



SMART EDITOR DASHBOARD USER MANUAL

Last Updated date: 3/11/2025

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Introduction

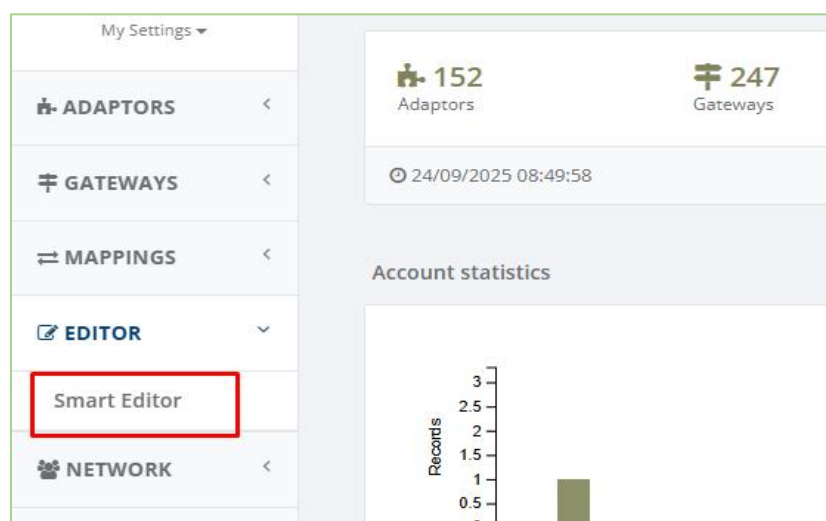
Welcome to the **Smart Editor Dashboard**. This platform empowers users to manage business documents efficiently - from searching, editing, validation, bulk processing, to seamless export and integration.

This manual is designed for viewers, editors, and administrators, providing essential guidance adapted for all user levels.

The screenshot shows the 'Smart Editor Dashboard' interface. At the top, there's a header with 'HUBBROKER' and 'Smart Editor Dashboard' on the left, and 'Dashboard' on the right. Below the header is a 'Filters' section with various input fields: 'Document No', 'Sender Name', 'Receiver Name', 'Sender Endpoint Id', 'Receiver Endpoint Id', 'Received Date' (with a date range selector), 'Last Updated Date' (with a date range selector), and 'Assign To' (a dropdown menu). There's also a 'Document Type' dropdown with 'All' selected. A 'Clear' button and a 'Search' button are at the bottom right of the filters section. Below the filters is a 'Smart Editor Dashboard' section. It starts with 'Select Status and Filters' showing a summary: 'Total Records: 12', 'New: 2', 'In Progress: 5', 'Review: 0', 'Success: 3', 'Rejected: 1', and 'Deleted: 1'. To the right of this are icons for adding, refreshing, viewing, and printing. Below this is a 'Display' dropdown set to '10 records per page' and a 'Search:' input field. At the bottom is a table with columns: 'Status', 'Sender Endpoint Id', 'Receiver Endpoint Id', 'Document No', 'Document Type', 'Document Format', 'File Name', 'Assigned To', 'Received Date', 'Last Updated Date', and 'Action'.

Login & Access

Navigate to the Editor dashboard from the main Dashboard Left Side Panel.



Filters & Search Panel

Locate documents quickly using these filters:

Document No	Search by invoice/order/credit note number.
Sender Name	Filter by trading partner Name.
Receiver Name	Filter by trading partner Name.
Sender Endpoint ID	Filter by trading partner endpoint.
Receiver Endpoint ID	Filter by trading partner endpoint.
Document Type	Select Invoice, Order, Credit Note, etc.
Document Format:	Choose XML, PDF, CSV, UBL, and more.
Date Range:	Filter by received or last updated date.
Assign To:	Filter based on users responsible for each file.
Search:	Apply selected filters.
Reset:	Clear filters and refresh list.

Dashboard Status Overview

Colored status badges provide instant overview:

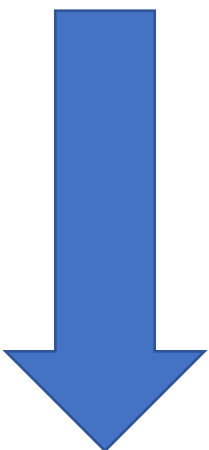
Status	Status Description
New	Awaiting processing.
In Progress	Under review/editing.
Review	Pending final check.
Success	Processed and exported.
Rejected	Marked by users with comments.
Deleted	Permanently removed; comments required.

Document List (Table View)

Central table fields include:

Display: 10 records per page	Search:											
☐ Status	Sender Name	Receiver Name	Sender Endpoint Id	Receiver Endpoint Id	Document No	Document Type	Document Format	File Name	Assigned To	Received Date	Last Updated Date	Action
☐ InProgress			16963038		400596403	Invoice	BISV3	M_836800_Id_textila_faktura_4...	Chirag Mashiyava	23/09/2025 08:07:06	23/09/2025 08:26:27	  
☐ InProgress				38108867	20255575	Invoice	BISV3	M_827719_Id_Faktura_20255575.p...	Chirag Mashiyava	23/09/2025 07:54:35	23/09/2025 08:06:23	  

- Status
- Sender Name
- Receiver Name
- Sender Endpoint ID
- Receiver Endpoint ID
- Document No
- Document Type
- Document Format
- File Name
- Assigned To
- Received Date
- Last Updated Date
- Actions



Row-Level Actions

For each file entry:

Action Name	Action Description
Edit	Opens editor to make changes.
Reject	Mark as rejected with comment.
Delete	Remove (requires comment).
Original File	Download uploaded source.
Output File	Download system-transformed file.

Bulk Actions (Multi-File Selection)

Use checkboxes to select multiple files and apply these actions in bulk:

Smart Editor Dashboard

Select Status and Filters

Total Records: 12 New: 2 In Progress: 5 Review: 0 Success: 3 Rejected: 1 Deleted: 1

Re-extract Reject Delete Status Change

Display 10 records per page

Status	Sender Name	Receiver Name	Sender Endpoint Id	Receiver Endpoint Id	Document No	Document Type	Document Format	File Name	Assigned To	Received Date	Last Updated Date	Action
☒ In Progress			16963038		400596403	Invoice	BISV3	M_836800_Id_textila_faktura_4...	Chirag Mashiyava	23/09/2025 08:07:06	23/09/2025 08:26:27	

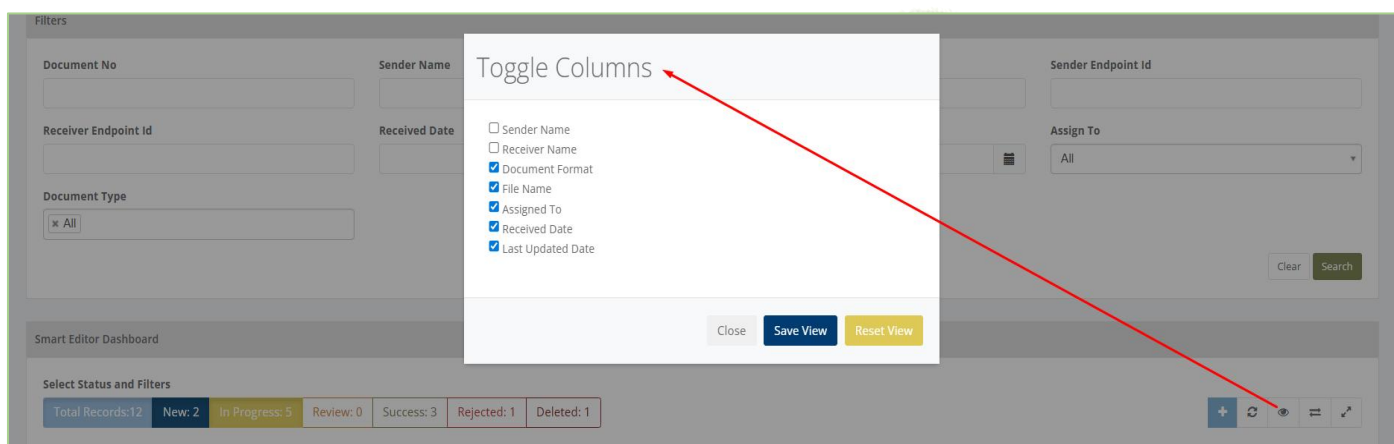
Action Name	Action Description
Re-extract	Re-run data extraction.
Reject	Mark as rejected multiple files.
Delete	Remove multiple files.
Status Change	Move files to a new status in bulk.

Table Controls

Controls to refresh, expand view and paginate records.



Toggle Columns Feature

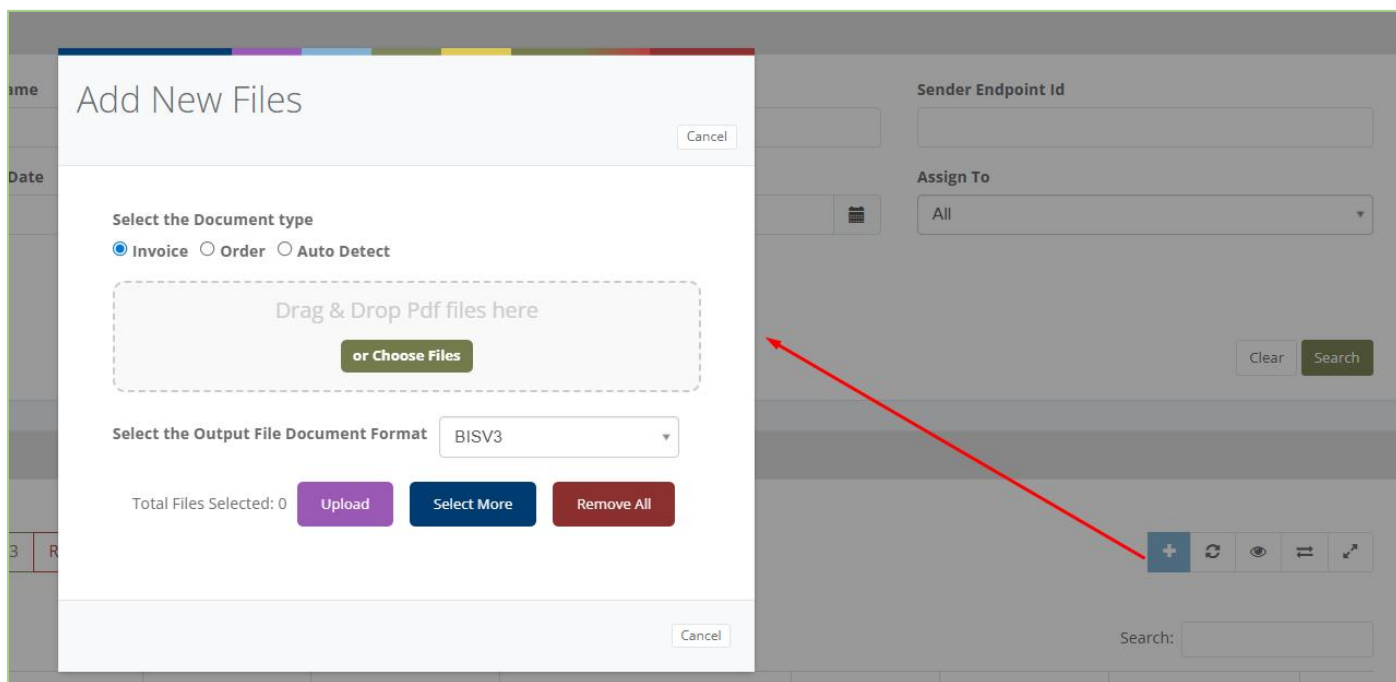


Customize the table view to show only relevant columns:

- Open the Toggle Columns dialog from dashboard controls.
- Checkbox list of columns: Sender Name, Receiver Name, Document Format, File Name, Assigned To, Received Date, Last Updated Date.
- Select which columns to show or hide.
- Save View stores user preferences for future sessions.
- Reset View restores default layout.
- Immediate column display update for personalized dashboards.

Add New Files

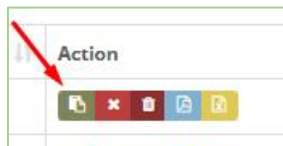
Adding new files to the dashboard is intuitive and supports bulk uploads with flexible format configurations:



- Use the "+" button to open the Add New Files dialog.
- Select the type of document being uploaded: **Invoice, Order, or Auto Detect.**
- Upload multiple PDF files at once using drag-and-drop or file selection.
- Select output document format such as **BISV3, HUBXML and other** based on system needs.
- Clear files selected or add more before uploading.
- Upload files immediately to begin processing.
- Confirmation and file counts displayed for tracking.
- Supports efficient bulk ingestion.

Document Editing Features

The editor provides structured tabs for comprehensive data entry and review, with PDF side-by-side display:



HUBBROKER Generic Smart Editor
InProgress

Document Type: Invoice

Back | AI | Editor View | Status Change | Save Draft | Validate | Make XML

M_836800_id_textilia...

M_836800_id_textilia_faktura... 1 / 1 - 110% +

TEXTILIA

Crowne Plaza Copenhagen
Ørestads Boulevard 114
2300 København S
Att: BSK

Fakturanr.: 400596403
Fakturadato: 31-08-2025
Forfaldsdato: 31-10-2025
Debitornr.: 12738789
Debitors CVR-nr.: DK30548043

Dato	Vare	Beholdning	Antal	Pris	Beløb
Leveret til	138789 Crowne Plaza Copenhagen Ørestads Boulevard 114, 2300 København S Att: HEA			Subtotal	493,28 DKK
06-08-2025	V 46499 Måtte Micromix 85 X 150		2	21,74	43,48 DKK
	V 46502 Måtte Micromix 150 X 250		2	39,92	79,84 DKK
13-08-2025	V 46499 Måtte Micromix 85 X 150		2	21,74	43,48 DKK
	V 46502 Måtte Micromix 150 X 250		2	39,92	79,84 DKK
20-08-2025	V 46499 Måtte Micromix 85 X 150		2	21,74	43,48 DKK
	V 46502 Måtte Micromix 150 X 250		2	39,92	79,84 DKK
27-08-2025	V 46499 Måtte Micromix 85 X 150		2	21,74	43,48 DKK
	V 46502 Måtte Micromix 150 X 250		2	39,92	79,84 DKK

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T: 70334335 | koeg@textilia.dk | www.textilia.dk
CVR-nr. 16963038 | SE-nr. 16674086 | P-nr. 1028466109
SWIFT: DABADKKK | IBAN: DK15000000000021740
Danish Bank: 4216-0000021740
PBS: 01280511 | Deb. grp 00001

HEADER

Document No: 400596403 Invoice Date: 08/31/2025

Due Date: 10/31/2025 Order No: Enter Order No

Currency Code: DKK

SUPPLIER

Endpoint Qualifier: Select... Endpoint Id: Enter Supplier Endpoint Id

Name: Enter Supplier Name Address Line 1: Enter Supplier Address 1

Address Line 2: Enter Supplier Address Line 2 City: Enter Supplier City

Postal Code: Enter Supplier Postal Code Country: Select...

Contact Name: Enter Supplier Contact Name Contact Phone No: Enter Supplier Contact Phone No

Contact Email: Enter Supplier Contact Email New Field 12:

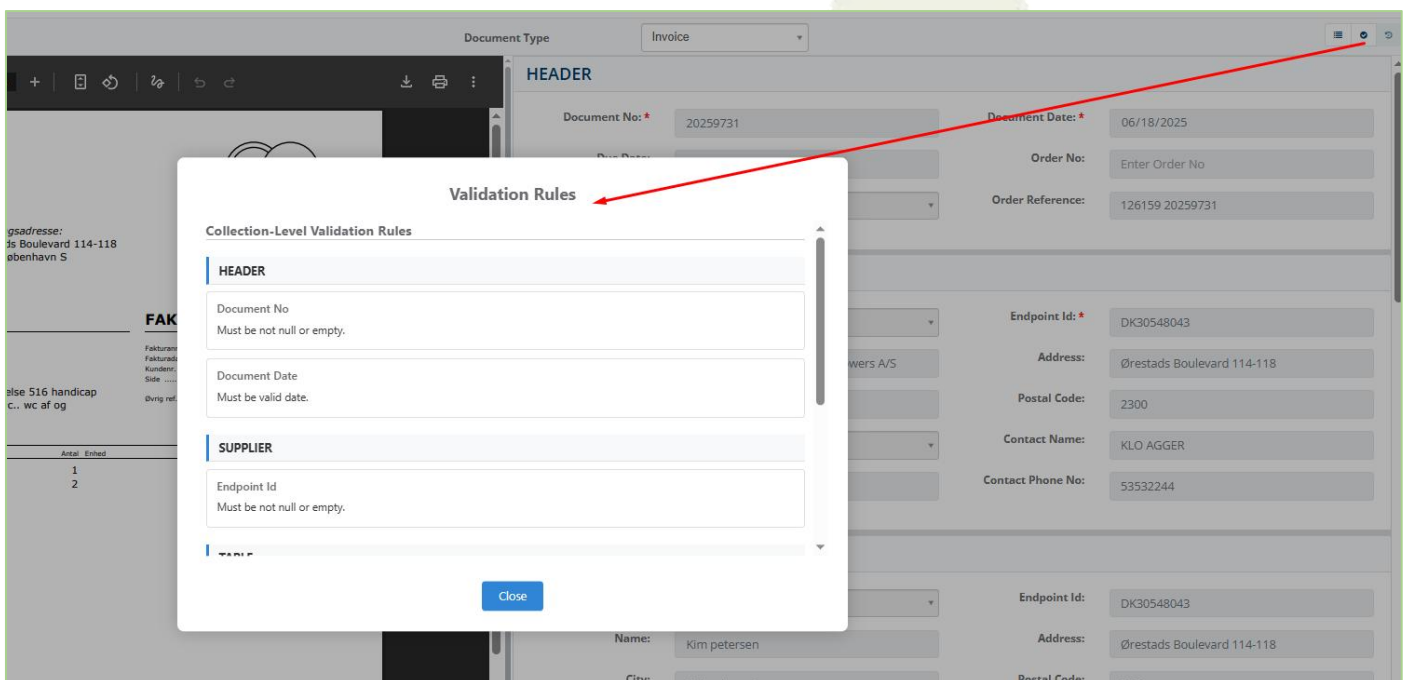
- **Header:** Edit document number, dates, currency.
- **Supplier/Customer/Delivery:** Enter full contact and endpoint details; delivery can be copied from customer.
- **Bank Details:** Fill bank name, account no, SWIFT, IBAN, payment terms, etc.
- **Line Items Table:** Add/edit/delete products or services with quantity, Description, price, discounts, tax, etc.
- **Amount Summary:** Tax, discount, and total payable overview.
- Save Draft, Validate Data, Change Status, and Make XML actions.

File Validation Overview

Dynamic Form Validation:

When a document is open in the Editor module, users can review all Collection-Level Validation Rules applied to its fields.

This is accessed via a dedicated icon in the editor interface, which opens the Validation Rules dialog for the currently loaded dynamic form.



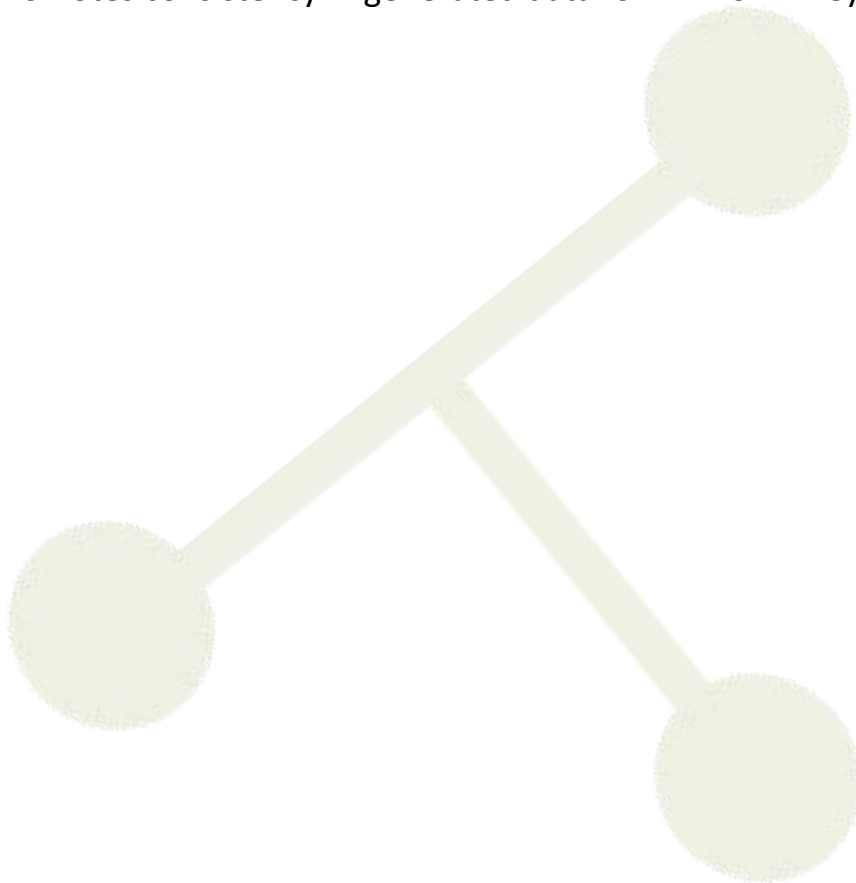
What the Validation Overview Displays:

- Rules are grouped by form sections (e.g., Header, Supplier, Table).
- For each field, the rule is clearly stated:
 - ✓ **Required fields:** e.g., Document No – “**Must be not null or empty.**”
 - ✓ **Formatting rules:** e.g., Document Date – “**Must be valid date.**”
 - ✓ **Data integrity:** e.g., Endpoint ID – “**Must be not null or empty.**”

These are enforced in the editor to prevent invalid or incomplete submissions.

Purpose & Benefits:

- ✓ Enables users to quickly verify what business and technical requirements are enforced for each document type.
- ✓ Minimizes user error and ensures that mandatory fields and formats required for downstream processing and integration are met.
- ✓ Promotes consistency in generated data for XML or AI key bindings.



Field Collection Catalogue: Collection Lists

Purpose:

The "**Collection Lists**" dialog shows all available field collections linked to the current customer, divided into two sections:

- ✓ **User Collections:** Personally or account-specific collections.
- ✓ **Default Collections:** System/master collections for standard formats.

Comment History View

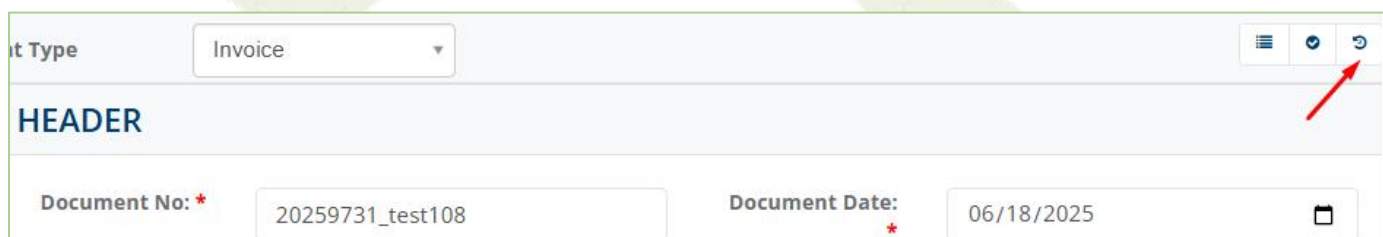
Purpose:

The Comment History feature in the Smart Editor module allows users to access all status-change comments, review notes, and feedback linked to the current document.

It supports audit trails, transparency, and collaborative validation for document processing.

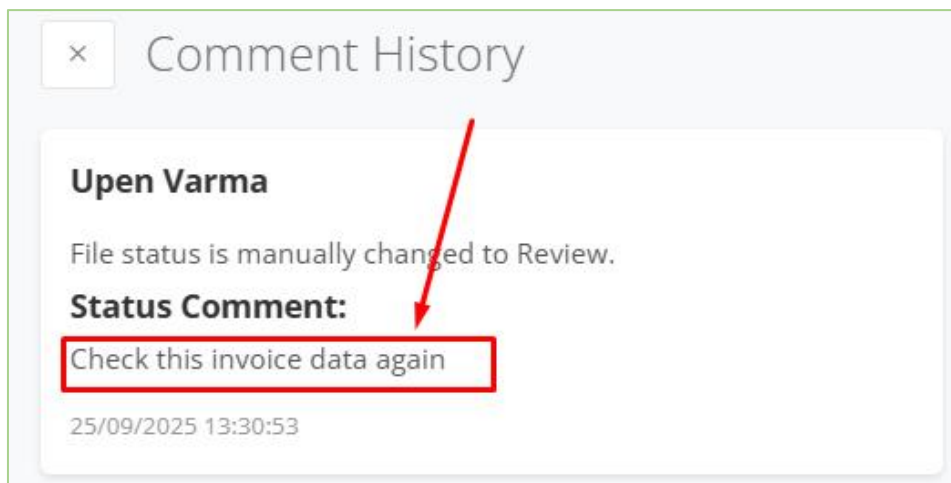
How to Access:

In the Editor module, locate and click the "**Comment History**" icon (a clock/arrow or comments symbol) in the upper-right controls panel, as shown in the screenshot.



This will open the Comment History popup window for the active file.

What the Comment View Displays:



Each comment entry displays:

- The user who submitted the comment or performed the status action.
- The file status change (e.g., Success, In progress, Review, Rejected, Deleted).
- The **Status Comment**: The actual note or feedback provided by the reviewer, approver, or processing user.
- The date and time the comment was submitted.
- All historical status comments and notes are listed in reverse chronological order for easy review.

Example Use Case:

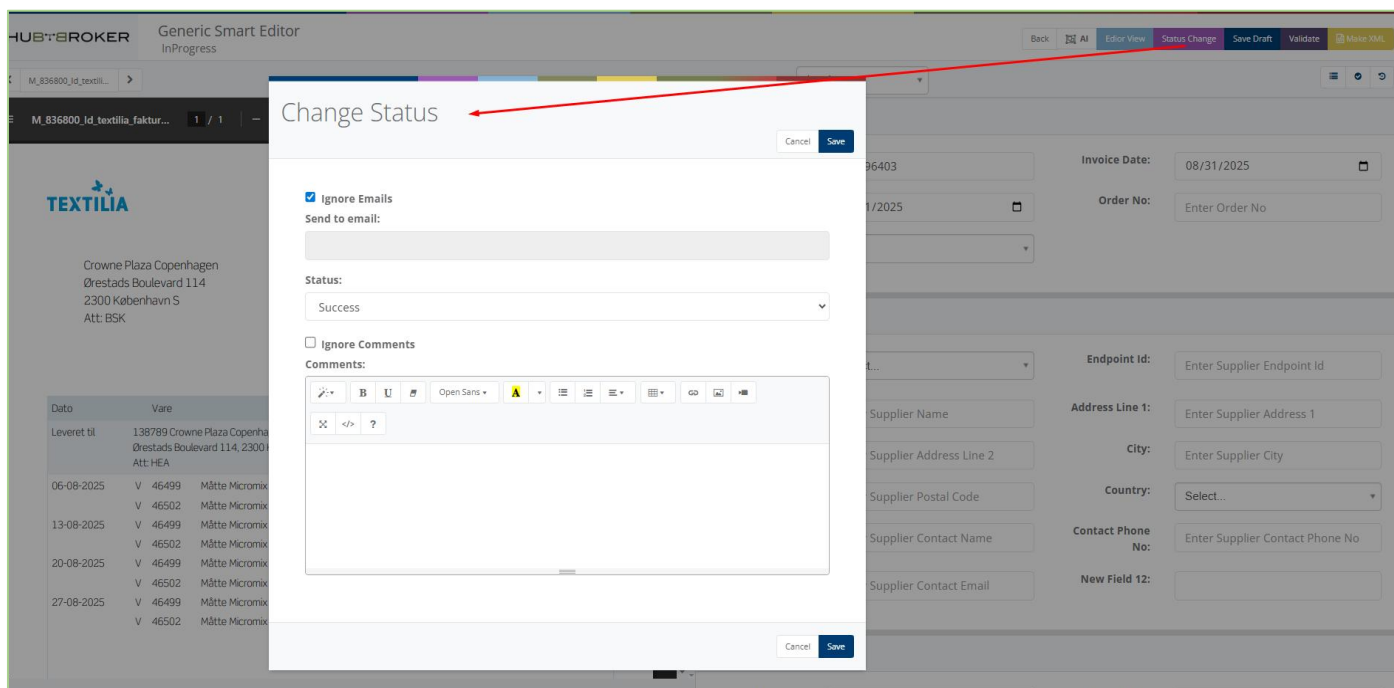
- If status changes from In Progress to Review due to a data issue, the comment will capture feedback like "**Check this invoice total**".
- The next user or auditor can quickly see history and address issues/responses before the next status step.

Benefits:

- Facilitates transparent business workflows and audit readiness.
- Enables faster resolution and reduced miscommunication by collecting all context in-document.

Change Status Feature

The Change Status dialog enables updating the document workflow state with audit and communication controls:



- Access via the editor's "**Status Change**" button.
- Select status from choices like **In Progress**, **Review**, **Success**, **Rejected**, **Deleted**.
- Option to send or ignore email notifications.
- Rich-text comment box for explanations or instructions with formatting support.
- Comment entry can be required or optionally ignored.
- Save or cancel changes.