# VM3COP20.95 Invoice Processing on B2B Router Platform

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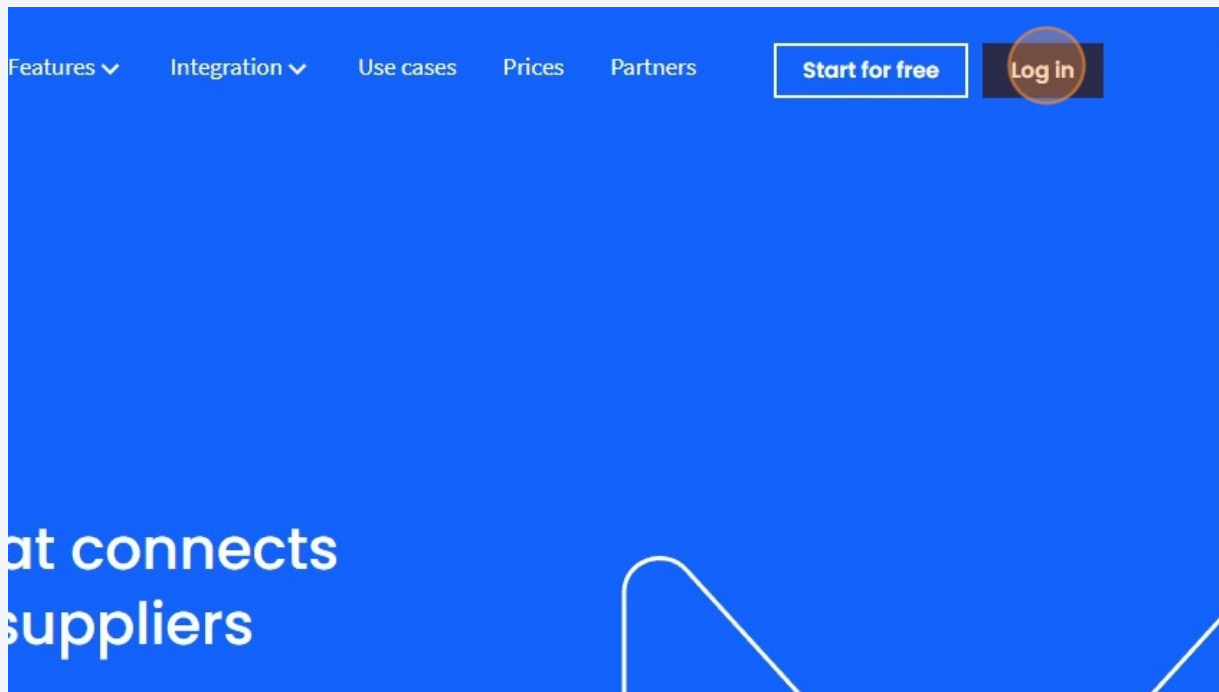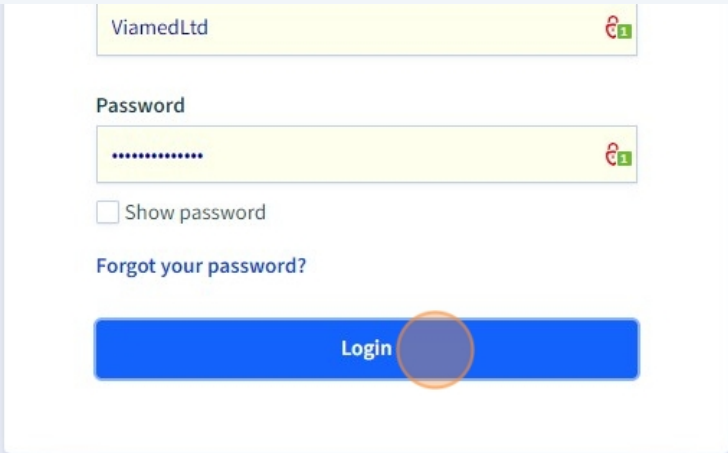
**2**     Click "Log in"



**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**

7,000

6,000

Difference

**6** Click "Expired"



Viamed Ltd BUSINESS

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

**Income**                              [Find]    [🔍 Search]    [🔽 Filters]

Issued invoices

  Commercial invoices

  Tickets

Templates (recurring)

Proforma

Quotes

| | NUMBER ⌄ | STATUS ⌄ | CONTACT |
|---|---|---|---|
| ☐ | 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... |

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

**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 |
|---|---|---|---|---|---|---|

| | NUMBER ⌄ | STATUS ⌄ | CONTACT |
|---|---|---|---|
| **Commercial invoices** | ☐ RVM149838-1 | ● SENT | University Hospitals of Derl |
| **Tickets** | ☐ RVM149660-1 | ● SENT | North Cumbria University... |
| Templates (recurring) | ☐ RVM149640-1 | ● SENT | FINANCE DEPARTMENT FINANCE DEPARTMENT |
| Proforma | ☐ RVM139567-1, RVM139567-2, RVM139567-3 | ● READ | PAYMENT SECTION S37A PAYMENT SECTION S37A |
| Quotes | ☐ RVM148721-1 | ● READ | RLNP BILL TO |
| Despatch advices | ☐ RVM149090-1 | ● READ | 1 FIN ACRE_HOUSE |
| Orders | | | |

**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.

plans are changing in the UK. To find out what this ✕

Your last login: last month from United Kingdom   **Edit dashboard**

wed to you

nvoice
Draft invoices          0.00
554 Awaiting payment   218,877.07
196 Overdue             92,166.63

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

🔍  rvm149838-1          ✕    ▼ All          Kingdom   **Edit dashboard**

Show all results (1)

wed to you

nvoice
Draft invoices
554 Awaiting pay
196 Overdue

Invoices (1)

**RVM149838-1**

Derby and Burton University Hospitals NHS Foundation Trust          ⌄

75.96

8 June 2024

2-8 Jun   This week   16-22 Jun   23-29 Jun   Future

eed to pay

**13** Navigate to **https://app.b2brouter.net/projects/viamed-ltd/invoices?closed=0&date_to=2024-10-07&sel_data=due_date&tab_filter=overdue**

**14** Click "Income
Issued invoices
Commercial invoices
Tickets
Templates (recurring)
Proforma
Quotes
Despatch advices
Orders
Search
Filters
Export
Create in..."

| | | | |
|---|---|---|---|
| Templates (recurring) | ☐ RVM152054-1 | ● SENT | University Hospitals of Derby... |
| Proforma | ☐ RVM151745-1 | ● SENT | BILL TO ADDRESS<br>BILL TO ADDRESS |
| Quotes | ☐ RVM150820-1 | ● SENT | AGH Solutions Limited |
| Despatch advices | | | |
| Orders | | | |

**15** If the invoice has been paid, in B2B Router, open the invoice by clicking the invoice number to open.

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

### Income

Find   [Q Search]   [⊽ Filters]

| Issued invoices | All | Drafts | Sent | Expired ⚠ | Validation error | Mistakes |
|---|---|---|---|---|---|---|

**Commercial invoices**

Tickets

| | NUMBER ⌄ | STATUS ⌄ | CONTACT |
|---|---|---|---|
| ☐ | RVM152070-1 | ● SENT | University Hospitals of Derby... |
| ☐ | RVM152054-1 | ● SENT | University Hospitals of Derby... |
| ☐ | RVM151745-1 | ● SENT | BILL TO ADDRESS BILL TO ADDRESS |
| ☐ | RVM150820-1 | ● SENT | AGH Solutions Limited |

Templates (recurring)

Proforma

Quotes

Despatch advices

Orders

---

**16** Click the green "Send" dropdown

< > **Invoice RVM152070-1**                    👁 Preview

⚠ **2024-10-06 - Exceeded due date**
This invoice is past its payment due date and is not yet marked as closed. If the invoice is unpa
**Send invoice payment reminder to customer**

● SENT ⌄

Client: University Hospit... | **Transport:** Peppol network | **Format:** Peppol BIS3 Invoice

⤓

**M VIAMED**

**17** Click "Closed"

Send invoice payment reminder to customer

■ SENT  ∨

Sent
Accepted
Refused
Collected
Closed

Transport: Peppol network | Format: Peppol BIS3 Invoice

**M VIAMED**

**Viamed Ltd**
15 Station Road
BD207DT Cross Hills, Keighley, West Yorkshire
VAT Reg No: GB287389593
GLN: 5051826000007

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

| 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... |
| Despatch advices | ☐ RVM150111-1 | ● SENT | UCLH NHS Foundation Trus |
| Orders | ☐ 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 |

**19**  Click on the filters icon.

| | 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 | |

Search | Filters

Order number

**20**  Click "Accepted"

Order number

File

Imported file

Delivery place

Name of the pla

Date

Date type

Order date

From

Y-MM-DD

Status

☑ Everyone  ☐ Accepted  ☐ Closed

☐ Received  ☐ Refused  ☐ Cancelled

Country

Apply  Delete

**21** 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 ⌄

---

**22** Click "Apply"

Despatch advices

Orders

Status

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

Country

⌄

**Apply**    Delete

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

**23** Selecting the first number, copy the order number.

| Issued invoices | Received × Accepted × | | | |
|---|---|---|---|---|
| Templates (recurring) | ☐ ORDER NUMBER ⌄ | STATUS ⌄ | ORDER DATE ⌄ | ACCOUNT ⌄ |
| 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 |

**24** Go back to Intrastats menu and click this dropdown.

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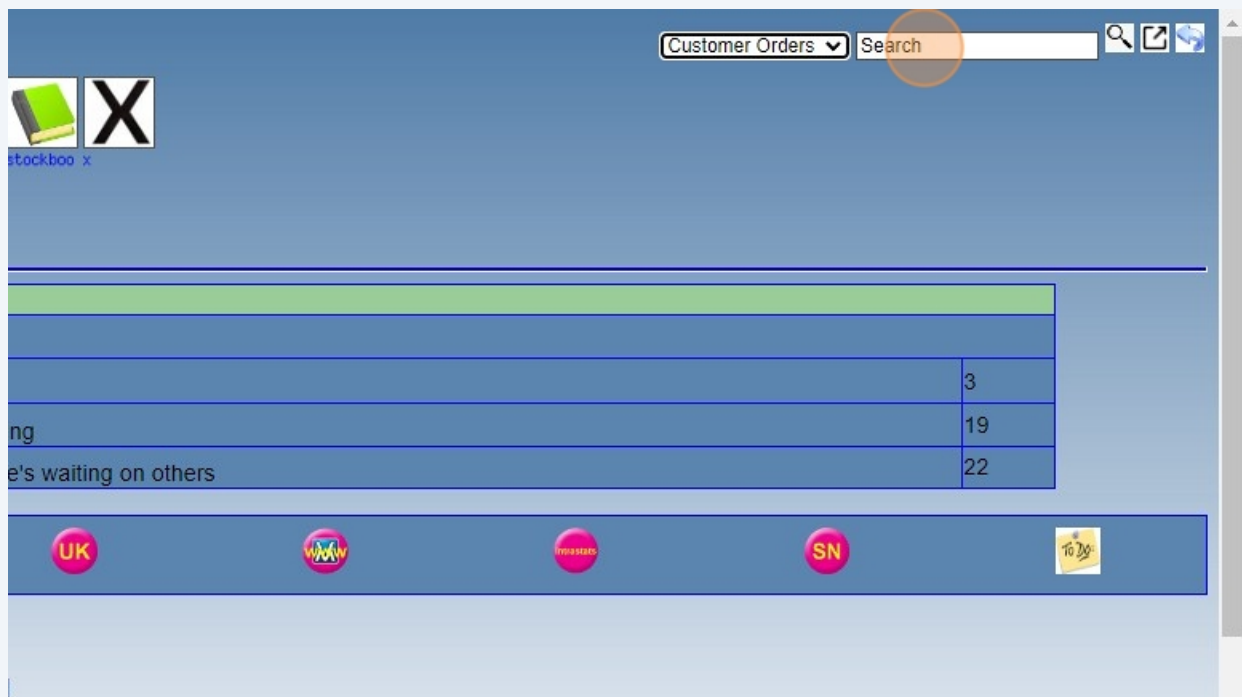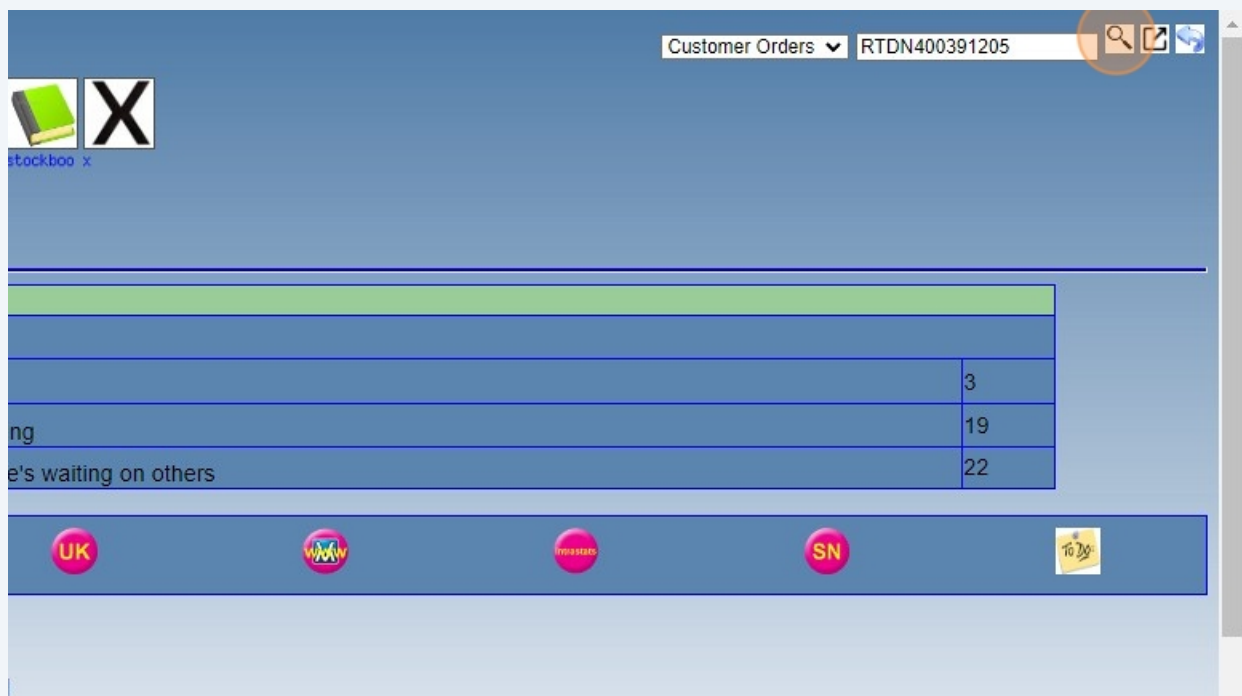


**26** Click the magnifying glass icon to search.

**27** When the order is found, click "Invoice/QA Details".

**Order ID 150169 - Customer Referen**

Created by Aqib Majeed 28 May 2024
Paperwork Name Aqib Majeed / Aqib Majeed
Checked by Kate Griffiths
Order Picked by Catherine Spence On Tuesday 28th of May 20
Invoice Sent RVM150169-1 Sherralee Lamb Via Not Sent On Wednesday 2
Invoice Sent to Xero RVM150169-1 Helen Lamb On Friday 31st of May 2024 0
Click if Paid via Credit Card ☐

| Priority | Order ID | Order Type | Created | Main Due Date | Company |
|---|---|---|---|---|---|

Original Details   Ordered Items   Delivery Details   Invoice/QA Details   Overview Stages   Documentation   Addresses   Bar

---

**28** 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 ✕   Accepted ✕

**Templates (recurring)**

| | ORDER NUMBER ∨ | STATUS ∨ | ORDER DATE ∨ | ACCOUNT ∨ |
|---|---|---|---|---|
| **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 |

**29** Click "Create invoice"

Preview ⌄ ⓘ                                                    Close ✕

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

# Order

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

**30** Click "Edit"

Preview ⌄ ⓘ                                                    Close ✕

ⓘ  More options ⌄   Edit   **Send**

# Invoice

| | |
|---|---|
| Number | RVM150316-2 |
| Date | 2024-06-10 |
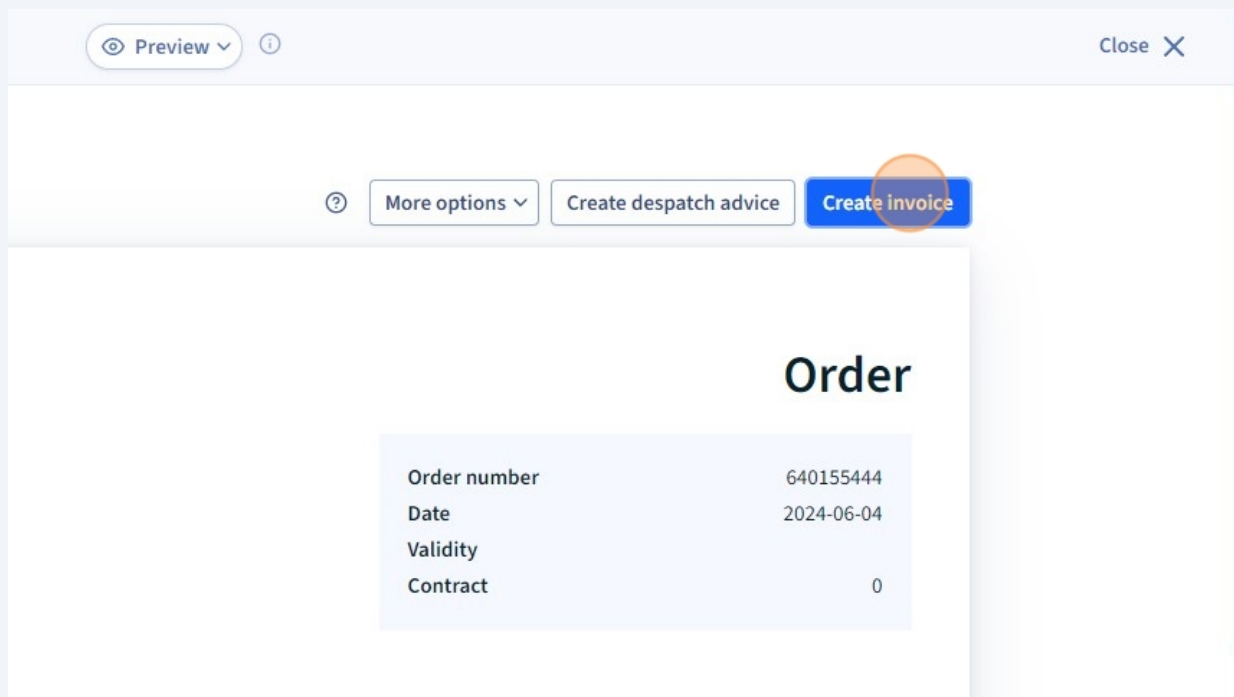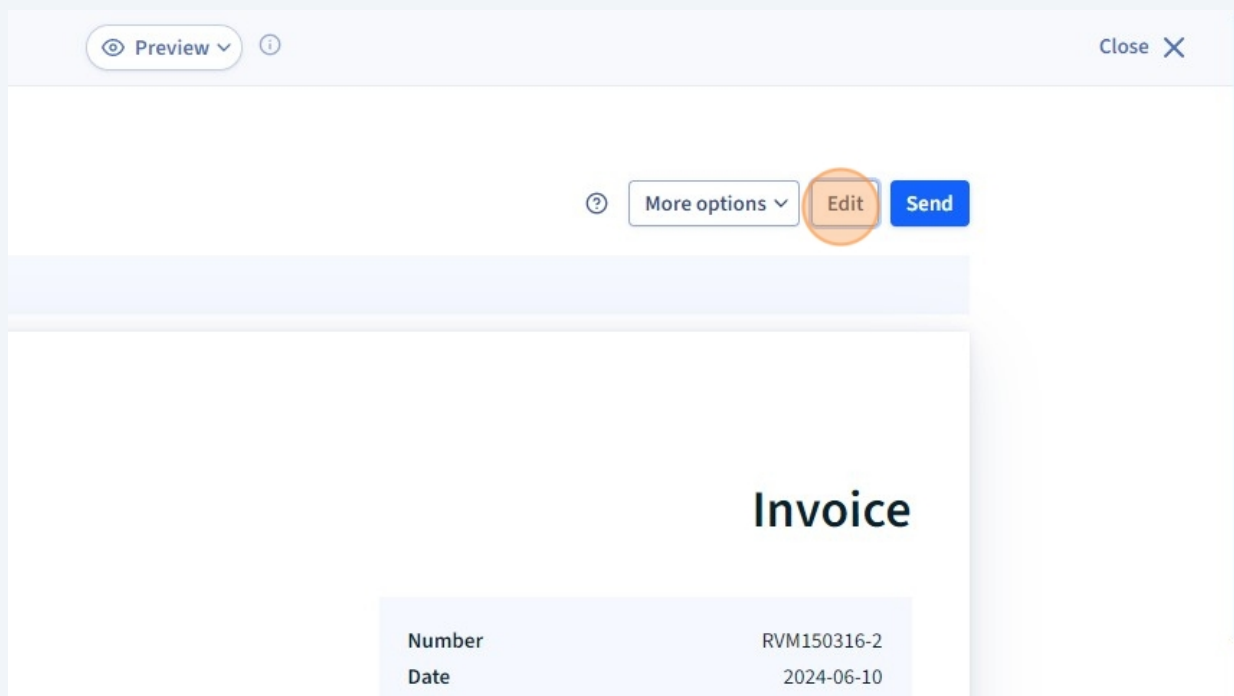
**31** Click the "Invoice number" field and add the RVM number as shown on invoice.

Collection

Transport
Peppol Network

Document type
Peppol BIS3 Invoice

Invoice number *
RVM150316-2

Last used: RVM150316-2

Date * ⓘ
2024-06-10

Chargeable event date
Y-MM-DD

Invoicing period start
Y-MM-DD

**32** 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 |

**33** 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 |

Chargeable event date

Y-MM-DD

Invoicing period start

Y-MM-DD

| 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 9 | 10 | 11 | 12 | 13 | 14 | 15 |
| 16 | 17 | 18 | 19 | 20 | 21 | 22 |

Invoicing period end

Y-MM-DD

**34** Click "Next"

iod start

Invoicing period end

Y-MM-DD

Sales order reference

Next >

**35** 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 |

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

0316-2

al data    # Line    Name of th

1    Regular s

tion

**Catalogue**
Select the items from the catalog.

Search product ID or name    🔍 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 - | |

**37** Click "Search"

**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 |

# Line 1 Regular s

**38** 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 c

**Taxes**

**VAT**

| 20.0% | ∨ | ☐ Apply by line |

**39**  Click the Add button.

the catalog.

22.12 GBP

132.72 GBP

🔍 Search

| NAME | UNIT PRICE |
|------|------------|
| UPS Courier Delivery | 12.00 |

Cancel  **Add**

⌄  ☐ Apply by line

---

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

| 114005, (boxes of 20) | | Quantity | | | Unit price | |
|---|---|---|---|---|---|---|
| | | 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** |

**41** 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 ›

**42** 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**

**43** Click "Next"

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

Optional description

< Previous    Next >

---

**44** Update the payment method to Bank Transfer.

Invoice RVM150316-2                                              Collection

- General data        Payment method
- Lines               Select                                          ⌄
- Other
- Collection          Due date

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

**45**   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

---

**46**   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
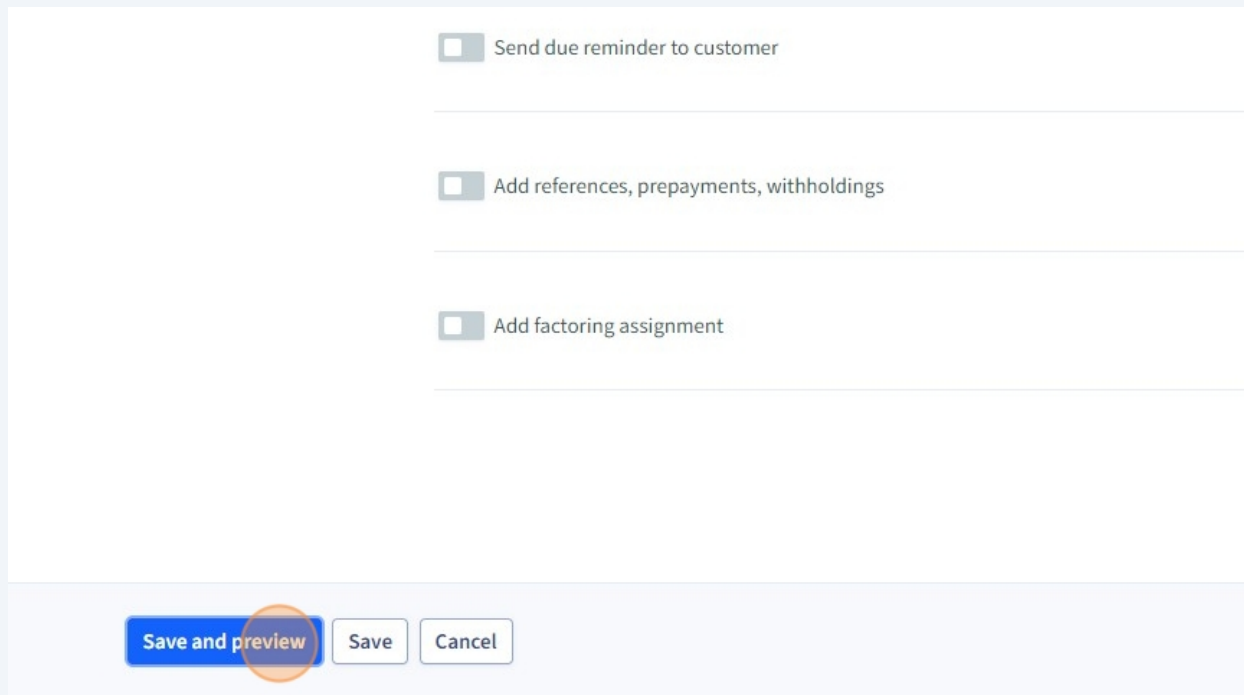
Select
Upon Receipt
15 days
30 days
60 days
90 days

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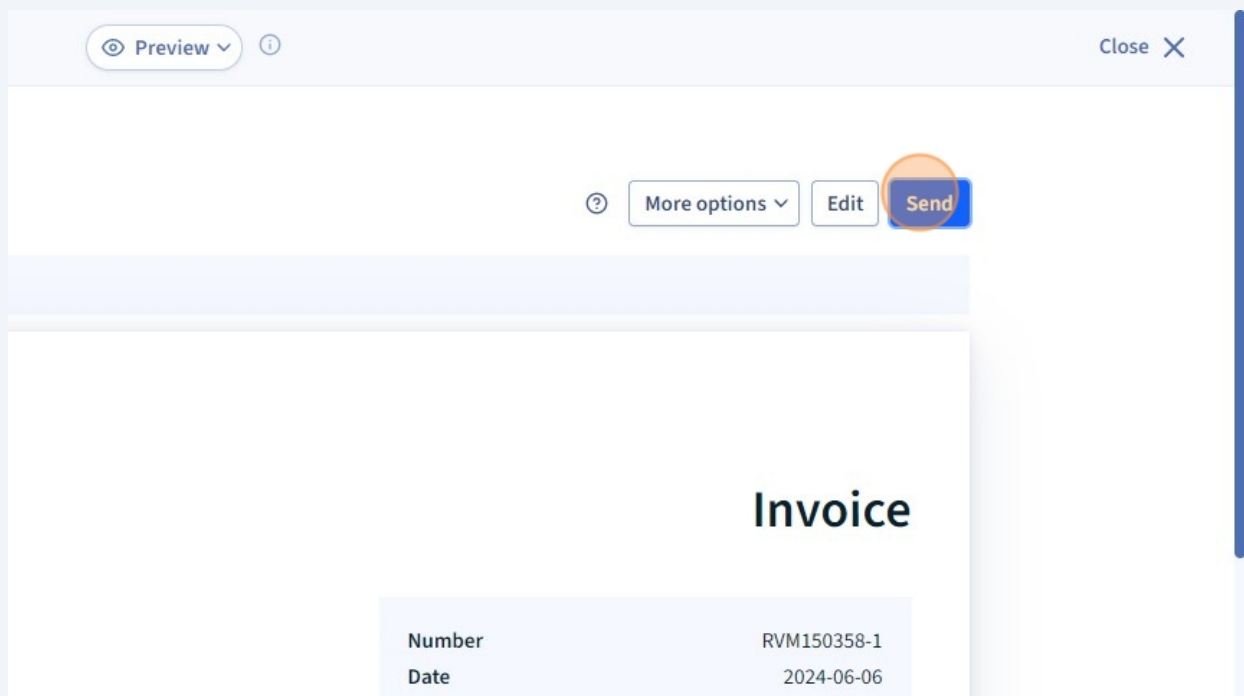
Send due reminder to customer

Add references, prepayments, withholdings

Add factoring assignment

Save and preview    Save    Cancel

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

Preview ⌄   ⓘ                                                    Close ✕

⑦   More options ⌄   Edit   Send

Invoice

Number         RVM150358-1
Date           2024-06-06

**49** 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".