HUBBROKER
AUTOMATIC, SECURE DATA TRANSFORMATION

SMART EDITOR DASHBOARD

USER MANUAL

Last Updated date: 16/03/2025

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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.
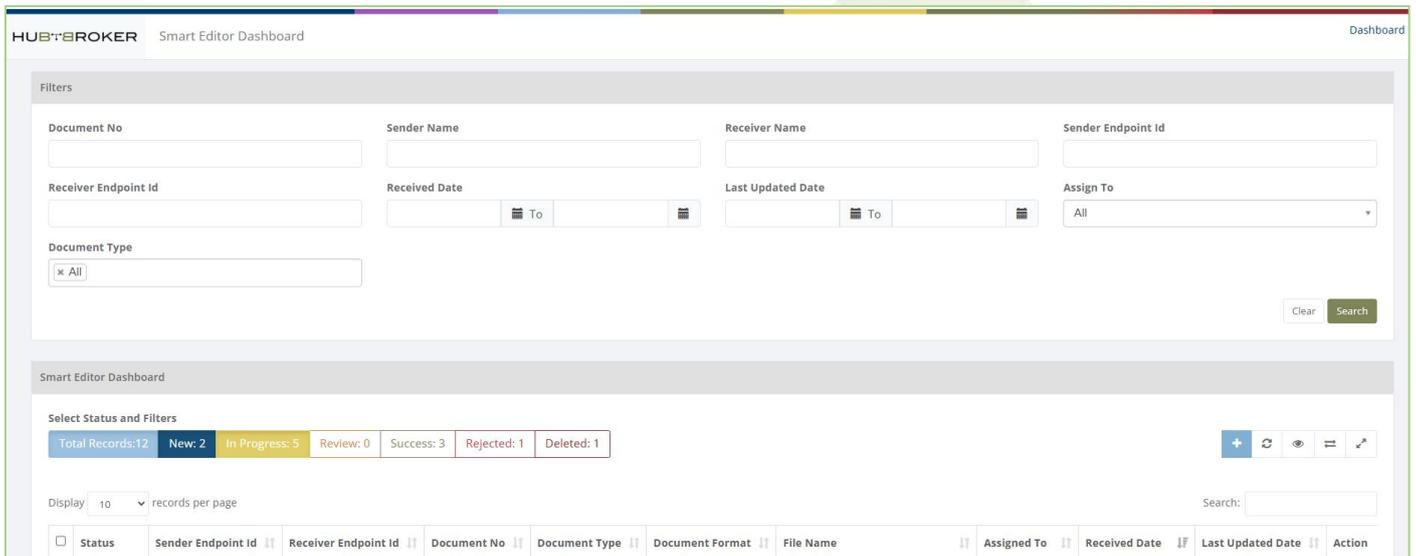
Login & Access

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

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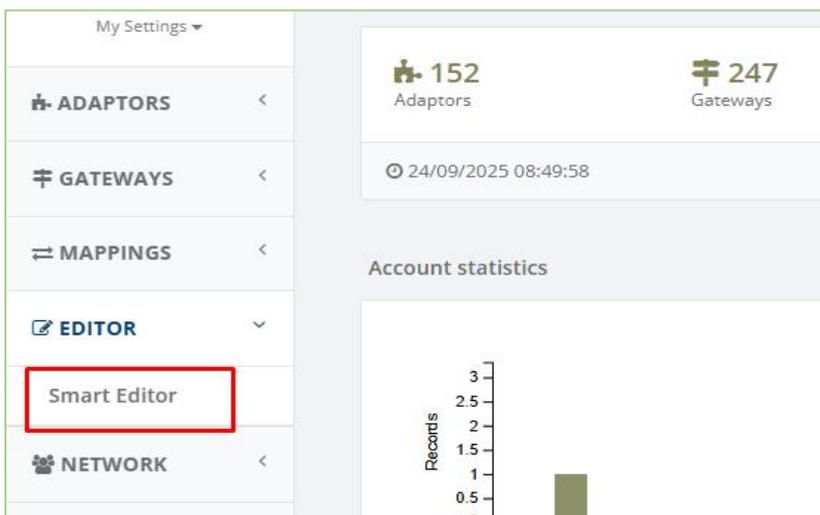
Filters & Search Panel

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.

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Document List (Table View)

Central table fields include:

☐	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_textilia_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

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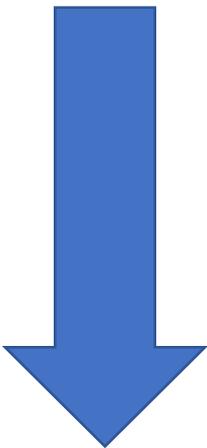
Row-Level Actions

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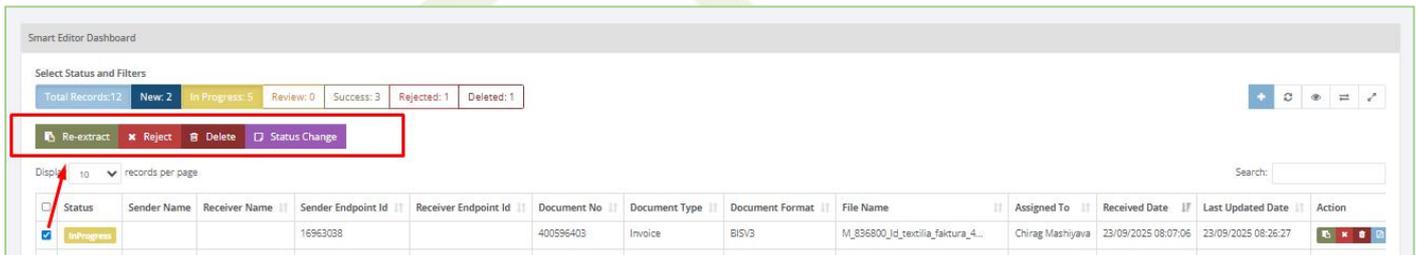
Action Name	Action Description
Re-extract	Re-run data extraction.
Reject	Mark as rejected multiple files.
Delete	Remove multiple files.
Status Change	Move files to a new status in bulk.

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Table Controls

Controls to refresh, expand view and paginate records.

## Toggle Columns Feature
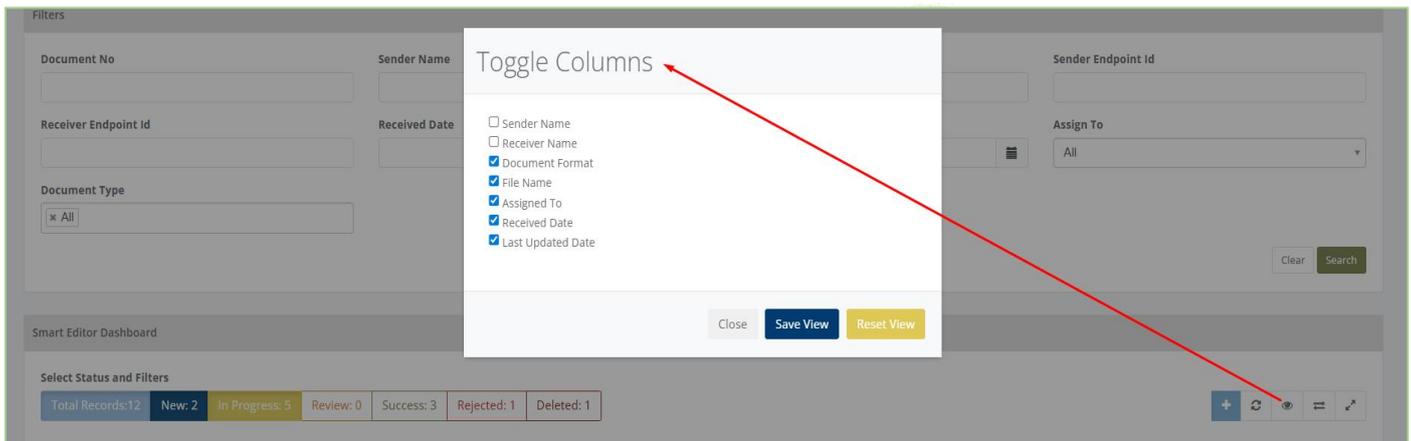
Customize the table view to show only relevant columns:

- 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.

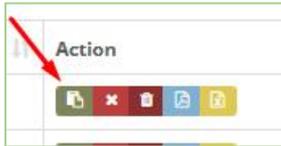support@hubbroker.net

Add New Files

Adding new files to the dashboard is intuitive and supports bulk uploads with flexible format configurations:
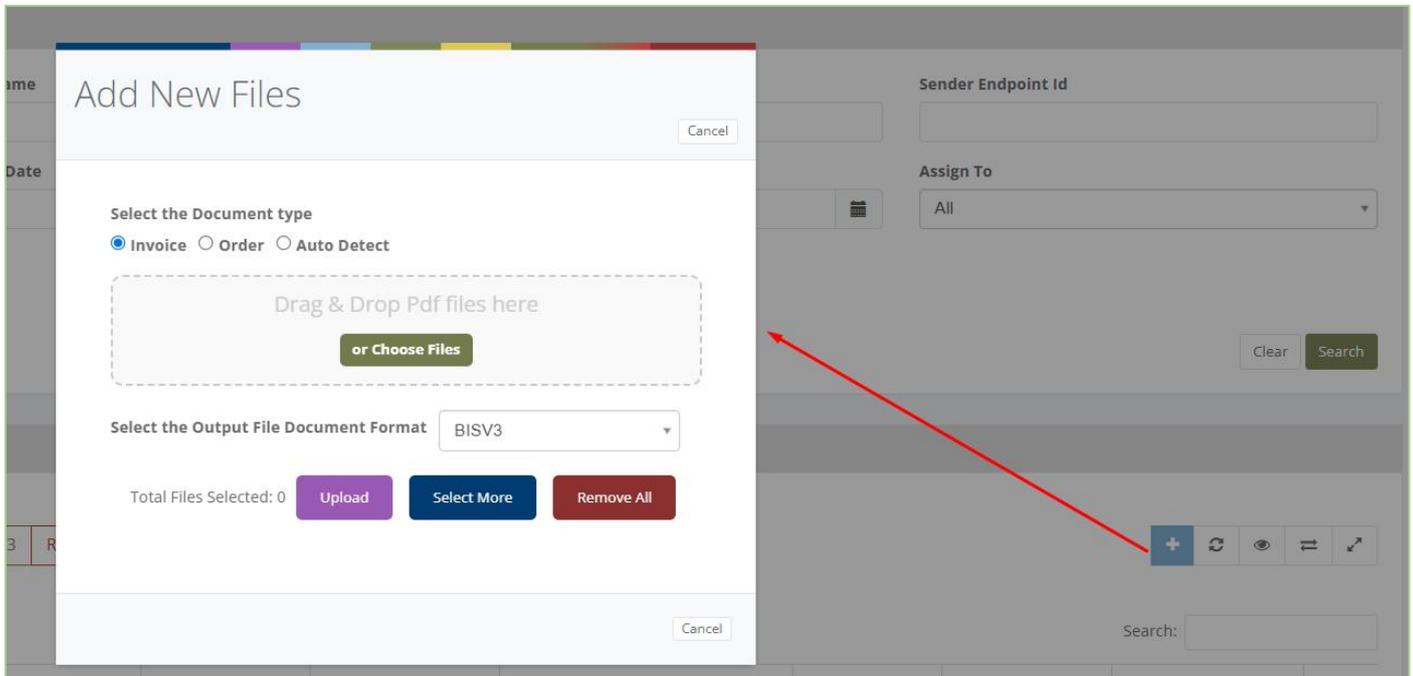
- Use the "+" button to open the Add New Files dialog.

- 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.

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Document Editing Features

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

- **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.

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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.
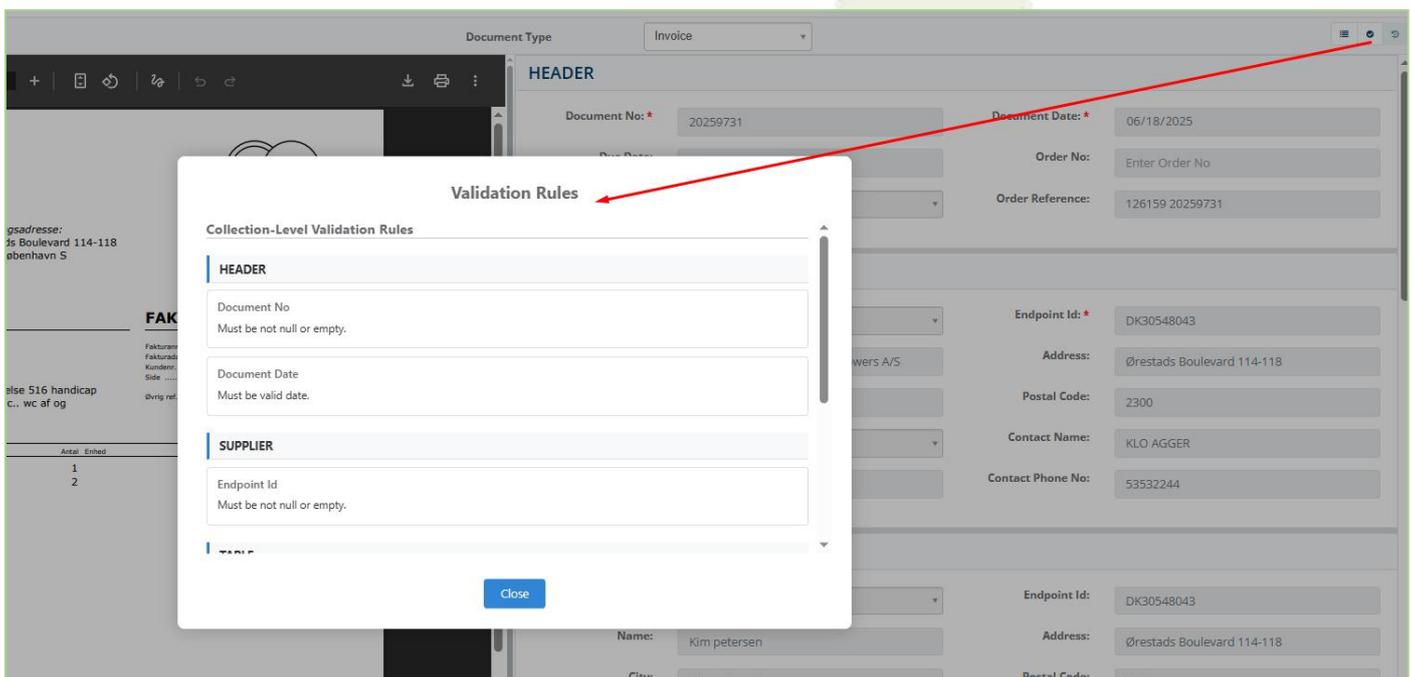
What the Validation Overview Displays:

- 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.

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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.

1. Back : The Back button allows users to navigate to the previous screen or the document list page.

2. Download XML : The Download XML feature enables users to download the currently displayed XML file to their local system.

3. Show Original XML File : The Show Original XML File option allows users to view the original source XML document before any transformation or manual modification.

This helps users to:

✓ Compare the original input document with the edited or mapped version.

✓ The original file remains unchanged and serves as a reference for validation and debugging.

4. Show Validation Errors : The Show Validation Errors feature runs validation checks on the XML file based on the configured schema (e.g., BIS V3 standard).

It displays:

✓ Missing mandatory fields

✓ Incorrect data formats

✓ Schema validation failures

✓ Business rule violations

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This allows users to identify and correct issues before sending the document to the receiver system.

5. Send Anyway : The Send Anyway option allows users to send the document even if validation errors are present.

This option is typically used when:

- ✓ The validation error does not block processing on the receiver side
- ✓ The user confirms that the document content is still acceptable
- ✓ Temporary exceptions are required for specific customers
- ✓ Use this feature cautiously, as sending invalid documents may cause downstream processing issues.

6. Save XML : The Save XML button saves any modifications made to the XML document within the Smart Editor.

This ensures that:

- ✓ Manual corrections are preserved
- ✓ The updated XML structure is stored in the system
- ✓ Changes can be validated or sent later
- ✓ Saving the file does not send the document, it only updates the stored version.

7. Send File : The Send File feature sends the validated XML document to the configured destination gateway.

Depending on the integration setup, the file transmitted via:

- ✓ FTP/SFTP or any other.

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.
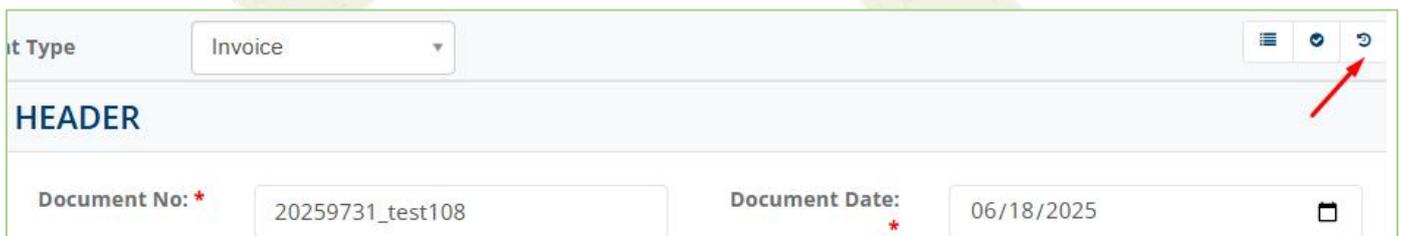
Comment History View

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.

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What the Comment View Displays:
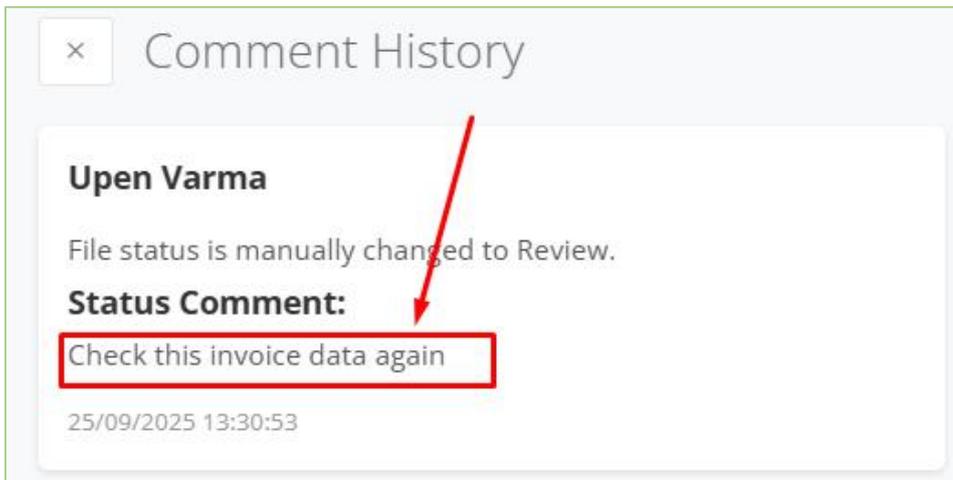
Each comment entry displays:

- 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:
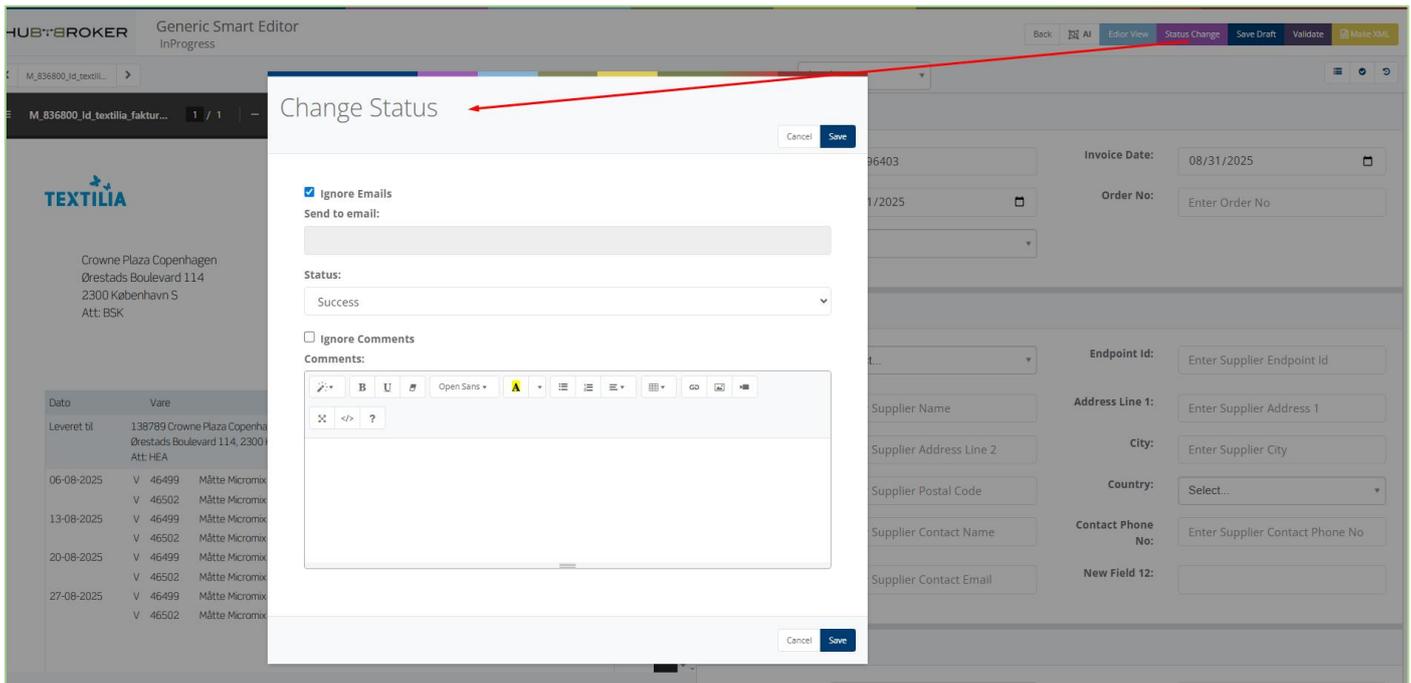
- Access via the editor's **"Status Change"** button.

- 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.

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