



How To Guide – Invoices

May 2023

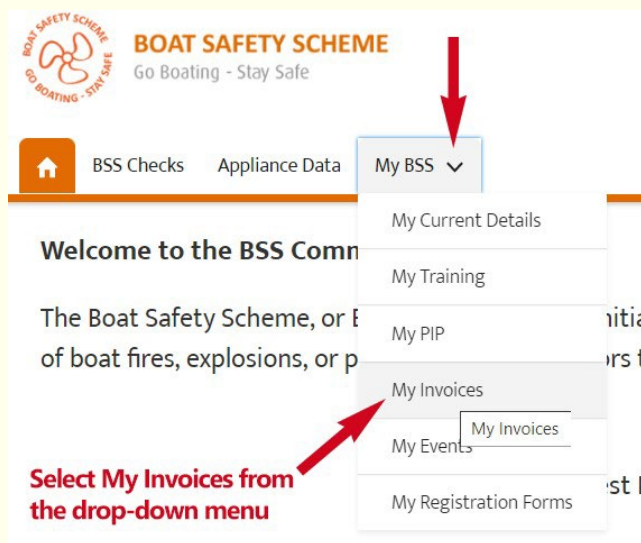
1. Invoices are now only available in the BSS Community

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

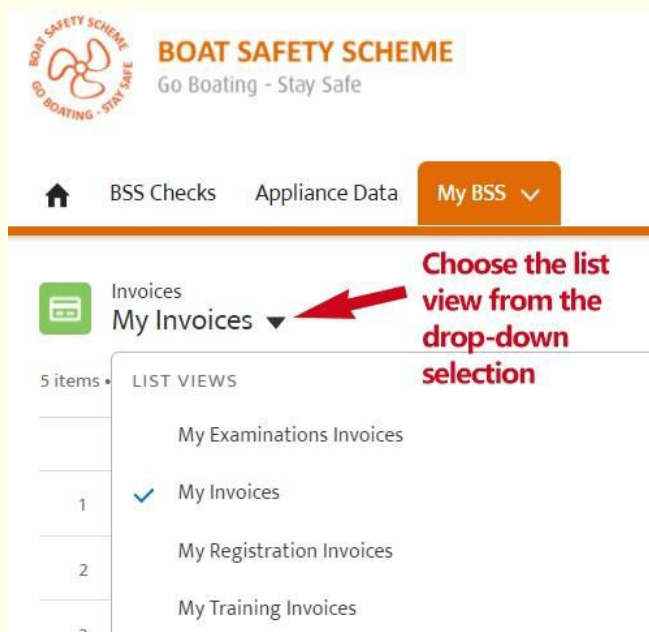
2. Go to My BSS then My Invoices

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**.

Click twice to reverse organise the list, z-a or 100-1 or newest-oldest.

Individual invoices are viewed by click on the BSS invoice ref: [Inv.MM/YY-#####](#)

BOAT SAFETY SCHEME
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BSS Checks Appliance Data **My BSS** ▾

Lists can be organised alphabetically or numerically by any column subject

Invoices **My Invoices** ▾ **Click on the arrow**

5 items • Sorted by Invoice Number • Filtered by My invoices

	Invoice Nu... ↑ ▾	Record Type ▾	Invoice Date
1	Inv.02/22-249795	Training Invoice	10/02/2022
2	Inv.02/22-249802	Training Invoice	15/02/2022
3	Inv.04/22-250280	Registration Invoice	26/04/2022

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.

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BSS Checks Appliance Data **My BSS** ▾

Invoice **Inv.02/22-249802**

SAP Invoice Number Examiner Account Number Payment Due Date

[Rob Test-Candidate](#) 800CAN1 16/03/2022

▾ Invoice layout

Invoice Number	Examiner
Inv.02/22-249802	Rob Test-Candidate
Event Registration	Examiner PIN
REG-0000803	1995
Event Description for Invoice	Account Name
Mandatory 15-month online training programme for existing BSS Examiners comprised of various modules released from June 2021 to summer 2022. Covering core systems knowledge, ECP checks and professional practice. Fees cover administration and support cost.	Training Dummy Contacts
Event Name	Account Number
Existing Examiner Online Training Prog 2021-22	800CAN1
Invoice Status ⓘ	
In Preparation	
Event Cost Ex Vat	
£269.00	
Event VAT	
£53.80	

Invoices in preparation can be viewed before the formal invoice is generated in the Canal & River Trust 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 layout

Invoice Number	Inv.02/22-249802	Examiner	Rob Test-Candidate
Event Registration	REG-0000803	Examiner PIN	1995
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. Covering core systems knowledge, ECP checks and professional practice. Fees cover administration and support cost.	Account Name	Training Dummy Co
Event Name	Existing Examiner Online Training Prog 2021-22	Account Number	800CAN1
Invoice Status	Prepared		
Event Cost Ex Vat	£269.00		
Event VAT	£53.80		
Event Cost Inc VAT	£322.80		
SAP Invoice Number	9876543		
Invoice Date	15/03/2022		

When the invoice is formally generated, the invoice status is switched to prepared. It is now payable and this is where to find the invoice number to use to make the payment.

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 SAFETY SCHEME
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Search...

Create a pdf format report of the invoice

BSS Checks | Appliance Data | My BSS

Invoice: Inv.02/22-249802

Create Training Inv PDF | Pay Training Invoice

SAP Invoice Number	Examiner	Account Number	Payment Due Date
9876543	Rob Test-Candidate	800CAN1	16/03/2022

CRT Invoice number

Canal & River Trust Customer Number

Payment due date

Click to the Canal & River Trust card payment portal

Link to the chargeable item(s)

Event Registrations (1)

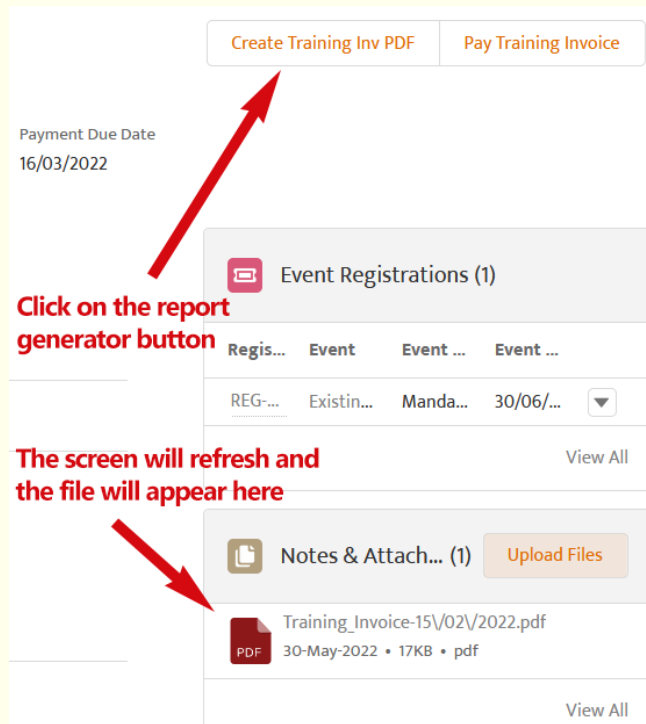
Regis...	Event	Event ...	Event ...
REG-...	Existin...	Manda...	30/06/...

Notes & Attac... (0) | Upload Files

Upload Files

Or drop files

4. How to create an invoice report pdf.

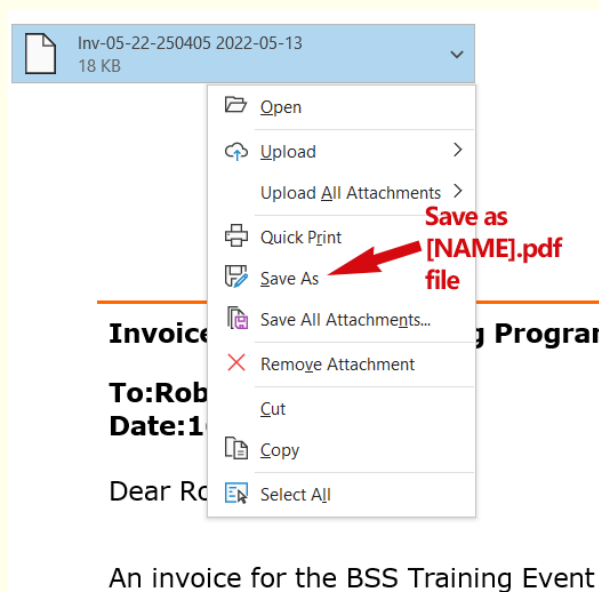


The PDF file will be saved in the Notes & Attachments section of the record.

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



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 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.

 Download Public Link View File Details 						
Rob Watford Boat Safety Scheme First Floor North 500 Elder gate Milton Keynes Buckinghamshire MK9 1BB			Download button is in the grey top bar		Address any queries to: Group Accounting National Waterways Museum South Pier Road Ellesmere Port CHESHIRE CH65 4FW T. 0303 040 4040	
Customer Number 8000001	Invoice Number 987654321	Invoice Date 04/05/2023	Tax Point 04/05/2023	Your Ref.	Payment due date 02/06/2023	
Description	Quantity	Price	Value	VAT Co		

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 drop-down search.



Customer

Customer Name

Customer Reference

Email Address

Invoice

Invoice

Date

Reference

Amount

Enter your name and email address

Enter your post code, select the right address

Post Code

Billing Address

⌂ Please Select an Address

My address is not shown...

- 2-3 Craft Workshops, South Pier Road Ellesmere Port, CH65 4FW
- 4 Craft Workshop, South Pier Road Ellesmere Port, CH65 4FW
- 1A Craft Workshops, South Pier Road Ellesmere Port, CH65 4FW
- 7A Craft Workshops, South Pier Road Ellesmere Port, CH65 4FW
- Canal & River Trust, South Pier Road Ellesmere Port, CH65 4FW
- Charleys Ceramics, 7B Craft Workshops, South Pier Road Ellesmere Port, CH65 4FW
- Deva Services Ltd, 6 Craft Workshops, South Pier Road Ellesmere Port, CH65 4FW
- Go Group, 6 Craft Workshops, South Pier Road Ellesmere Port, CH65 4FW

Enter your post code, select the right address

Total: £322.80

The sum of three hundred and twenty two pounds and eighty pence only

But if the link fails, you use this link <https://paynow.canalrivertrust.org.uk/> 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.

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 £20.