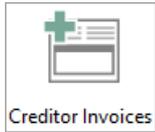


Creditor Invoices | Configuration

Last Modified on 01/04/2026 12:43 pm AEST



This article covers the various settings and tick boxes in the 'Configuration' window in the **Creditor Invoices** screen.

Creditor Invoices | Configuration

Hover over each setting to determine if the setting is a *Global* setting (affecting all users) or a *Local* setting (affecting only the user). To open the *Configuration* window in the **Creditor Invoices** menu, simply click *File > Configure*.

Settings

Creditor Account Code Selection

The list of creditors will appear sorted by name or number depending on selection set.

Show Creditor Account Selection List on Start Up

If ticked, a list of creditors will appear when the **Creditor Invoices** menu is opened, unless [DocMax Work Queues](#) have also been configured to start automatically (see the *Document Attachment* section further down this page).

Show Creditor Account Selection List on Building Change

When a building is selected after clicking the *Change Building* button, a list of creditors will appear.

Prompt If Creditor Has Amounts On Hold

If set, if the creditor has an amount on hold a prompt will appear to advise that the creditor has an amount on hold.

Auto Insert Today's Date

If set, this will insert today's date in the *Date* field.

Auto Select Last Expense Account

If set, this will select the expense code that was used in a previous invoice saved for this particular creditor in the building.

Clear Date For Each Entry

If set, this will clear the date field when the invoice is saved.

Clear Details And More Info For Each Entry

If set, this will clear the details field when the invoice is saved.

Limit Entry To Available Funds

This will prevent users from saving any invoices that are more than the amount in *Bank Balance* field. Note that this is a *Global Setting*.

Confirm Before Update Master Chart After Change Of Details

If set, when changing details in the *Creditor Maintenance* menu, a prompt will ask whether to update the Master Chart with the change. If not set, the Master Chart will be automatically updated.

Monitor Contractor Insurance Due Dates

This setting allows you to monitor the contractor's insurance due dates in the *TaskMax* menu. Once you have selected the creditor, the insurance due dates will display above the creditor's name.

Use Creditor GST Registered Settings

This setting uses the creditor's GST setting entered in the *Creditor Maintenance* menu, which will dictate whether the invoice will include or not include GST.

Overwrite Always On

If set, when typing in a field that already has data in it, it will overwrite the data in that field.

Show Preferred Creditors

The list of creditors will show preferred creditors only. This can be toggled on or off using a check box on the top right of the creditors list.

Show Ledger List at Start

This setting allows you to view the creditor's ledger list after selecting the creditor. Please note that only creditor invoices will be shown in this list.

Show Creditor Address

If set, this will display the creditors address in the *Creditor Invoices* menu.

Show TaskMax Jobs (User Settings)

When ticked, it will automatically display the *Work Order Lookup* screen after the creditor has been selected for the invoice. It will only display any work orders for the creditor selected in the creditor invoice. This is so the work order can be finalised and connected to the invoice.

Require Work Order For Each Creditor Invoice (Global Setting)

When ticked a prompt appearing on screen for all users whenever they try to save a creditor invoice without a work order attached. The prompt can still be overridden though.

Document Attachment

The 'Document Attachment' section relates to the use DocMax Work Queues. If your office does not use DocMax Work Queues as part of the office process or for internal approvals, then this section can be ignored.

Automatically start work queue when Creditor Invoices is opened

When ticked, the DocMax Work Queue set in the *Creditor Invoice Work Queues* setting, will automatically start when the *Creditor Invoices* menu is opened.

Invoice Document Display Position

Select the position of the invoice preview screen (we recommend to the right).

Creditor Invoice Work Queue

Select the [DocMax Work Queue](#) to use when the *Creditor Invoices* menu is opened.

Require Invoice Document For Each Creditor Invoice

Each invoice will require an invoice attachment before it can be saved.

Delete Original Document File On Save

If ticked, when an invoice is saved and an invoice attachment is added from the Windows directory, that original file will be deleted.

Global Settings

Test Fund Bank Balances When Creating Invoices and Payments

If set, when payments are being entered (Creditor Invoices) and created in *Payments*, split balances will be tested (by fund) to alert if a fund has insufficient funds.

Maximum amount for Creditor Invoices (v5.6.151)

This will assist in setting a threshold for any creditor invoice that may be incorrectly entered.