HUBBROKER
AUTOMATIC, SECURE DATA TRANSFORMATION

DYNAMIC FORM + FIELD COLLECTION USER MANUAL

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1. Field Collection Introduction & Overview

Introduction

The **Field Collection** feature in HubBroker's platform is designed to **simplify and standardize the management of key fields, XML binding keys, and collection configurations** across customers. It provides a **flexible and centralized interface** for defining, collecting, and structuring data fields that can later be leveraged in Dynamic Forms, automation workflows, and EDI/ERP integration processes.

This feature helps ensure **data consistency, reduces repetitive setup efforts**, and enables teams to maintain uniform field mappings and configurations across various projects - ultimately improving efficiency, accuracy, and scalability in client implementations.

Purpose

The purpose of the **Field Collection feature** is to provide a **unified and reusable framework** for managing **key data fields and XML binding configurations across different customers and integration projects.**

It enables HubBroker users and implementation teams to:

- ✓ Define and organize field structures once and reuse them across projects.
- ✓ Maintain consistent field mapping between source and target systems.
- ✓ Streamline setup for EDI, ERP, or custom automation processes.
- ✓ Reduce the dependency on manual configuration or repetitive setup tasks.

This standardization ensures that data integrity and consistency are maintained throughout the entire integration lifecycle.

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Navigation to Field Collections

- Log in to the IPASS Dashboard.
- Go to the top-left and click Settings.
- Locate Mapping Settings.
- Click **Fields Collections**
- You will see the Fields Collections management page, as shown in snapshot.
- This page lists all collections, which are logical groupings of field definitions for mapping and data binding.

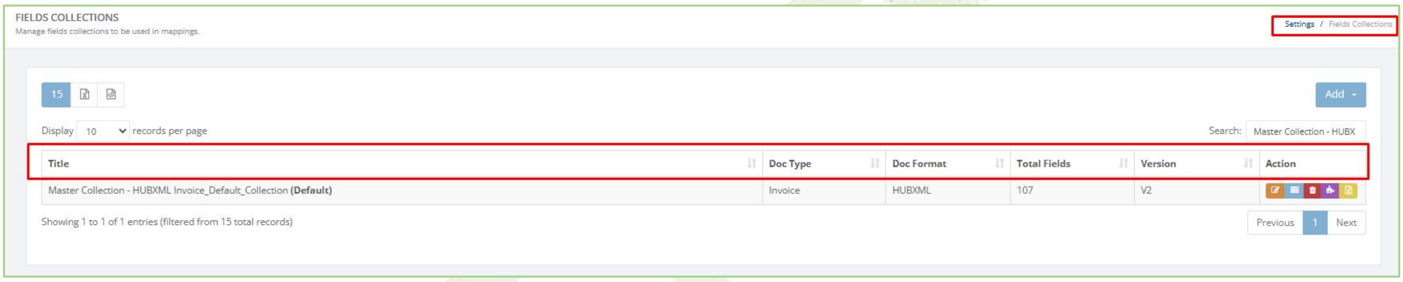

Table columns include:

Title	Name of the field collection
Doc Type	Document type, such as Order, Invoice, Credit Note.
Doc Format	Format type, e.g., CXML, HUBXML, BISV3, etc.
Total Fields	Number of mapping fields defined within the collection
Version	Version number for the field collection.
Action	Options to edit, copy, delete, or configure the individual collection.

- Use this page to search, review, and manage your collections before they are referenced in **Smart Editor/Mapping modules** for actual document processing.

Field Collections - Actions and Columns

Action Buttons Overview :

Title	Doc Type	Doc Format	Total Fields	Version	Action
Master Collection - HUBXML Invoice_Default_Collection **(Default)**	Invoice	HUBXML	107	V2	

For each Field Collection entry, the far-right Action section contains:

ICON	Icon Description
Edit (orange pencil icon)	Open and edit the field collection properties, mapping definitions, XML keys, and templates.
View Mapping Fields (blue list icon)	Display all mapping fields defined for the selected field collection, allowing review or export.
Delete (red trash icon)	Permanently delete the selected field collection from the system.
View Connected Mappings (purple link/puzzle icon)	Show all mapping rules and configurations that use this field collection, helping trace dependencies for mapping or processing modules.
Export Field Collection (yellow Excel/file icon)	Export the entire field collection and mapping definitions into an Excel file for offline review, sharing, or backup.

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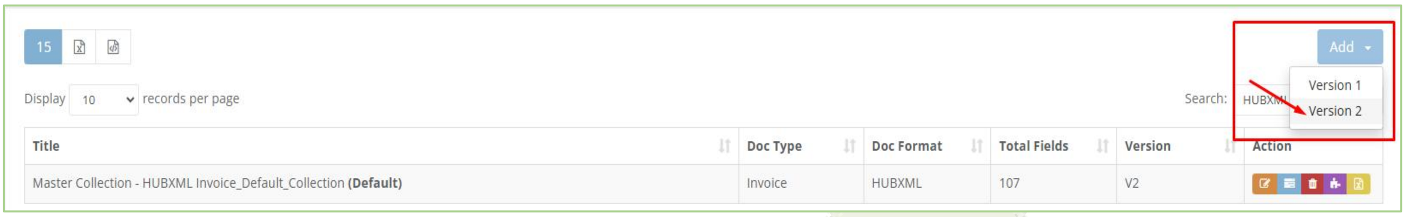
Field Collections - Versioning When Adding New Collections :

When creating a new Field Collection from the Fields Collections page, you will see the Add button with a dropdown presenting two options:



1. Version 1 (V1)
2. Version 2 (V2)

Version Details:

Version 2 (V2) is the active and recommended version to configure for usage in:

- **Smart Editor Module** - where users do data editing and validation.
- **Smart Adaptor Module** - where actual file processing and transformation take place.

The newer V2 version supports enhanced features, XML and AI data bindings, and dynamic form configurations necessary for current integration workflows.

Version 1 (V1) is required for older version mappings.

Action Required:

- When managing field collections for mapping and processing, always ensure that you are configuring and using Version 2.
- Versions help maintain backward compatibility during upgrades while enabling newer capabilities in the smart modules.

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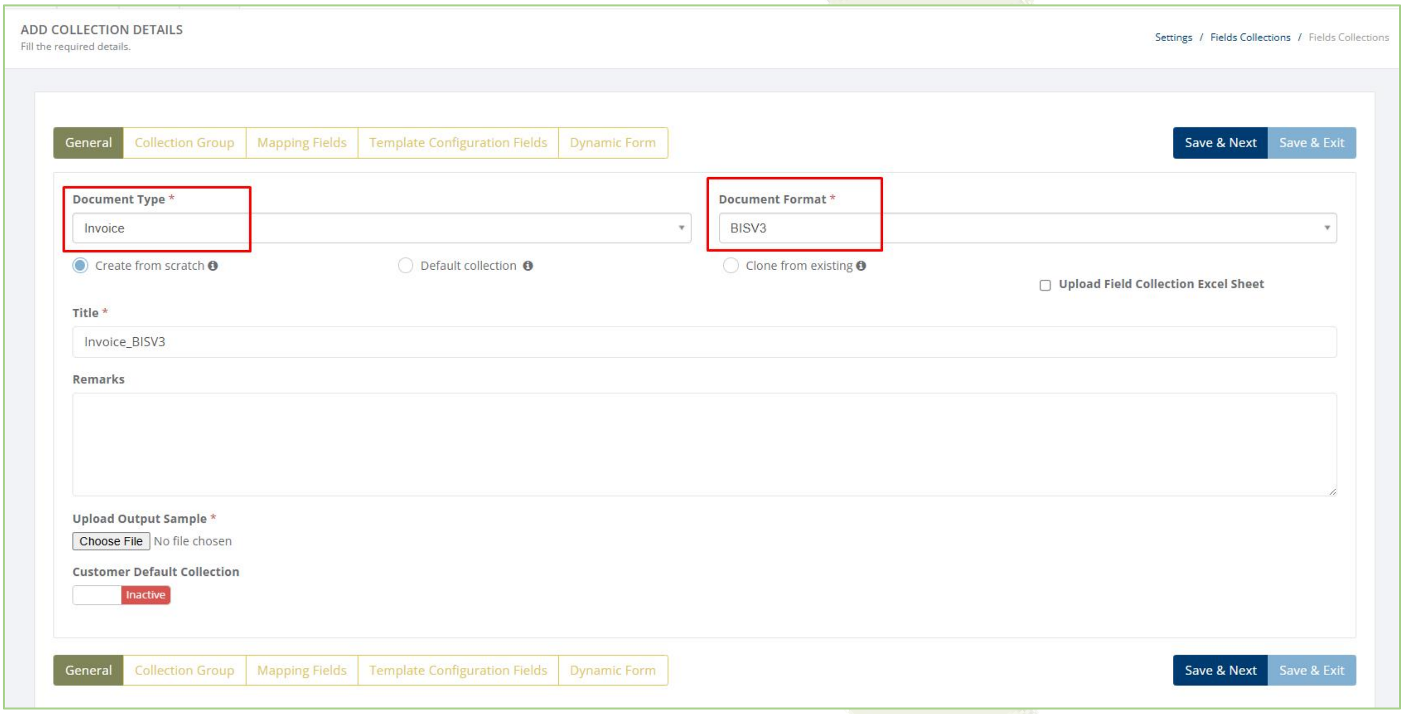
Start a New Collection

1. Click the Add dropdown on the top-right corner.
2. Select Version 2 from the list.

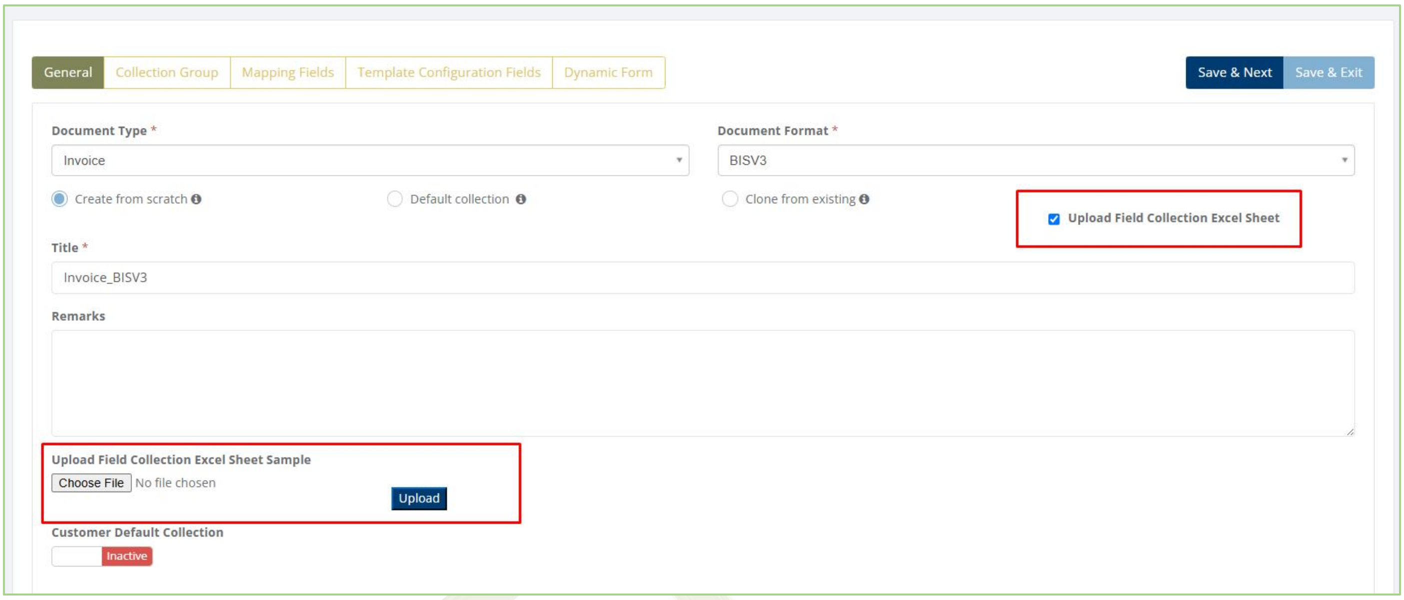
General Tab - Starting the Collection



1. Select the appropriate Document Type and Document Format.
2. Enter a clear Title and add Remarks (optional).

Option A - Using an Excel Template

- Click Upload Field Collection Excel Sheet.
- You'll see the button Upload Field Collection Excel Sheet Sample.

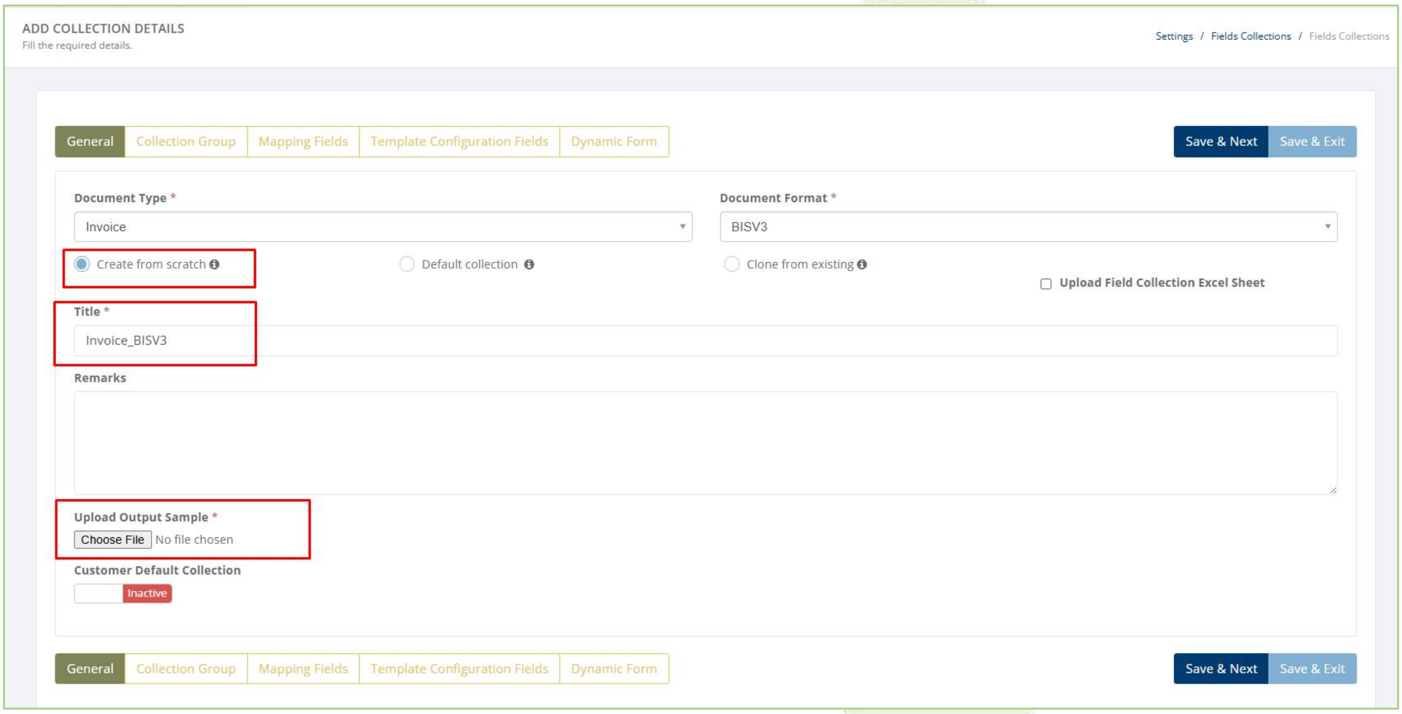


- Upload your Excel file -this will automatically create:
  - ✓ Collection groups
  - ✓ Mapping fields
  - ✓ Template configuration fields
- Only the Dynamic Form setup will need manual configuration.

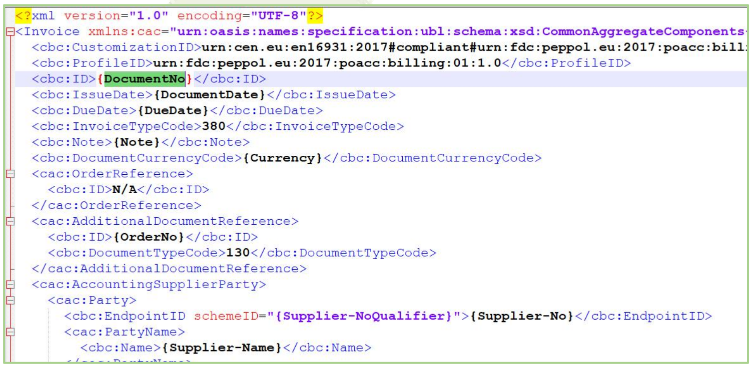
Note: Ensure your Excel follows the correct template structure to enable proper field mapping and recognition.

Option B - Creating from Scratch

- **Manually add:**
  - ✓ Collection Groups
  - ✓ Mapping Fields
  - ✓ Template Configuration Fields



- Upload an Output Sample matching your document type and format for accurate data binding.



Example:

For an invoice with:

- Doc Type: Invoice
- Format: BISV3

Add the details in the General Tab, then proceed to configure collection groups.

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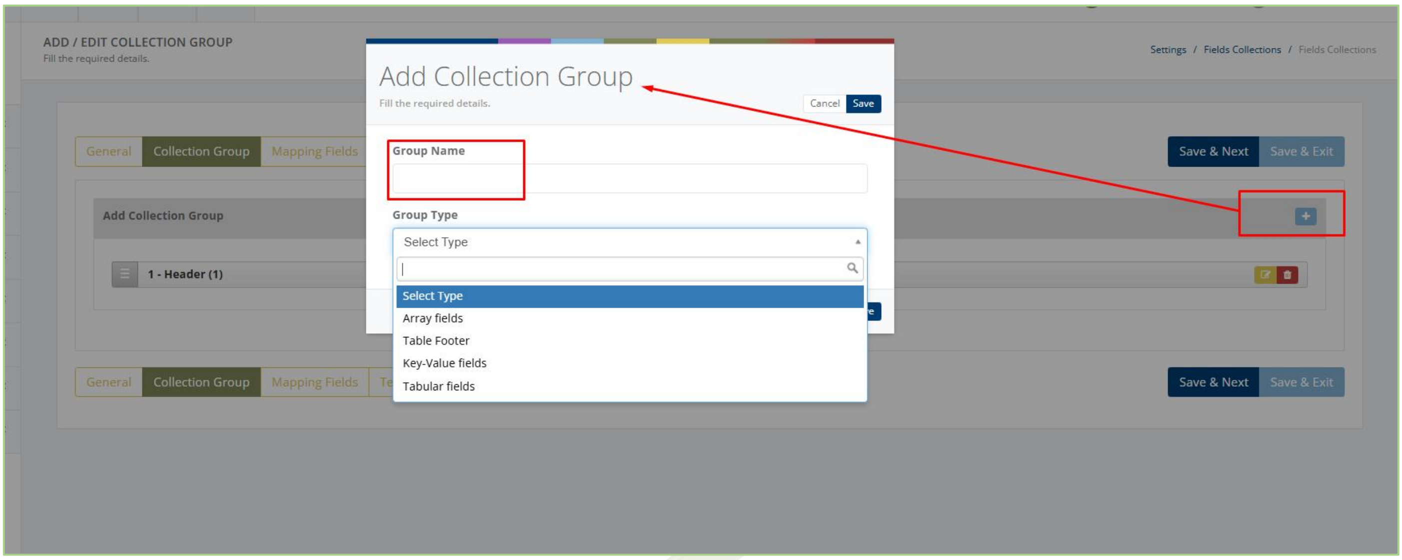
Collection Group Tab -Structuring Your Collection



1. Click the "+" (**Add**) button on the right side to create a new group.
2. Enter a Group Name (e.g., Header).
3. Choose a Group Type from the dropdown:

Group Type	Description
Array Fields	For repeating tags (e.g., multiple tax values or Allowance charge).
Table Footer	For constants like totals at the bottom of PDFs.
Key-Value Fields	For fixed header-level fields (customer/supplier info).
Tabular Fields	For line-level items (e.g., invoice lines). Select the XML path (e.g., InvoiceLine) and tick Is start with parent tag.

Always create mandatory collection groups **(e.g., Header group)** as shown in sample references.

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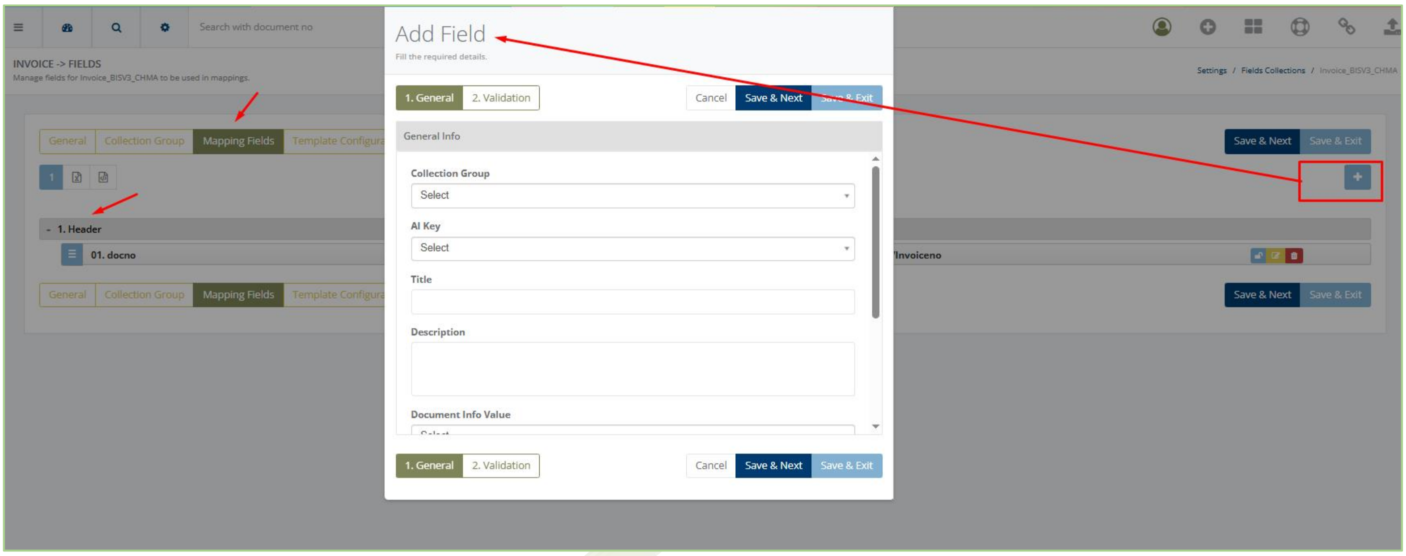
Mapping Fields Tab -Adding and Configuring Fields

- Click the “+” (Add Field) button.

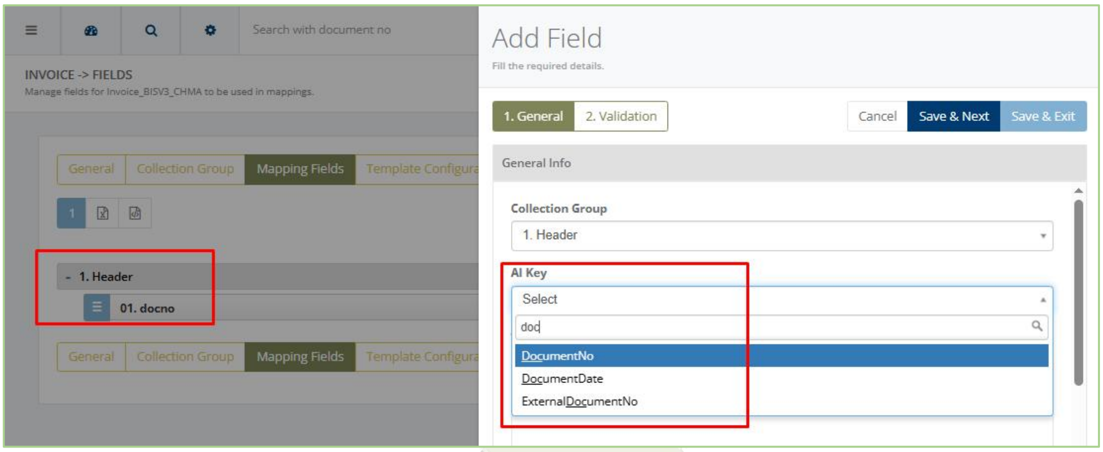


- Fill in the following details:

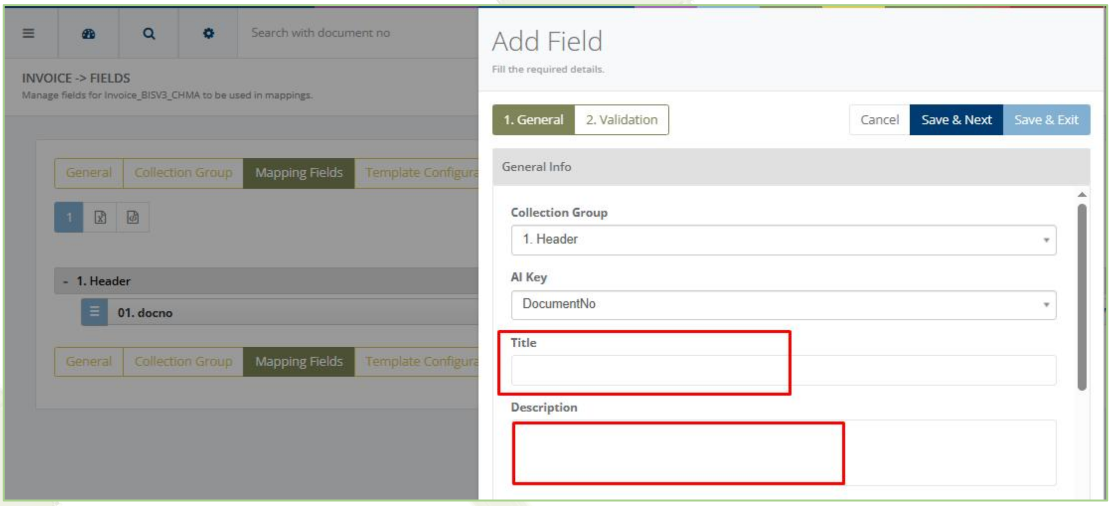
Fileld	Description
Collection Group	The group where the field belongs (e.g., Header).
AI KeyBinding	key for AI data capture.
Title	Field label (e.g., Document No).
Description	Optional field notes.
Document Info	Value Check if the value should display in adaptor history.
XPath	XML hierarchy for data capture (e.g., Invoice/InvoiceNo).
Configuration Required	Enable if field is mandatory in the editor module.
Output File Binding Key	Should match your field name (e.g., {Invoice_no}).

1. Select Collection group which created earlier : Example - Header

2. Select the Ai Key for Document No Field .



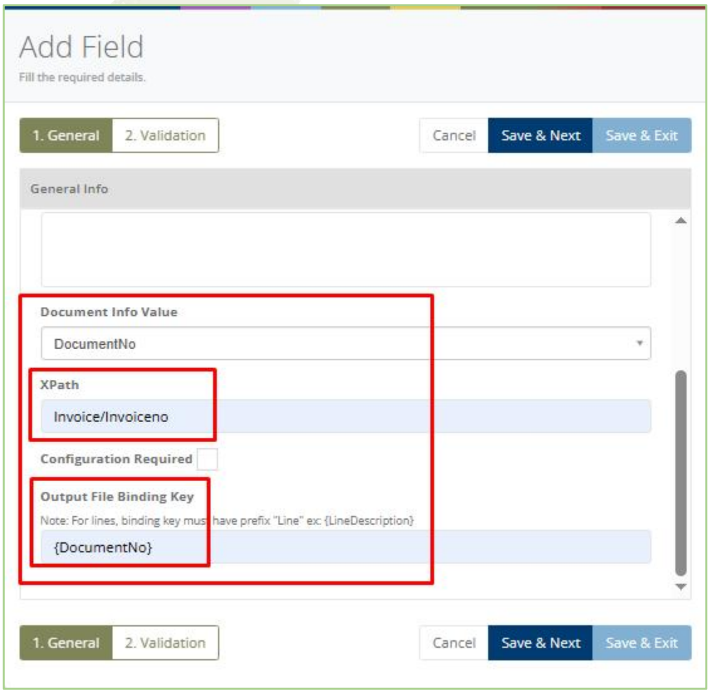
3. Add the Title text like docno and also description which is optional.



4. Add the Document info value for adaptor History if this Data kay value- need to be displayed.

5. Add the XPath which indicates the hierrchy of tags for this Fields.

6. Output file binding key need to be added format like displays in screenshot and make sure to follows the naming would be same as title.

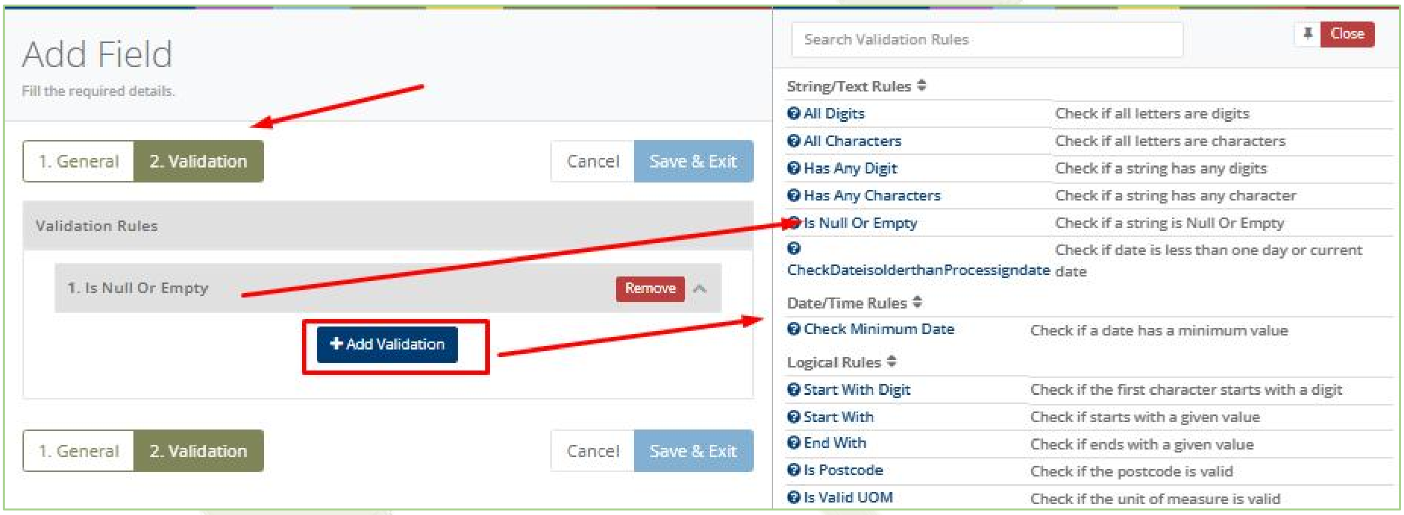


Add Validation Rules

Use the Validation section to apply data checks such as:

- ✓ Not Null
- ✓ Is Digit
- ✓ Date/Time
- ✓ Logical/Custom Rules

Click **Add Validation** and select from preset options.

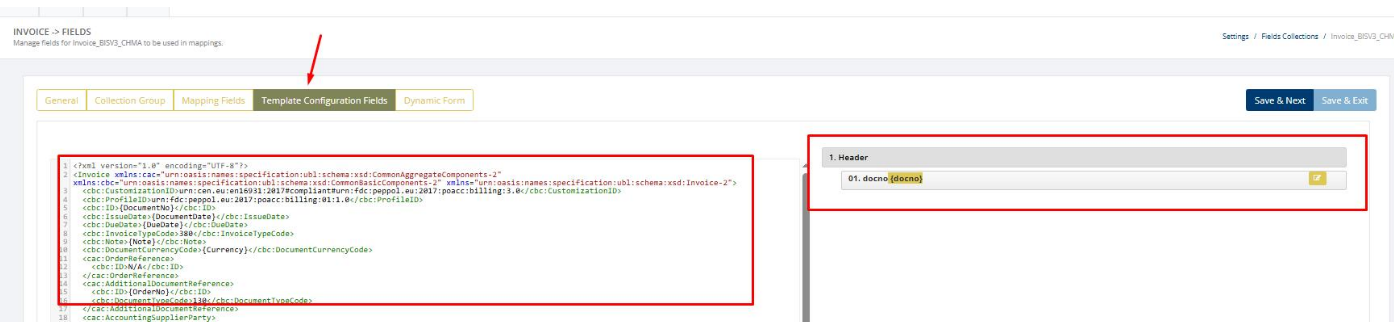


Template Configuration Fields Tab

View and verify sample template files.

Each field and its Binding Key (from mapping fields) will display.

Ensure all key fields are correctly mapped and connected.



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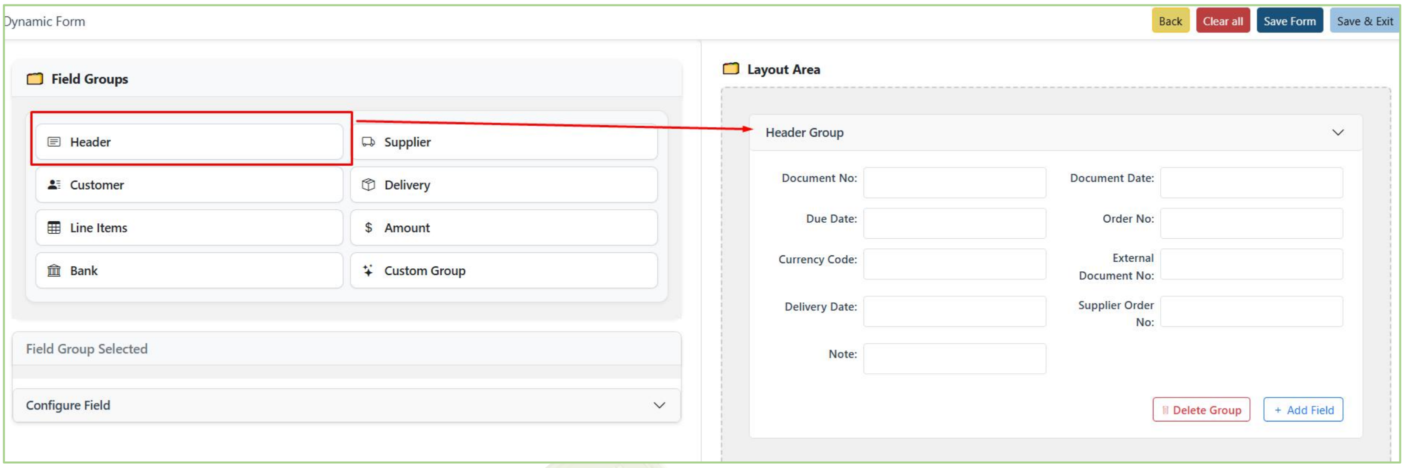
Dynamic Form Tab -Mapping for Editor Module

The Dynamic Form section allows you to visually configure how data fields appear and are grouped within the Field Collection (Version 2).

It's divided into two main panels: Field Groups and Layout Area.



Field Groups Panel (Left Side) : This panel lists all available field groups that organize your document's data sections. Each group represents a category of related fields (e.g., header info, customer details, or line items).

Default Field Groups:

Header- For document-level details (e.g., Document No, Date, Order No).

Customer- Captures buyer/customer-related information.

Supplier- Captures supplier/vendor details.

Delivery- Handles delivery address and logistics details.

Line Items- Lists repeating product/service rows.

Bank- Stores banking and payment details.

Amount- Stores totals, tax, and amount-related fields.

Custom Group- Allows adding your own custom-defined group for specific requirements.

Layout Area Panel (Right Side) : When a field group is selected (e.g., Header), its layout appears in this area. This is where you design the structure of the selected group.

Example: Header Group

The Header Group includes standard fields such as:

- Document No
- Document Date
- Due Date
- Order No
- External Document No
- Supplier Order No
- Currency Code
- Delivery Date
- Note

Each field corresponds to a mapped XML tag or binding key used in data extraction.

You can click any group (like Header) to start configuring its layout.

Use this tab to map field groups for the **Editor Module**, such as:

Header ,Supplier ,Customer ,Delivery ,Lines ,Bank, Amount

Buttons	Descriptions
+ Add Field	Add a new input field under the selected group. Opens a configuration form to define title, XPath, binding key, and validation.
Delete Group	Removes the entire selected group from your layout.
Back	Returns to the previous page.
Clear All	Resets all form configurations. Use with caution.
Save Form	Saves the current dynamic form setup.
Save & Exit	Saves and returns to the main Field Collection screen.

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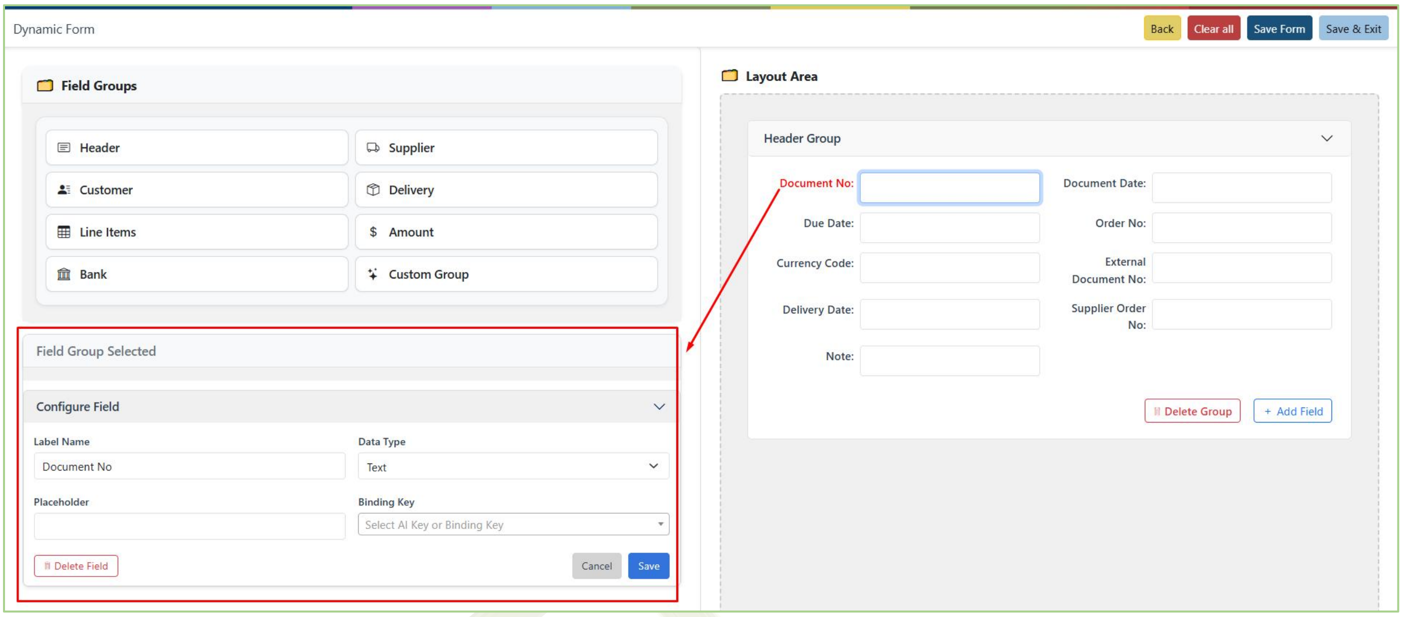
Field Configuration - Based on Selected Field in Layout Area

- This feature ensures that each field can be customized individually without affecting others.



1. Field Configuration Panel

When you click on a field (like Document No) in the layout area, its settings automatically appear here for editing.

2. Label Name

Defines the display name of the field.

Example: Document No appears as the field label in your layout.

3. Data Type

Determines what kind of input can be entered.

Options include: Text, Date, Number, Dropdown, etc.

Example: Document No uses Text type.

4. Placeholder

Adds a short hint inside the field to guide the user.

Example: Placeholder could be Enter document number.

5. Binding Key

Used to connect the field to backend data or an API key.

Example: Bind Document No to a specific key used in your integration.

6. Save / Cancel

Save: Confirms and applies field changes.

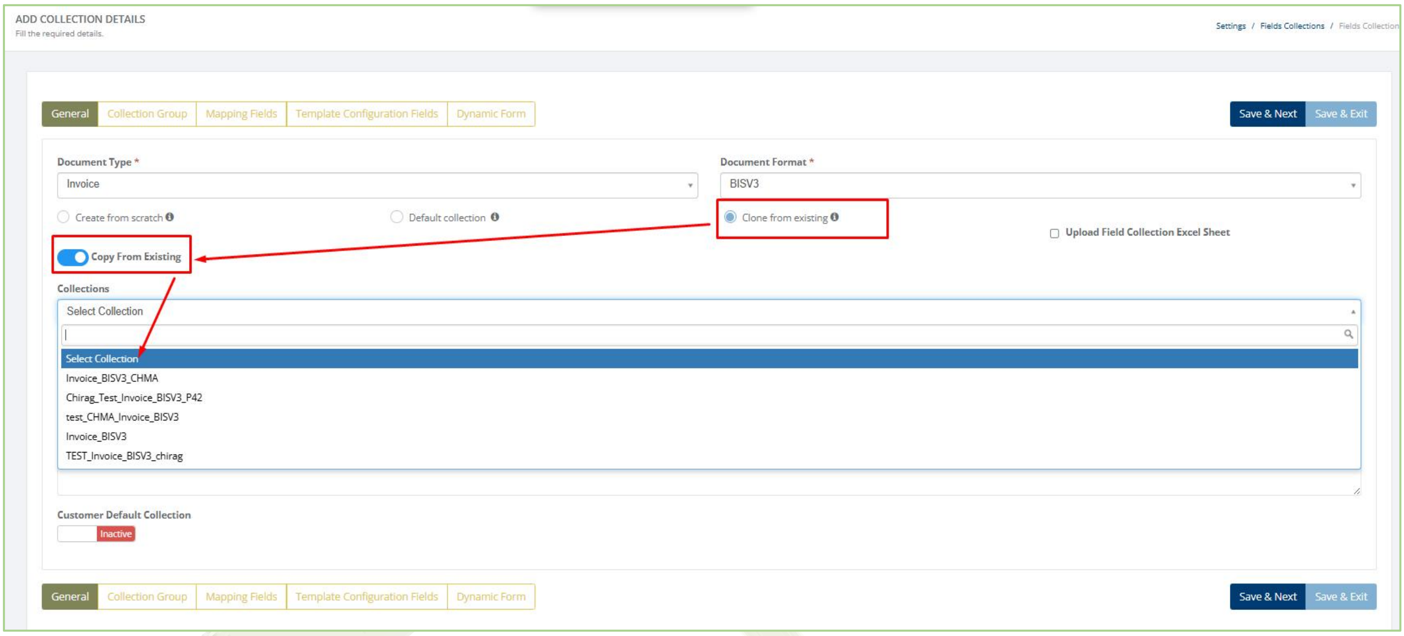
Cancel: Discards recent edits.

7. Delete Field

Removes the selected field from the layout if it's no longer required.

Option C : Clone from Existing – Key Features

This feature allows users to quickly create a new field collection by reusing an existing configuration, ensuring consistency and reducing setup time.



1. Clone from Existing (Option)

When selected, this option activates the ability to copy data from a pre-existing field collection.

Purpose: Helps maintain uniformity across similar projects or document types without rebuilding forms from scratch.

Tool-tip Available: A small help icon provides quick guidance on what this feature does.

2. Copy From Existing (Toggle)

A switch control that enables or disables the "**clone**" functionality.

When turned ON, it reveals a dropdown list to select an existing collection.

When OFF, the system allows manual creation of a new collection instead.

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3. Collections Dropdown

Label: “Select Collection”

Displays a list of available pre-configured collections.

Users can choose one to clone and modify as needed.

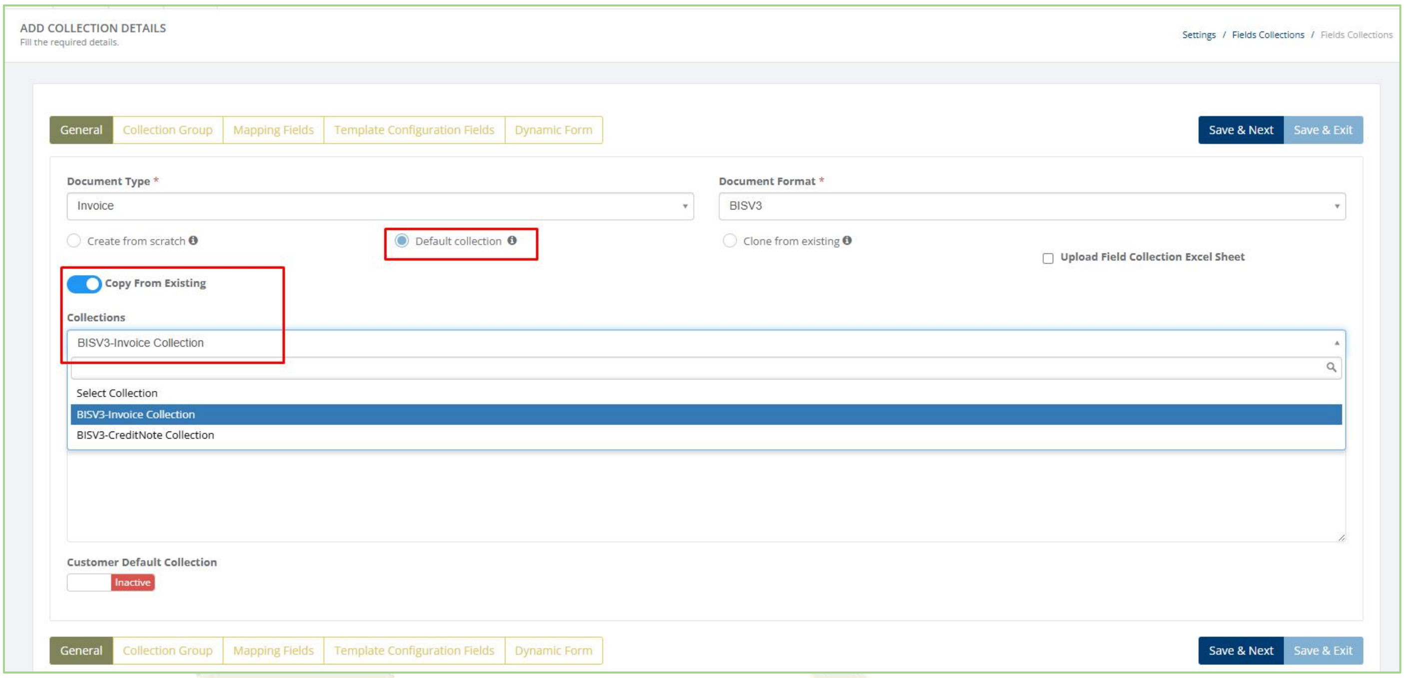
Example Options:

Invoice_BISV3_CHMA

Purpose: These templates represent existing configurations for various invoice or project types, allowing users to start with a ready structure and adapt it quickly.

Option D : Default Collection – Key Features

This feature allows users to quickly create a new field collection by reusing an existing Default configuration for selected document type and document format, ensuring consistency and reducing setup time.



1. Default collection

When selected, this option designates the current setup as the standard (default) Field Collection for the chosen document type and format.

Purpose: Automatically applies this configuration whenever a new document of the same type (e.g., Invoice - BISV3) is created.

Tool-tip Available: Provides quick guidance explaining that only one default collection can be active per format.

2. Copy From Existing (Toggle)

When turned ON, it reveals a dropdown list to select an existing default collection for selected document type and format.

4. Collections Dropdown

Displays a list of available pre-configured collections that can be used as a base.

Usage: Users can choose default setup to use and then customize according to project or customer requirements.

Example Options:

BISV3-Invoice Collection

BISV3-CreditNote Collection

Purpose: Enables quick setup by reusing proven templates instead of manually configuring each field.

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