Portal Refresh 1.1.0 – Invoice Hub

StrataMax has been dedicated to meeting the needs of Strata Managers for over 20 years through the continual enhancement of our software suite. We are committed to providing new functionality to support you in servicing your clients and to provide opportunities for you to optimize efficiency within your office environment.

This document describes exciting new features and enhancements available in the above release.

A history of Release Notes can be reviewed on the StrataMax Online Help

THE COMPLETE STRATA MANAGEMENT SOLUTION

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Contents

1.   Introduction

As part of our ongoing initiative to modernise and enhance the user experience across the StrataMax Portal, we are progressively rolling out refreshed modules in phases. The initial phase introduced the Roll Submission module, and the upcoming phase will deliver Branding and Invoice Hub.

2.   Invoice Hub Page Layout

The previously separate 'Approve Invoices', 'Invoice Summary', and 'Invoice History' pages have been combined into a single 'Invoice Hub' page in the newly refreshed Invoice Hub. The new 'Invoice Hub' page now features a responsive layout, meaning it automatically adjusts and scales to fit different screen sizes, including tablets and mobile devices. This ensures an optimal viewing experience across all devices.

To access the 'Invoice Hub' page:

1.   Access the StrataMax Portal.

2.   If multiple offices are available, select the correct office from the 'My Office / Properties' list.

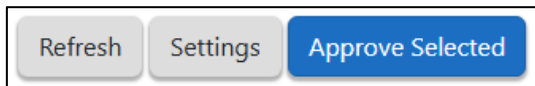3.   Click on 'Invoice Hub'.

The 'Invoice Hub' page will consist of the following sections which will each be discussed in detail below:

1.   Action bar
2.   Warnings / Messages
3.   Filters
4.   View selection

5. Invoice List
6. Invoice Detail

2.1   The Action Bar

The 'Action' bar is located at the top of the 'Invoice Hub' page and will contain the actions that can be taken on the page:
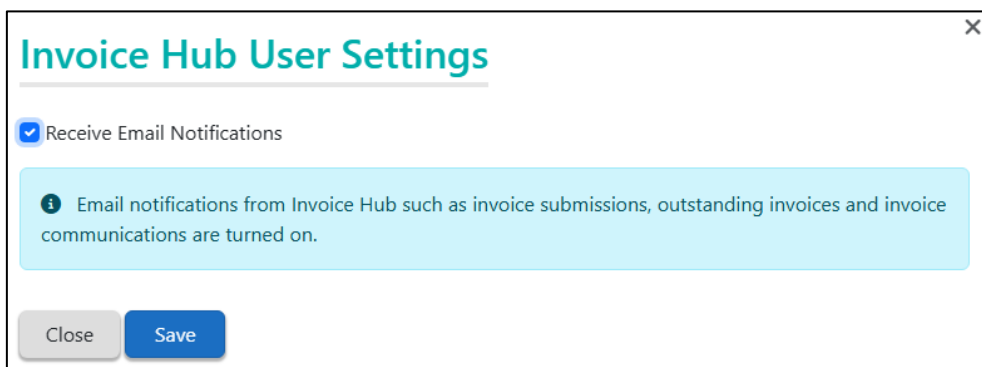

Refresh

The 'Refresh' button will refresh the 'Invoice Hub' page.

Settings

The 'Settings' button will display the 'Invoice Hub User Settings' pop-up screen where the approver can indicate whether they want to receive email notifications for Invoice Hub.

Should the approver uncheck the 'Receive Email Notifications' checkbox, a warning will be displayed informing them that they will not receive any email notifications from Invoice Hub.
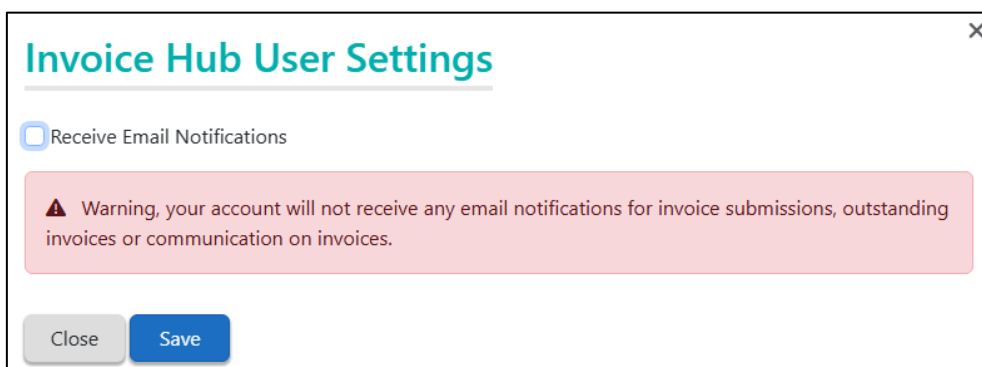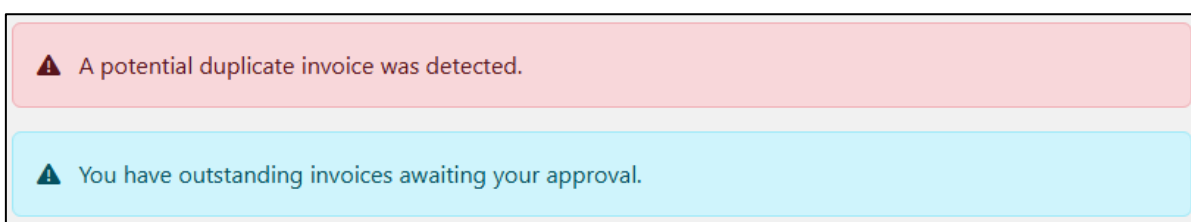
Approve Selected

The 'Approve Selected' button will approve the selected invoices and will only be displayed if the approver has selected one or more invoices from the Invoice List.

2.2   The Warnings / Messages

The 'Warnings / Messages' section is located below the Action Bar on the Invoice Hub page and will list all warnings or messages related to the approver.

2.3   The Filters

The 'Filters' section is located above the 'View Selection' section on the 'Invoice Hub' page and will display one or more of the below filters.

Filter by Building

The 'Filter by Building' field will only be displayed if the approver has been granted access to multiple buildings and will allow the approver to select the building, they wish to view the invoices for, from a list.

The invoices in the 'Invoice List' will be filtered based on the selections made. If no building is selected in the filter, the invoices in the 'Invoice List' will be unfiltered. The approver can clear the filter by clicking on the [×] button.

Filter…

The 'Filter…' field is always visible and enables approvers to refine the 'Invoice List' by entering specific criteria. When a filter is applied, the list will display only invoices containing data that matches the entered criteria across the following invoice parameters:

- Building
- Creditor

- Amount

- Invoice Number

- Expense Account

2.4   The View Selection

The 'View Selection' section is located above the 'Invoice List' on the 'Invoice Hub' page and will allow the user to specify how they want to view the invoices in the 'Invoice List'.
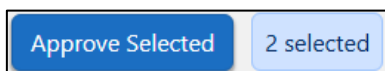

The Invoice Selector

The 'Invoice Selector' will allow the approver to toggle between selecting or deselecting all invoices when clicking on the button. The approver can also click on the down arrow and select the relevant selection option from the list.
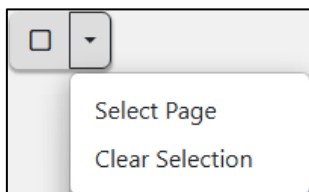

The Approve Selected button

The 'Approve Selected' button will approve the selected invoices and will only be displayed if the approver has selected one or more invoices from the Invoice List.

The number of selected invoices that will be approved, when the approver clicks on 'Approve Selected' will be displayed next to the button.


The 'Sort By' selector

The 'Sort By' selector will allow the user to select which column, in the 'Invoice List, the invoices should be sorted by. The button can be used to toggle between sorting the invoices in ascending or descending order.
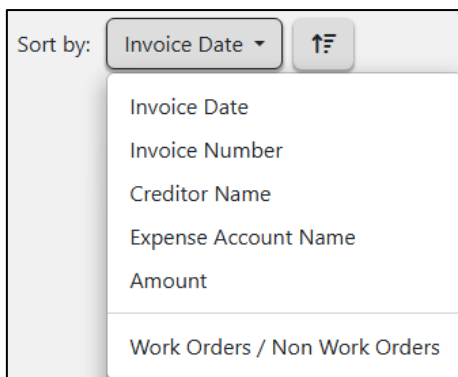
> **Note:** Invoices can also be sorted by clicking on the relevant column heading in the 'Invoice List'.

The 'Show' view selector

The 'Show' view selector allows the approver to select the invoices they want to display in the 'Invoice List'.
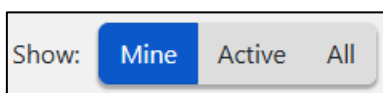
The options are:

- Mine – This view will list all invoices that requires approval from the approver.

- Active – This view will list all invoices that are still in the approval process irrespective of whether they are before, at, or after the approver's approval layer, i.e., these invoices have not been fully approved yet.

> **Note:** This view will only list invoices where the current approver has been included as an approver, i.e., if the invoice is in an approval process where the current approver has not been specified as an approver, it will not be listed here.

- All – This view will list all invoices that have been uploaded to Invoice Hub in the building's current and prior financial year irrespective of:

  o The invoice's approval layer.

  o Whether the current approver has been specified as an approver of the invoice.

  o Whether the invoice is still in the approval process or been fully approved.

Note – Historic Invoice Visibility Update:

Previously, newly added approvers in Invoice Hub could only view invoices they were assigned to approve.

With this update, **all approvers can now access all historic invoices**, regardless of their prior involvement.

If there are historic invoices that should remain restricted, they must be retracted from Invoice Hub to prevent visibility.

The Expand / Collapse button

The [⌄] button will allow the approver to toggle between expanding and collapsing all invoices in the 'Invoice List'.

2.5   The Invoice List

The 'Invoice List' will list all invoices based on the filters specified, and view selections made by the approver. Invoices can be sorted by clicking on the relevant column heading or by selecting the correct option in the 'Sort By' selector.

	Creditor ⇅	Invoice Date ⬇	Amount ⇅	Invoice Number ⇅	Expense Account ⇅				
☐	GARDENING AND MAINT	26/11/2025	$25.00	14412	GARDEN & GROUNDS		🗓	📄	⌄
☐ ⚠		24/11/2025	$26.85	88888	CLEANING		🗓	📄	⌄
☐	PAINTING	4/8/2025	$32.50	442211	PLUMBING & DRAINAGE	✂	🗓	📄	⌄
☐	GROUND ENGINEERING F	31/7/2025	$70.00	IN3221	Multi Expense		🗓	📄	⌄

The Select Invoice checkbox

The 'Select Invoice' checkbox can be checked to select the invoice for approval.

Note: The whole row is selectable, meaning that the user can click anywhere on the invoice row to check the 'Select Invoice' checkbox.

The Potential Duplicate Invoice indicator

The indicator will be displayed on an invoice if it is a possible duplicate and serves as a warning to the approver. The recent creditor history will need to be viewed to identify the accompanying duplicate invoice.

The Invoice Information

These columns will show the information specified on the invoice when it was entered:

- Creditor.
- Invoice Date.
- Amount.
- Invoice Number.

The Invoice Note indicator

The indicator will display on an invoice if an invoice query has been sent to the approver and that query has not been read. This indicator will disappear as soon as the approver views the query on the 'Invoice Detail'.

The Expense Account

The 'Expense Account' column will display the expense account(s) specified on the invoice when it was entered. If more than one expense account was entered, the 'Invoice List' will display the words 'Multi Expense' and the invoice detail will have to be viewed to see all the expense codes specified.

The Work Order icon

The icon will only be displayed next to an invoice if the invoice has a work order associated with it. The invoice detail will have to be viewed to see the number of the linked work order.

The Recent Creditor History button

The button can be clicked to view the last 5 invoices, that were uploaded to Invoice Hub, for the creditor specified on the current invoice.

Creditor Invoice History

Recent invoices processed for SUZAN LANDA

	Invoice Date	Invoice Number	Amount	Payment Date	
	28/11/2025	GFF45	$118.00		📄
	28/11/2025	1142124	$220.50		📄
⚠	5/8/2025	8888888	$26.85	24/11/2025	📄
	31/7/2025	44444	$69.00	24/11/2025	📄

Close

The following information is displayed for each invoice listed in the 'Creditor Invoice History:

- The ⚠ icon will only be displayed next to an invoice if it is a possible duplicate of the current invoice.

- These columns will show the information specified on the invoice when it was entered:
    - Invoice Date.
    - Invoice Number.
    - Amount.

- The 'Payment Date' field will display the date on which the historic invoice was paid and will not display a value if the invoice has not been paid yet.

- The 📄 button will display the actual invoice document in a new browser window.

The View Invoice button

The 📄 button will display the actual invoice document in a new browser window. If the invoice document is not available to be viewed, this button will have a grey background.

2.6   The Invoice Detail

The 'Invoice Detail' will display when the invoice is expanded on the 'Invoice List' by clicking on the ⌄ arrow.

The Invoice Information

These fields will display the information specified on the invoice when it was entered:

- Building.
- Invoice Number.
- Creditor Name.
- Creditor Number.
- Work Order Number.

Financial Statement

The [$] button will display the Financial Statement for the building specified on the invoice.

The Creditor Invoice Line Items

The 'Creditor Invoice Line Items' will display all the expense codes entered for the invoice with the accompanying invoice details, and amount for each.

The Invoice Notes

The 'Invoice Notes' section will display a running history of the invoice since it was uploaded to Invoice Hub. Approvers will also use this section to send invoice queries to the manager and/or other approvers – see section 4 below for more detail.

🕐 Invoice Submitted for approval.	31/7/2025 2:04 PM
🕐 ▨▨▨ ▨▨▨ added to approval layer 1.	
🕐 Karla Dixon added to approval layer 1.	
🕐 Oscar Finley added to approval layer 2.	
🕐 Roscoe Conklin added to approval layer 2.	
🕐 Karla Dixon's query has placed this invoice on hold.	27/11/2025 2:46 PM

> 💬 **Karla Dixon**   27/11/2025 2:46 PM
>
> `@Oscar Finley` Please confirm that this has been completed to your satisfaction before I approve the invoice

💬 [@Manager ▾] Reply...   ↩

3. Approving Invoices

As mentioned above, the 'Invoice Hub' page will display the invoices, that require approval, for all the buildings related to the approver. This means that invoices for multiple buildings can be approved at the same time.

To approve an invoice:

1. Access the StrataMax Portal.
2. If multiple offices are available, select the correct office from the 'My Office / Properties' list.
3. Click on 'Invoice Hub'.
4. Select each invoice, in the 'Invoice List' you wish to approve.
5. Click on the 'Approve Selected' button.

4. Querying an Invoice

|	
🕐 Erik Cook added to approval layer 1.	
🕐 Gil Porter added to approval layer 1.	
🕐 Karla Dixon added to approval layer 1.	
🕐 Dexter Lam added to approval layer 1.	
🕐 Tricia Hansen added to approval layer 1.	
🕐 Dexter Lam's query has placed this invoice on hold.	2/12/2025 2:49 PM

> 💬 **Dexter Lam**   2/12/2025 2:49 PM
>
> `@Karla Dixon` Karla, please confirm that the service was delivered satisfactorily before I approve the invoice

💬 [@Manager ▾] Reply...   ↩

New functionality has been introduced that allows an approver to send an invoice query to:

- The manager – The query will be sent to the manager only.

- A specific approver – The query will be sent to the selected approver only.

- All – The query will be sent to the manager as well as all the approvers of the invoice.
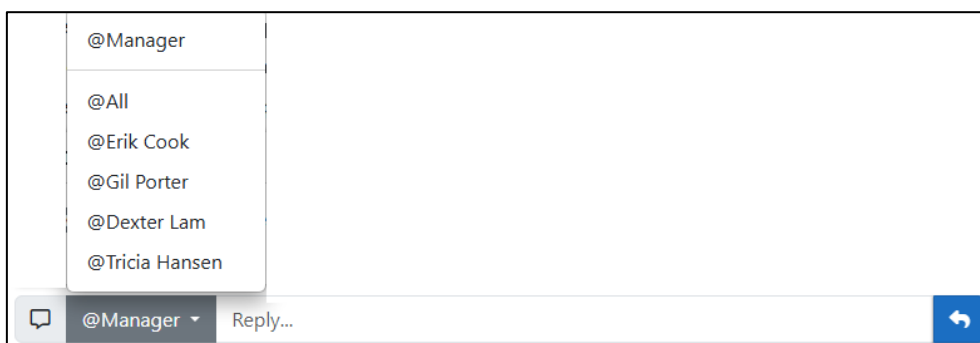
To send or reply to an invoice query:

1. Access the StrataMax Portal.

2. If multiple offices are available, select the correct office from the 'My Office / Properties' list.

3. Click on 'Invoice Hub'.

4. Expand the invoice for which you want to send or reply to an invoice query.

5. Select the correct receiver for your query.

6. Enter the query message you want to send and click on the button or press <Enter>.

> **Note:** When an approver sends a new or replies to an existing invoice query while the invoice is at their approval layer, the invoice will be placed on hold.
>
> The approver whose query placed the invoice on hold, will have to approve the invoice for it to progress further in the approval process.