

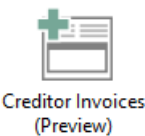
Creditor Invoice Refresh

Last Modified on 04/02/2026 3:17 pm AEST

This page contains information relating to the first stage of enhancements to Creditor Invoices within both StrataMax and DocMax planned for release during 2026. These enhancements will provide a refreshed interface along with new methods to save creditor invoices in a more efficient manner while maintaining validation checks.

The refreshed Creditor Invoice will be released as a *Preview Feature* meaning the legacy Creditor Invoice interface can still be accessed if required.

Refreshed Creditor Invoice Interface



Creditor Invoice Work Queue - Craigs Villa Keep 654

Building

Craigs Villa Keep 654

Creditor

08200006 DIY Pool Cleaning

ABN:

38 089 173 231

Pay by

EFT - BSB: 085-745 A/C: 214214

Invoice Number

1234567890

Work Order

EFT Reference

Payment Authority

Current: 4/25 to 3/26, Month: 4/25

Bank Balance:

12,000.00

Unpaid Invoices:

790.00

Total: 330.00

+ Add

Account	Amount	Details	Bill To
<div><div>Account: 13905 GARDEN & GROUNDS</div><div>YTD Actual: 120.00 Budget: 1,000.00</div><div>Amount: 330.00 Invoice</div><div>Details: Monthly Pool Service</div><div>More Info:</div><div><div><input checked="" type="checkbox"/> OK to Pay</div><div><input type="checkbox"/> Add Purchase To Asset Register</div><div><input type="checkbox"/> Bill to Owner</div><div><input type="checkbox"/> Pro Rata</div></div></div>			

Properties

Open

INVOICE: 1234567890

26-Jul-2013

TO: CTS 8889

12 Bunkell Rd, Bunkell, 4112

Phone: 07 5522 4545 Fax: 07 5522 4545 2

CTS 8889

12 Bunkell Rd, Bunkell, 4112

Phone: 07 5522 4545 Fax: 07 5522 4545 2

Item	QTY	Description	Unit Price	Total
1	1	Monthly Pool Service	289.99	289.99
		GST	20.00	20.00
				309.99
				330.00

THANK YOU FOR YOUR BUSINESS!

Skip Document

Save and Pay

Save

Clear

Close

1 of 1

44%

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.

Creditor Invoice - Craigs Street Keep 6313

Building: **Craigs Street Keep** 6313

Creditor: **08200005 BYO Mowing** Posting Date: **17/04/2025** Current: 4/25 to 3/26, Month: 4/25

ABN: Bank Balance: 20,000.00

Pay by: **EFT - BSB: 012-009 A/C: 51515** Unpaid Invoices: 500.00

Invoice Number: **123** **Duplicate** ☐ **Allow Duplicate** ADMINISTRATIVE FUN 19,500.00

Work Order: **...**

EFT Reference: **...** Total: 0.00 **+ Add**

- 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.

Account Code List - Craigs Villa Keep 654

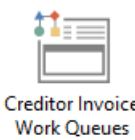
Search: ☐ Show Preferred Creditors Only

Code ^	Name	ABN	YTD Balance	Uninvoiced Work Orders	Preferred
08200001	SUNDRY CREDITORS		0.00	0	
08200003	AUSTRALIAN TAXATION OFFICE		0.00	0	
08200004	ATO - INCOME TAX		0.00	0	
08200005	BYO Mowing		0.00	0	
08200006	DIY Pool Cleaning	38 089 173 231	0.00	0	
08200007	Pipeworks		0.00	1	
08200008	America Dibbert		0.00	0	

Count: 7

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

Work Queue

Creditor Invoices

Documents in Queue: 6

Start Queue

Start processing the work queue manually starting with the first document in the queue. Invoices will be displayed for review.

Auto Create All

Invoices will be created for all documents in the work queue where all required data is available. Invoices will not be displayed.

Refresh

Configure

Close

Select documents for Creditor Invoice Work Queue Auto Create

Search

<input checked="" type="checkbox"/>	Building Number	Building Name	Entry Date	Creditor Code	Creditor Name	Invoice Amount	Invoice Number	Title
<input checked="" type="checkbox"/>	6313	Craigs Street Keep	17/04/2025	08200005	BYO Mowing	300.00	1234567890	BYO Mowing
<input checked="" type="checkbox"/>	654	Craigs Villa Keep	17/04/2025	08200005	BYO Mowing	120.00	6548	BYO Mowing
<input checked="" type="checkbox"/>	654	Craigs Villa Keep	17/04/2025	08200007	Pipeworks	210.00	31554	Pipeworks
<input checked="" type="checkbox"/>	6313	Craigs Street Keep	17/04/2025	08200007	Pipeworks	450.00	31568	Pipeworks
<input checked="" type="checkbox"/>	6313	Craigs Street Keep	17/04/2025	08200006	DIY Pool Cleaning	330.00	1315	DIY Pools
<input checked="" type="checkbox"/>	654	Craigs Villa Keep	17/04/2025	08200008	America Dibbert		23532	America Dibbert

OK

Creditor Invoice Work Queues - [Help] [Close]

Work Queue: **creditor invoices** [?]

Documents in Queue: 5

Start Queue Start processing the work queue manually starting with the first document in the queue. Invoices will be displayed for review.

Auto Create All Invoices will be created for all documents in the work queue where all required data is available. Invoices will not be displayed.

Creating Invoices [Stop]

Documents remaining for Auto Create: 3 Invoices created: 0 Documents that could not have invoices created automatically: 2

Building	Building Name	Title	Creditor	Creditor Name	Message
440000	AMTRAC/AMTRAC 1 2 3 4 5	Amtrak/Amtrak/Amtrak Services			Posting Date must be at or before Creditor is required
440000	AMTRAC/AMTRAC 1 2 3 4 5	Amtrak/Amtrak/Amtrak Services			At least one item is required Posting Date must be at or before Creditor is required At least one item is required

[Refresh] [Configure] [Close]

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 +

Status Received

Assigned To

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

13105 CLEANING

Details

Cleaning Public Area

Amount

85.00

DR/CR

Invoice

No GST

%

Total 85.00

Create Invoice

Docu Save Document and open Creditor Invoices

File Details

References

Creditor Invoice - Craigs Villa Keep 654

Building: Craigs Villa Keep 654 Payment Authority

Creditor: 08200006 DIY Pool Cleaning Posting Date: 30/04/2025 Current: 4/25 to 3/26, Month: 4/25

ABN: 38 089 173 231 Bank Balance: 12,000.00

Pay by: EFT - BSB: 085-745 A/C: 214214 Unpaid Invoices: 790.00

Invoice Number: 351

Work Order: EFT Reference:

Total: 85.00

Account: 13105 CLEANING Fund: ADMINISTRATIVE FUND

YTD Actual: 450.00 Budget: 500.00

Amount: 85.00 Invoice

Details: Cleaning Public Area

More Info:

☒ OK to Pay

☐ Add Purchase To Asset Register

☐ Bill to Owner

☐ Pro Rata

BYO MOWING

INVOICE: 1234567890 25-Jul-2013

TO: CTS 8889 12 Broad St. Broad St. 4112 Phone: 07 5522 4565 Fax: 07 5522 4565 2

Qty	Description	Unit Price	Total
1	Monthly Lawn Mowing Service	100.00	100.00
	GST	10.00	10.00
			110.00

Make all checks payable to BYO MOWING Pty Ltd

THANK YOU FOR YOUR BUSINESS!

Configure Save and Pay Save Clear Close

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Additional Enhancements

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

6313 Craigs Street Keep Total: 330.00 Outstanding: 330.00 EFT

08200006 DIY Pool Cleaning Invoice Number: 1315

Date: 10/04/2025 Work Order: EFT Reference:

Reference	Description	More Information	Expense Account	Amount	Paid Amount	Hold
D0000003	Pool Service		13905 GARDEN & GROUND	330.00	0.00	<input type="checkbox"/>

Select Document Remove Document View Document Tag Paid Invoices Hold All Unhold All Undo Changes Reverse & Recreate Reverse Invoice Save

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

Save Changes Discard Changes

Task

Document Profile Assigned To

Status Finalised Action Date

Custom Properties

Document Details

Property Document Internal Document

Building Craigs Villa Keep 654

Lot Details

Pipeworks Plumbing

INVOICE: 1234567890 28-Jul-2013

TO: CTS 8009 12 Bundall Rd, Bundall, 4112 CTS 8009 12 Bundall Rd, Bundall, 4112
Phone: 07 5522 6565 | Fax: 07 5522 6565 3 Phone: 07 5522 6565 | Fax: 07 5522 6565 3

Sales Rep.	P.O. Number	Ship Date	Ship Via	FOB	Terms

THANK YOU FOR YOUR BUSINESS!

654 Craigs Villa Keep Total: 450.00 Outstanding: 450.00 EFT

08200007 Pipeworks Invoice Number: 31568

Date: 17/04/2025 Work Order: EFT Reference:

Reference	Description	More Information	Expense Account	Amount	Paid Amount	Hold
D0000004	Blocked Drain		13105 CLEANING	450.00	0.00	<input checked="" type="checkbox"/>

Select Document Remove Document View Document Tag Paid Invoices Hold All Unhold All Undo Changes Reverse & Recreate Reverse Invoice Save

Invoice Items

Expense Account	Details	Amount	DR/CR	No GST
13105 CLEANING	Blocked Drain	450.00	Invoice	<input checked="" type="checkbox"/>
Total		450.00		

Details

Document Source

File Details

References