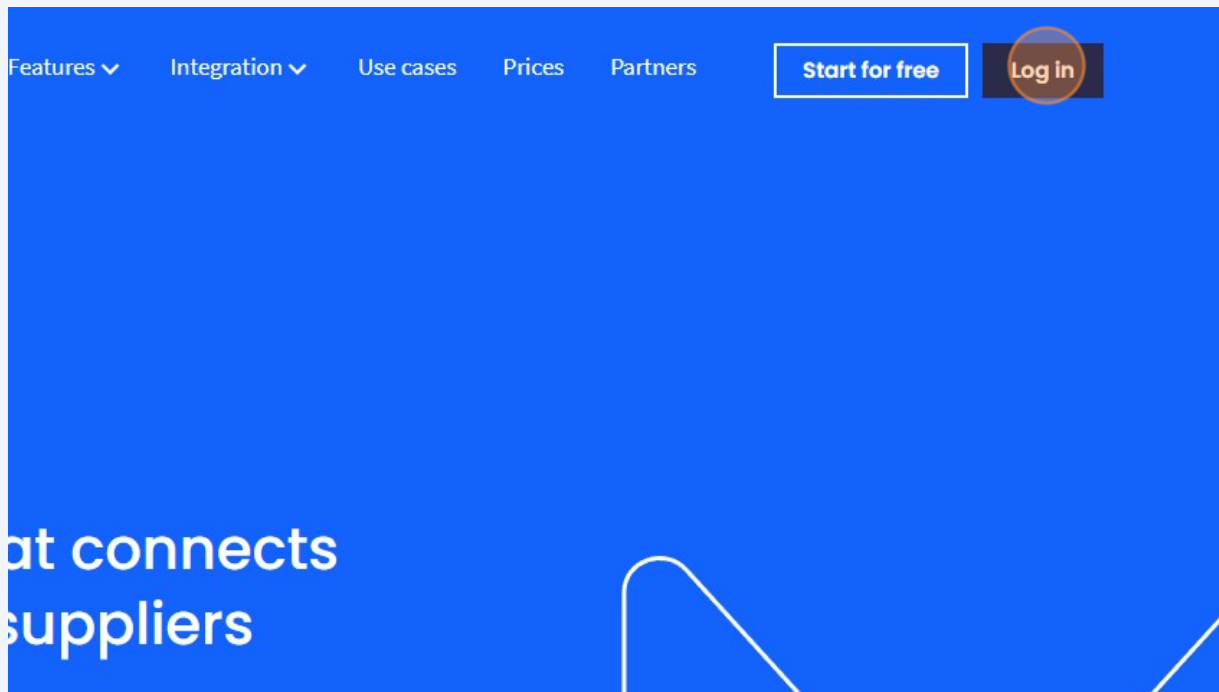


VM3COP20.95 Invoice Processing on B2B Router Platform

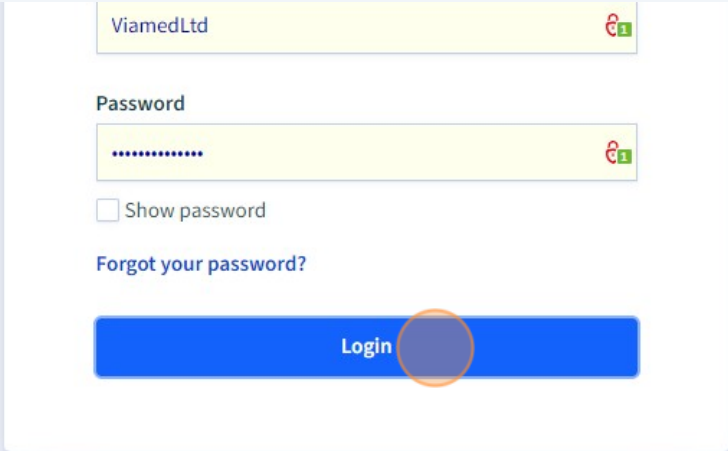
1 Navigate to <https://www.b2brouter.net/uk/>

2 Click "Log in"



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

4 Click Login.



ViamedLtd

Password

.....

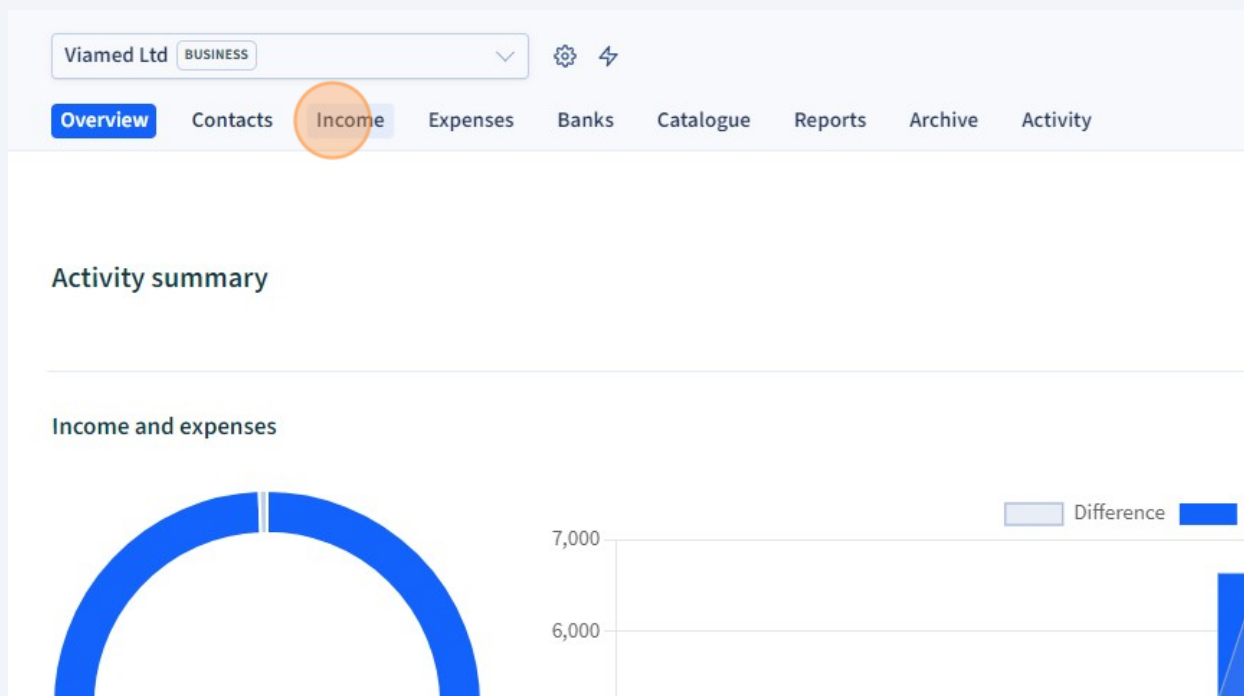
☐ Show password

[Forgot your password?](#)

Login

You do not have an account? [Sign up](#)

5 Click "Income"



6 Click "Expired"

The screenshot shows the Xero 'Income' page for 'Viamed Ltd' in 'BUSINESS' mode. The 'Income' tab is active in the top navigation bar. On the left sidebar, 'Issued invoices' is expanded, showing 'Commercial invoices', 'Tickets', 'Templates (recurring)', 'Proforma', and 'Quotes'. The main table has tabs for 'All', 'New', 'Sent', 'Expired' (highlighted with an orange circle and a warning icon), 'Validation error', and 'Error'. The table lists four invoices, all with a 'SENT' status. The 'Expired' filter is currently selected.

	NUMBER	STATUS	CONTACT
<input type="checkbox"/>	RVM150316-1	SENT	York Teaching Hospital Nhs. 1 FINANCE 230108
<input type="checkbox"/>	RVM150307-1	SENT	FINANCE DEPARTMENT FINANCE DEPARTMENT
<input type="checkbox"/>	RVM150276-1	SENT	Wirral University Teaching.. WUTHC 1 700095
<input type="checkbox"/>	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

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				Q Search				Filters																							
Issued invoices				All				New				Sent				Expired ⚠				Validation error				Error											
Commercial invoices				NUMBER				STATUS				CONTACT																							
Tickets				<input type="checkbox"/>				RVM149838-1				SENT				University Hospitals of Dert																			
Templates (recurring)				<input type="checkbox"/>				RVM149660-1				SENT				North Cumbria University...																			
Proforma				<input type="checkbox"/>				RVM149640-1				SENT				FINANCE DEPARTMENT FINANCE DEPARTMENT																			
Quotes				<input type="checkbox"/>				RVM139567-1, RVM139567-2, RVM139567-3				READ				PAYMENT SECTION S37A PAYMENT SECTION S37A																			
Despatch advices				<input type="checkbox"/>				RVM148721-1				READ				RLNP BILL TO																			
Orders				<input type="checkbox"/>				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.

The screenshot shows the Xero dashboard interface. At the top, there is a blue header bar with a search icon (magnifying glass) circled in orange. Below the header, the dashboard displays a summary of invoices. A table shows the following data:

Invoice Type	Count	Amount
Draft invoices	0.00	
554 Awaiting payment	218,877.07	
196 Overdue	92,166.63	

Below the table, there is a bar chart showing the distribution of invoices across different time periods. The x-axis labels are: 2-8 Jun, This week, 16-22 Jun, 23-29 Jun, and Future. The y-axis represents the count of invoices.

12

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

The screenshot shows the Xero dashboard interface with a search bar at the top. The search bar contains the text "rvm149838-1". Below the search bar, a dropdown menu displays the search results. The results show one invoice, "RVM149838-1", with a status of "Awaiting Payment" (indicated by an orange arrow button). The invoice details include:

- Invoice Number: RVM149838-1
- Company: Derby and Burton University Hospitals NHS Foundation Trust
- Amount: 75.96
- Date: 8 June 2024

The background of the dashboard shows the same invoice summary table as in the previous screenshot.

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

Issued invoices

Commercial invoices

Tickets

Templates (recurring)

Proforma

Quotes

Despatch advices

Orders

All New Sent **Expired** Validation error Error

<input type="checkbox"/>	NUMBER	STATUS	CONTACT
<input type="checkbox"/>	RVM149838-1	SENT	University Hospitals of Dert
<input type="checkbox"/>	RVM149660-1	SENT	North Cumbria University...
<input type="checkbox"/>	RVM149640-1	SENT	FINANCE DEPARTMENT FINANCE DEPARTMENT
<input type="checkbox"/>	RVM139567-1, RVM139567-2, RVM139567-3	READ	PAYMENT SECTION S37A PAYMENT SECTION S37A
<input type="checkbox"/>	RVM148721-1	READ	RLNP BILL TO
<input type="checkbox"/>	RVM149090-1	READ	1 FIN ACRE_HOUSE 1 FIN ACRE_HOUSE

14

Click "Mark as"

+ Create

Activity

5 selected **Mark as**

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"

5 selected x

Send Download copy v Mark as v Check status Delete

New
Sent
Accepted
Registered
Refused
Closed

CONTACT	TAXABLE BASE v	TOTAL v	DATE v			
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	:

16 Click "Yes"

SENT University Hospitals of Derby... 63.30 GBP 75.96 GBP 2024-05-09 Registered

SENT North Cumbria University... 71.10 GBP 85.32 GBP 2024-04-30 Refused

6.80 GBP 164.16 GBP 2024-04-29 2024-04-30 Closed

2.02 GBP 1,250.42 GBP 2024-04-10 2024-04-26

1.20 GBP 1,261.44 GBP 2024-04-22 2024-04-24

432.00 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... 343.80 GBP 412.56 GBP 2024-02-23 2024-02-27

READ BILL TO ADDRESS 216.00 GBP 259.20 GBP 2024-01-26 2024-01-30

SENT University Hospitals of Derby... 63.30 GBP 75.96 GBP 2023-10-09 2023-10-25

139567-3

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

Cancel Yes

17

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

Tickets	<input type="checkbox"/>			
Templates (recurring)	<input type="checkbox"/>	RVM150316-1	SENT	York Teaching Hospital Nhs 1 FINANCE 230108
Proforma	<input type="checkbox"/>	RVM150307-1	SENT	FINANCE DEPARTMENT FINANCE DEPARTMENT
Quotes	<input type="checkbox"/>	RVM150276-1	SENT	Wirral University Teaching.. WUTHC 1 700095
Despatch advices	<input type="checkbox"/>	RVM150268-1	SENT	North Cumbria University...
Orders	<input type="checkbox"/>	RVM150111-1	SENT	UCLH NHS Foundation Trus
	<input type="checkbox"/>	RVM150111	NEW	UCLH NHS Foundation Trus
	<input type="checkbox"/>	RVM150050	SENT	BILL TO ADDRESS BILL TO ADDRESS
	<input type="checkbox"/>	RVM149944-1	SENT	University Hospitals of Derb University Hospitals of Derby
	<input type="checkbox"/>	RVM150050-1	SENT	The Newcastle upon Tyne.. The Newcastle upon Tyne...
	<input type="checkbox"/>	RVM150043-1	SENT	AGH Solutions Limited

18

Click on the filters icon.

BUSINESS

Contacts

Income

Expenses

Banks

Catalogue

Reports

Archive

Activity

Order number

Q Search

F Filters

<input type="checkbox"/>	ORDER NUMBER ▾	STATUS ▾	ORDER DATE ▾	ACCOUNT ▾	DELIVERED
<input type="checkbox"/>	RBSN400150149	ACCEPTED	2024-06-06	FINANCE DEPARTMENT	
<input type="checkbox"/>	RLNP400101516	ACCEPTED	2024-06-06	RLNP BILL TO	
<input type="checkbox"/>	640155444	ACCEPTED	2024-06-04	University Hospitals of Derby...	2024-06-06
<input type="checkbox"/>	RBSN400149878	CLOSED	2024-06-03	FINANCE DEPARTMENT	
<input type="checkbox"/>	RCBN400164403	CLOSED	2024-06-03	1 FINANCE 230108	

19 Click "Accepted"

es

curring)

ices

Order number	File	Delivery place
<input type="text"/>	Imported file	Name of the pla

Date

Date type	From
Order date	Y-MM-DD

Status

<input checked="" type="checkbox"/> Everyone	<input type="checkbox"/> Accepted	<input type="checkbox"/> Closed
<input type="checkbox"/> Received	<input type="checkbox"/> Refused	<input type="checkbox"/> Cancelled

Country

20 Click "Received"

Templates (recurring)

Proforma

Quotes

Despatch advices

Orders

<input type="text"/>	Imported file
----------------------	---------------

Date

Date type	From
Order date	Y-MM-DD

Status

<input checked="" type="checkbox"/> Everyone	<input checked="" type="checkbox"/> Accepted	<input type="checkbox"/> Cl
<input type="checkbox"/> Received	<input type="checkbox"/> Refused	<input type="checkbox"/> Ca

Country

☐ ORDER NUMBER ☐ STATUS ☐ ORDER DATE ☐ ACCOUNT

21 Click "Apply"

Despatch advices

Orders

Status

☒ Everyone

☒ Accepted

☐ C

☒ Received

☐ Refused

☐ C

Country

Apply

Delete

<input type="checkbox"/>	ORDER NUMBER ▾	STATUS ▾	ORDER DATE ▾	ACCOUNT ▾
<input type="checkbox"/>	RBSN400150149	ACCEPTED	2024-06-06	FINANCE DEPARTMENT
<input type="checkbox"/>	RLNP400101516	ACCEPTED	2024-06-06	RLNP BILL TO
<input type="checkbox"/>	640155444	ACCEPTED	2024-06-04	University Hospitals of Derby...
<input type="checkbox"/>	RBSN400140878	ACCEPTED	2024-06-03	FINANCE DEPARTMENT

22 Selecting the first number, copy the order number.

Issued invoices

Received × Accepted ×

Templates (recurring)

Proforma

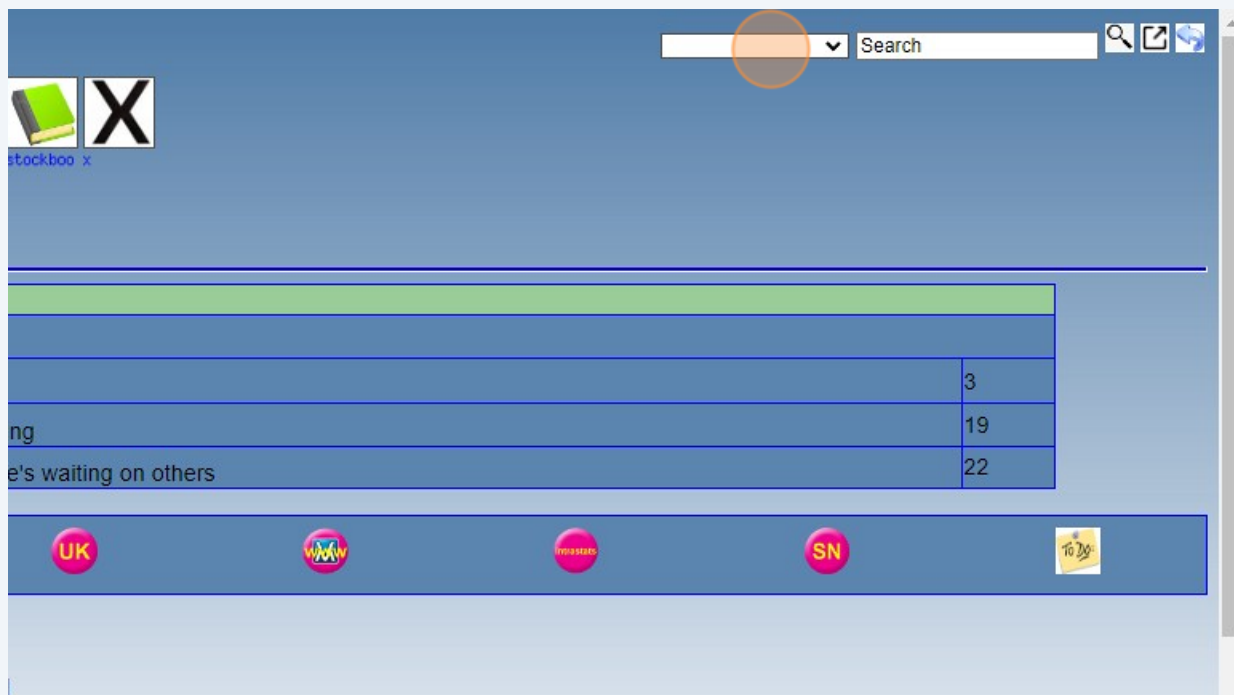
Quotes

Despatch advices

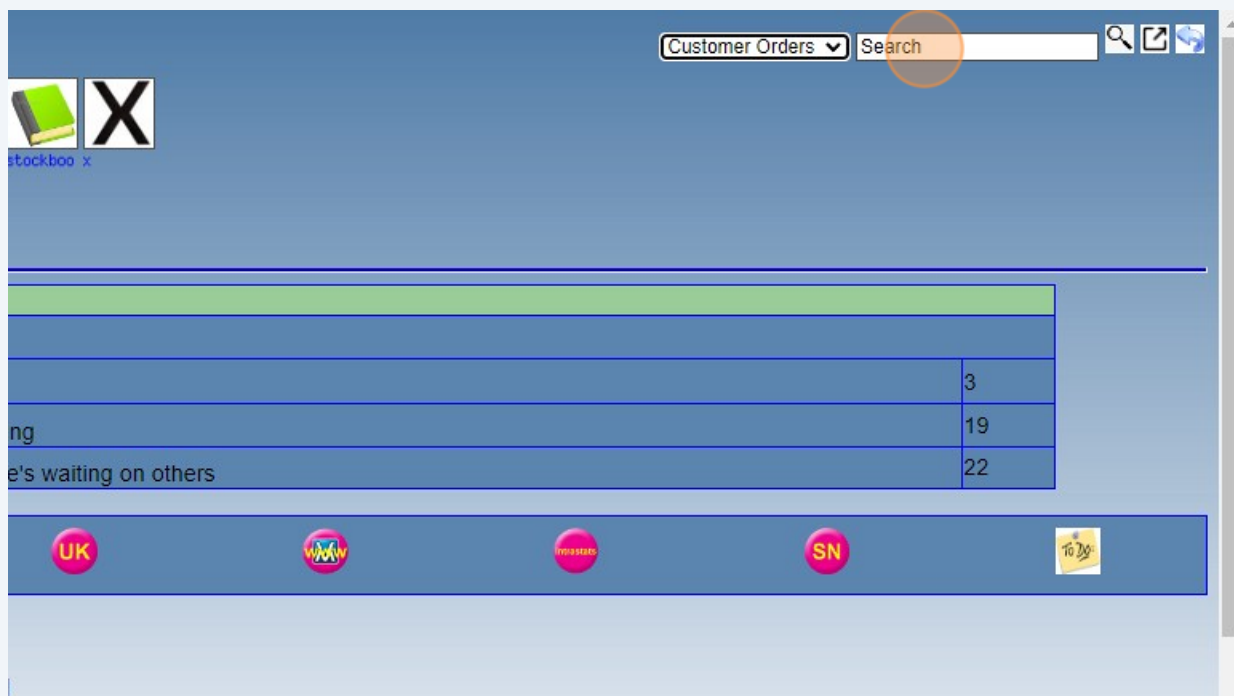
Orders

<input type="checkbox"/>	ORDER NUMBER ▾	STATUS ▾	ORDER DATE ▾	ACCOUNT ▾
<input type="checkbox"/>	RBSN400150149	ACCEPTED	2024-06-06	FINANCE DEPARTMENT
<input type="checkbox"/>	RLNP400101516	ACCEPTED	2024-06-06	RLNP BILL TO
<input type="checkbox"/>	640155444	ACCEPTED	2024-06-04	University Hospitals of D
<input type="checkbox"/>	RTDN400391205	ACCEPTED	2024-05-22	BILL TO ADDRESS

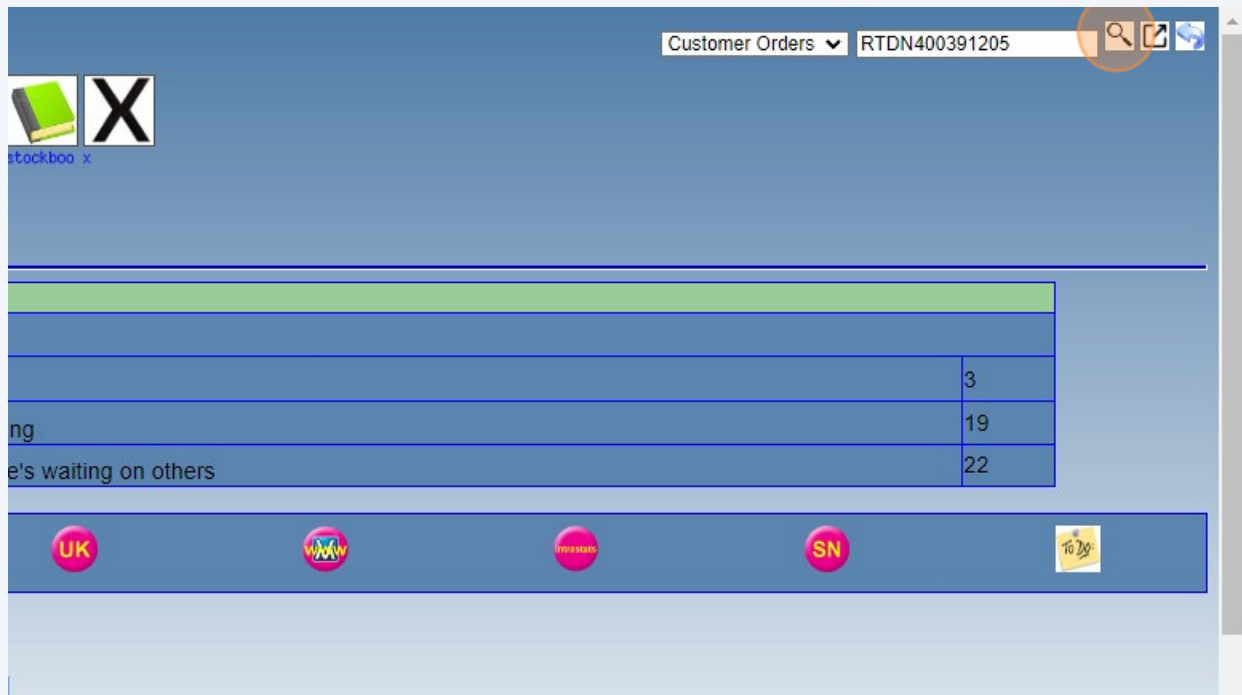
23 Go back to Intrastats menu and click this dropdown.



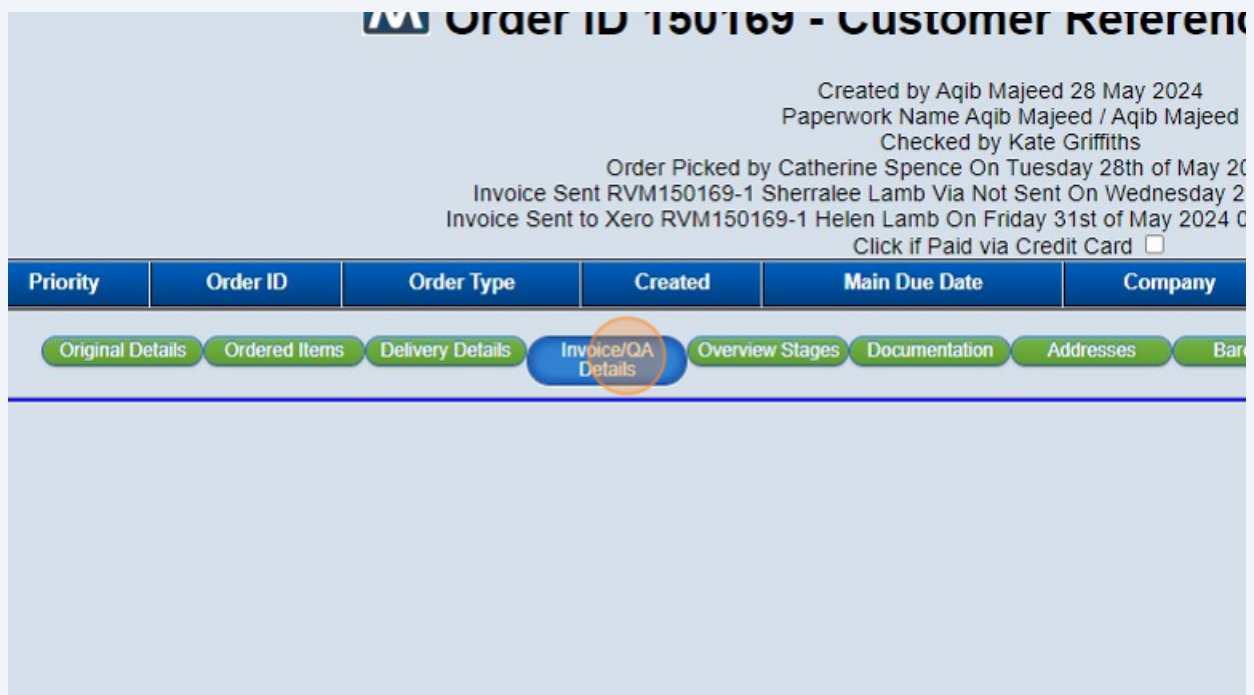
24 Select Customer Order and paste the invoice number into the search box.



- 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.

Issued invoices

Received x Accepted x

Templates (recurring)

Proforma

Quotes

Despatch advices

Orders

<input type="checkbox"/>	ORDER NUMBER ▾	STATUS ▾	ORDER DATE ▾	ACCOUNT ▾
<input type="checkbox"/>	RBSN400150149	■ ACCEPTED	2024-06-06	FINANCE DEPARTMENT
<input type="checkbox"/>	RLNP400101516	■ ACCEPTED	2024-06-06	RLNP BILL TO
<input type="checkbox"/>	640155444	■ ACCEPTED	2024-06-04	University Hospitals of D
<input type="checkbox"/>	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"

Preview ⓘ Close X

More options ▾ Edit Send

Invoice

Number	RVM150316-2
Date	2024-06-10

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

Collection

Transport
Peppol Network

Document type
Peppol BIS3 Invoice

Invoice number * Date * ⓘ

RVM150316-2 2024-06-10 ⓘ

Last used: RVM150316-2

Chargeable event date Invoicing period start

Y-MM-DD ⓘ Y-MM-DD ⓘ

- 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

Chargeable event date

Y-MM-DD

Invoicing period start

Y-MM-DD

Invoicing period end

Y-MM-DD

33 Click "Next"

The screenshot shows a form with several input fields. At the top, there is a date field with a calendar icon. Below it, there are two more date fields: 'Invoicing period start' and 'Invoicing period end'. The 'Invoicing period end' field contains the text 'Y-MM-DD' and also has a calendar icon. At the bottom of the form, there is a 'Sales order reference' field. In the bottom right corner, there is a blue button labeled 'Next >' which is circled in orange.

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

The screenshot shows a form with a table. The table has two columns: 'Quantity' and 'Unit price'. The first row of the table contains the text '1114005, (boxes of 20)' in the 'Quantity' column and '55.3' in the 'Unit price' column. Below the table, there are two buttons: 'Add catalogue item' and '+ Add line'. The 'Add catalogue item' button is circled in orange. Below the buttons, there is a summary table with three rows: 'Subtotal' with a value of '110.60 GBP', 'VAT 20,00%' with a value of '22.12 GBP', and 'Total amount' with a value of '132.72 GBP'.

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

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

<input type="checkbox"/>	PRODUCT ID	NAME	UNI
<input type="checkbox"/>	0012165	Viamed Pulse Oximeter VM 2160 SMARTsat.	
<input type="checkbox"/>	0013110	Carrying Case for V1000	
<input type="checkbox"/>	0014002	Pulse Oximetry Finger Sensor - Nellcor DS-100A Oximax Digit X1	
<input type="checkbox"/>	0014061	Pulse Oximetry Extension Cable - Nellcor DEC-8	
<input type="checkbox"/>	0014062	Pulse Oximetry Sensor/Extension Cable - Nellcor DOC-10	
<input type="checkbox"/>	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

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

ntity

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

Catalogue
Select the items from the catalog.

ppups1

<input type="checkbox"/>	PRODUCT ID	NAME
<input type="checkbox"/>	PPUPS1	UPS Courier Delivery

☐ Add discount
☐ Add additional c

Taxes

VAT
20.0%

☐ Apply by line

38 Click the Add button.

the catalog.

NAME	UNIT PRICE
UPS Courier Delivery	12.00

☐ Apply by line

22.12 GBP
132.72 GBP

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

	Quantity	Unit price
114005, (boxes of 20)	2	55.3
	1	12.0

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%	24.52 GBP
Total amount	144.72 GBP

☐ Apply by line

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 document. If you add a link to the file, the link will be displayed in the document for downloading by the receiver.

[Select files](#)

[Add link to the file](#)

☐ Add delivery of goods

Delivery date

42

Click "Next"

These files will be attached to the document sent. You can also add a link to the file, the link will be displayed in the document for downloading by the receiver.

Optional description

[< Previous](#) [Next >](#)

43 Update the payment method to Bank Transfer.

Invoice RVM150316-2Collection

- 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.

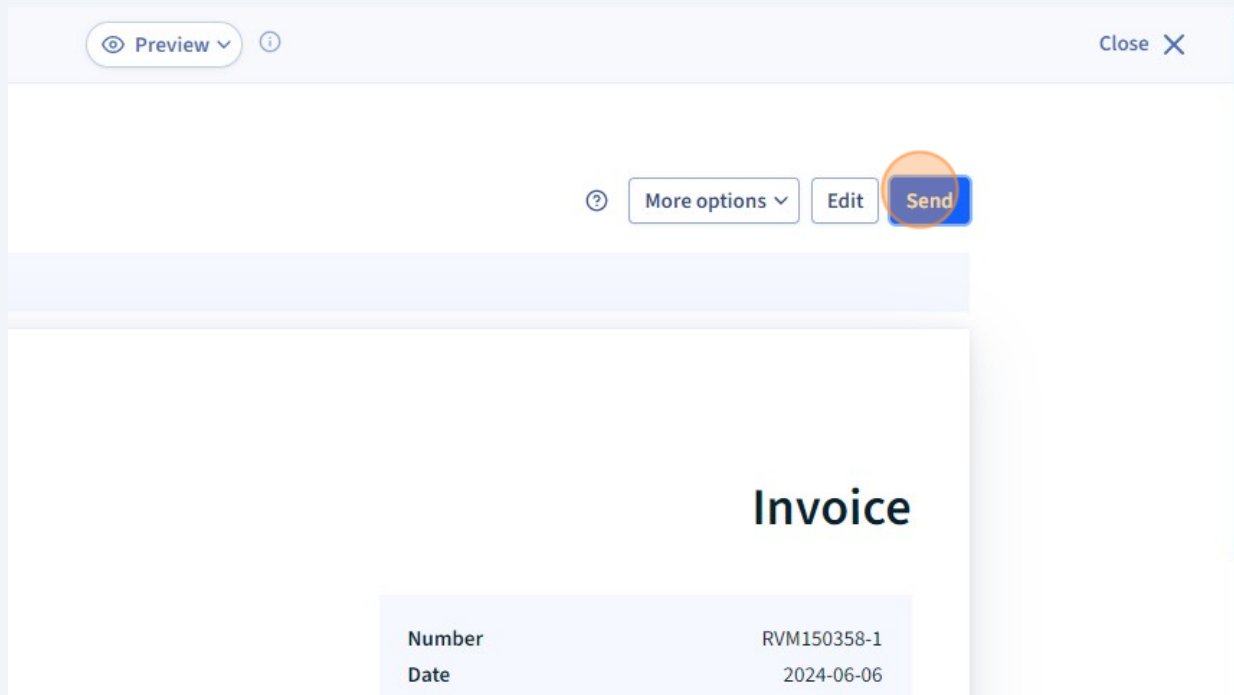
☐ Send due reminder to customer

☐ 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".