VM3COP20.95 Invoice Processing on B2B Router Platform

1 Navigate to **https://www.b2brouter.net/uk/**
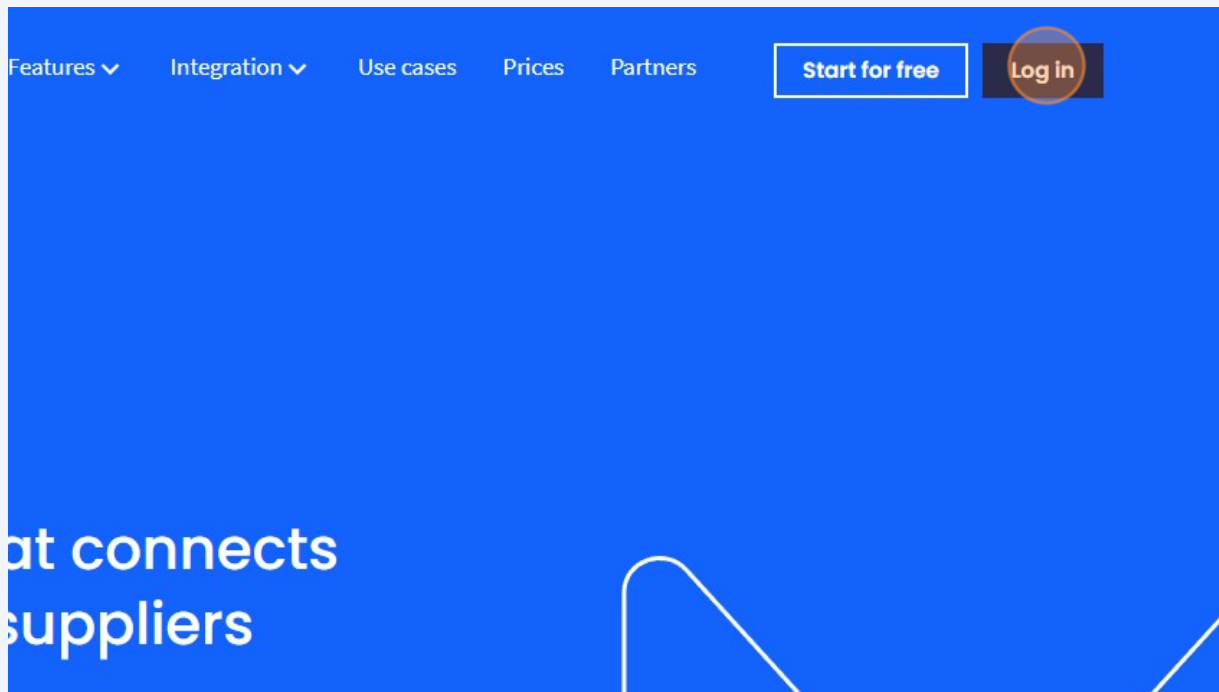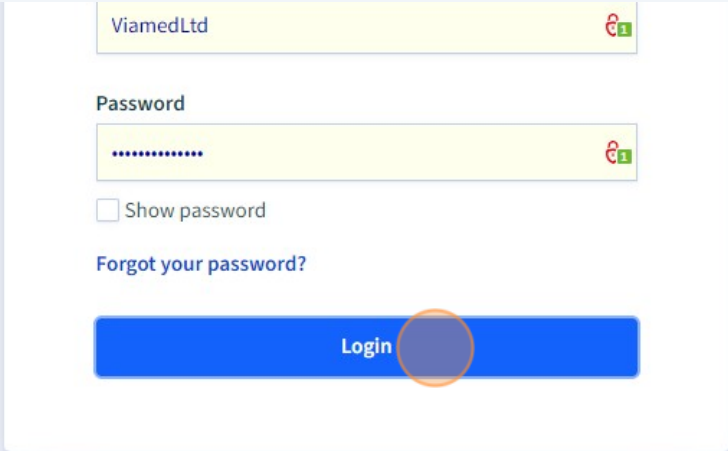
2 Click "Log in"

3 Enter the login details shown on "B2B Router" CRM Account Memo.

4 Click Login.

ViamedLtd

Password

••••••••••••

☐ Show password

Forgot your password?

Login

You do not have an account? Sign up

5 Click "Income"

Viamed Ltd BUSINESS

Overview   Contacts   Income   Expenses   Banks   Catalogue   Reports   Archive   Activity

Activity summary

Income and expenses

Difference

7,000

6,000

6 Click "Expired"

Viamed Ltd BUSINESS   ⌄   ⚙ ⚡

Overview   Contacts   **Income**   Expenses   Banks   Catalogue   Reports   Archive   Activity

Income   [Find   ] [🔍 Search]   [▽ Filters]

Issued invoices   All   New   Sent   Expired ⚠   Validation error   Error

  Commercial invoices   ☐   NUMBER ⌄   STATUS ⌄   CONTACT

  Tickets   ☐   RVM150316-1   🟢 SENT   York Teaching Hospital Nhs.
                                                                                 1 FINANCE 230108

Templates (recurring)   ☐   RVM150307-1   🟢 SENT   FINANCE DEPARTMENT
                                                                                 FINANCE DEPARTMENT

Proforma   ☐   RVM150276-1   🟢 SENT   Wirral University Teaching..
                                                                                 WUTHC 1 700095
Quotes
                                 ☐   RVM150268-1   🟢 SENT   North Cumbria University...

---

7 Either in IntraStats navigate to the Xero logo or go directly to URL
https://login.xero.com

---

8 Type in your user name and password as provided by Accounts.

9   Click "Log in"

Log in to Xero

catrin.hollings@viamed.co.uk

••••••••

Log in

Forgot password?   Can't log in?

10   In B2BRouter copy the first invoice number which shows at the top of the expired list.

Overview   Contacts   **Income**   Expenses   Banks   Catalogue   Reports   Archive   Activity

Income

| Find | | 🔍 Search | ▽ Filters |

Issued invoices

All   New   Sent   **Expired** ⚠   Validation error   Error

- Commercial invoices

- Tickets

Templates (recurring)

Proforma

Quotes

Despatch advices

Orders

	NUMBER ˅	STATUS ˅	CONTACT
☐	RVM149838-1	● SENT	University Hospitals of Derl
☐	RVM149660-1	● SENT	North Cumbria University...
☐	RVM149640-1	● SENT	FINANCE DEPARTMENT FINANCE DEPARTMENT
☐	RVM139567-1, RVM139567-2, RVM139567-3	● READ	PAYMENT SECTION S37A PAYMENT SECTION S37A
☐	RVM148721-1	● READ	RLNP BILL TO
☐	RVM149090-1	● READ	1 FIN ACRE_HOUSE

11 In Xero, click the magnifying glass and paste the invoice number. Please make sure that you do not include any spaces at the beginning as it will not show you the correct results.

12 Next to the relevant invoice number, click the arrow button. This will either state Paid (in green) or Awaiting Payment (in orange).

13 If the invoice has been paid, in B2B Router click the tickbox to the left of the invoice number. Continue down the list of expired invoices and select all invoices which have been paid.

Income

Find   [🔍 Search]   [🔽 Filters]

Issued invoices

— Commercial invoices

— Tickets

Templates (recurring)

Proforma

Quotes

Despatch advices

Orders

	NUMBER ⌄		STATUS ⌄	CONTACT
☐	RVM149838-1		● SENT	University Hospitals of Derl
☐	RVM149660-1		● SENT	North Cumbria University...
☐	RVM149640-1		● SENT	FINANCE DEPARTMENT FINANCE DEPARTMENT
☐	RVM139567-1, RVM139567-2, RVM139567-3		● READ	PAYMENT SECTION S37A PAYMENT SECTION S37A
☐	RVM148721-1		● READ	RLNP BILL TO
☐	RVM149090-1		● READ	1 FIN ACRE_HOUSE 1 FIN ACRE_HOUSE

All   New   Sent   **Expired ⚠**   Validation error   Error

14 Click "Mark as"

[+ Create ⌄]   [? Help]   [👤]

Activity

5 selected ✕   Send   Download copy ⌄   Mark as ⌄   Check status   Delete

CONTACT	TAXABLE BASE ⌄	TOTAL ⌄	DATE ⌄	SENDING ⌄	DUE DATE ⌄	
University Hospitals of Derby...	63.30 GBP	75.96 GBP	2024-05-09	2024-05-10	2024-06-08	⋮
North Cumbria University...	71.10 GBP	85.32 GBP	2024-04-30	2024-05-01	2024-05-30	⋮
FINANCE DEPARTMENT FINANCE DEPARTMENT	136.80 GBP	164.16 GBP	2024-04-29	2024-04-30	2024-05-29	⋮
PAYMENT SECTION S37A PAYMENT SECTION S37A	1,042.02 GBP	1,250.42 GBP	2024-04-10	2024-04-26	2024-05-10	⋮

15 Click "Closed"

CONTACT	TAXABLE BASE ⌄	TOTAL ⌄	DATE ⌄			
University Hospitals of Derby...	63.30 GBP	75.96 GBP	2024-05-09		...08	⋮
North Cumbria University...	71.10 GBP	85.32 GBP	2024-04-30		...30	⋮
FINANCE DEPARTMENT FINANCE DEPARTMENT	136.80 GBP	164.16 GBP	2024-04-29	2024-04-30	2024-05-29	⋮
PAYMENT SECTION S37A PAYMENT SECTION S37A	1,042.02 GBP	1,250.42 GBP	2024-04-10	2024-04-26	2024-05-10	⋮
RLNP BILL TO	1,051.20 GBP	1,261.44 GBP	2024-04-22	2024-04-24	2024-05-22	⋮
1 FIN ACRE_HOUSE 1 FIN ACRE_HOUSE	432.00 GBP	518.40 GBP	2024-03-28		2024-04-27	⋮
University Hospitals of Derby...	155.00 GBP	186.00 GBP	2024-02-28	2024-02-29	2024-03-29	⋮

5 selected ✕   Send   Download copy ⌄   Mark as ⌄   Check status   Delete

New
Sent
Accepted
Registered
Refused
Closed

16 Click "Yes"

The status of all selected invoices will be changed, do you want to continue?

Cancel   Yes

	CONTACT	TAXABLE BASE ⌄	TOTAL ⌄	DATE ⌄		
● SENT	University Hospitals of Derby...	63.30 GBP	75.96 GBP	2024-05-09		Accepted
● SENT	North Cumbria University...	71.10 GBP	85.32 GBP	2024-04-30		Registered
		6.80 GBP	164.16 GBP	2024-04-29	2024-04-30	Refused
		2.02 GBP	1,250.42 GBP	2024-04-10	2024-04-26	Closed
		1.20 GBP	1,261.44 GBP	2024-04-22	2024-04-24	
● READ	1 FIN ACRE_HOUSE	2.00 GBP	518.40 GBP	2024-03-28		
● READ	University Hospitals of Derby...	155.00 GBP	186.00 GBP	2024-02-28	2024-02-29	
● SENT	University Hospitals of Derby... University Hospitals of Derby...	343.80 GBP	412.56 GBP	2024-02-23	2024-02-27	
● READ	BILL TO ADDRESS BILL TO ADDRESS	216.00 GBP	259.20 GBP	2024-01-26	2024-01-30	
● SENT	University Hospitals of Derby... University Hospitals of Derby...	63.30 GBP	75.96 GBP	2023-10-09	2023-10-25	

17 Now you need to check there are no outstanding orders which have not been invoiced. Click "Orders"

Tickets

Templates (recurring)

Proforma

Quotes

Despatch advices

Orders

	RVM150316-1	● SENT	York Teaching Hospital Nhs 1 FINANCE 230108
	RVM150307-1	● SENT	FINANCE DEPARTMENT FINANCE DEPARTMENT
	RVM150276-1	● SENT	Wirral University Teaching.. WUTHC 1 700095
	RVM150268-1	● SENT	North Cumbria University...
	RVM150111-1	● SENT	UCLH NHS Foundation Trus
	RVM150111	● NEW	UCLH NHS Foundation Trus
	RVM150050	● SENT	BILL TO ADDRESS BILL TO ADDRESS
	RVM149944-1	● SENT	University Hospitals of Derb University Hospitals of Derby
	RVM150050-1	● SENT	The Newcastle upon Tyne.. The Newcastle upon Tyne...
	RVM150043-1	● SENT	AGH Solutions Limited

18 Click on the filters icon.

USINESS

Contacts **Income** Expenses Banks Catalogue Reports Archive Activity

Order number   🔍 Search   ▽ Filters

	ORDER NUMBER ⌄	STATUS ⌄	ORDER DATE ⌄	ACCOUNT ⌄	DELIVE
	RBSN400150149	● ACCEPTED	2024-06-06	FINANCE DEPARTMENT	
	RLNP400101516	● ACCEPTED	2024-06-06	RLNP BILL TO	
	640155444	● ACCEPTED	2024-06-04	University Hospitals of Derby...	2024-0
	RBSN400149878	● CLOSED	2024-06-03	FINANCE DEPARTMENT	
	RCBN400164403	● CLOSED	2024-06-03	1 FINANCE 230108	

19 Click "Accepted"

Order number

File

Delivery place

| Imported file | Name of the pla

Date

Date type

From

Order date

Y-MM-DD

Status

☑ Everyone   ☐ Accepted   ☐ Closed
☐ Received   ☐ Refused   ☐ Cancelled

Country

Apply   Delete

---

20 Click "Received"

Templates (recurring)

Proforma

Quotes

Despatch advices

Orders

Imported file

Date

Date type

From

Order date

Y-MM-DD

Status

☑ Everyone   ☑ Accepted   ☐ Cl
☐ Received   ☐ Refused   ☐ Ca

Country

Apply   Delete

☐ ORDER NUMBER ⌄   STATUS ⌄   ORDER DATE ⌄   ACCOUNT ⌄

21 Click "Apply"

22 Selecting the first number, copy the order number.

23 Go back to Intrastats menu and click this dropdown.
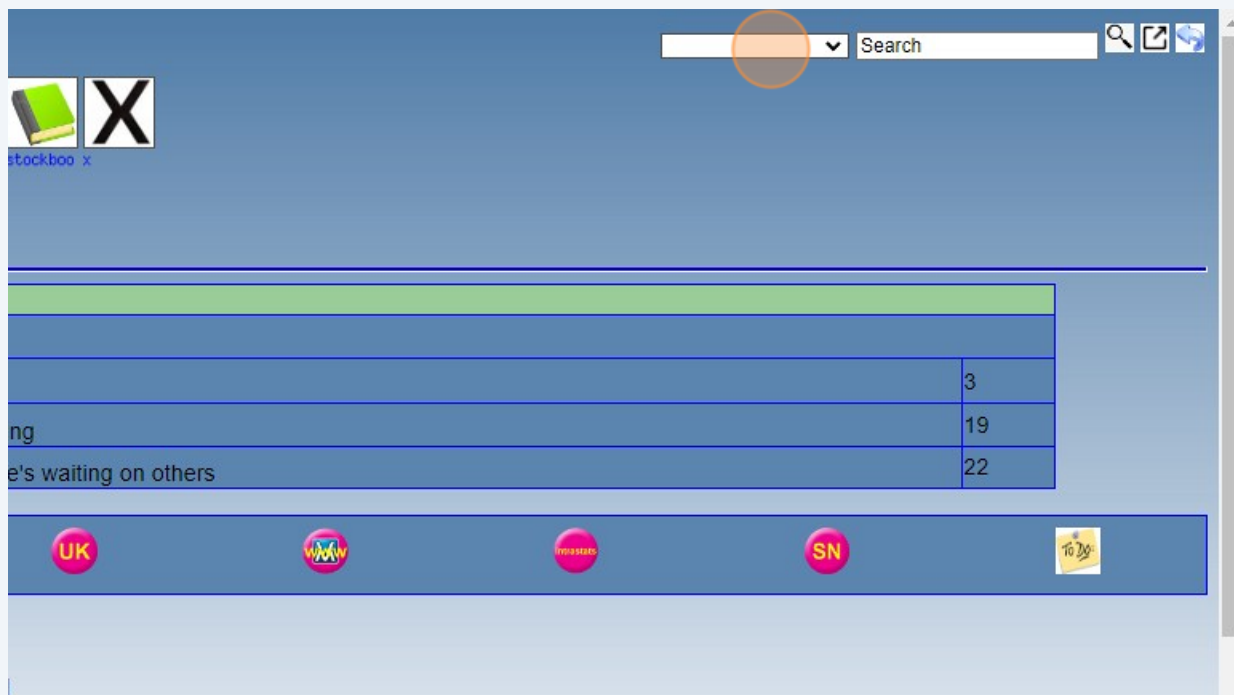
24 Select Customer Order and paste the invoice number into the search box.
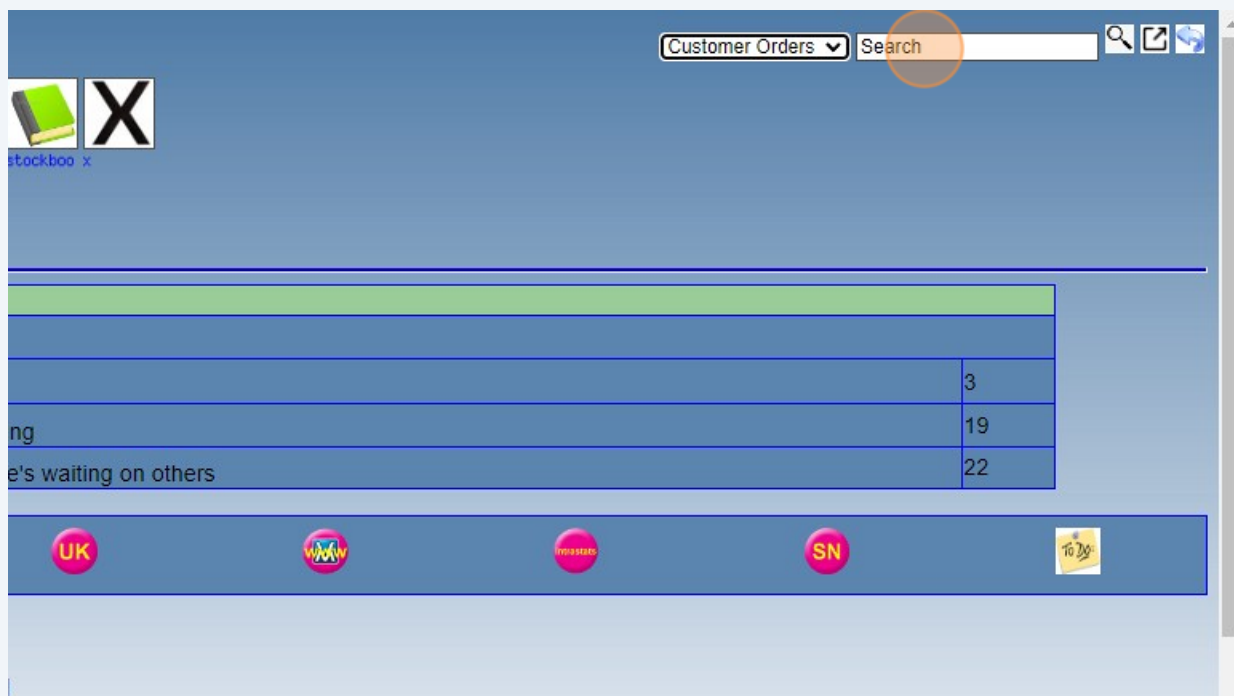
25 Click the magnifying glass icon to search.

26 When the order is found, click "Invoice/QA Details".
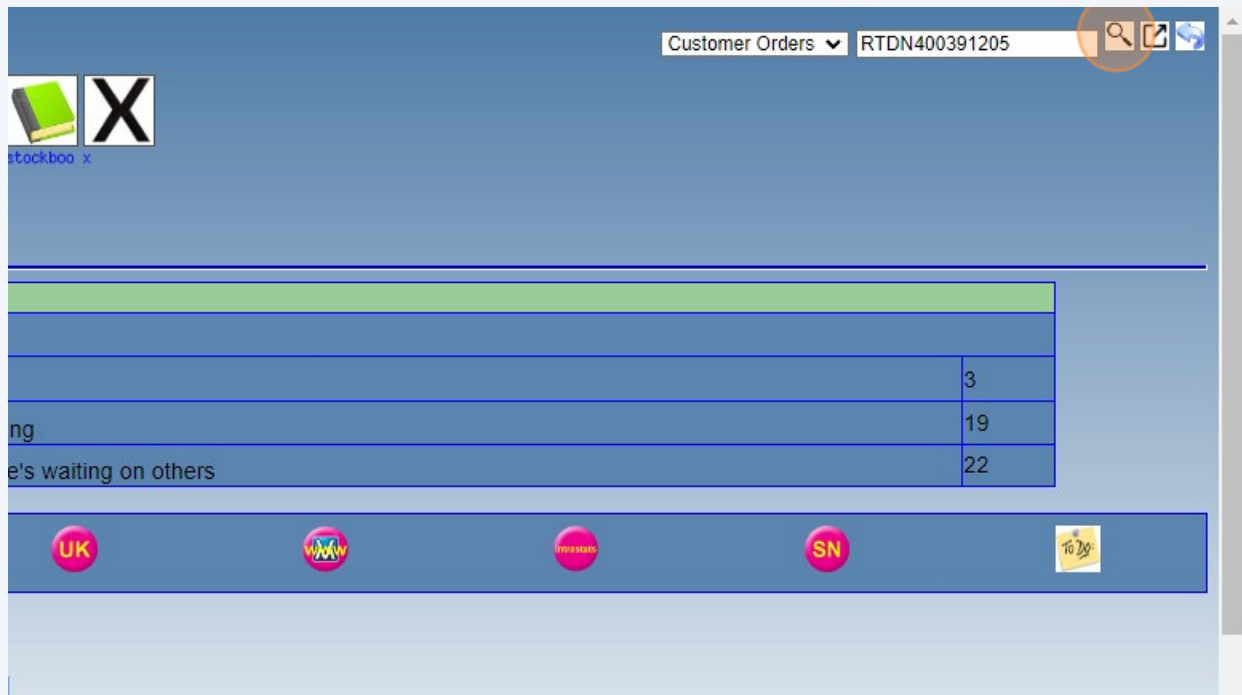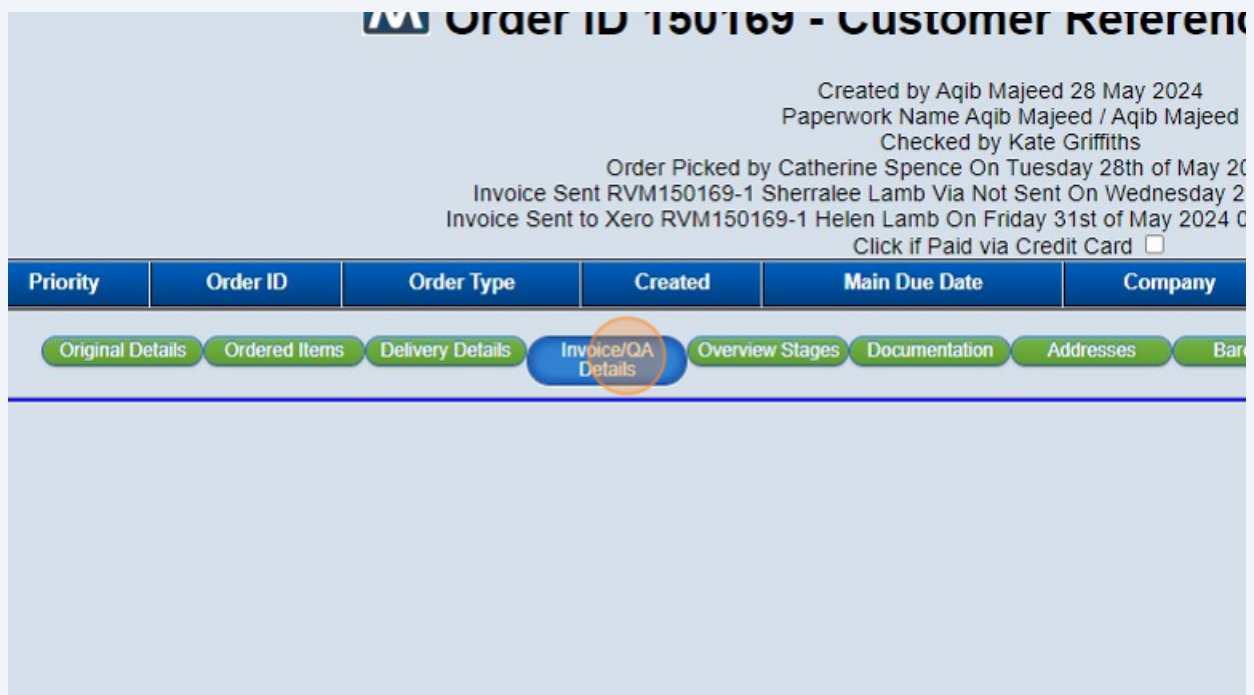
27 If no invoice is available, this order is outstanding move onto the next.
If it has been invoiced, go back to B2B Router and click the applicable invoice number.

		ORDER NUMBER ⌄	STATUS ⌄	ORDER DATE ⌄	ACCOUNT ⌄
Issued invoices		Received ✕ Accepted ✕			
Templates (recurring)	☐				
Proforma	☐	RBSN400150149	● ACCEPTED	2024-06-06	FINANCE DEPARTMENT
Quotes	☐	RLNP400101516	● ACCEPTED	2024-06-06	RLNP BILL TO
Despatch advices	☐	640155444	● ACCEPTED	2024-06-04	University Hospitals of D
Orders	☐	RTDN400391205	● ACCEPTED	2024-05-22	BILL TO ADDRESS

28 Click "Create invoice"

👁 Preview ⌄   ⓘ   Close ✕

ⓘ   More options ⌄   Create despatch advice   **Create invoice**

Order

Order number	640155444
Date	2024-06-04
Validity	
Contract	0

29 Click "Edit"

30 Click the "Invoice number" field and add the RVM number as shown on invoice.

31 Download a copy of the relevant invoice from Intrastats.

Barcodes	Stock Reference	Description
Stock Barcode Details	1114005	EyeMax 2 Neonatal Phototherapy Mask - Regular Ref. R300P01 Pa Memo:
Stock Barcode Details	PPUPS1	Courier delivery - Standard Memo:AWB:1Z9W96386877582392

Delivery ID	Stock ref	Qty Picked
RVM150358-1	1114005	2
RVM150358-1	PPUPS1	1

32 Edit the relevant fields in B2B Router to reflect the information shown on the invoice. Click and edit the "Y-MM-DD" field.

Transport
Peppol Network

Document type
Peppol BIS3 Invoice

Invoice number *
RVM150358-1
Last used: RVM150316-2

Date * ⓘ
2024-06-10

<	June	∨ 2024	>

Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22

Chargeable event date
Y-MM-DD

Invoicing period start
Y-MM-DD

Invoicing period end
Y-MM-DD

33 Click "Next"

iod start   Invoicing period end

Y-MM-DD

Sales order reference

Next >

34 Usually carriage is not shown on an order. To add this Click "Add catalogue item.

	Quantity		Unit price	
1114005, (boxes of 20)	2	⌄	55.3	⋮

📁 Add catalogue item   + Add line

Subtotal	110.60 GBP
VAT 20,00%	22.12 GBP
Total amount	132.72 GBP

35 Click the "Search product ID or name" field - usually PPUPS1 (see the applicable invoice)

)316-2

al data

Line   Name of th

1   Regular s

tion

Catalogue
Select the items from the catalog.

Search product ID or name   Q Search

	PRODUCT ID	NAME	UNI
☐	0012165	Viamed Pulse Oximeter VM 2160 SMARTsat.	
☐	0013110	Carrying Case for V1000	
☐	0014002	Pulse Oximetry Finger Sensor - Nellcor DS-100A Oximax Digit X1	
☐	0014061	Pulse Oximetry Extension Cable - Nellcor DEC-8	
☐	0014062	Pulse Oximetry Sensor/Extension Cable - Nellcor DOC-10	
☐	0014591	Pulse Oximetry Silicone Finger Sensor - Viamed -	

36 Click "Search"

Line   Name of th

1   Regular s

Catalogue
Select the items from the catalog.

ppups1   Q Search

	PRODUCT ID	NAME	UNIT PRICE
☐	0012165	Viamed Pulse Oximeter VM 2160 SMARTsat.	445.00
☐	0013110	Carrying Case for V1000	50.00
☐	0014002	Pulse Oximetry Finger Sensor - Nellcor DS-100A Oximax Digit X1	97.50
☐	0014061	Pulse Oximetry Extension Cable - Nellcor DEC-8	64.75
☐	0014062	Pulse Oximetry Sensor/Extension Cable - Nellcor DOC-10	78.75
☐	0014591	Pulse Oximetry Silicone Finger Sensor - Viamed -	255.00

antity

37 When found, Click the tick box to the left of the product ID.

Catalogue
Select the items from the catalog.

| ppups1 | Q Search |

	PRODUCT ID	NAME
☐	PPUPS1	UPS Courier Delivery

Add discount

Add additional cl

Taxes

VAT

| 20.0% | ∨ | ☐ Apply by line |

---

38 Click the Add button.

the catalog.

Q Search

22.12 GBP

132.72 GBP

NAME	UNIT PRICE
UPS Courier Delivery	12.00

Cancel **Add**

∨ ☐ Apply by line

39 Click the "Unit Price" field and input the correct amount (no £ symbol required).

		Quantity		Unit price	
114005, (boxes of 20)		2	⌄	55.3	⋮

		Quantity		Unit price	
		1	Units ⌄	12.0	⋮

📁 Add catalogue item   **+ Add line**

Subtotal	122.60 GBP
VAT 20,00%	24.52 GBP
Total amount	**147.12 GBP**

40 Check that the prices are correct and the total is equal to the invoice shown on Intrastats. Click "Next"

VAT 20,00%	24.12 GBP
Total amount	**144.72 GBP**

☐ Apply by line

‹ Previous   **Next ›**

41 Upload a copy of the invoice by clicking "Select files" and navigate to the downloaded invoice.

Additional files

Upload files related to the document (maximum 50MB). These files will be attached to the d
add a link to the file, the link will be displayed in the document for downloading by the rece

⬆ Select files

🔗 Add link to the file

Add delivery of goods

Delivery date

42 Click "Next"

se files will be attached to the document sent. You can also
ent for downloading by the receiver.

Optional description 🗑

‹ Previous   Next ›

43   Update the payment method to Bank Transfer.

Invoice RVM150316-2   Collection

- General data
- Lines
- Other
- Collection

Payment method

Select   ⌄

Due date

| Select |
| Cash |
| Debit payment |
| Hold |
| Bank transfer |
| SEPA transfer |
| Bank card |
| Stripe |

---

44   Update the bank account to by clicking this dropdown.

- General data
- Lines
- Other
- Collection

Payment method

Bank transfer   ⌄

Bank account ⓘ

Select   ⌄

+ Add bank account

Due date

Custom   ⌄

Date   Amount

45 Amend the due date to 30 days by clicking this dropdown.

- Other
- Collection

Bank account ⓘ

Viamed Ltd - GB93BARC20784200906662 ⌄

+ Add bank account

Due date

Custom ⌄

Date	Amount

Select
Upon Receipt
15 days
30 days
60 days
90 days

46 Once all information has been inputted click the "Save and Preview" Button. Check all information is correct against the Intrastats invoice.
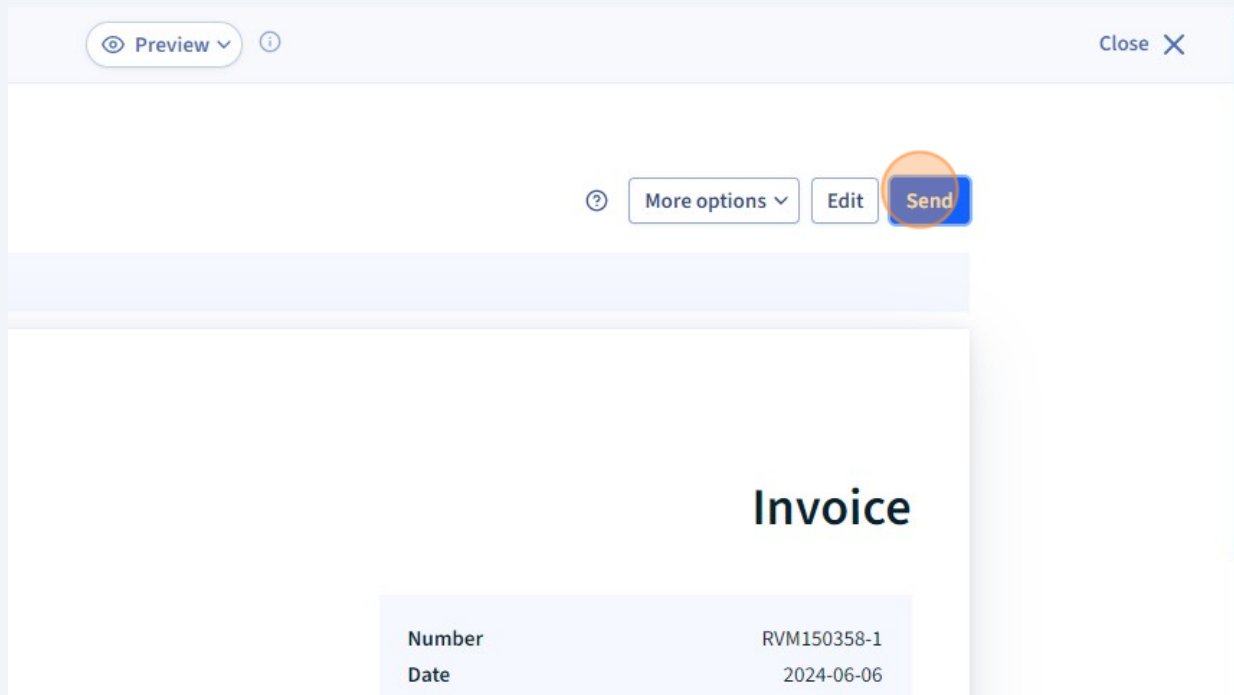
☐ Send due reminder to customer

☐ Add references, prepayments, withholdings

☐ Add factoring assignment

Save and preview   Save   Cancel

47   Once all information has been checked then you can click "Send".

48   You may wish to also check that the invoice is not showing on the Invoices to Be Emailed List - Opera Data, Invoices to be Emailed.

If it is shown in this list, please click "Invoice Sent".