



How To Guide – Invoices

May 2024

1. BSS Invoices

Invoices are issued by the Canal & River Trust on behalf the Boat Safety Scheme Limited

BSS Limited is public safety initiative run as a not-for-profit company limited by guarantee. It is registered in England and Wales with Company No. 15501423. The registered office is: National Waterways Museum Ellesmere Port, South Pier Road, Ellesmere Port, Cheshire CH65 4FW

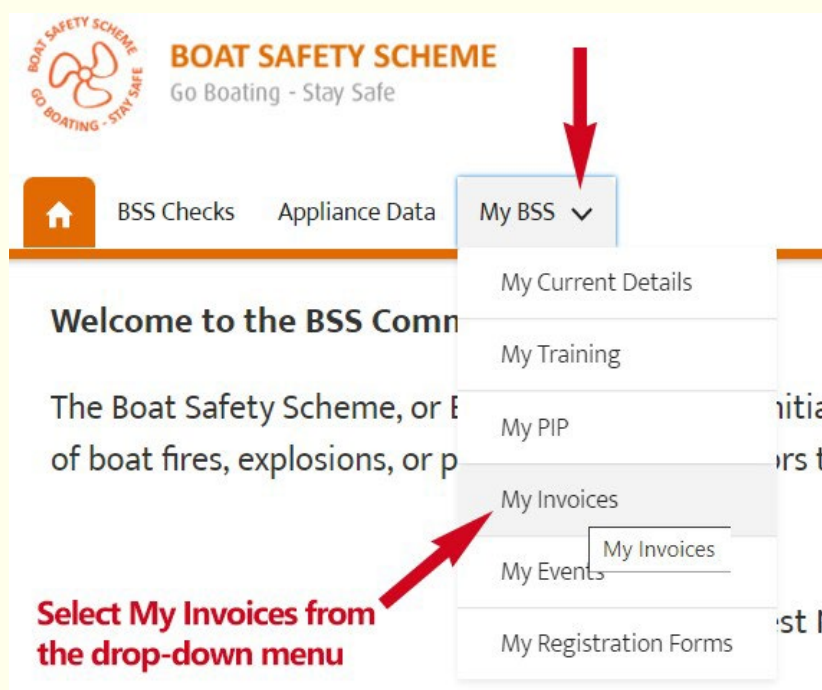
2. Invoice information is now only available in the BSS Community

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

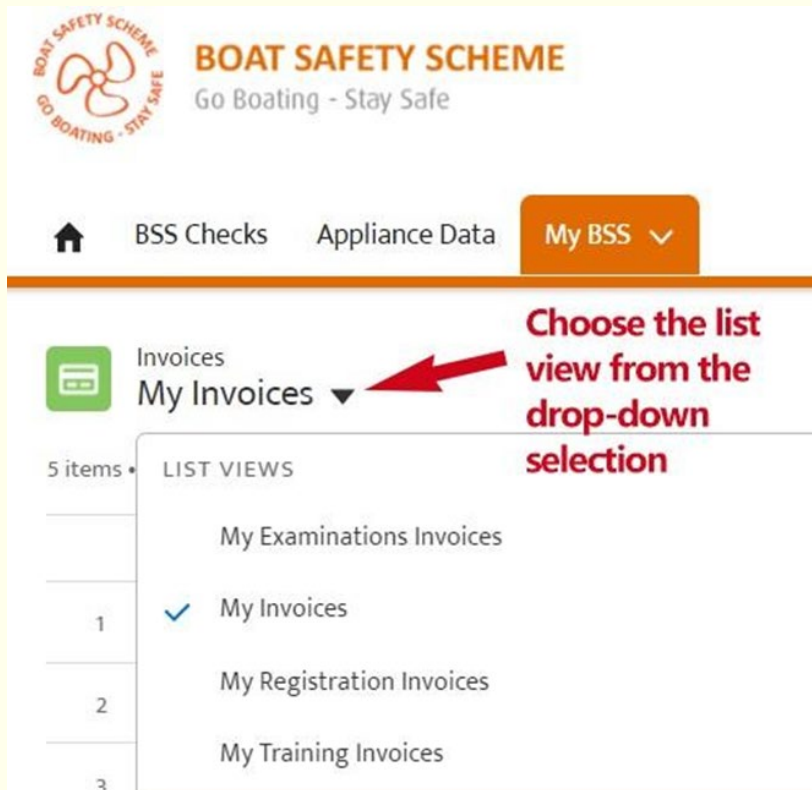
3. Go to My BSS then My Invoices

To open a list of your invoices:

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



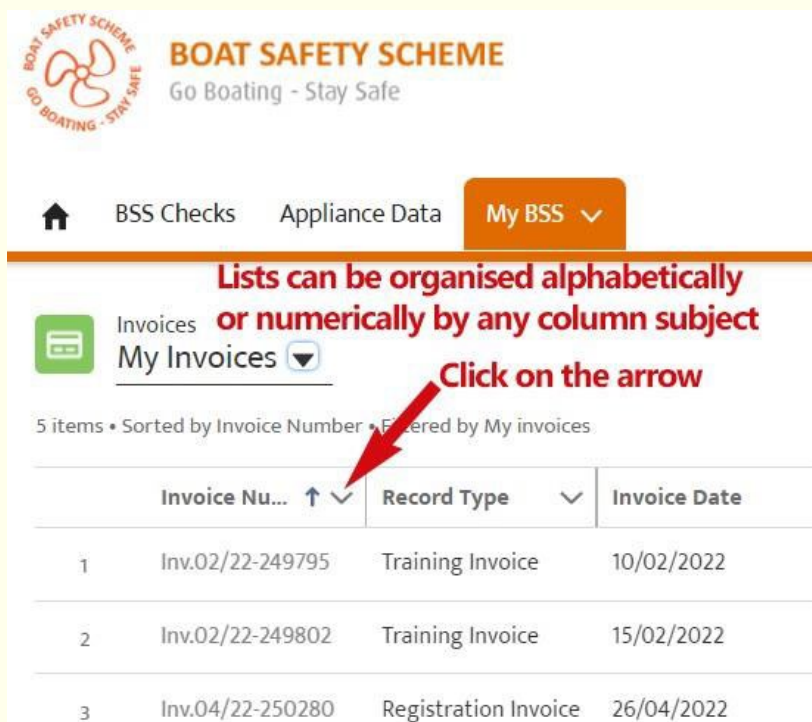
When you have selected the Invoices, you will be taken to a page that shows you a list of your invoices, this is known as a list view. You have a choice of which list view you want to see:



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-#####](#)



4. 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.

The screenshot shows the BOAT SAFETY SCHEME website interface. At the top, there is a navigation bar with 'BSS Checks', 'Appliance Data', and 'My BSS'. Below this, the invoice details are displayed:

- Invoice Number: Inv.02/22-249802
- SAP Invoice Number: (blank)
- Examiner: Rob Test-Candidate
- Account Number: 800CAN1
- Payment Due Date: 16/03/2022

The 'Invoice layout' section is expanded, showing the following details:

- 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. Covering 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 (highlighted with a red arrow)
- Event Cost Ex Vat: £269.00
- Event VAT: £53.80

On the right side of the 'Invoice layout' section, the following details are listed:

- Examiner: Rob Test-Candidate
- Examiner PIN: 1995
- Account Name: Training Dummy Contacts
- Account Number: 800CAN1

A red arrow points from the 'In Preparation' status to a text box that reads: **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.

The screenshot shows the BOAT SAFETY SCHEME website interface, similar to the previous one, but with the invoice status changed to 'Prepared'.

The 'Invoice layout' section is expanded, showing the following details:

- 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. Covering 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: Prepared (highlighted with a red arrow)
- Event Cost Ex Vat: £269.00
- Event VAT: £53.80
- Event Cost Inc VAT: £322.80

On the right side of the 'Invoice layout' section, the following details are listed:

- Examiner: Rob Test-Candidate
- Examiner PIN: 1995
- Account Name: Training Dummy Co
- Account Number: 800CAN1

A red arrow points from the 'Prepared' status to a text box that reads: **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.**

At the bottom of the 'Invoice layout' section, the following details are listed:

- SAP Invoice Number: 9876543 (highlighted with a red arrow)
- Invoice Date: 16/03/2022

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

Invoice record overview

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

BOAT SAFETY SCHEME
Go Boating - Stay Safe

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

CRT Invoice number

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. Covering 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: Prepared
Event Cost Ex Vat: £269.00
Event VAT: £53.80

Examiner PIN: 1995
Account Name: Training Dummy Contacts
Account Number: 800CAN1

Payment due date

Canal & River Trust Customer Number

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

5. How to create an invoice report pdf.

Create Training Inv PDF Pay Training Invoice

Payment Due Date: 16/03/2022

Click on the report generator button

Event Registrations (1)

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

The screen will refresh and the file will appear here

Notes & Attach... (1) Upload Files

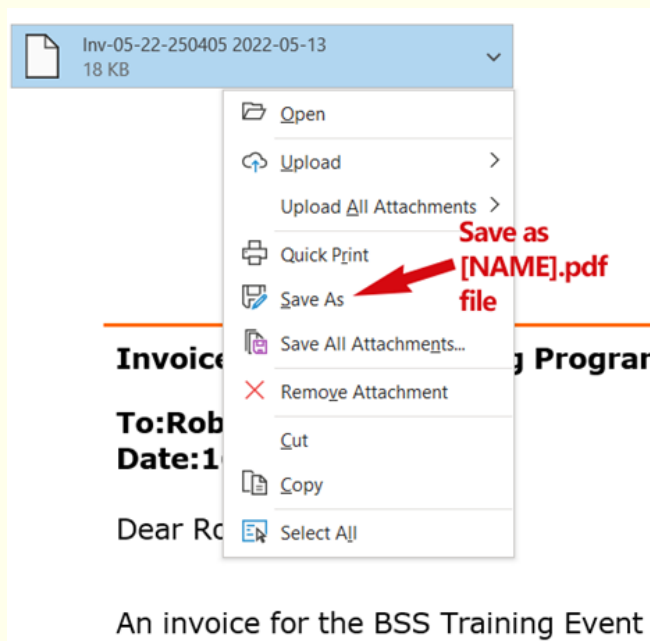
Training_Invoice-15\02\2022.pdf
30-May-2022 • 17KB • pdf

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.

6. 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.

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	

7. Paying your invoice

Please remember the next two points that must be adhered to whichever payment method you use. You must quote these two numbers:-



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.

8. 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: Rob Candidate

Customer Reference: 8888888

Email Address: demonstration.mail@

Invoice

Invoice: 98765431

Date: 15 Mar 2022

Reference: Inv.02/22-249802

Amount: 322.8

Billing Address

Post Code: CH65 4FW

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

Total: £322.80

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

Continue

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:-

Cashiers
Group Accounting
National Waterways Museum
South Pier Road
Ellesmere Port
Cheshire CH65 4FW

Please do not send post-dated cheques

9. Further information

Query?

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

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.