

V10 INVOICE HUB

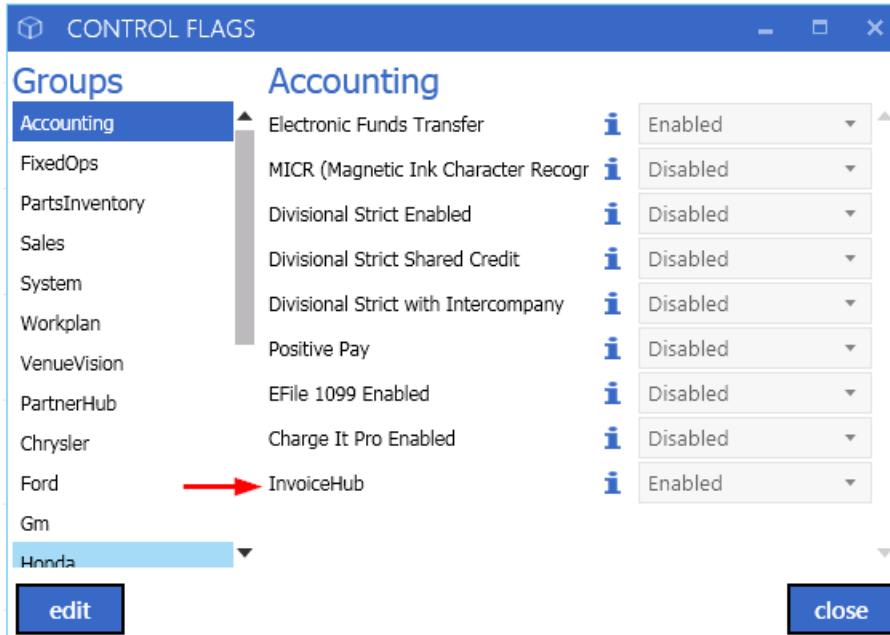
Invoice Hub is a great tool for dealerships to provide their customers with a portal to keep track of their paid and outstanding invoices online. This document will cover setting up Invoice Hub within the DMS for a dealership, how to use Invoice Hub from the perspective of a dealership, and how to use Invoice Hub from the perspective of a dealership's customer.

Invoice Hub Setups within the DMS

In this section we will cover all the setups required for a dealership using Invoice Hub, as well as how to give a dealerships customers access to view their invoices online.

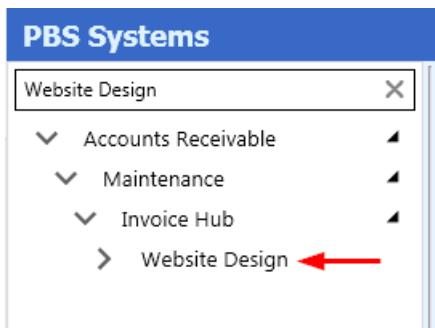
Enabling Invoice Hub for a Dealership (PBS WILL DO THIS)

To Enable a Dealership or a V10 site for Invoice Hub, switch the flag in Control Flags to Enabled.

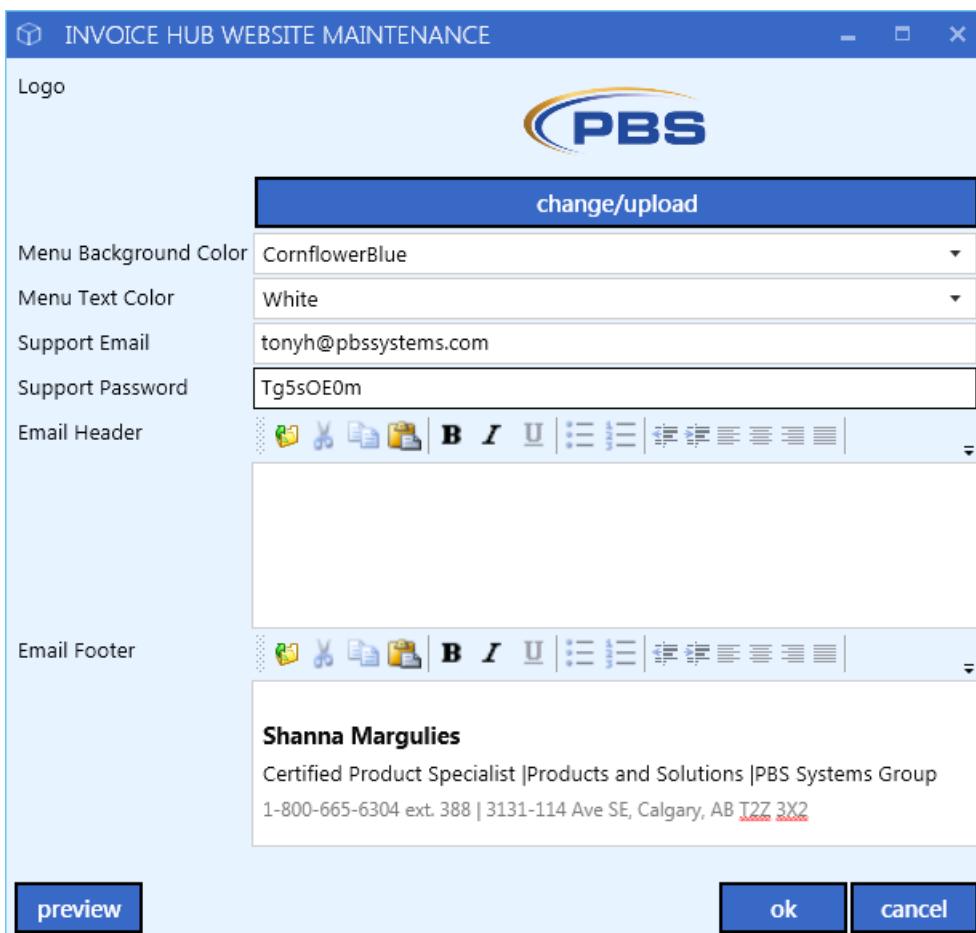


Setting up Website Design

Once Invoice hub is enabled for a dealership they will need to do some basic setups to make their Invoice Hub look like a true extension of their dealership. Website Design can be found on the main menu under Accounting > Receivables > Maintenance > Invoice Hub > Website Design.



Within Website Design choose the dealerships **logo** which will be displayed on Invoice Hub and emails. **We recommend a logo with a transparent background.**



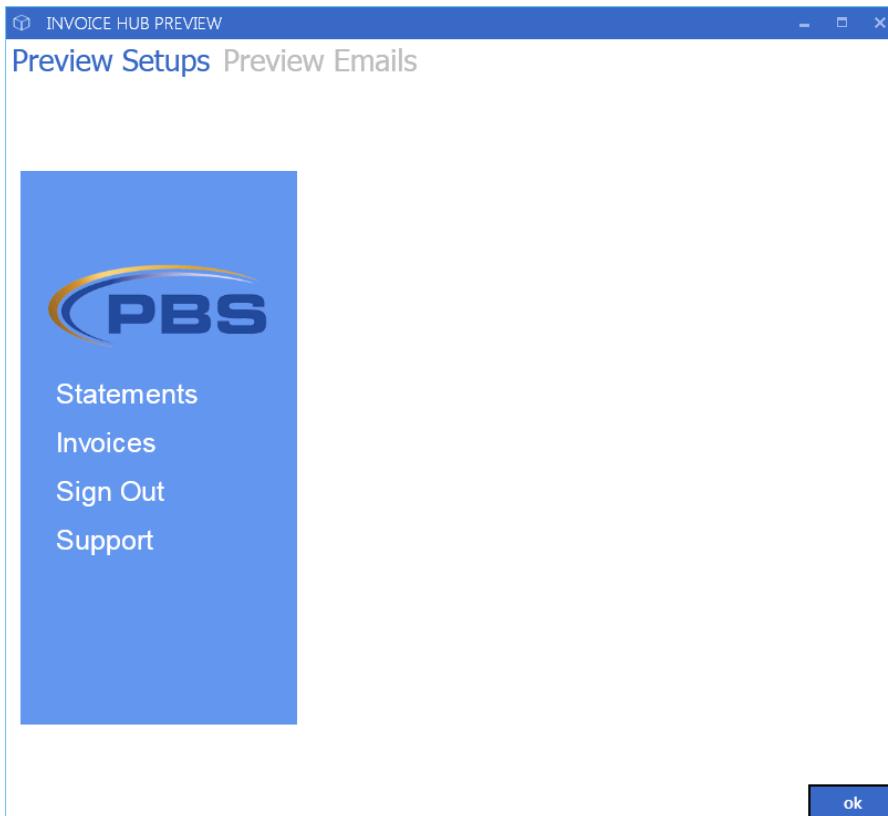
A **Menu Background color** and **Menu Text Color** will also need to be chosen. This should match the dealerships color scheme and branding.

The **Support email** will be the email that they would like their customers to email with any questions about their invoices. This email will also be used as the from address on our Invoice Hub activation emails and as the user name for the Invoice Hub support view.

The **support password** will be the password to login to the Invoice Hub support view. We will go into more detail on the support view later.

They can also choose to add a **header** and **footer** message to our Invoice Hub activation emails.

Select the Preview button to see a preview of the setups. The Preview Setups tab will show the user what the colors and logo they have chosen will look like together. The Preview emails tab will show the three different types of emails that are sent to their customer. If they have set up a header or footer message, this will also show here.



INVOICE HUB PREVIEW

Preview Setups Preview Emails

Email Type: **Activate**

Email Preview: **Activate**

ResetPassword
Deactivate

PBS

Welcome to PBS Development Testing US

Invoice Hub

You are receiving this email because PBS Development Testing US has enabled you to view your invoices online. To activate your account, login using your email as your username and the one time password below.

Your one time password is: **#PASSCODE#**

ACTIVATE YOUR ACCOUNT

After activating your account you will be required to choose a new password.

Enabling Invoice Hub through the Contact Record.

The first step is to make sure the customer has an email address. If they have more than one email address, select the magnifying glass next to the email in the contact header.

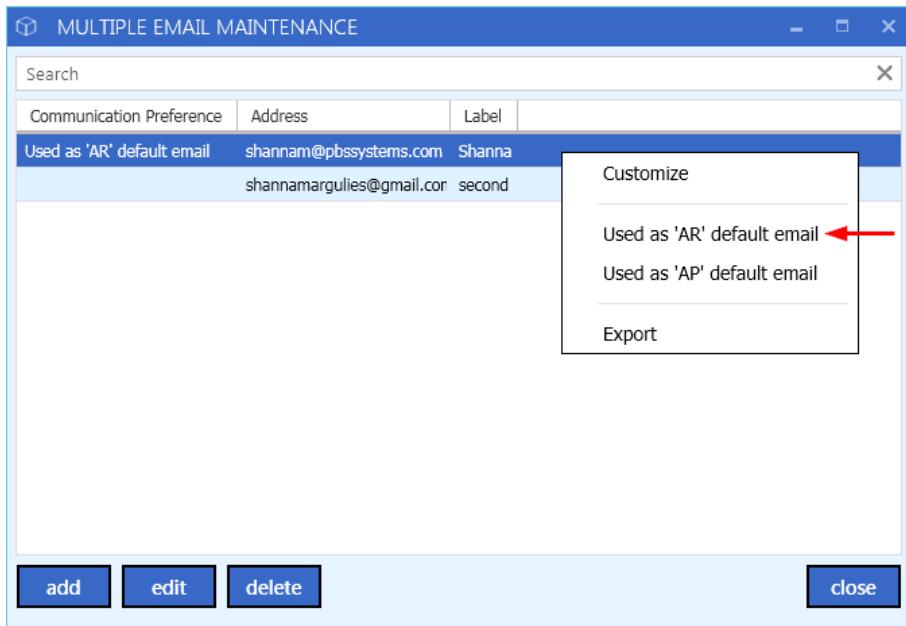


SHANNA MARGULIES

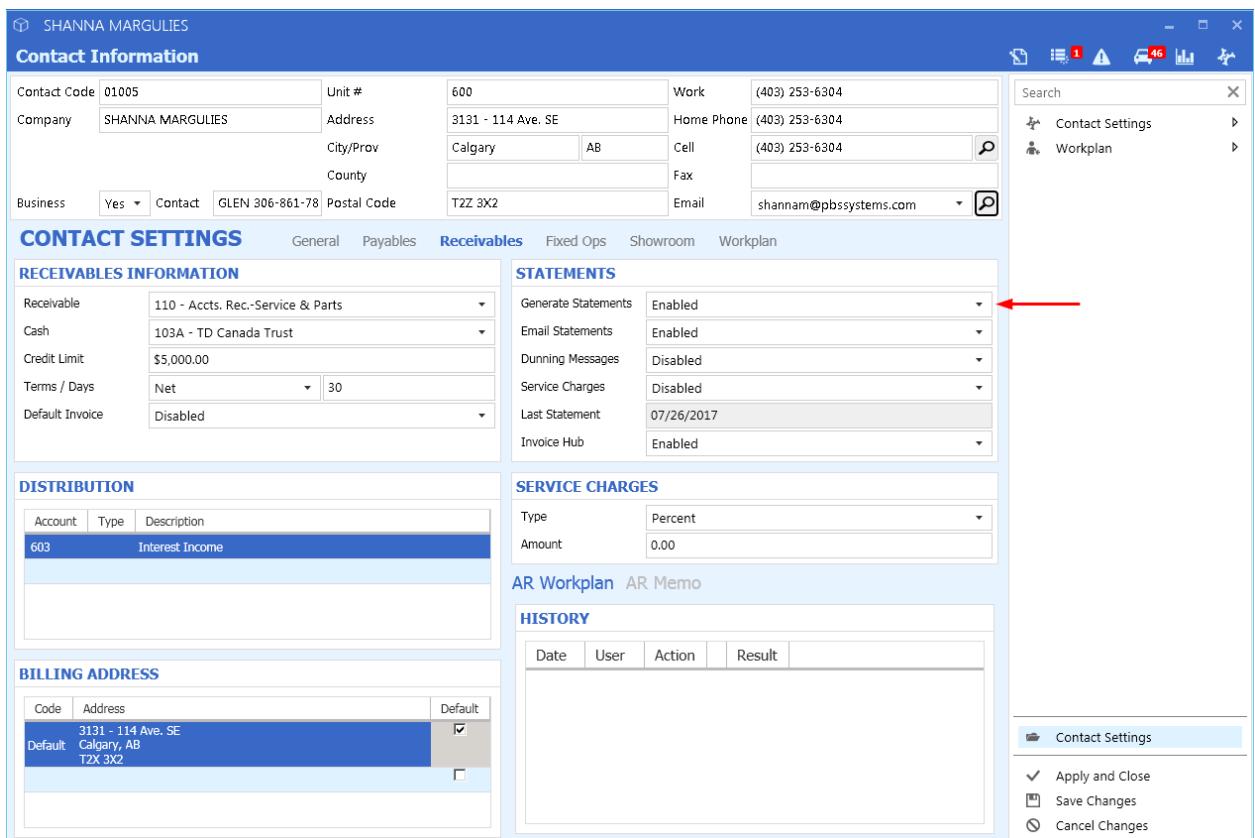
Contact Information

Contact Code	01005	Unit #	600	Work	(403) 253-6304
Company	SHANNA MARGULIES	Address	3131 - 114 Ave. SE	Home Phone	(403) 253-6304
		City/Prov	Calgary	Cell	(403) 253-6304
		County		Fax	
Business	Yes	Contact	GLEN 306-861-78	Postal Code	T2Z 3X2
				Email	shannam@pbssystems.com

This will open multiple email maintenance. In this screen select the email that they will be receiving their AR statements and Right click. From the right click menu choose 'Used as 'AR' default email'. Close multiple email maintenance and save the contact record.

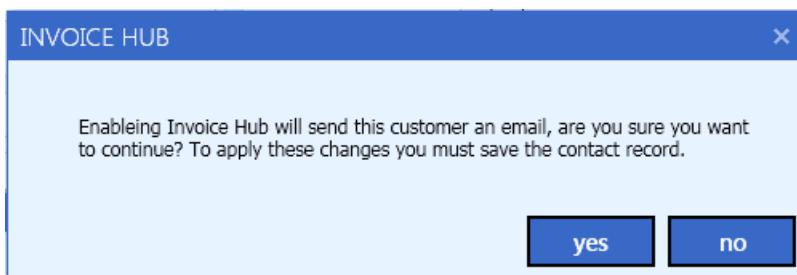


The second step is to make sure that the Generate Statements Flag is Enabled.



Finally, to enable the customer to view their statements on the Invoice Hub, switch the Invoice Hub flag to 'Enabled' in the statements section.

After flagging the customer as enabled for Invoice Hub, you will receive the below popup:

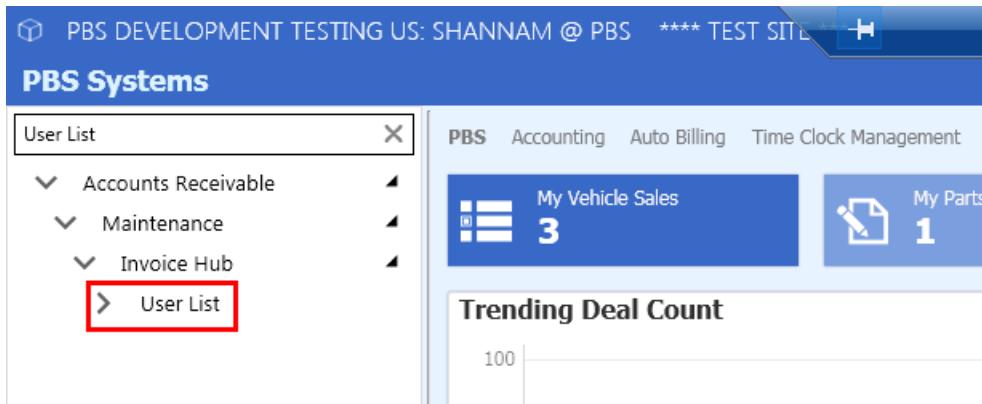


This popup states that by enabling Invoice Hub for this customer, they will automatically receive an email to activate their Invoice Hub account. Press yes on the popup and Apply and Close the Contact Record.

This Customer is now enabled to use the Invoice Hub.

Enabling Invoice Hub for a Customer through Invoice Hub maintenance

On the left hand menu, navigate to Invoice Hub maintenance through Accounting > Accounts Receivable > Maintenance > Invoice Hub > User list. Or by typing User List into the main search bar.



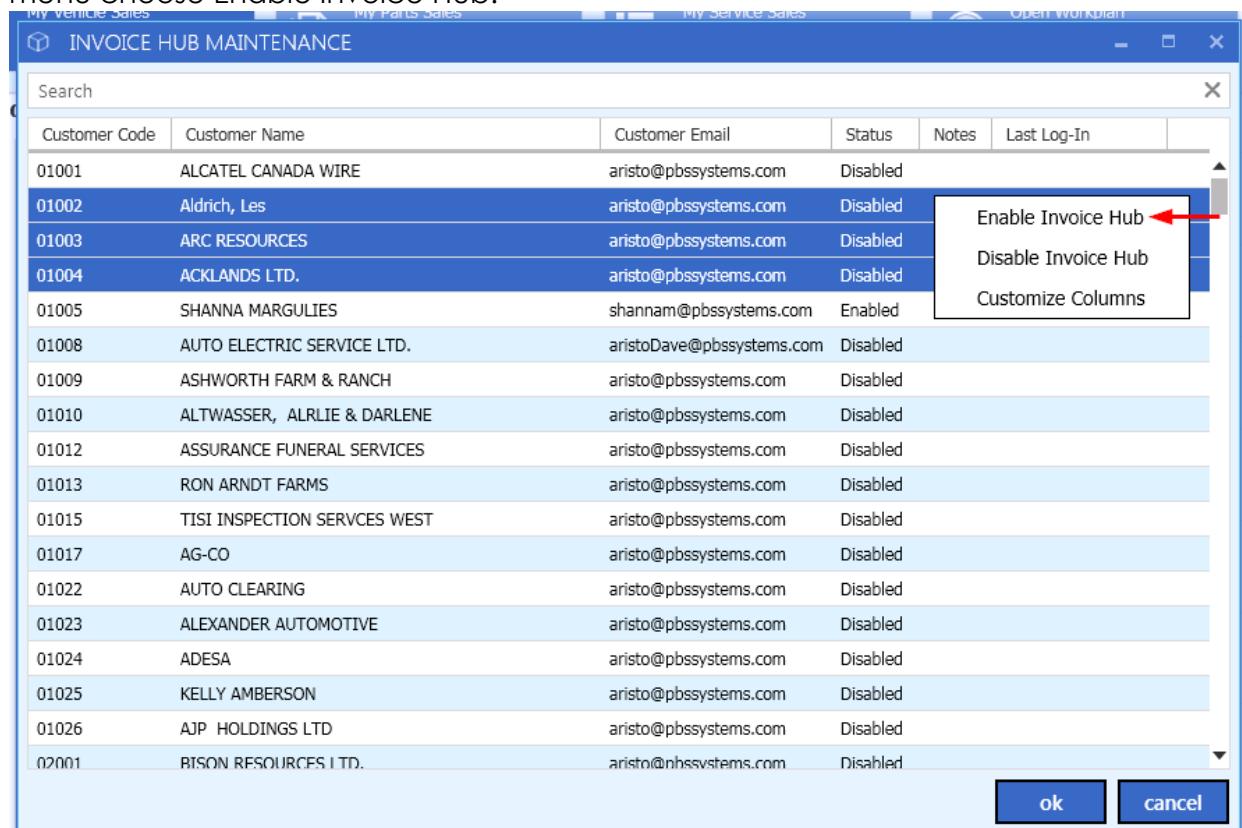
The Invoice Hub user list will bring up a list of all customers currently enabled for generate statements. If the customer, you are looking for is not in this list you will need to go into the contact record and enable them for generate statements. This list also gives you information such as which customers are currently enabled for Invoice Hub as well as their last login time.

The image shows a "Invoice Hub Maintenance" dialog box. The title bar says "INVOICE HUB MAINTENANCE". The main area is a table with columns: Customer Code, Customer Name, Customer Email, Status, Last Log-In, and Notes. The table lists various customers with their details. At the bottom right of the dialog box are "ok" and "cancel" buttons.

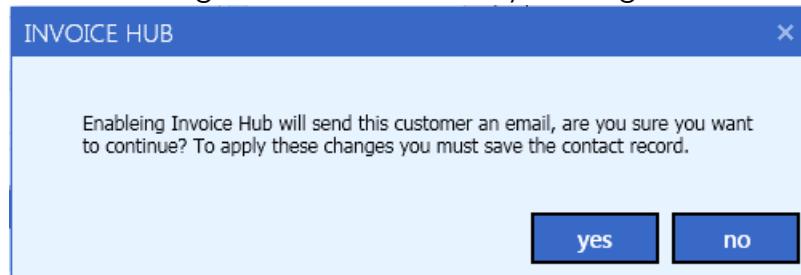
Customer Code	Customer Name	Customer Email	Status	Last Log-In	Notes
MARGULIES1		shannam@pbssystems.com	LostUser		Deleted user
01005	SHANNA MARGULIES	shannam@pbssystems.com	Enabled	7/28/2017 3:36:11 PM	
08021	24-7 ENTERPRISES LTD.	ireneh@pbssystems.com	Enabled	7/28/2017 11:29:19 AM	
08021	24-7 ENTERPRISES LTD.	ireneh@pbssystems.com	Enabled	7/28/2017 11:29:19 AM	
23004	WANNER WELL SITE SUPERVISIONS LTD	aristoDave@pbssystems.com	Disabled		
22807	B & D HILLRUD FARMS INC	aristo@pbssystems.com	Disabled		
22485	NEUBERGER, TODD	aristo@pbssystems.com	Disabled		
23006	WCLC	aristoDave@pbssystems.com	Disabled		
22428	ENTERPRISE FLEET MANAGEMENT INSTALLATION GRP	aristo@pbssystems.com	Disabled		
22012	VOGEL, BARBRA	aristo@pbssystems.com	Disabled		
23006	WCLC	aristoDave@pbssystems.com	Disabled		
22450	WILTON, HOLLY	aristo@pbssystems.com	Disabled		
22384	FELLNER, DANIEL	aristo@pbssystems.com	Disabled		
22081	SOUTHERN RANGE WELL SERVICING LTD	aristo@pbssystems.com	Disabled		
22028	MAHNKE, KEVIN	aristo@pbssystems.com	Disabled		
22398	MUS, SHAWN	aristo@pbssystems.com	Disabled		
22443	GILL, KENNETH	aristo@pbssystems.com	Disabled		
22022	VelociT Solutions	aristo@nhssystems.com	Disabled		

From this list select the customer you wish to enable for Invoice hub and Right click. If you want to enable multiple customers, hold down the Ctrl key on your keyboard and select the customers you wish to enable. From the right click

menu choose Enable Invoice Hub.



After selecting Enable Invoice Hub you will get the below popup:



This popup states that by enabling Invoice Hub for this customer(s), they will automatically receive an email to activate their Invoice Hub account. Press yes on the popup.

The Customer(s) will now be enabled to use the Invoice Hub.

Disabling Invoice Hub for a Customer:

You can Disable Invoice Hub for a customer the same way you enabled them. Follow the same steps laid out above, but choose disable instead of enable. Please note that disabling Invoice Hub for a customer will send them an email notifying them they no longer have access to their Invoice Hub and they will not be able to login anymore.

Invoice Hub – Support View

In this section we will go over setups for the Invoice Hub support view as well as navigation of the website. The support view is an admin login for the dealership to view their Invoice Hub enabled customers, statements and invoices online. This will help dealerships support their Invoice Hub website as they can directly view the same statements and emails that their customers see on their account. This feature is available in version 10.3.9 and later.

Setting up the Support View

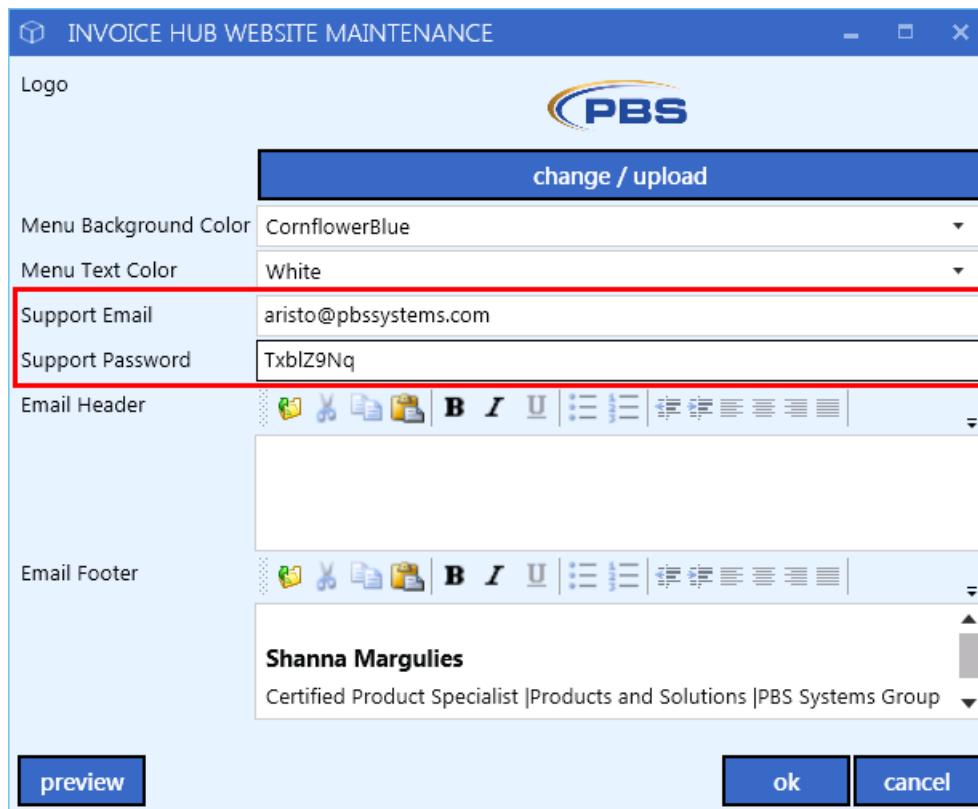
Support view setups can be access in website design, which can be found on the main menu under Accounts Receivable > Maintenance > Invoice Hub > Website Design, or by typing Website Design into the search bar.



Within Website design maintenance enter the email address of the user that will be supporting the Invoice Hub website. This will be the username for the support view login.

Note: This is also the email that any support questions from customers about their Invoice Hub will go to.

Next enter the support password. This will be the password for the support view login.

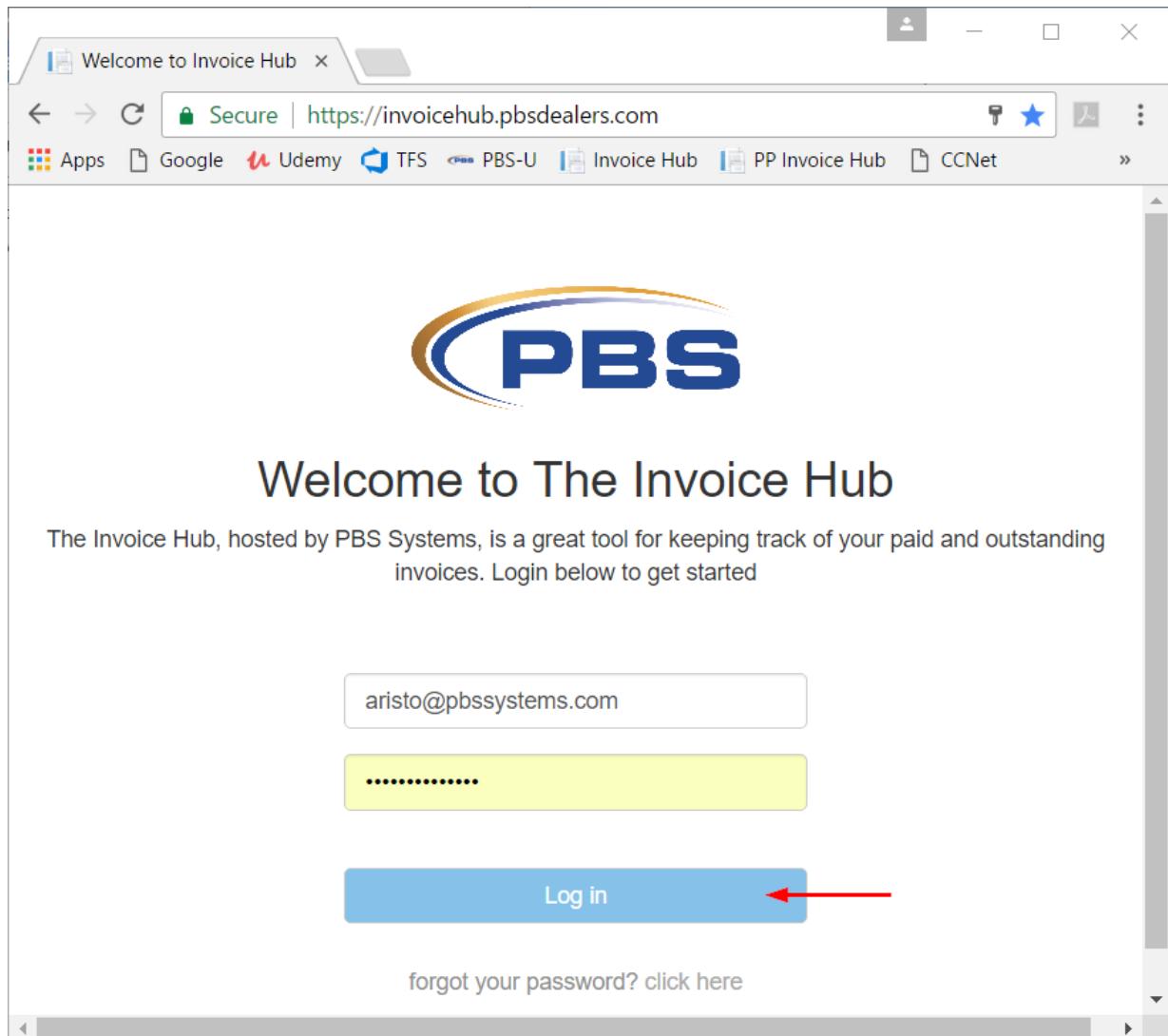


Logging in to the Support View

To access the support view, navigate to your web browser and go to the following URL:

<https://invoicehub.pbsdealers.com/>

Enter your Support email as the user name and your support password, then select login.

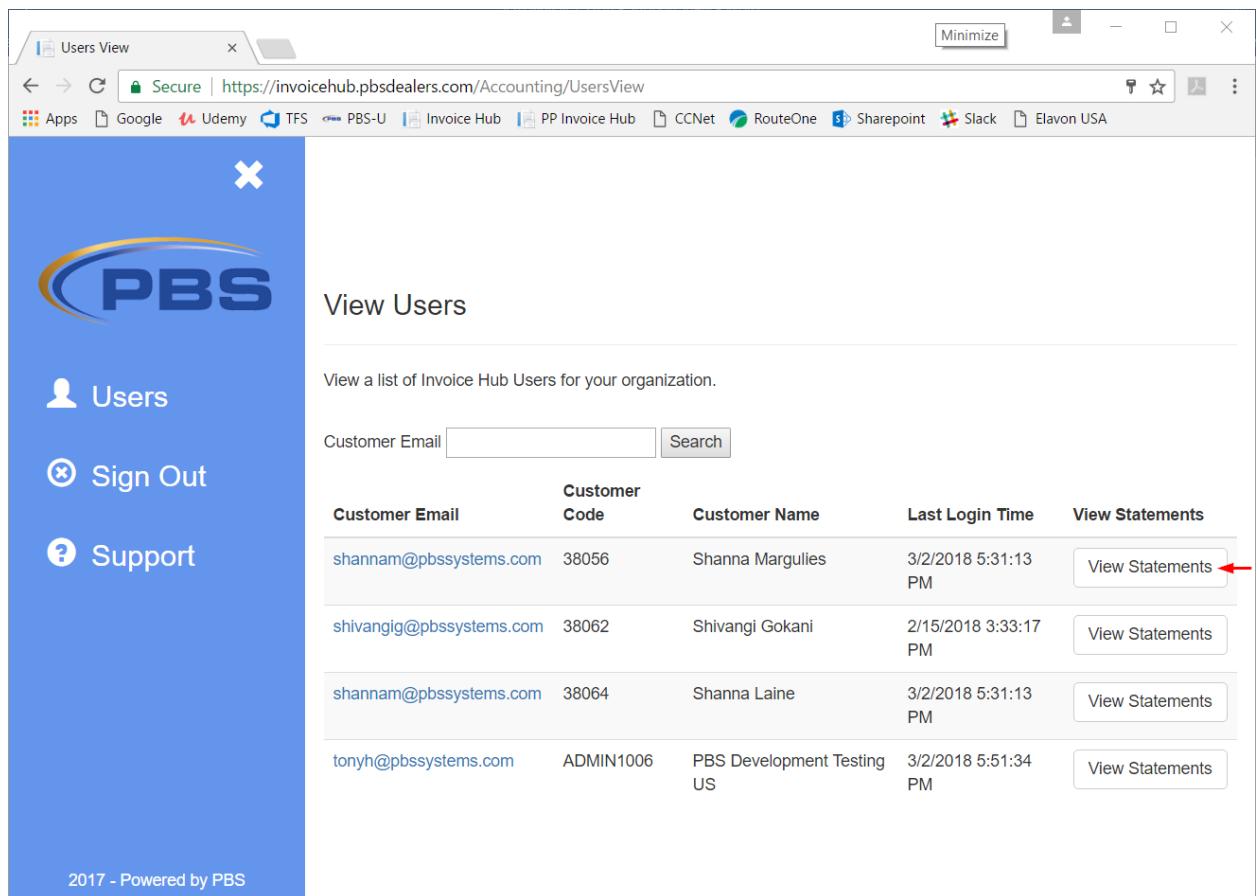


Navigating the Support View

After logging in to the support view you will see a list of customers that are enabled for Invoice Hub. If this list is long you can search by the customer email address. The list will show the customers email that they use to log into their Invoice Hub, the customer code, customer name, and the last time they logged in to their Invoice Hub.

Select the customer email hyperlink to send the customer an email directly from the support view.

Select View statements to view a list of the customer's statements that are on their Invoice Hub.



The screenshot shows the 'Users View' page of the PBS Invoice Hub. The left sidebar has links for 'Users', 'Sign Out', and 'Support'. The main content area is titled 'View Users' and displays a table of users. The table columns are: Customer Email, Customer Code, Customer Name, Last Login Time, and View Statements. The 'View Statements' column contains buttons for each user. A red arrow points to the 'View Statements' button for the first user, shannam@pbssystems.com.

Customer Email	Customer Code	Customer Name	Last Login Time	View Statements
shannam@pbssystems.com	38056	Shanna Margulies	3/2/2018 5:31:13 PM	View Statements →
shivangig@pbssystems.com	38062	Shivangi Gokani	2/15/2018 3:33:17 PM	View Statements
shannam@pbssystems.com	38064	Shanna Laine	3/2/2018 5:31:13 PM	View Statements
tonyh@pbssystems.com	ADMIN1006	PBS Development Testing US	3/2/2018 5:51:34 PM	View Statements

The Statement view will show a list of statements and their dates, that have been uploaded to Invoice Hub. You can search an invoice number to bring up any statements that have that invoice on them.

To view a PDF of the statement, select the blue PDF link next to the statement. To download a PDF of the statement, select the blue down arrow next the PDF link of the.

Choose view invoices to view all invoices on the corresponding statement

Statement View

Secure | https://invoicehub.pbsdealers.com/Accounting/StatementView

Users

Sign Out

Support

View Statements

Review up to 6 months of statements. Click the PDF link to open a PDF version of your statements.

Statement Date	Report	View Invoices
1/30/2018	PDF	View Invoices
12/30/2017	PDF	View Invoices
11/30/2017	PDF	View Invoices
10/31/2017	PDF	View Invoices

2017 - Powered by PBS

From the invoices view you can see the invoice number, date, due date and age. To view a PDF of the invoice, select the blue PDF link next to the invoice. To download a PDF of the invoice, select the blue down arrow next the PDF link of the invoice.

Invoice View Minimize Close

Secure | <https://invoicehub.pbsdealers.com/Accounting/InvoiceView>

Apps Google Udemy TFS PBS-U Invoice Hub PP Invoice Hub CCNet RouteOne Sharepoint Slack Elavon USA

PBS

×

Users

Sign Out

Support

View Statement Invoices (Tuesday, January 30, 2018)

Review up to 6 months of invoices. Click the PDF link to open a PDF version of your invoices.

Invoice #

Invoice Number	Report	Invoice Date	Invoice Due Date	Age
134241	PDF 	1/26/2018	2/15/2018	0
64167	PDF 	1/26/2018	2/15/2018	0
0004	PDF 	1/1/2018	1/21/2018	10
0003	PDF 	12/1/2017	12/30/2018	0
0002	PDF 	11/1/2017	11/30/2017	62
00001	PDF 	10/1/2017	10/21/2017	102

[< Back](#)

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To navigate back to a list of all users enabled for Invoice Hub, select users from the left menu.

Statement View

Secure | https://invoicehub.pbsdealers.com/Accounting/StatementView

Apps Google Udemy TFS PBS-U Invoice Hub PP Invoice Hub CCNet RouteOne Sharepoint Slack Elavon USA

PBS

Users ←

Sign Out

Support

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View Statements

Review up to 6 months of statements. Click the PDF link to open a PDF version of your statements.

Invoice # Search

Statement Date	Report	View Invoices
1/30/2018	PDF 	View Invoices
12/30/2017	PDF 	View Invoices
11/30/2017	PDF 	View Invoices
10/31/2017	PDF 	View Invoices

Invoice Hub – Customer

In this section we will go over Invoice Hub from the point of view of the dealerships customers. It will cover activating their account and navigating the website.

Activating your Invoice Hub Account

When a Dealership flags a customer as enabled for Invoice Hub, their customer will receive an email to Activate their Account.

This Email will contain a one-time password and a link to Activate their account.



Mon 07/31/2017 10:12 AM

pbs@pbssystems.com

[PBS-Invoice HUB] Welcome to Invoice Hub - PBS Dealership

To Shanna Margulies



Welcome to PBS Dealership

Invoice Hub

You are receiving this email because PBS Dealership has enabled you to view your invoices online. To activate your account, login using your email as your username and the one time password below.

Your one time password is: **RH3pfBYO**

ACTIVATE YOUR ACCOUNT

After activating your account you will be required to choose a new password.

This link will expire in 3 days.

If you have not signed up to use PBS Dealership Invoice Hub, please ignore this email.

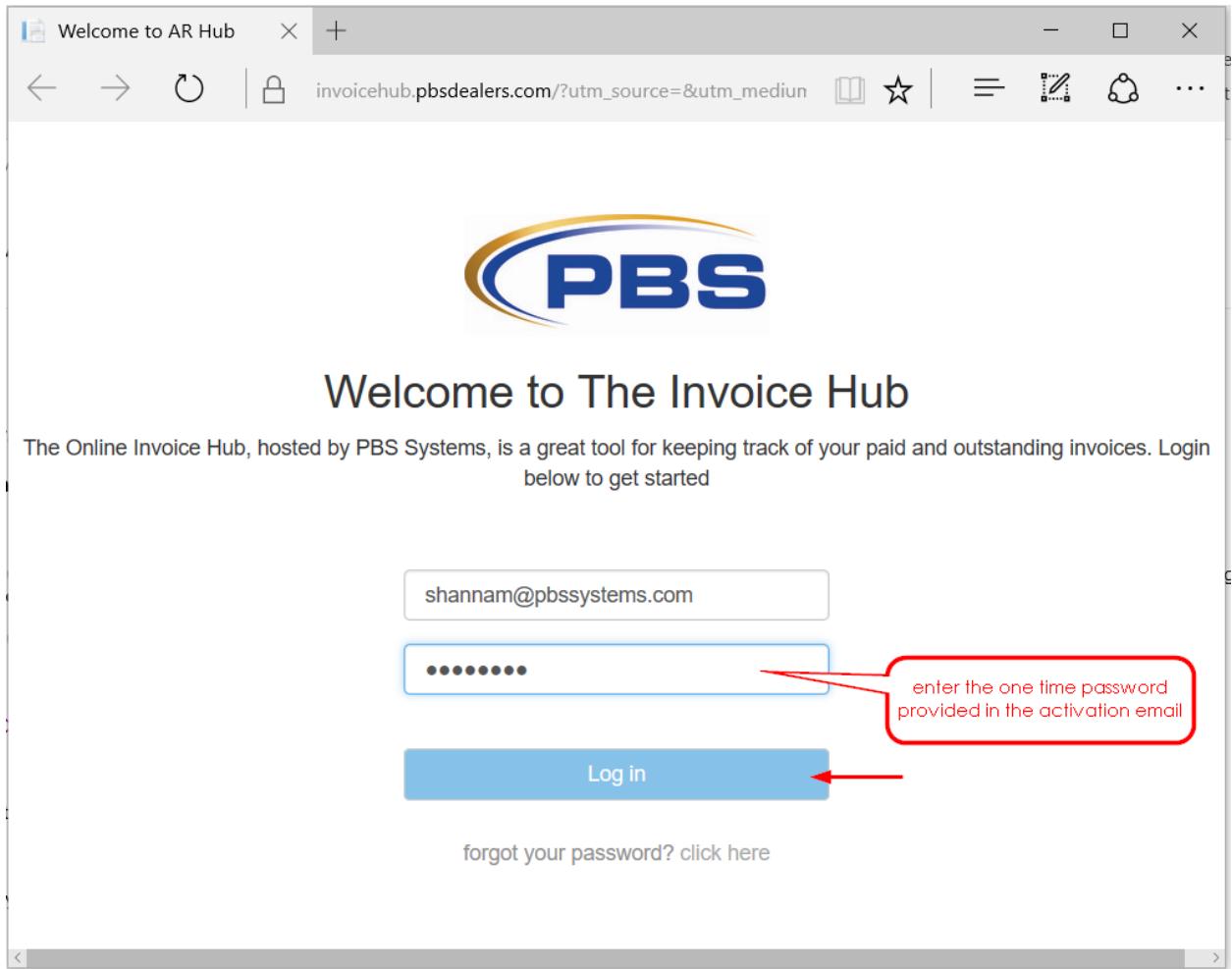
Thank You,

PBS Dealership

[visit our website](#) | [log in to your account](#) | [get support](#)

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Copy the one-time password and select the Activate your account link. This will open the Invoice Hub in the customer's default browser.



In the email field it will automatically fill the users email which they receive their statements to. This must be the email they use to activate their account.

Paste the one-time password into the password field and select login. This will bring you to the registration page where you will select your permanent

password.



Register.

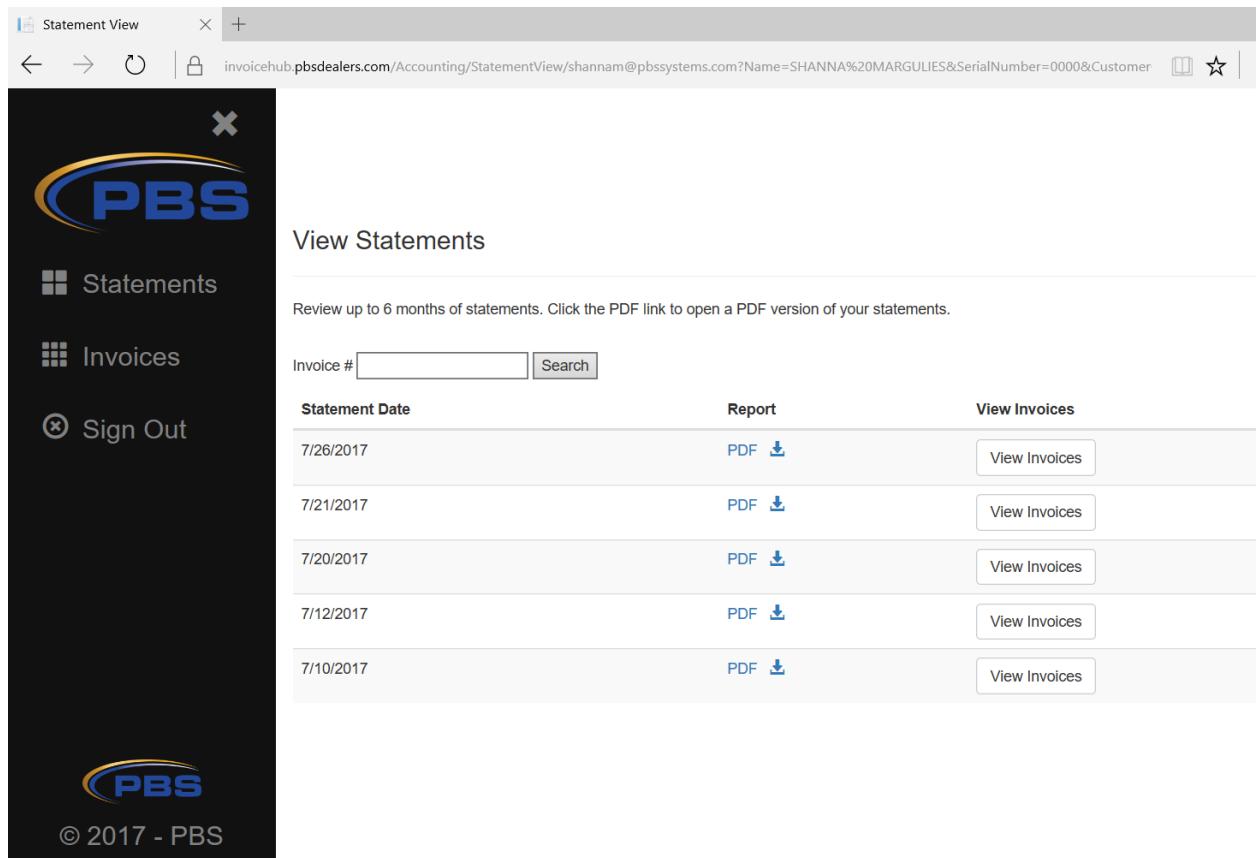
Create a new account.

User Email	shannam@pbssystems.com
Confirm Email Address	shannam@pbssystems.com
Password	*****
Confirm password	*****
<input type="button" value="Register"/> 	

Choose your new password and select Register. This will log you in to your new Invoice Hub account.

Navigating the Statement View of Invoice Hub

The home page of your Invoice Hub is the statements view. Here you will find a list of your recent statements. This page will only show your last 6 months of statements.



Statement View +

invoicehub.pbsdealers.com/Accounting/StatementView/shannam@pbssystems.com?Name=SHANNA%20MARGULIES&SerialNumber=00000&Customer

PBS

View Statements

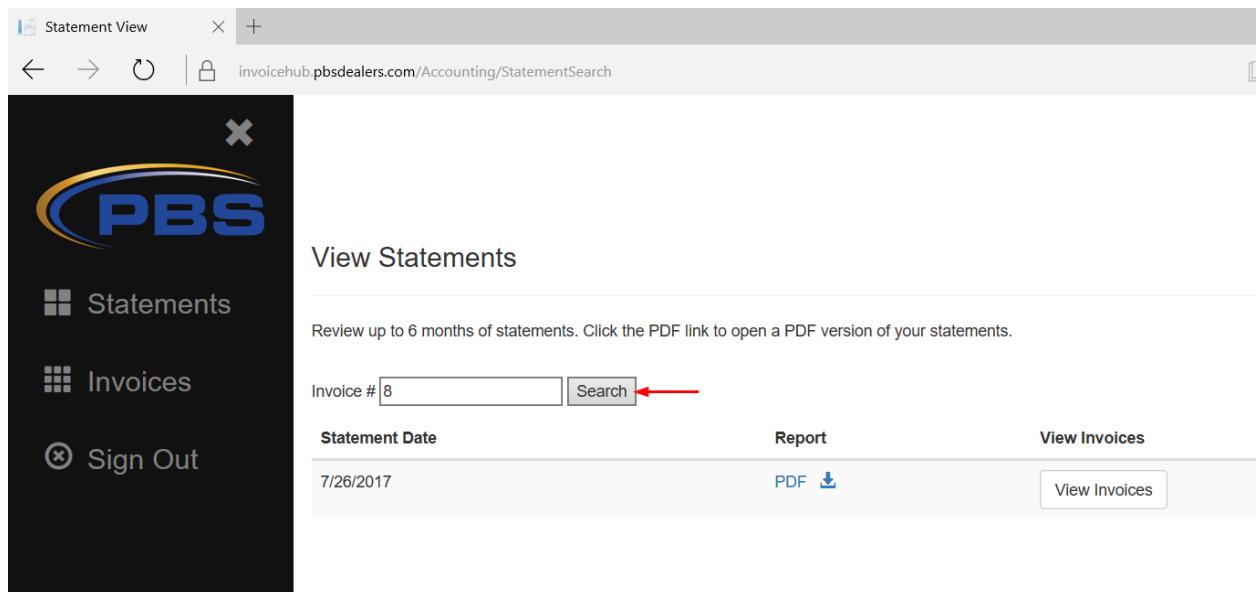
Review up to 6 months of statements. Click the PDF link to open a PDF version of your statements.

Invoice #

Statement Date	Report	View Invoices
7/26/2017	PDF 	View Invoices
7/21/2017	PDF 	View Invoices
7/20/2017	PDF 	View Invoices
7/12/2017	PDF 	View Invoices
7/10/2017	PDF 	View Invoices

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If you want to search for a statement which contains a specific invoice number, type the invoice number in the search bar and it will filter your invoices that contain that invoice.



Statement View +

invoicehub.pbsdealers.com/Accounting/StatementSearch

PBS

View Statements

Review up to 6 months of statements. Click the PDF link to open a PDF version of your statements.

Invoice #

Statement Date	Report	View Invoices
7/26/2017	PDF 	View Invoices

To View a PDF copy of your Statement, select the PDF link. Alternatively, if you wish to download the statement select the down arrow next to the PDF link.

Report

PDF 

Statement View 2Q0KZW5kc3RyZWFrDQplbm... +

data:application/pdf;base64,JVBERi0xLjMNCiXi48/TDQoxlDAb2JqDQo8PA0KL1R5cGUgL091dGxpbmVzDQo+Pg0KZW5k

Page: 1 of 1 Automatic Zoom



PBS Financial Systems Inc.
3131 114 Avenue SE, Calgary, AB T2Z 3X2
Phone: 800-665-6304
www.pbssystems.com

ACCOUNT STATEMENT
As of: 07/26/2017 Code:01005
Fax:
Phone: (403) 253-6304

SHANNA MARGULIES
3131 - 114 Ave. SE
Calgary, AB
T2X 3X2

<u>Invoice #</u>	<u>Date</u>	<u>Due Date</u>	<u>Description</u>	<u>Amount</u>	<u>Balance</u>
1	07/12/2017	07/12/2017	01005 - SHANNA MARGULIES	100.00	100.00
111173	05/10/2017	06/09/2017	SERVICE INVOICE	1,650.33	1,650.33
111254	05/03/2017	06/02/2017	SERVICE INVOICE	380.71	380.71
111265	05/02/2017	06/01/2017	SERVICE INVOICE	29.97	29.97
2	07/12/2017	07/12/2017	01005 - SHANNA MARGULIES	150.00	150.00
3	07/12/2017	07/12/2017	01005 - SHANNA MARGULIES	56.00	56.00
4	07/20/2017	07/30/2017	01005 - SHANNA MARGULIES	400.00	400.00
5	07/21/2017	07/21/2017	01005 - SHANNA MARGULIES	100.00	100.00
8	07/26/2017	07/30/2017	01005 - SHANNA MARGULIES	80.00	80.00
				Total	2,947.01

Account Aging Analysis

Current	31 - 60	61 - 90	Over 90
886.00	0.00	2,061.01	0.00

Note: If you are unable to view the PDF try opening Invoice Hub with Google Chrome or Firefox.

To view invoices on a particular statement, select the View Invoices button next to the statement you wish to view.

View Invoices

View Statement Invoices (Wednesday, July 26, 2017)

Review up to 6 months of invoices. Click the PDF link to open a PDF version of your invoices.

Invoice Number	Report	Invoice Date	Invoice Due Date
8	PDF	7/26/2017	7/30/2017
5	PDF	7/21/2017	7/21/2017
4	PDF	7/20/2017	7/30/2017
1	PDF	7/12/2017	7/12/2017
2	PDF	7/12/2017	7/12/2017
3	PDF	7/12/2017	7/12/2017

[back](#)

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Navigating the Invoices View of Invoice Hub

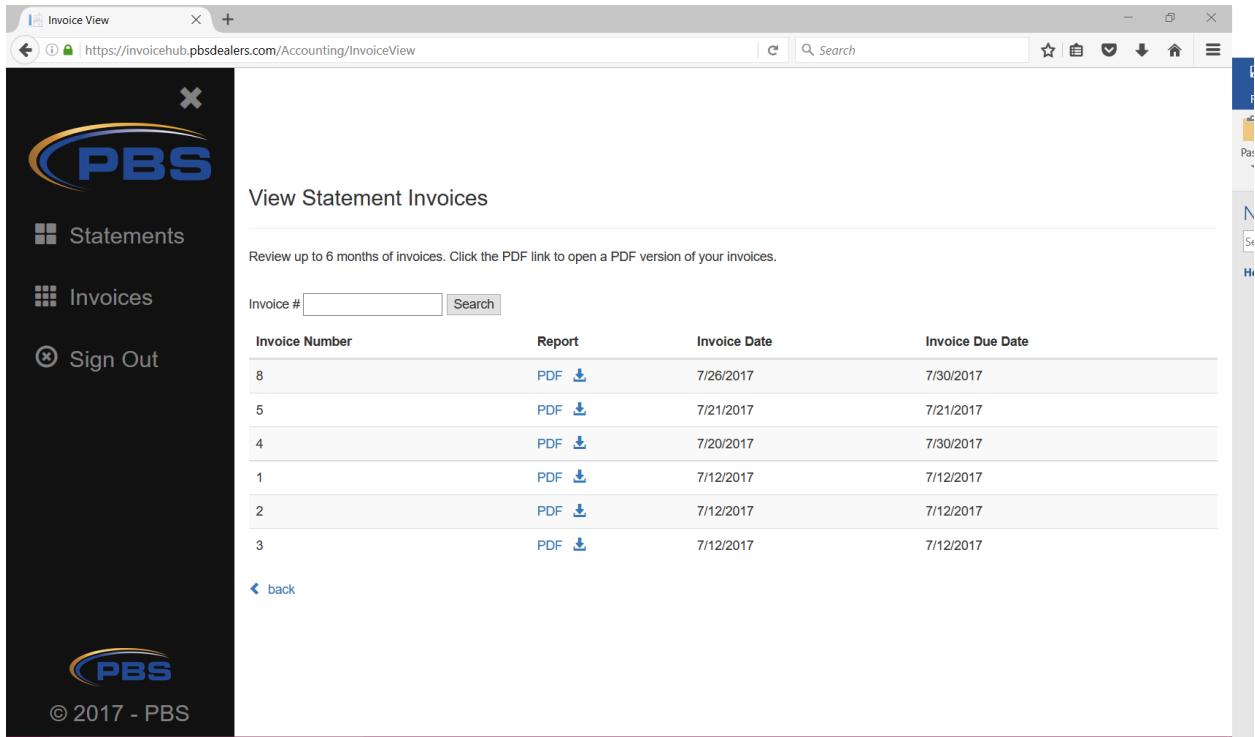
The Invoices view will list all invoices that have been generated for you in the last 6 months since your dealership started using Invoice Hub.

Select Invoices from the left side menu to access this view.

- Statements
- Invoices
- Sign Out

The Invoice view lists any service orders, parts orders or receivables invoices that have been generated for you by the dealership. This view functions the same as

the statements view with the options to search for an invoice, as well as view or download a PDF of the invoice.



The screenshot shows a web browser window titled "Invoice View" with the URL <https://invoicehub.pbsdealers.com/Accounting/InvoiceView>. The page is titled "View Statement Invoices" and displays a table of invoices. The table has columns for "Invoice Number", "Report", "Invoice Date", and "Invoice Due Date". Each row in the table contains an "Invoice Number" (8, 5, 4, 1, 2, 3), a "Report" link (PDF with a download icon), an "Invoice Date" (7/26/2017, 7/21/2017, 7/20/2017, 7/12/2017, 7/12/2017, 7/12/2017), and an "Invoice Due Date" (7/30/2017, 7/21/2017, 7/30/2017, 7/12/2017, 7/12/2017, 7/12/2017). To the left of the table is a sidebar with links for "Statements", "Invoices", and "Sign Out". The PBS logo is visible at the bottom of the sidebar. The footer of the page also features the PBS logo and the text "© 2017 - PBS".

Invoice Number	Report	Invoice Date	Invoice Due Date
8	PDF 	7/26/2017	7/30/2017
5	PDF 	7/21/2017	7/21/2017
4	PDF 	7/20/2017	7/30/2017
1	PDF 	7/12/2017	7/12/2017
2	PDF 	7/12/2017	7/12/2017
3	PDF 	7/12/2017	7/12/2017