

V10 INVOICE HUB

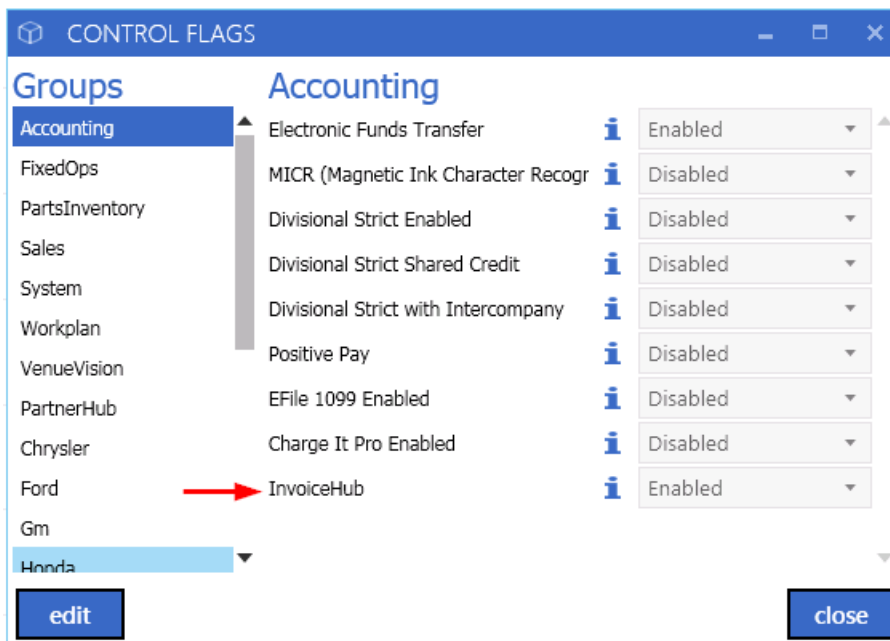
Invoice Hub is a great tool for dealerships to provide their customers with a portal to keep track of their paid and outstanding invoices online. This document will cover setting up Invoice Hub within the DMS for a dealership, how to use Invoice Hub from the perspective of a dealership, and how to use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

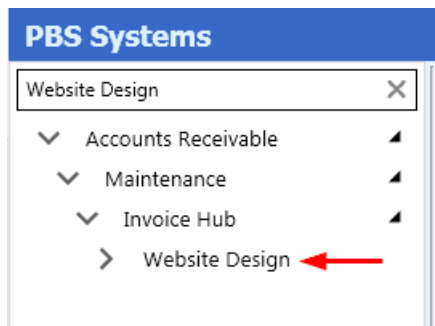


Setting up Website Design

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 screenshot of the "INVOICE HUB WEBSITE MAINTENANCE" window. The window has a blue title bar with the text "INVOICE HUB WEBSITE MAINTENANCE" and standard window controls. The main content area is light blue and contains several configuration options:

- Logo:** Displays the PBS logo. Below it is a blue button labeled "change/upload".
- Menu Background Color:** A dropdown menu currently set to "CornflowerBlue".
- Menu Text Color:** A dropdown menu currently set to "White".
- Support Email:** A text input field containing "tonyh@pbssystemms.com".
- Support Password:** A text input field containing "Tg5sOE0m".
- Email Header:** A rich text editor with a toolbar (including icons for bold, italic, underline, bulleted list, numbered list, link, unlink, and text color) and a large text area.
- Email Footer:** Another rich text editor with a similar toolbar and text area. The footer text is:

Shanna Margulies
 Certified Product Specialist |Products and Solutions |PBS Systems Group
 1-800-665-6304 ext. 388 | 3131-114 Ave SE, Calgary, AB T2Z 3X2

 At the bottom of the window are three buttons: "preview", "ok", and "cancel".

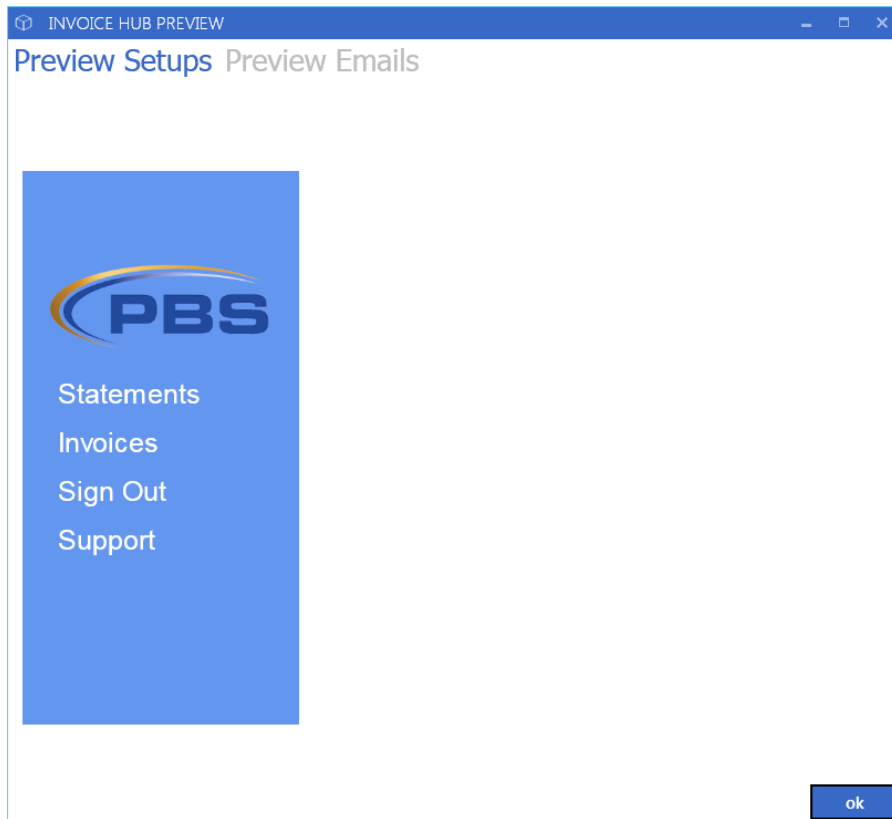
A **Menu Background color** and **Menu Text Color** will also need to be chosen. This should match the dealerships color scheme and branding.

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	<div>Activate</div> <div>ResetPassword</div> <div>Deactivate</div>



Welcome to PBS Development Testing US

Invoice Hub

You are receiving this email because PBS Development Testing US has enabled you to 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

Search

Contact Settings

Workplan

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 AB	Cell	(403) 253-6304
		County		Fax	
Business	Yes	Contact	GLEN 306-861-78	Postal Code	T2Z 3X2
				Email	shannam@pbssystem.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.

MULTIPLE EMAIL MAINTENANCE

Search

Communication Preference	Address	Label
Used as 'AR' default email	shannam@pbssystems.com	Shanna
	shannamargulies@gmail.com	second

Customize

Used as 'AR' default email

Used as 'AP' default email

Export

add edit delete close

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

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 AB Cell: (403) 253-6304
 County: Postal Code: T2Z 3X2 Fax: Email: shannam@pbssystems.com

Business: Yes Contact: GLEN 306-861-78

CONTACT SETTINGS General Payables **Receivables** Fixed Ops Showroom Workplan

RECEIVABLES INFORMATION

Receivable: 110 - Accts. Rec.-Service & Parts
 Cash: 103A - TD Canada Trust
 Credit Limit: \$5,000.00
 Terms / Days: Net 30
 Default Invoice: Disabled

STATEMENTS

Generate Statements: Enabled
 Email Statements: Enabled
 Dunning Messages: Disabled
 Service Charges: Disabled
 Last Statement: 07/26/2017
 Invoice Hub: Enabled

DISTRIBUTION

Account	Type	Description
603		Interest Income

SERVICE CHARGES

Type: Percent
 Amount: 0.00

BILLING ADDRESS

Code	Address	Default
Default	3131 - 114 Ave. SE Calgary, AB T2Z 3X2	<input checked="" type="checkbox"/>

AR Workplan AR Memo

HISTORY

Date	User	Action	Result
------	------	--------	--------

Search

Contact Settings Workplan

Contact Settings

Apply and Close
 Save Changes
 Cancel Changes

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

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 AB	Cell	(403) 253-6304
		County		Fax	
Business	Yes	Contact	GLEN 306-861-78	Postal Code	T2Z 3X2
				Email	shannam@pbssystems.com

CONTACT SETTINGS

General Payables **Receivables** Fixed Ops Showroom Workplan

RECEIVABLES INFORMATION

Receivable	110 - Accts. Rec.-Service & Parts
Cash	103A - TD Canada Trust
Credit Limit	\$5,000.00
Terms / Days	Net 30
Default Invoice	Disabled

STATEMENTS

Generate Statements	Enabled
Email Statements	Enabled
Dunning Messages	Disabled
Service Charges	Disabled
Last Statement	07/26/2017
Invoice Hub	Enabled

DISTRIBUTION

Account	Type	Description
603		Interest Income

SERVICE CHARGES

Type	Percent
Amount	0.00

BILLING ADDRESS

Code	Address	Default
Default	3131 - 114 Ave. SE Calgary, AB T2Z 3X2	<input checked="" type="checkbox"/>

HISTORY

Date	User	Action	Result
------	------	--------	--------

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

INVOICE HUB

Enabling Invoice Hub will send this customer an email, are you sure you want to continue? To apply these changes you must save the contact record.

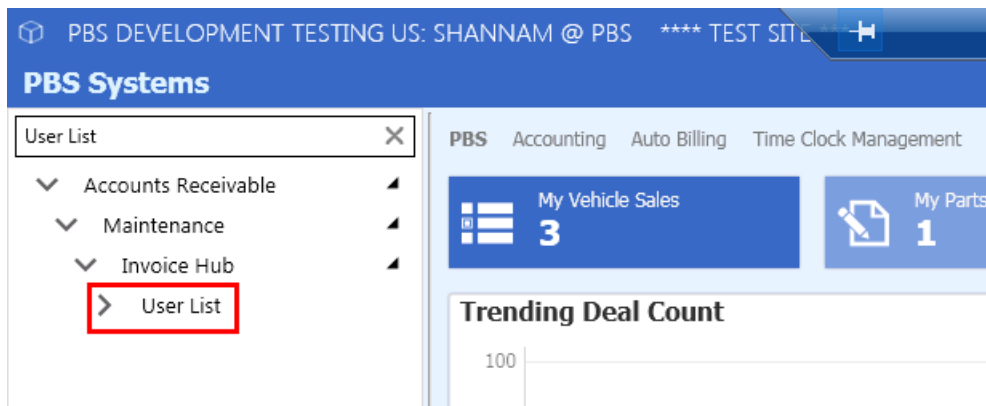
yes no

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.

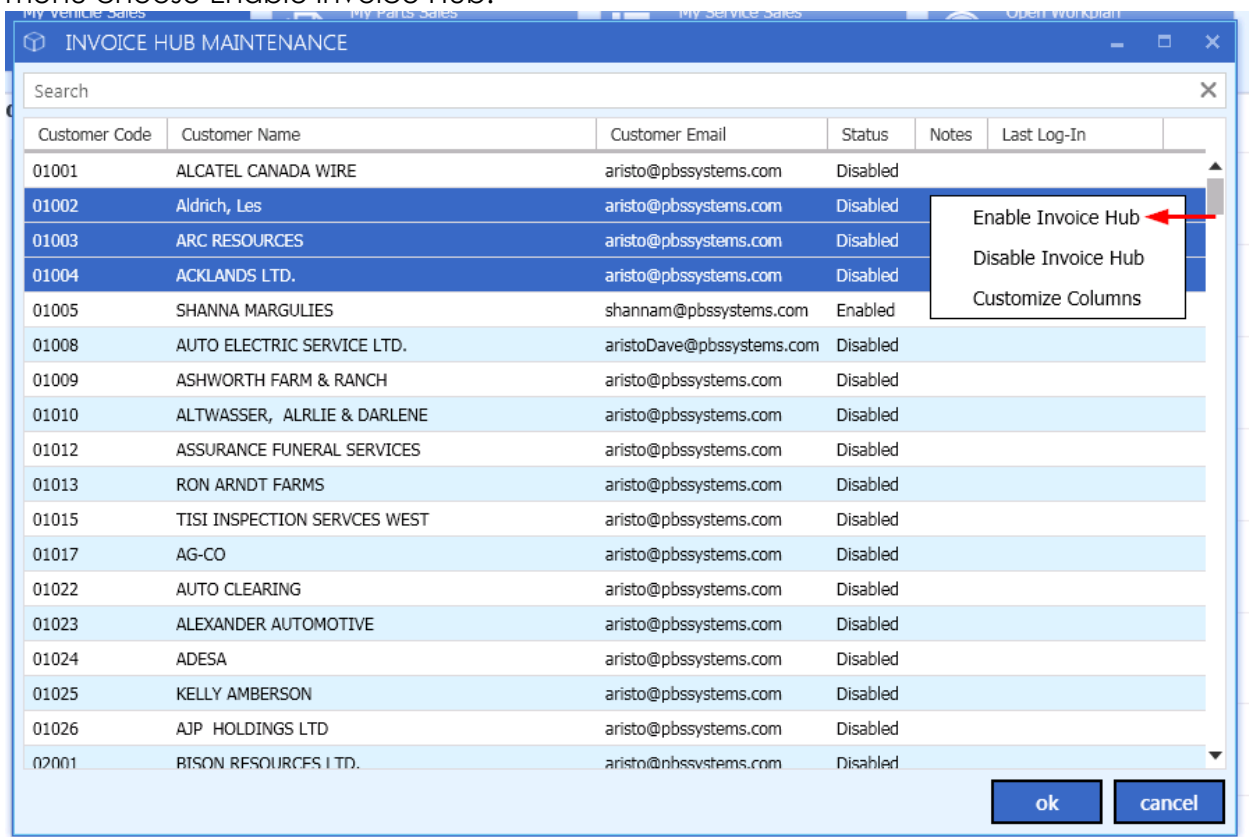


The Invoice Hub user list will bring up a list of all customers currently enabled for generate statements. If the customer, you are looking for is not in this list you will need to go into the contact record and enable them for generate statements. This list also gives you information such as which customers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

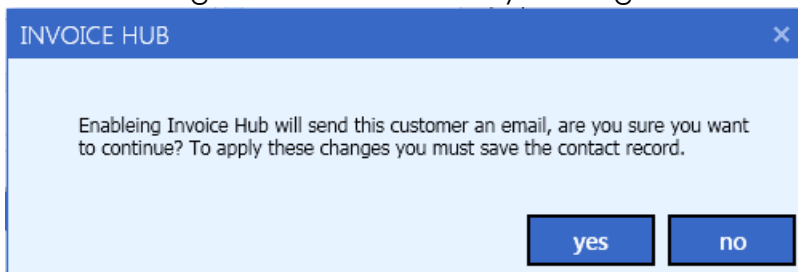
INVOICE HUB MAINTENANCE					
Search					
Customer Code	Customer Name	Customer Email	Status ↓	Last Log-In	Notes
MARGULIES1		shannam@pbssystems.com	LostUser		Deleted us
01005	SHANNA MARGULIES	shannam@pbssystems.com	Enabled	7/28/2017 3:36:11 PM	
08021	24-7 ENTERPRISES LTD.	ireneh@pbssystems.com	Enabled	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@pbssystems.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:

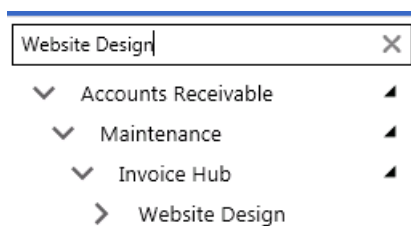
You can Disable Invoice Hub for a customer the same way you enabled them. Follow the same steps laid out above, but choose disable instead of enable. Please note that disabling Invoice Hub for a customer will send them an email notifying them they no longer have access to their Invoice Hub and they will 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.

INVOICE HUB WEBSITE MAINTENANCE

Logo



change / upload

Menu Background Color: CornflowerBlue

Menu Text Color: White

Support Email: aristo@pbssystem.com

Support Password: TxbIZ9Nq

Email Header

Email Footer

Shanna Margulies
Certified Product Specialist | Products and Solutions | PBS Systems Group

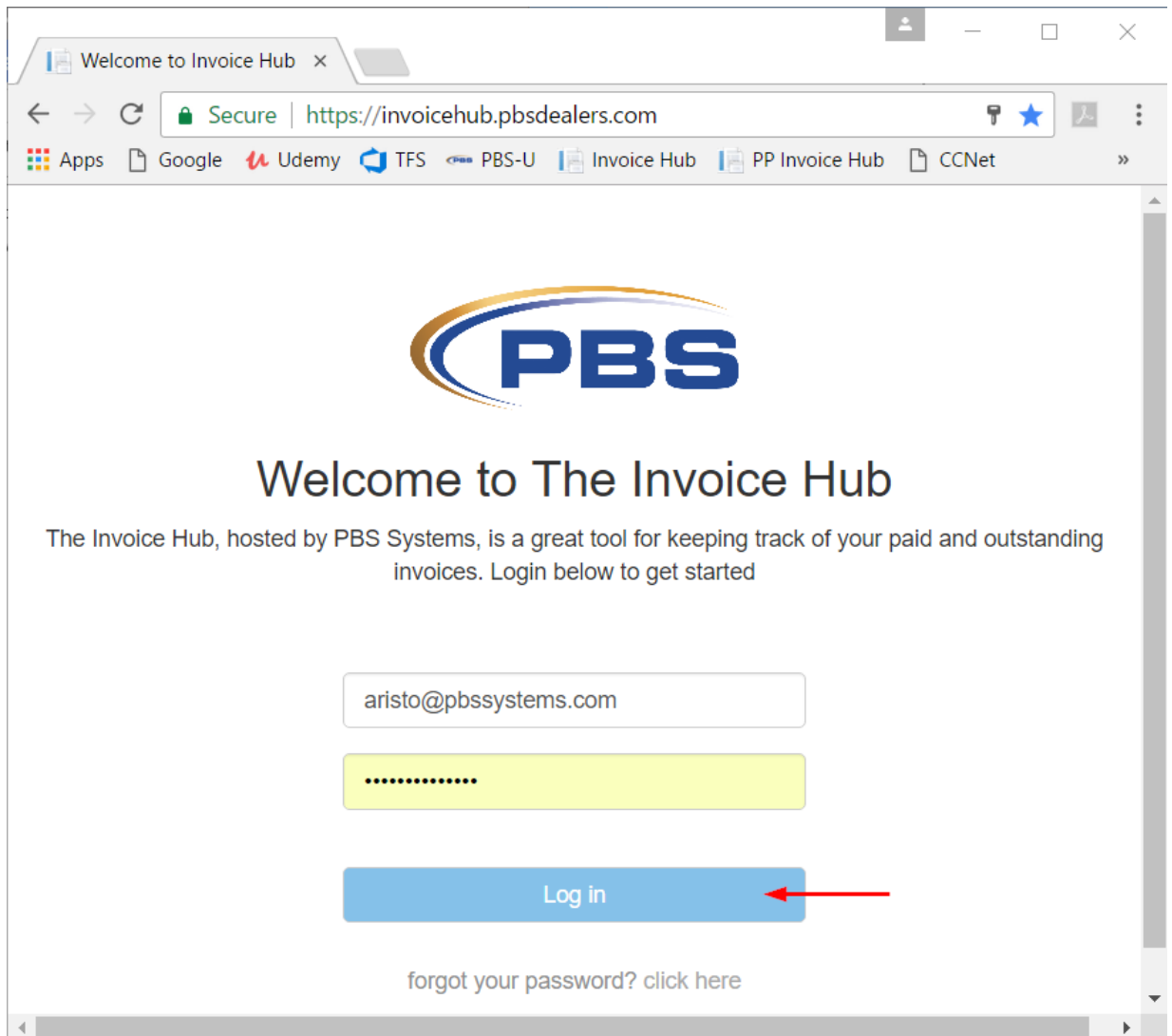
preview ok cancel

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 a web browser window with the URL <https://invoicehub.pbsdealers.com/Accounting/UsersView>. The page title is 'View Users'. Below the title, there is a search bar for 'Customer Email' and a 'Search' button. The main content area displays a table of users:

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

A red arrow points to the 'View Statements' button for the first user, shannam@pbssystems.com. The left sidebar contains the PBS logo and navigation links: Users, Sign Out, and Support. The footer text reads '2017 - Powered by PBS'.

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 o 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 x

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

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



Users

Sign Out






Support

2017 - Powered by PBS

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

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 x

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

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

 X

Users

Sign Out







Support

2017 - Powered by PBS

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


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


Statement View



Minimize


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


AppsGoogleUdemyTFSPBS-UInvoice HubPP Invoice HubCCNetRouteOneSharepointSlackElavon USA





 Users 

 Sign Out





 Support

2017 - Powered by 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
1/30/2018	PDF 	<input type="button" value="View Invoices"/>
12/30/2017	PDF 	<input type="button" value="View Invoices"/>
11/30/2017	PDF 	<input type="button" value="View Invoices"/>
10/31/2017	PDF 	<input type="button" value="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](#)

Copyright © PBS Systems, All rights reserved.

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

Welcome to AR Hub

invoicehub.pbsdealers.com/?utm_source=&utm_medium=

Welcome to The Invoice Hub

The Online Invoice Hub, hosted by PBS Systems, is a great tool for keeping track of your paid and outstanding invoices. Login below to get started

shannam@pbssystems.com

.....

enter the one time password provided in the activation email

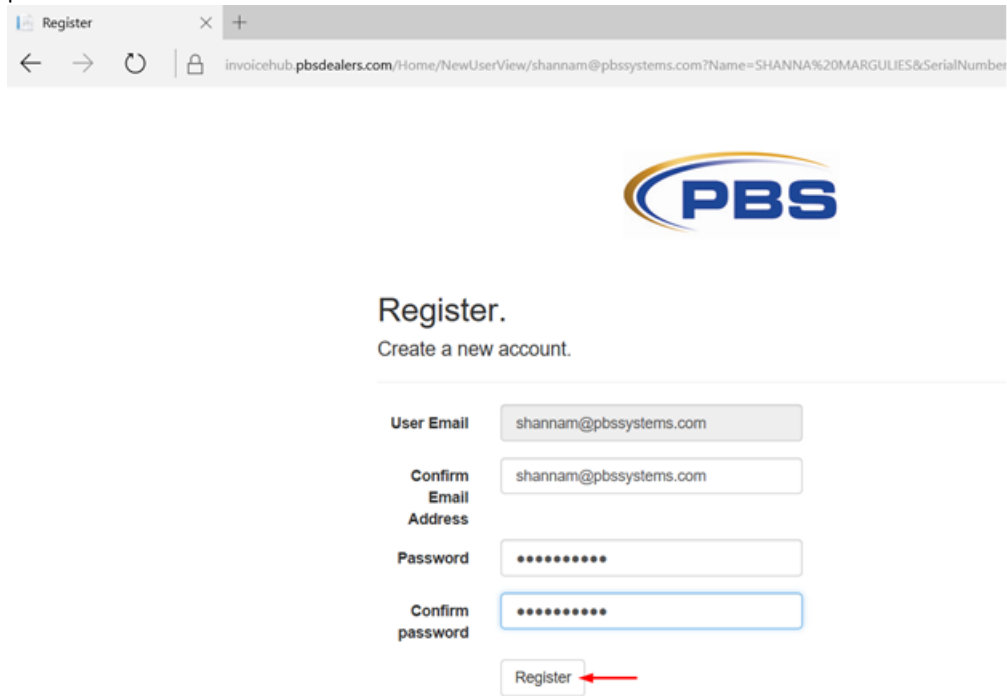
Log in

forgot your password? [click here](#)

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.



The screenshot shows a web browser window with the title 'Register'. The address bar displays 'invoicehub.pbsdealers.com/Home/NewUserView/shannam@pbssystems.com?Name=SHANNA%20MARGULIES&SerialNumber'. The page features the PBS logo at the top. Below the logo, the heading 'Register.' is followed by the instruction 'Create a new account.' The registration form includes the following fields: 'User Email' (shannam@pbssystems.com), 'Confirm Email Address' (shannam@pbssystems.com), 'Password' (masked with dots), and 'Confirm password' (masked with dots). A 'Register' button is located at the bottom of the form, with a red arrow pointing to it.

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=0000&Customer

PBS

- Statements
- Invoices
- Sign Out

© 2017 - 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 ↓	<input type="button" value="View Invoices"/>
7/21/2017	PDF ↓	<input type="button" value="View Invoices"/>
7/20/2017	PDF ↓	<input type="button" value="View Invoices"/>
7/12/2017	PDF ↓	<input type="button" value="View Invoices"/>
7/10/2017	PDF ↓	<input type="button" value="View Invoices"/>

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

- Statements
- Invoices
- Sign Out

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 ↓	<input type="button" value="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 x 2Q0KZW5kc3RyZWVfDQplbm... x +

data:application/pdf;base64,JVBERi0xLjMNCiX48/TDQoxIDAgb2JqDQo8PA0KL1R5cGUGL091dGxpbnVzDQo+Pg0KZW5k Search

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

Invoice #	Date	Due Date	Description	Amount	Balance
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 Invoices

Invoice View

2Q0KZW5kc3RyZWFTDQplbm...

https://invoicehub.pbsdealers.com/Accounting/InvoiceView

Search

- Statements
- Invoices
- Sign Out

© 2017 - PBS

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 # Search

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

[back](#)

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

© 2017 - PBS

View

Review

Invoice

Invoice

8


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.

Invoice View

https://invoicehub.pbsdealers.com/Accounting/InvoiceView


Search



Statements

Invoices







Sign Out


© 2017 - PBS

View Statement Invoices

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
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](#)