

May 2023

1. Invoices are now only available in the BSS Community

The online invoice information is available in the Examiner Community, login at https://boatsafetyscheme.force.com/login

2. Go to My BSS then My Invoices

To open a list of your invoices:

- click on the My BSS tab
- select the **Invoices** menu item as shown in the image below:



When you have selected the Invoices, you will be taken to a page that shows you a list of your invoices, this is known as a list view. You have a choice of which list view you want to see:



Helpful hack: List views in the community can be organised by clicking on the column headers click once for ordering the list for example, **a-z** or **1-100** or **oldest-newest**.

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3. Layout of the invoice

The status of the invoice record is important. We start an invoicing process by creating a preparatory invoice record.

A record showing 'In Preparation' indicates an invoice is in progress and is not yet become a formal invoice to be paid.

Invoice Invoice Number Examiner Account Numb Rob Test-Candidate 800CAN1 Novice layout Invoice layout Invoice layout Invoice Number Inv.02/22-249802 Event Registration REG-0000803 Event Description for Invoice Mandatory 15-month online training programme for existing BSS Examiners comprised of various modules released from June 2021 to summer 2022. Cor core systems knowledge, ECP checks and professional practice. Fees cover administration and support cost. Event Name Existing Examiner Online Training Prog 2021-22 Invoice Status In Preparation Event Cost Ex Vat E269.00 Event Vat	e Data My BSS 🗸
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	irust finance system.

An invoice record of status 'Prepared' is a formalised invoice. It has a Canal & River Trust

invoice number that should be quoted when paying the invoice.

Invoice Number		Examiner
Inv.02/22-249802		Rob Test-Candidate
Event Registration		Examiner PIN
REG-0000803		1995
Event Description for Invoice		Account Name
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knowledge, ECP checks an cost.	d professional practice. Fees cover administration and support	
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Existing Examiner Online	raining Prog 2021-22	800CAN1
Invoice Status		
Prepared		
Event Cost Ex Vat		
£269.00	When the invoice is formally ge	enerated,
Event VAT	the invoice status is switched to	prepared.
£53.80	It is now payable and this is wh	ere to find
Event Cost Inc VAT	the invoice number to use to m	nake the
£322.80	payment.	
SAP Invoice Number		
9876543		
Invoice Date		
15/00/0000		

If you pay the invoice by phone, you'll be asked for the SAP (Trust) invoice number and your account number.

The image below shows where the key information is on the screen.

BOAT SA	AFETY SCHEME - Stay Safe	L	Q Search		J
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BSS Checks	Appliance Data 🛛 My BSS 🗸				
Invoice Inv.02/22-249	802			Create Training Inv PDF	Pay Training Invoice
SAP Invoice Number 9876543 CRT Invoice layout	Examiner Rob Test-Candidate	Account Number 800CAN1	Payment Due Date 16/03/2022	Click to th Trust card Event Registration	he Canal & River d payment portal ons (1)
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Invoice Status	1				
Event Cost Ex Vat £269.00	anal & River Trust Custo	mer Number			
Event VAT £53.80		Link	to the chargeable ite	em(s)	

4. How to create an invoice report pdf.

	Create Training Inv PDF	Pay Training Invoice
Payment Due Date 16/03/2022	1	
Click on the repo	Event Registration	ons (1)
	REG Existin Man	da 30/06/ 💌
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	Training_Invoice-15 PDF 30-May-2022 • 17KB	/02\/2022.pdf • pdf
		View All

The PDF file will be saved in the Notes & Attachments section of the record.

If you want to check what the invoice is for, click on the link to the related items. Which is the section just above notes and attachments.

The PDF for examinations invoices now includes more pages containing the list of all Examinations linked to that invoice.

Click the file to view and/or download it

\Box	Inv-05-22-250405 18 KB	5 2022	-05-13	~	
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An invoice for the BSS Training Event

Click the **download** button to open in a new browser window or save it to your downloads folder.

5. Your invoice notification email attachments

If you are having difficulty opening the file of the invoice report attached to the email notification, a simple hack is to save the file with a name of your of choice and add .pdf to the end of the name. It should be easy to open the file using your usual pdf reader e.g. Adobe, MS Edge, Google Drive PDF.

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6. Paying your invoice

Please remember the next two points that must be adhered to whichever payment method you use:-

Always Quote the Canal & River Trust (SAP) Invoice Number,

This is the seven-digit number that begins with 9_____

Note: the BSS reference (e.g. Inv.05/13-100188) is only a cross reference

Always Quote Your Customer Number

Your customer number can be found both on the upper left corner of your invoice printout and on the Salesforce invoice page where it is called 'Account No.

Methods of paying your invoice

There are various ways to pay, but an easy way to pay is online through the Canal & River Trust's pay portal.

By the Canal & River Trust Pay Link

This is automatic process that will take your card payment - use the 'Pay Invoice' button at the top of the invoice page to take you to the Trust's payment page.

Click on the button and important information will pre-load.

Both the Trust's seven-digit invoice number and your Trust customer number should appear automatically along with the payment amount.

You will need to key in your name, your email address and select your address from the dropdown search.

Customer			Billing Address
Customer Name	 Rob Candidate 		Post CH65 4FW Search
Customer Reference	8888888	0	♠ Please Select an Address
Email Address	demonstration.mail@		My address is not shown
nvoice			2-3 Craft Workshops, South Pier Road Ellesmere Port, CH6 4FW
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mount	✓ 322.8	0	Charleys Ceramics, 7B Craft Workshops, South Pier Road Elesmere Port, CH6 4FW
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	Enter your name and en	nail address	Go Group, 6 Craft Workshops, South Pier Road Ellesmere Port, CH65 4FW

But if the link fails, you use this link <u>https://paynow.canalrivertrust.org.uk/</u> and you will need to enter all the information

By Credit Card

You can pay by debit, or credit card over the phone, call the Trust on 0303 040 4040.

Please quote your invoice number and customer number when making a payment. Please quote your invoice number and customer number when making a payment.

By Electronic Banking

To pay your invoice electronically, contact your bank or building society as appropriate, and quote - You must quote these numbers on all electronic payments.

- Sort Code: 60-00-01
- Account No. 36133310
- Customer Number

By Cheque

Detach the payment slip from the bottom of the invoice and enclose it with a cheque.

Make cheques payable to Canal & River Trust and write your customer number on the back.

Send your payment to:-National Waterways Museum South Pier Road Ellesmere Port Cheshire CH65 4FW

Please do not send post-dated cheques

7. Further information

? Query?

If any details have changed, or you have any queries in respect of this invoice, please contact the Shared Service Centre at Leeds.

Please quote your customer number in all enquiries.

If you are paying by Direct Debit, the invoice print-out is for your records only.

A Late Payments!

Where no higher rate of interest is specific in any contract between CRT and you, CRT may charge interest at a rate of 8% above the Bank of England base rate on overdue amounts.

CRT reserves the right to claim debt recovery costs.

If the payment is not honoured by your bank, CRT may apply a handling charge of $\pounds 20$.