invoices by clicking on the tick however I am receiving emails to remind me of invoices awaiting approval and when I log in invoices I have approved are still awaiting approval?

When ticking the invoices to approve they are then displayed on the same page in a section 'Confirm Changes to Invoices', from this section you must click on Submit Changes for the approvals to be sent.

3. I am an approver for more than one building and use the same login however cannot locate the invoices to approve?

When logged onto the Invoice Hub Portal, at the top right of the screen is a drop down arrow next to the word 'viewing'. Click on this and all buildings your login has access to will be shown and available for selection.

4. I cannot view the invoice when viewing invoices on the History tab?

Invoice details are available however invoice images are only available while awaiting approval. Contact your Strata Manager if you require a copy of the invoice.

5. I have logged on to approve invoices however I cannot see the expense account used?

Click on the magnifying glass symbol to display invoice details, you can then select the Line Items tab to view the expense account and the Notes tab to view any notes associated to the invoice.

6. When I try to log on to approve invoices, I am getting a message that reads 'Your account is pending. Please activate account before attempting to reset password'?

When invoices are first uploaded for your approval, if you are a Non Owner Office Bearer Approver you will be sent an activation email that requires you to click on a link to activate your account

7. When I log on to approve invoices, I cannot see the Invoice Hub Tab?

If an approver has created a Passport and added the StrataMax ID to the passport, you must log on using Passport credentials to view the Invoice Hub Tab. If logging on using the StrataMax ID the Invoice Hub Tab will not be available.