

# 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

A screenshot of the Creditor Invoice Work Queue interface. The main window title is 'Creditor Invoice Work Queue - Craigs Villa Keep 654'. The interface includes fields for Building (Craigs Villa Keep), Creditor (08200006 DIY Pool Cleaning), ABN (38 089 173 231), Pay by (EFT - BSB: 085-745 A/C: 214214), Invoice Number (1234567890), Work Order, and EFT Reference. It shows a total amount of 330.00. On the right, there is a preview of the invoice document, which includes the header 'DIV Pool Cleaning', the date '26-Jun-2018', and the body showing the invoice details: TO: CTS 8888, 12 Broadall Rd, Bundall, 4112, Phone: 07 5512 6567, Fax: 07 5512 6562; Sales Rep: P.O. Number: Ship Date: Ship Via: POB: Terms: Quantity: Description: Unit Price: Total: 1 Monthly Pool Service 260.00 260.00 GST 30.00 30.00 290.00. The preview also includes a 'THANK YOU FOR YOUR BUSINESS!' message and a decorative footer. At the bottom of the main window, there are buttons for 'Skip Document', 'Save and Pay', 'Save', 'Clear', and 'Close', along with a set of standard window control buttons.

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	<input type="button" value="..."/>		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				
Invoice Number	123	<input type="button" value="Duplicate"/>		<input type="checkbox"/> Allow Duplicate	Unpaid Invoices: 500.00
Work Order	<input type="button" value="..."/>				ADMINISTRATIVE FUN 19,500.00
EFT Reference	Total 0.00			<input type="button" value="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

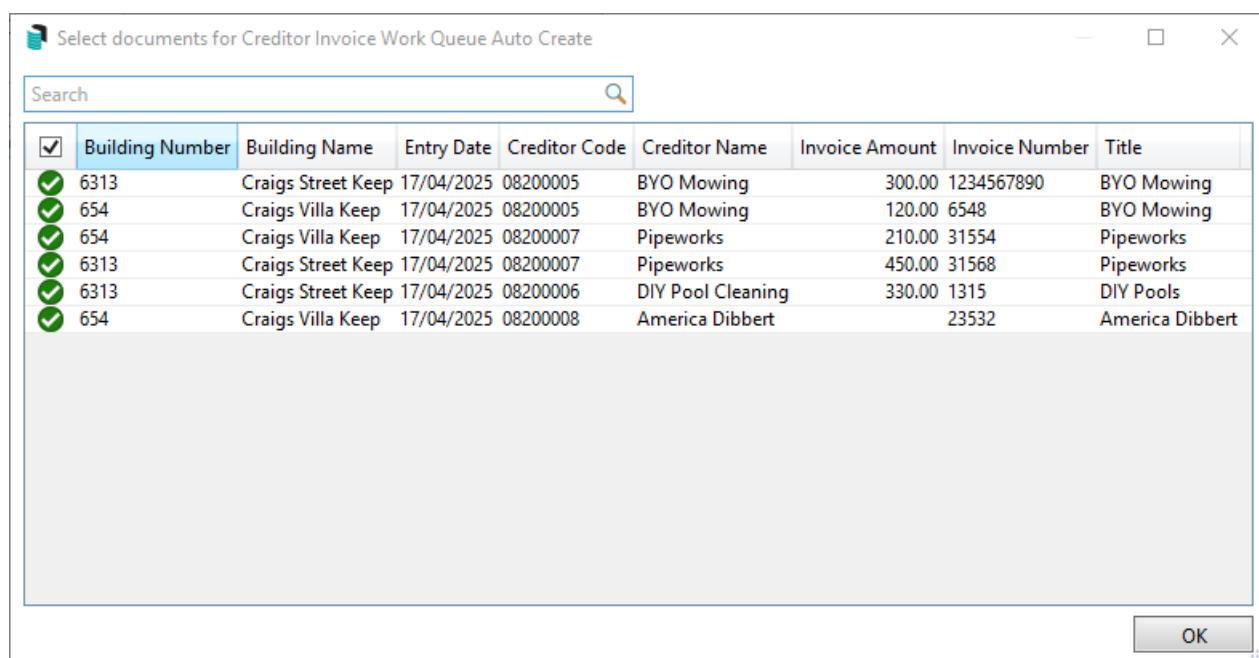
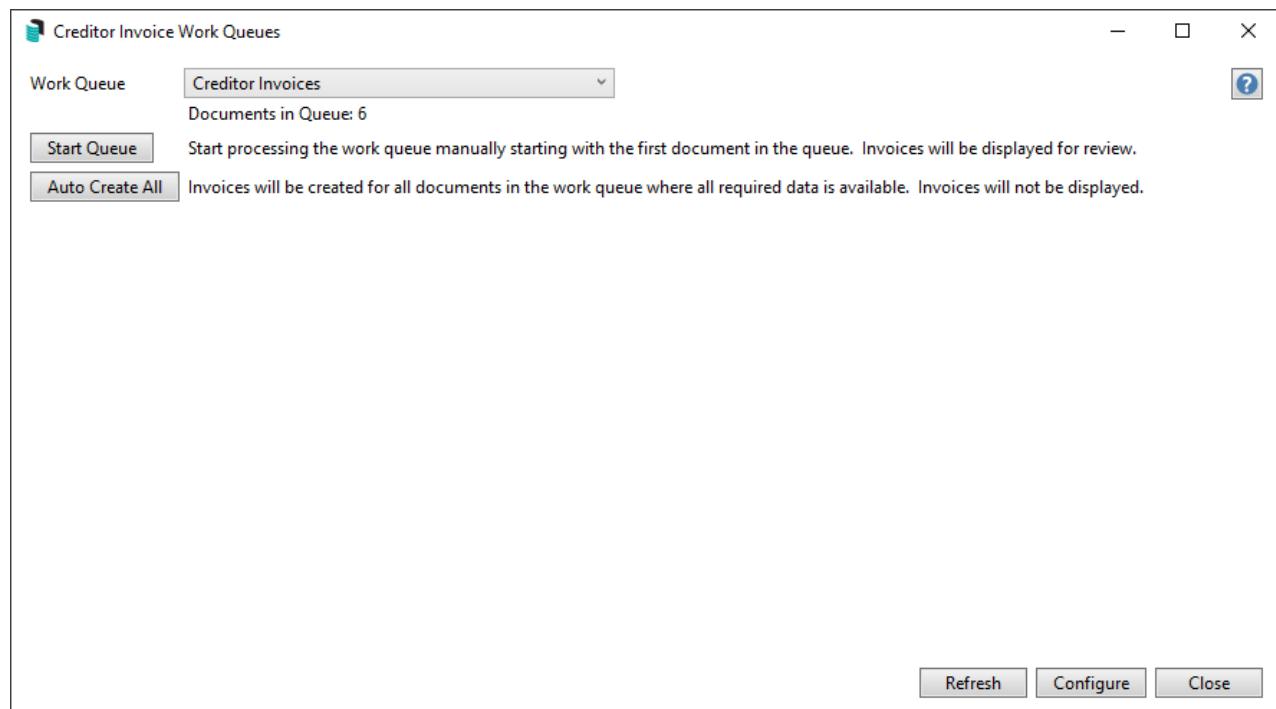
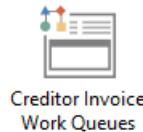
Creditors		ABN	YTD Balance	Uninvoiced Work Orders	Preferred
Code ^	Name				
08200001	SUNDRY CREDITORS		0.00	0	
08200003	AUSTRALIAN TAXATION OFFICE		0.00	0	
08200004	ATO - INCOME TAX		0.00	0	
08200005	BYO Mowing		0.00	0	
08200006	DIY Pool Cleaning	38 089 173 231	0.00	0	
08200007	Pipeworks		0.00	1	
08200008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

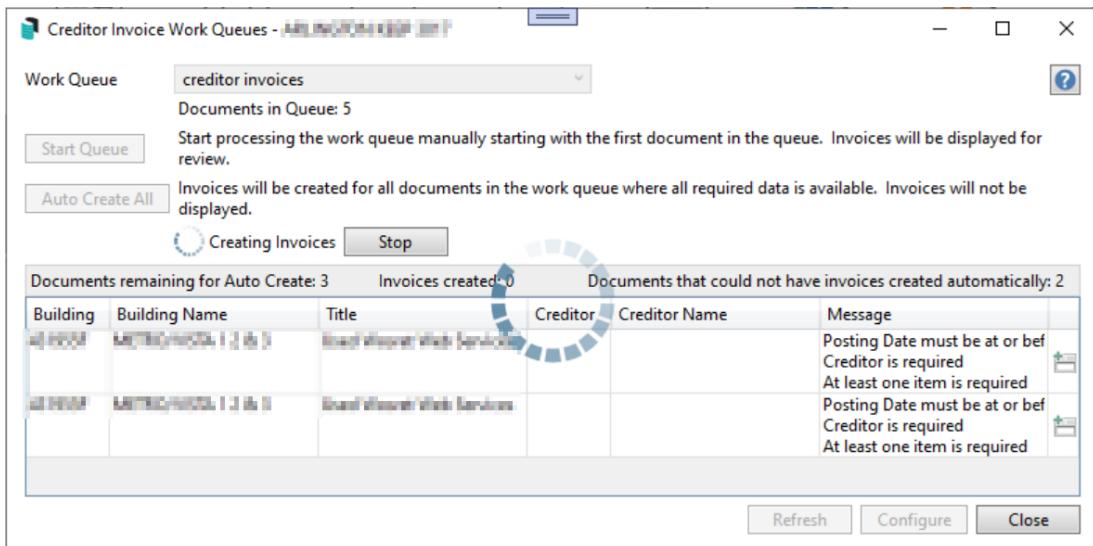
Count: 7

OK Cancel

# 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.





## 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

Discard Changes 

Status  Assigned To  

Custom Properties

Document Details

Property Document  Internal Document

Building  654 

Lot Details  

Owner

Category  Invoices CJ 

Title

Description

Notes

Search Words  Add 

Online Portal

Invoice Details

Building is Active on Invoice Hub

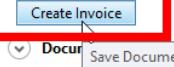
Creditor  

Invoice Date  

Invoice Number

Invoice Items

Expense Account	Details	Amount	DR/CR	No GST
13105 CLEANING 	Cleaning Public Area 	85.00	Invoice 	   
				

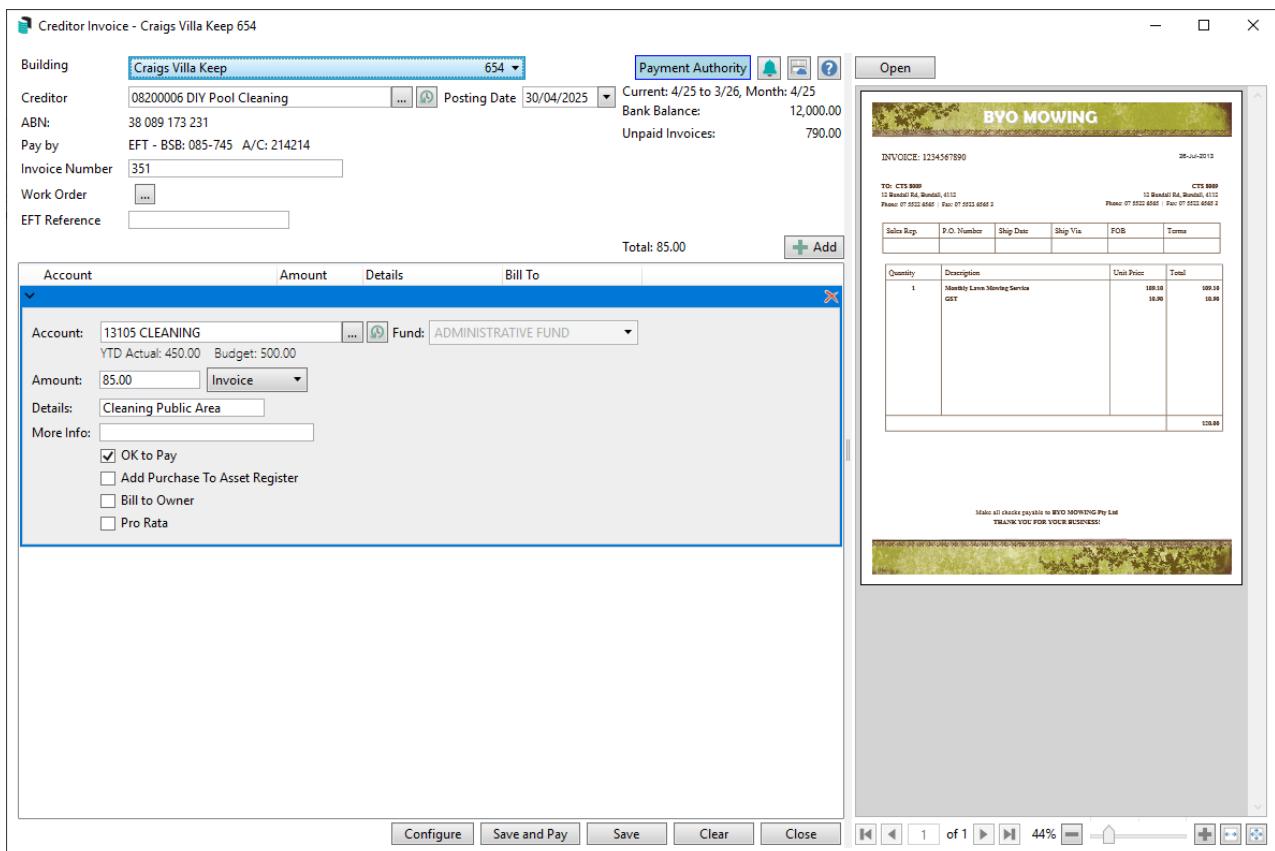
**Create Invoice** 

Total 85.00

Document  

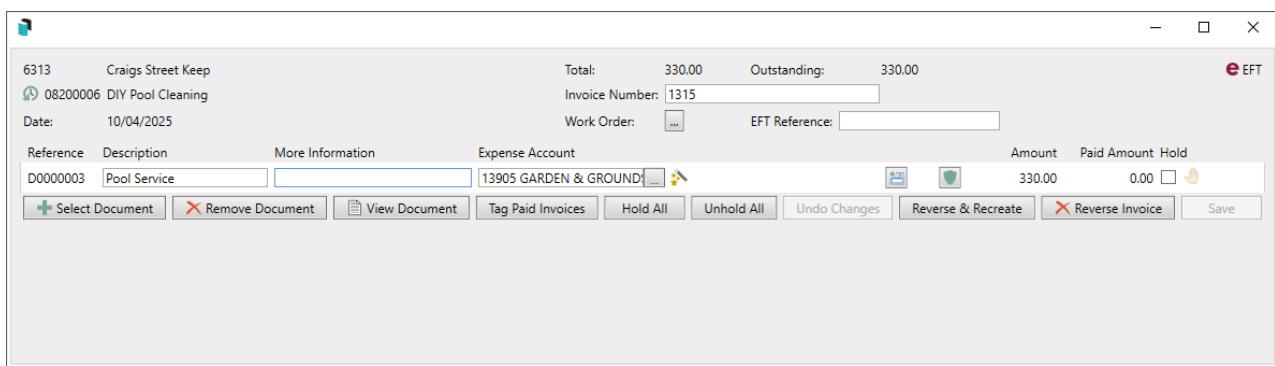
File Details 

References 



## 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



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

[Save Changes](#) [Discard Changes](#)

Document Profile

Status: Finalised

Assigned To

Action Date

Custom Properties

Document Details

Property Document  Internal Document

Building:  654 [X](#)

Lot Details

654 Craigs Villa Keep

08200007 Pipeworks

Date: 17/04/2025

Reference	Description	More Information	Expense Account	Amount	Paid Amount	Hold
D0000004	Blocked Drain	<a href="#">View Document</a>	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"/> % <a href="#">Details</a> <a href="#">X</a>

Total 450.00

Document Source

File Details

References

**Pipeworks Plumbing**

INVOICE: 1234567890 28-Jul-2013

TO: CTS 8009  
12 Bundall Rd, Bundall, 4112  
Phone: 07 5522 6565 | Fax: 07 5522 6563 3

CTS 8009  
12 Bundall Rd, Bundall, 4112  
Phone: 07 5522 6565 | Fax: 07 5522 6563 3

Sales Rep.	P.O. Number	Ship Date	Ship Via	FOB	Terms
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THANK YOU FOR YOUR BUSINESS!