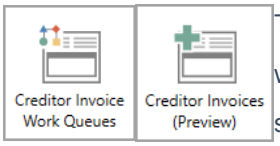
Creditor Invoices | Configuration

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

Creditor Invoices | Configuration

Hover over each setting to identify whether it is a *Global* setting, which affects all users, or a *Local* setting, which affects only the current user. To open the *Configuration* window from either ***Creditor Invoices*** screen, click *Configure*.

Settings

Creditor Account Code Selection (User Setting)
The list of creditors will appear sorted by name or number depending on the selection set.

Show Creditor Account Selection List on Start Up (User Setting)
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 (User Setting)
When a building is selected after clicking the *Change Building* button, a list of creditors will appear.

Prompt If Creditor Has Amounts On Hold (User Setting)
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 (User Setting)
If set, this will insert today's date in the *Date* field.

Auto Select Last Expense Account (User Setting)
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 (User Setting)
If set, this will clear the date field when the invoice is saved.

Clear Details And More Info For Each Entry (User Setting)
If set, this will clear the details field when the invoice is saved.

Limit Entry To Available Funds (Global Setting)
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 (Global Setting)
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 (User Setting)
If set, when typing in a field that already has data in it, it will overwrite the data in that field.

Show Preferred Creditors (User Setting)
The list of creditors will show preferred creditors only. This can be toggled on or off using a checkbox on the top right of the creditors list.

Show Ledger List at Start (User Setting)
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 (User Setting)
When selecting the Creditor, if this is set, it will display the creditor's address.

Show Creditor Email Address (User Setting)
When selecting the Creditor, if this is set, it will display the creditor's email address used for Remittance Advices.

Show TaskMax Jobs (User Setting)
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 (User Setting)
When ticked, the DocMax Work Queue set in the *Creditor Invoice Work Queue* setting, will automatically start when the ***Creditor Invoices*** menu is opened.

Invoice Document Display Position (User Setting)
Select the position of the invoice preview screen (we recommend to the right).

Creditor Invoice Work Queue (User Setting)
Select the DocMax Work Queue to use when the ***Creditor Invoices*** menu is opened.

Require Invoice Document For Each Creditor Invoice (Global Setting)
Each invoice will require an invoice attachment before it can be saved.

Delete Original Document File On Save (Global Setting)
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 (Global Setting)
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 (Global Setting)
This will assist in setting a threshold for any creditor invoice that may be incorrectly entered.