

Creditor Invoice Refresh

Last Modified on 19/06/2026 11:40 am AEST

This page contains information relating to the first stage of enhancements to Creditor Invoices within both StrataMax and DocMax.

This will be **accessible to all clients on version v5.6.157 or higher**. The refreshed Creditor Invoice is released as a *Preview Feature* meaning the legacy Creditor Invoice interface can still be accessed if required.

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)

Creditor Invoice Work Queue - Craig's Villa Keep 654

Building: 654

Creditor: Posting Date: 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:

Work Order:

EFT Reference:

Total: 330.00

Account	Amount	Details	Bill To
13905 GARDEN & GROUNDS	330.00	Monthly Pool Service	

Account: Fund:

YTD Actual: 120.00 Budget: 1,000.00

Amount: Invoice

Details:

More Info:

OK to Pay
 Add Purchase To Asset Register
 Bill to Owner
 Pro Rata

Invoice Ref.	P.O. Number	Ship Date	Ship Via	FOB	Terms
1					

Quantity	Description	Unit Price	Total
1	Monthly Pool Service	288.00	288.00
	GST	26.00	26.00
			330.00

INVOICE: 1234567890 28-Jun-2015

TO: CTS 8889 12 Dundell Rd, Marcellin, VIC 3172 Phone: 07 5522 6566 Fax: 07 5522 6562

FROM: CTS 8889 12 Dundell Rd, Marcellin, VIC 3172 Phone: 07 5522 6566 Fax: 07 5522 6562

THANK YOU FOR YOUR BUSINESS

Skip Document Save and Pay Save Clear Close

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

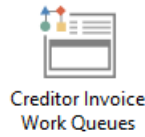
Search: | Show Preferred Creditors Only | Master Chart

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 | 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.



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.

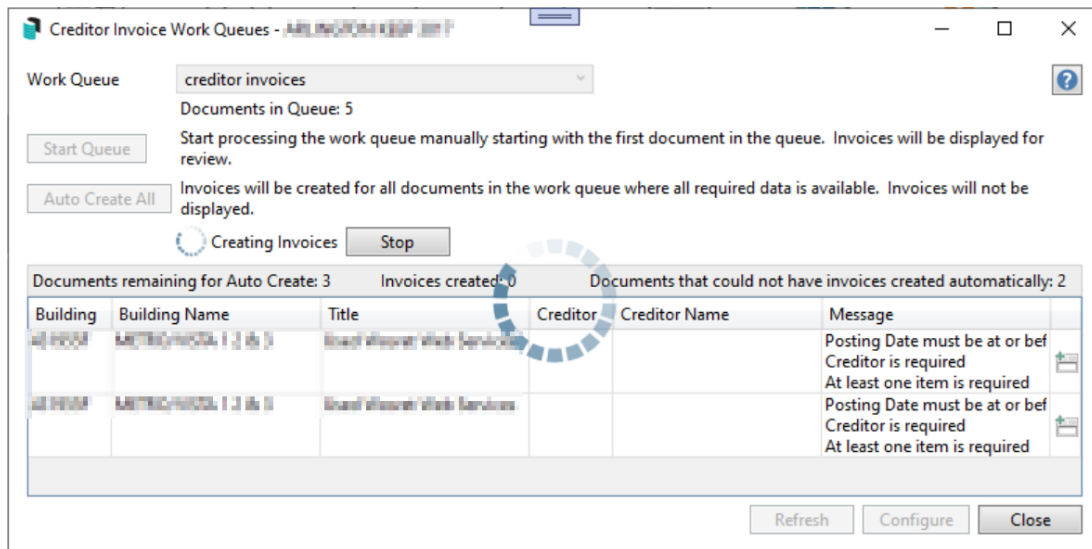
Refresh **Configure** **Close**

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



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: ... X
Action Date: ...

Custom Properties

Document Details
 Property Document Internal Document

Building: Craigs Villa Keep 654 X

Lot Details: ... X

Owner: ...

Category: Invoices CJ X

Title: BYO Mowing

Description: ...

Notes: ...

Search Words: ... Add +

Online Portal

Invoice Details
Building is Active on Invoice Hub

Creditor: 08200006 DIY Pool Cleaning X

Invoice Date: 30/04/2025

Invoice Number: 351

Invoice Items

Expense Account	Details	Amount	DR/CR	No GST
13105 CLEANING X	Cleaning Public Area	85.00	Invoice	<input type="checkbox"/> % <input type="checkbox"/>
... X				
		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

Creditor: 08200006 DIY Pool Cleaning

ABN: 38 089 173 231

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

Invoice Number: 351

Work Order: ...

EFT Reference: ...

Payment Authority: ...

Posting Date: 30/04/2025

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

Bank Balance: 12,000.00

Unpaid Invoices: 790.00

Total: 85.00

Account	Amount	Details	Bill To
13105 CLEANING	85.00	Cleaning Public Area	

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

Buttons: Configure, Save and Pay, Save, Clear, Close

Invoice Preview: BYO MOWING

INVOICE: 1234567890 28-Jul-2012

TO: CTS 8889 12 Broad St, Bendall, VIC 3088

FROM: CTS 8889 12 Broad St, Bendall, VIC 3088

Phone: 07 5522 4565 Fax: 07 5522 4567

Qty	Description	Unit Price	Total
1	Monthly Lawn Mowing Service GST	189.99	189.99
		18.99	18.99
			208.98

Make all checks payable to BYO MOWING Pty Ltd

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Navigation: 1 of 1, 44%, Home, Zoom, Print

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

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"/>

Buttons: 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: [dropdown] Assigned To: [dropdown]

Status: Finalised Action Date: [dropdown]

Custom Properties

Document Details

Property Document Internal Document

Building: Craigs Villa Keep 654

Lot Details: [dropdown]

Pipeworks Plumbing

INVOICE: 1234567890 28-Jul-2013

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

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

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

654 Craigs Villa Keep Total: 450.00 Outstanding: 450.00 EFT

08200007 Pipeworks Invoice Number: 31568

Date: 17/04/2025 Work Order: [dropdown] EFT Reference: [input]

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

THANK YOU FOR YOUR BUSINESS!