Creditor Invoice Refresh

Last Modified on 24/09/2026 3:34 pm AEST

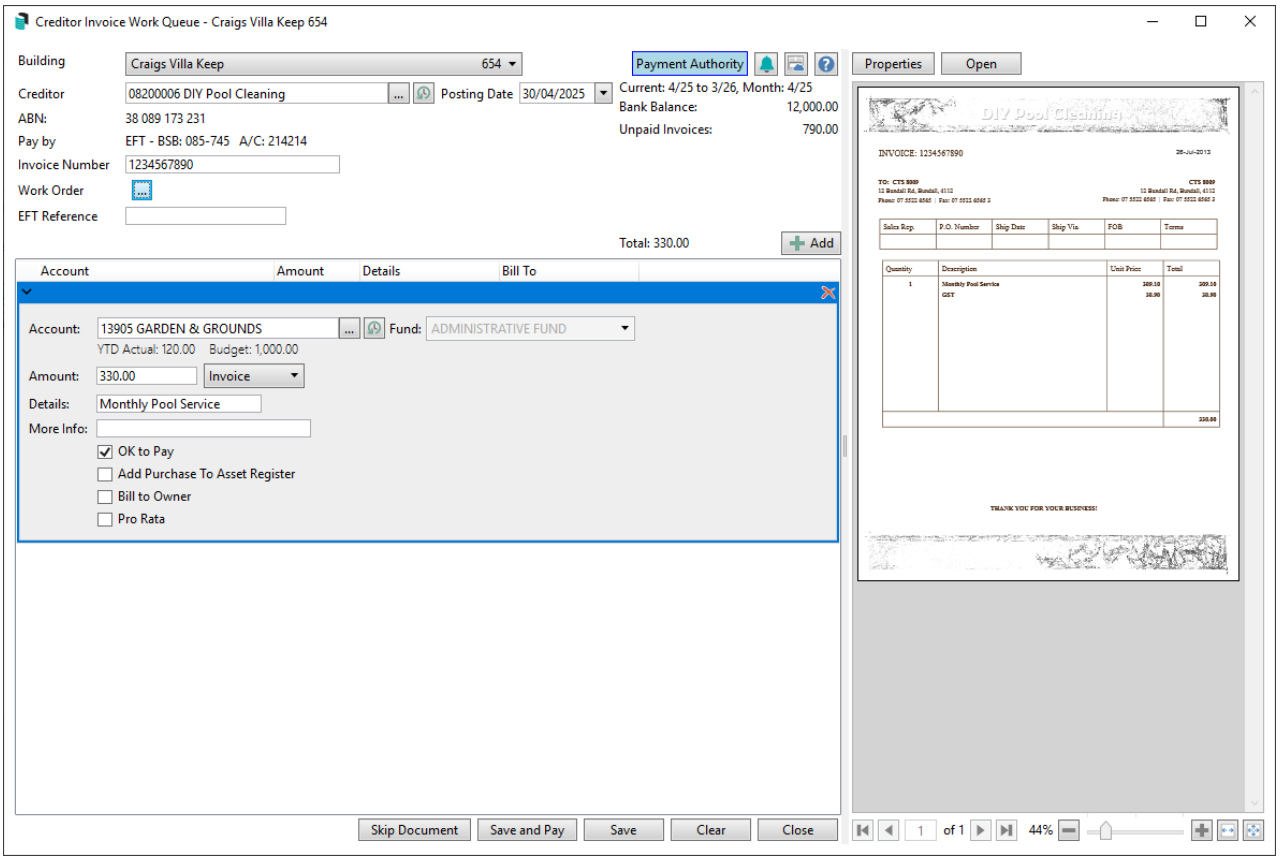
This page contains information relating to the first stage of enhancements to Creditor Invoices within both StrataMax and DocMax which was released during 2026.

Access the Creditor Invoices refresh release notes or the recent New Creditor Invoices webinar to see all the enhancements.

Refreshed Creditor Invoice Interface



Creditor Invoices
(Preview)

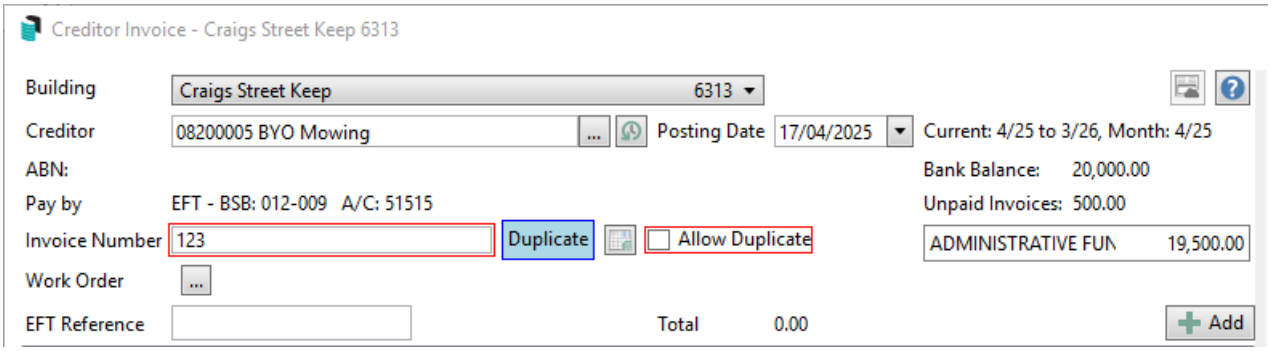


The redesigned Creditor Invoice interface brings all key functions together on a single screen, reducing the need to navigate through multiple clicks &/or menus. Some of the additional changes to improve the process include:

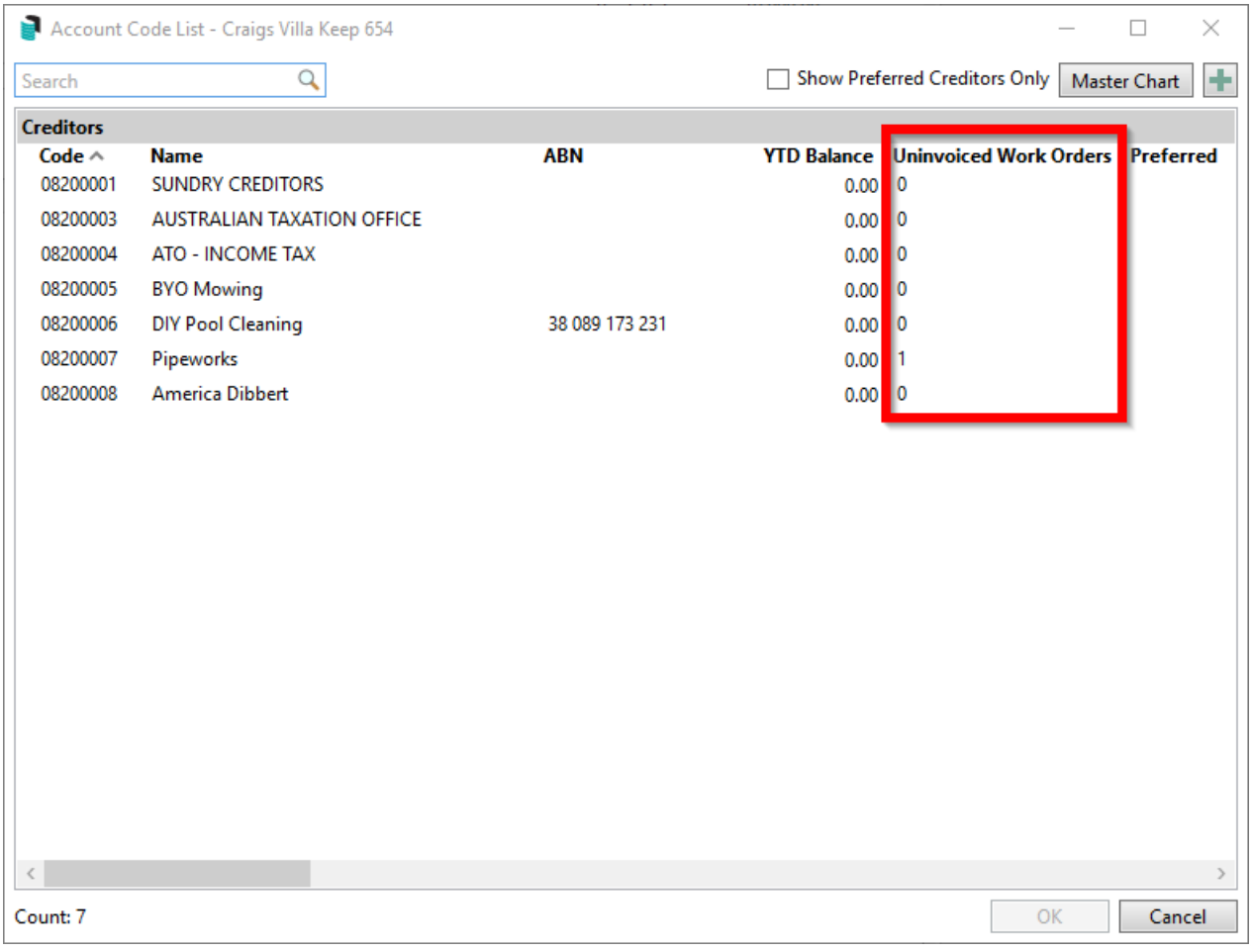
- Ability to save the creditor invoice to the old financial year.
- Earlier identification of a possible duplicate invoice, which will complete the check as soon as the

invoice number is entered and again when saved.

- New Invoice duplication security permission (Allow Creation of Invoices with Duplicate Numbers) to control which users are allowed / not allowed to override duplicate invoice checks.



- When entering invoices from the work queue, there is now the ability to skip a document which will leave the document in the work queue however the next document will load for entry.
- Work Order count will be included in the Creditor account list to help select the appropriate Creditor & Work Order. The selection of a work order will use the search interface, adding the ability to locate the work order based on all fields.

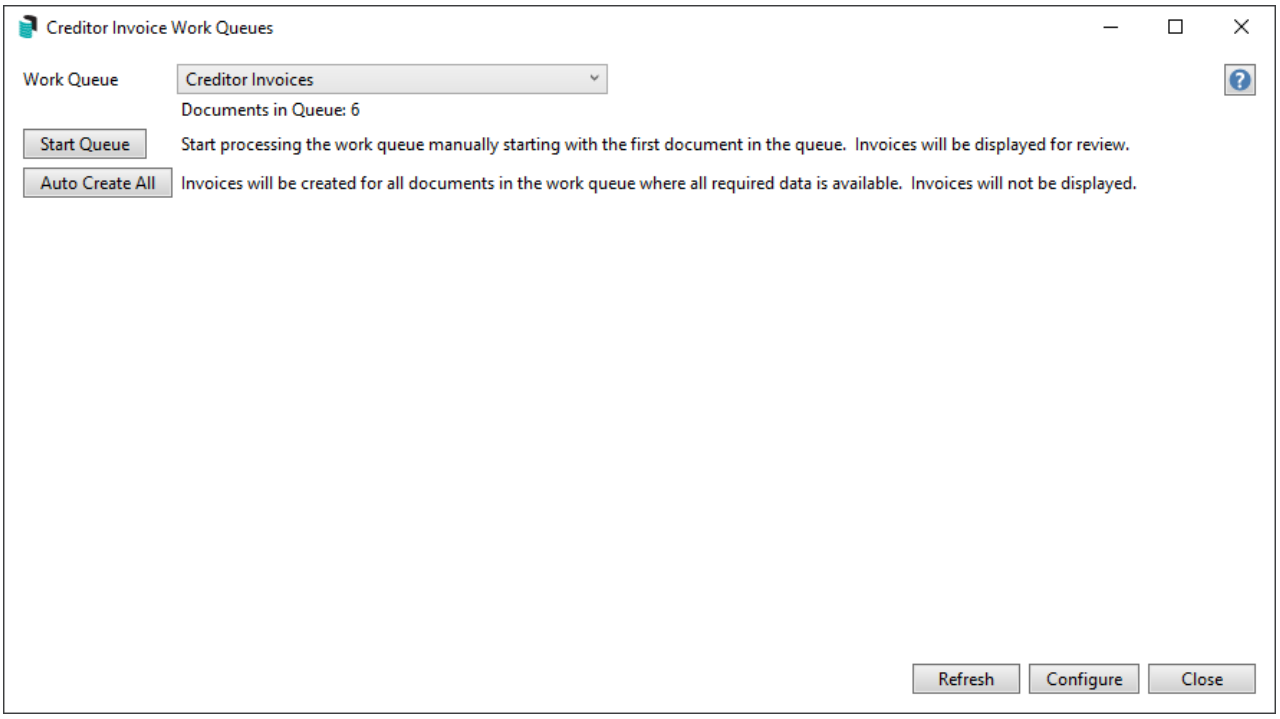


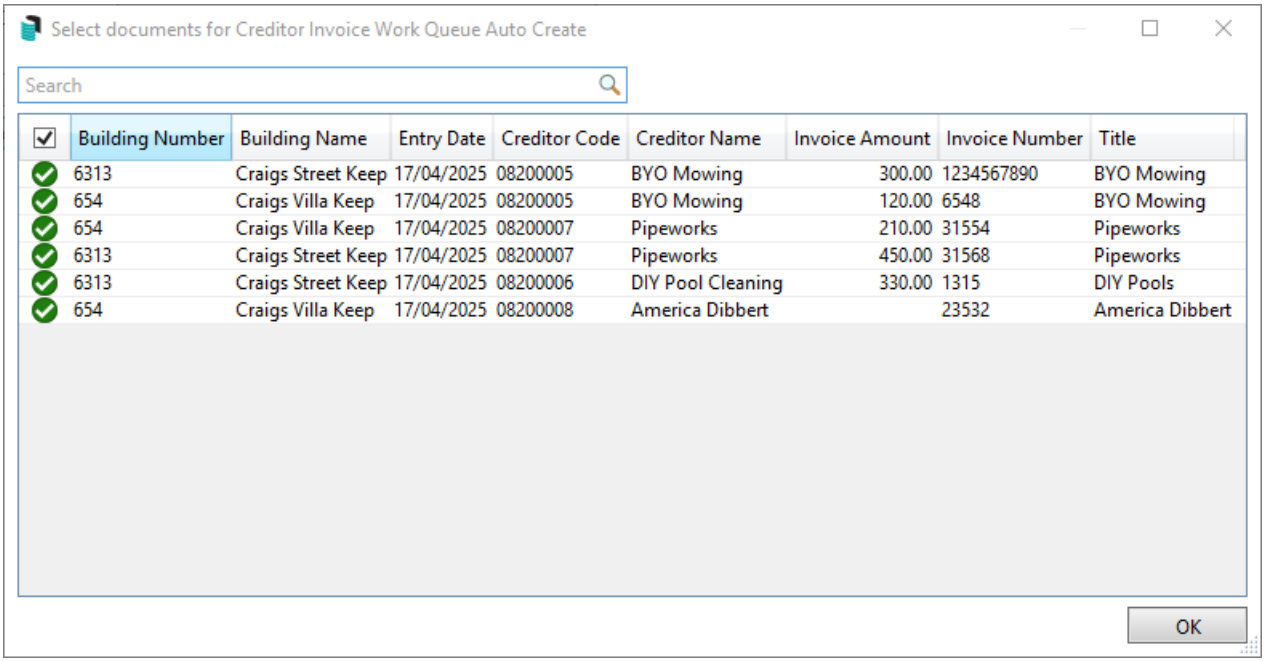
Bulk Creation of Creditor Invoices from a Work Queue

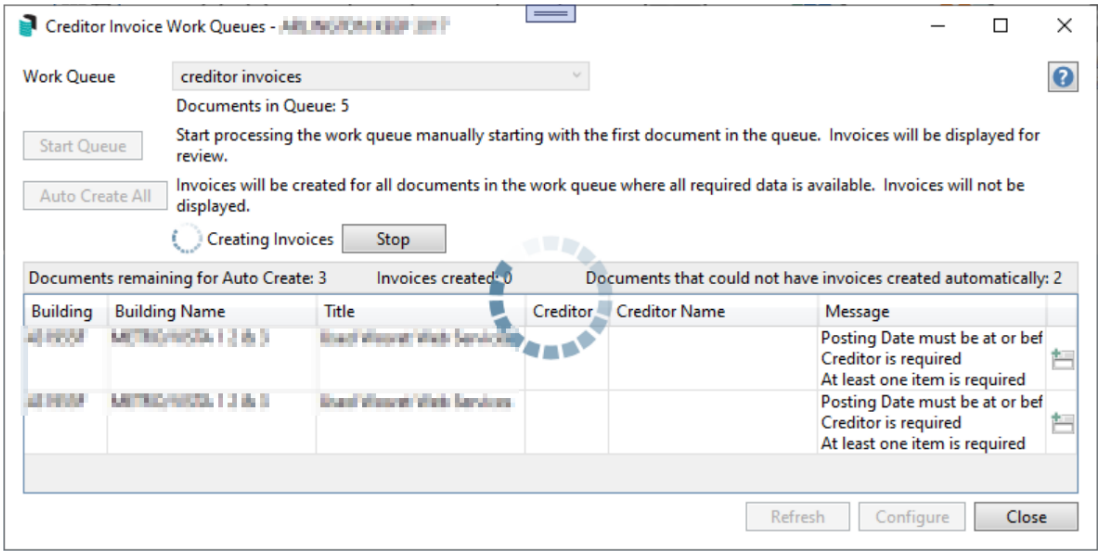
Invoices entered into a DocMax Work Queue, that are complete and have no validation issues, can be saved in bulk with a single action. Any invoices requiring further details will need to be processed individually, with the option to easily skip any invoice if needed.



Creditor Invoice
Work Queues



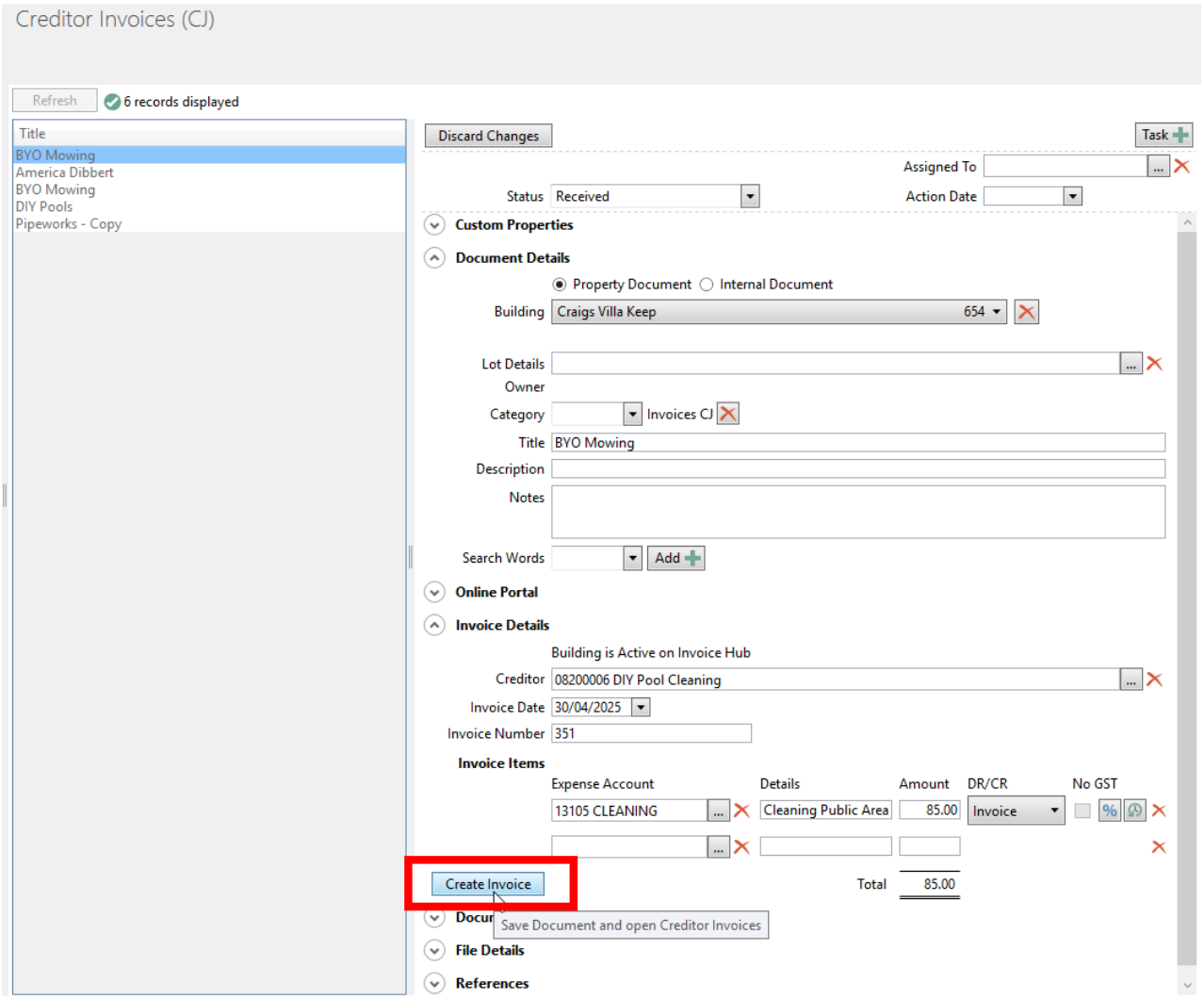


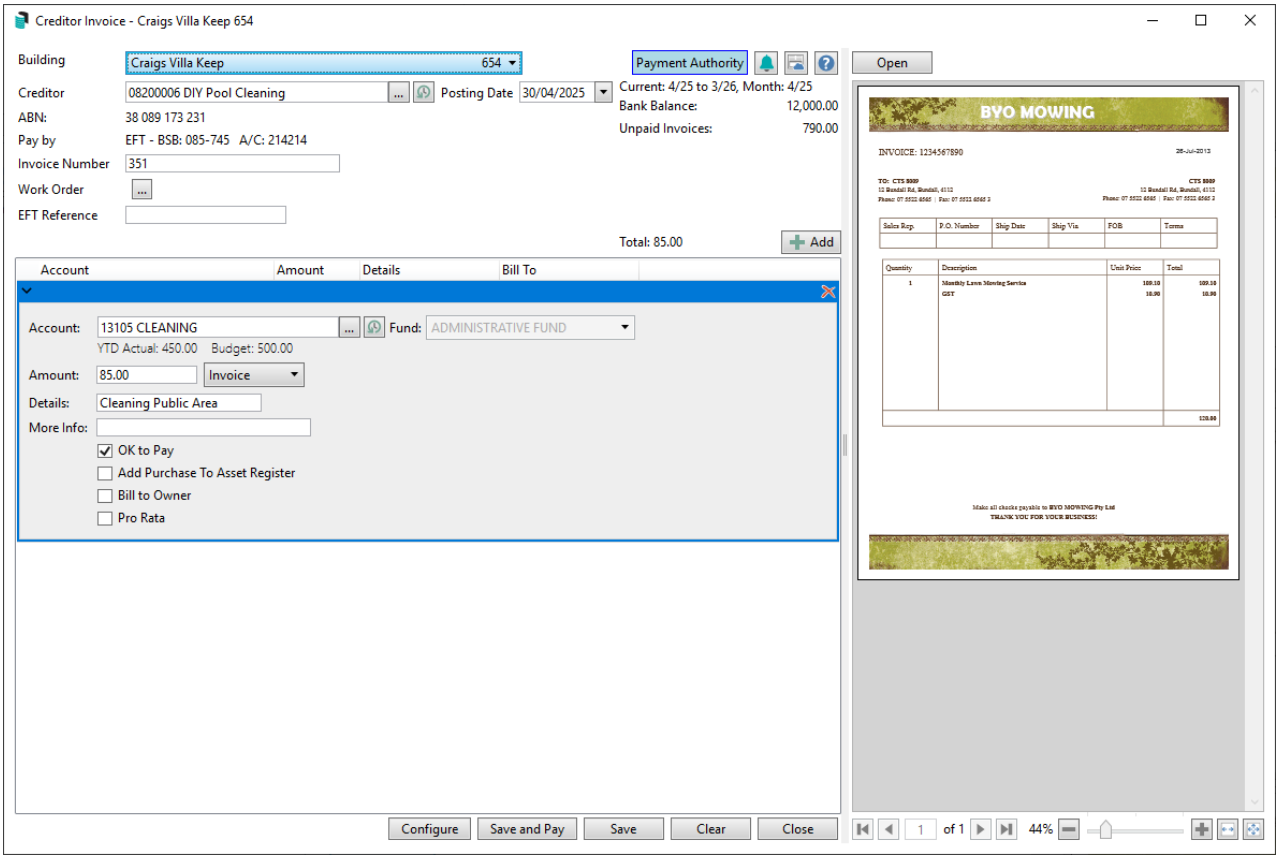


Creation of Creditor Invoices Direct from DocMax

Some offices prefer to complete data entry and validation directly within the DocMax Work Queue. Where this process is followed, you now have the ability to save creditor invoices directly from DocMax, while still maintaining the same validation and checks using the Creditor Invoice interface.

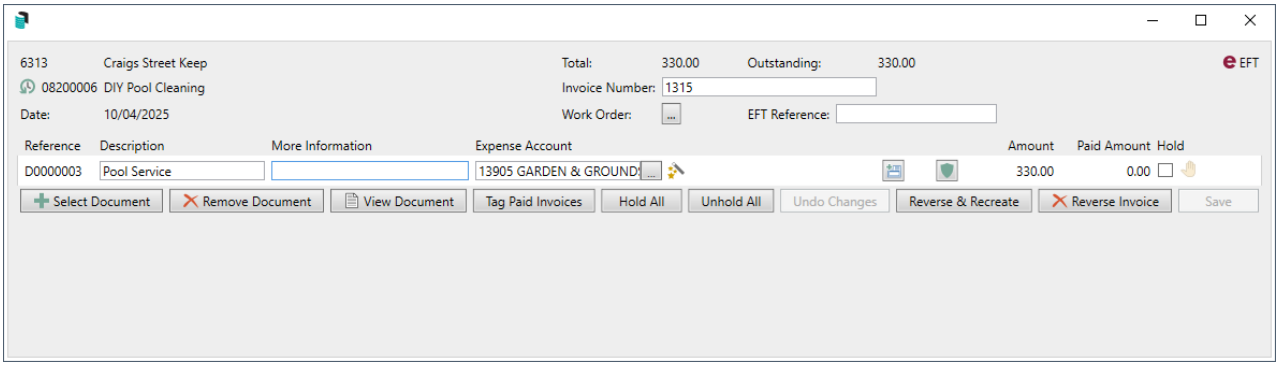
Click on Create Invoice to open the Creditor Invoice interface; any data populated in DocMax would be populated in the creditor invoice interface.


Creditor Invoices (CJ)
Refresh
6 records displayed
Title
BYO Mowing
America Dibbert
BYO Mowing
DIY Pools
Pipeworks - Copy
Discard Changes
Task
Assigned To
Status
Received
Action Date
Custom Properties
Document Details
Property Document
Internal Document
Building
Craigs Villa Keep
654
Lot Details
Owner
Category
Invoices CJ
Title
BYO Mowing
Description
Notes
Search Words
Add
Online Portal
Invoice Details
Building is Active on Invoice Hub
Creditor
08200006 DIY Pool Cleaning
Invoice Date
30/04/2025
Invoice Number
351
Invoice Items
Expense Account
Details
Amount
DR/CR
No GST
13105 CLEANING
Cleaning Public Area
85.00
Invoice
Create Invoice
Total
85.00
Save Document and open Creditor Invoices
File Details
References



Additional Enhancements

- Additional functionality has been added to Creditor Invoice transactions accessed via Interactive Reports, Search Creditor Invoice Items and Local / Global Transactions.
    - Attach and remove linked documents
    - Edit More Information
    - Bill to Owner
    - Add Pro Rata
    - Reverse & Recreate the invoice



- The ability to access Creditor Invoice Details which will give the above functionality from DocMax via the new Details button.

