



JOIN **1000s** OF SCHOOLS THAT ARE ALREADY  
SAVING UP TO **1 HOUR PER DAY**



# SMART CONNECT USER GUIDE

CAPITA |

SIMS

helping  
schools  
inspire

For help setting up call us on **028 9756 2886** or email [smartconnect@spa4schools.co.uk](mailto:smartconnect@spa4schools.co.uk)

# SPA 4 SCHOOLS SMART CONNECT

If you are looking to save time and money on your procurement then our Smart Connect solution is for you. You simply create an order in our website and import it back into SIMS to get your order authorised, the process is seamless and activation is simple.

This new and efficient way of ordering is free to setup and you can benefit from;

- Faster and more efficient shopping - no rekeying required
- Seamless link with your SIMS FMS – simple one-off setup
- Fully compliant - providing a complete digital audit trail
- Orders placed immediately following approval
- Access to latest products and prices
- Free delivery available on all orders
- More environmentally friendly - full digital solution means less paper wastage

## HOW IT WORKS



## GETTING STARTED

To setup Smart Connect we need to make a couple of simple changes to your account.

Before proceeding with the rest of the guide, **please call 028 9756 2886, or email, [smartconnect@spa4schools.co.uk](mailto:smartconnect@spa4schools.co.uk)** and one of our team will activate your account so that you are ready to complete your activation and start saving time on your procurement process.

You will also need the following information:


- 1. The email address you use to shop on SPA 4 Schools**
- 2. Your SPA 4 Schools Account Number**
- 3. Your SPA 4 Schools Website Password**
- 4. Your DUNS Number**

You will also need to check the 'Tools > eProcurement' Settings in your SIMS FMS. If this option is greyed out and therefore disabled you will have to contact your SIMS representative to enable it, either at your Local Authority or contact Capita directly.

# FINDING YOUR DUNS NUMBER

If you are unaware what your school's DUNS number is, then you can find it using this handy tool provided by DUN and Bradstreet.

<https://www.dnb.co.uk/duns-number/lookup.html>



The screenshot shows the 'Company D-U-N-S Number Search' page. At the top, a navigation bar contains links: HOME, D-U-N-S NUMBER, and GET YOUR D&B D-U-N-S NUMBER. The main heading is 'Company D-U-N-S Number Search'. Below this, there are two search options. The first, 'Search By Company Name', includes a subtext 'Find a UK or Ireland company's D-U-N-S Number by entering its name and location.' It features a text input field labeled 'Company Name' and a 'Search Now' button. The second, 'Search by Company Registration Number', includes a subtext 'Find a UK company's D&B D-U-N-S Number by entering its Company Registration Number.' It features a text input field labeled 'Company Registration Number', a reCAPTCHA 'I'm not a robot' checkbox, and a 'Search Now' button.

Simply enter your establishment name into the **Search By Company Name search box**. To help the refinement process, you can also add your postcode and postal town.

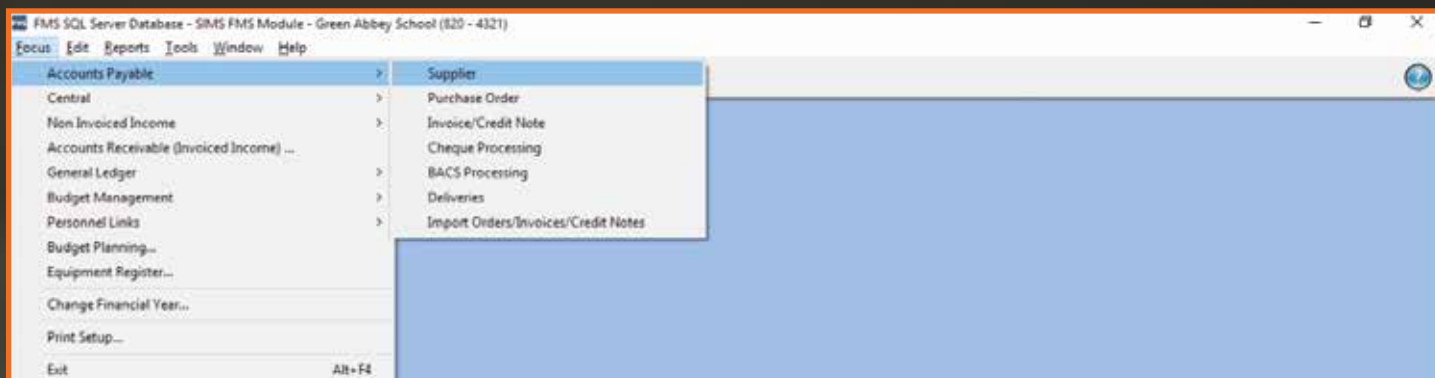
You can also find your DUNS number if you know your company registration number, by using the tool adjacent to Company Name search.


# SETTING UP YOUR SMART CONNECT

## SECTION A: BASIC SET-UP

### 1. Add SPA 4 Schools as a Supplier

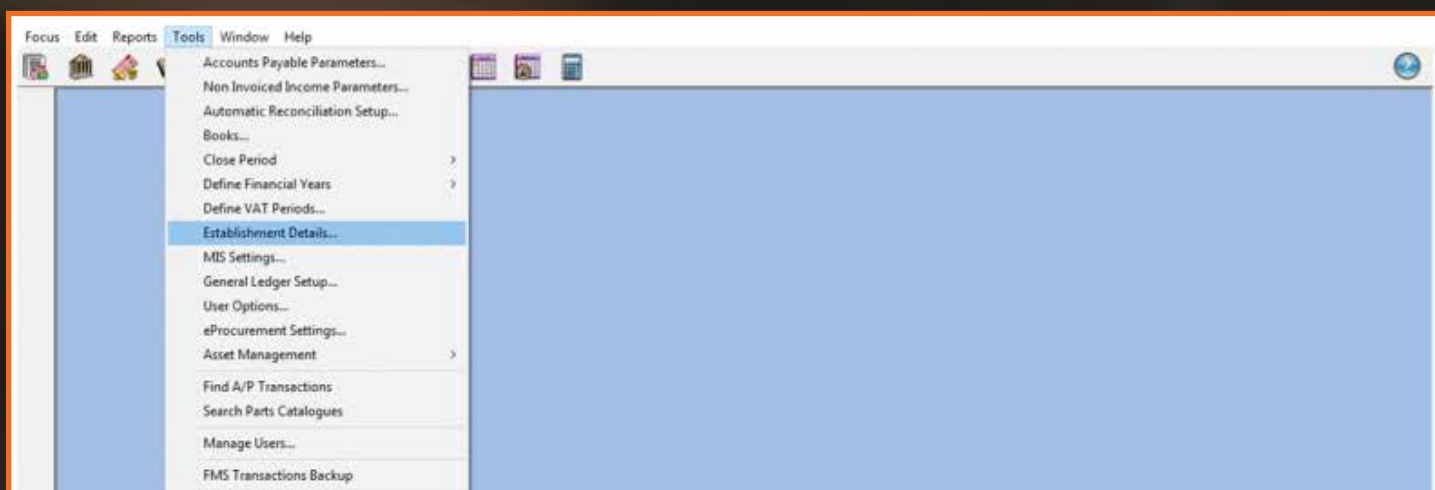
**1.1** To set up SPA 4 Schools as a new supplier go to 'Focus > Accounts Payable > Supplier'



**1.2** Select the  and enter the below details:  
SPA 4 Schools  
Units 1 and 2, 55 Antrim Road,  
Ballynahinch, Co.Down,  
BT24 8AN  
VAT Number – GB125688644  
DUNS - 219349384  
Telephone – 028 9756 2886  
Email Address – smartconnect@spa4schools.co.uk

### 2. Check your Establishment Details

**2.1** Ensure your Establishment details are correct and updated including the DUNS number via section 'Tools > Establishment Details'



**2.2** Check the details held on Tab 1 – Basic Details, including the DUNS number, and edit where necessary.

The screenshot shows the 'Establishment Details' window with the following fields and values:

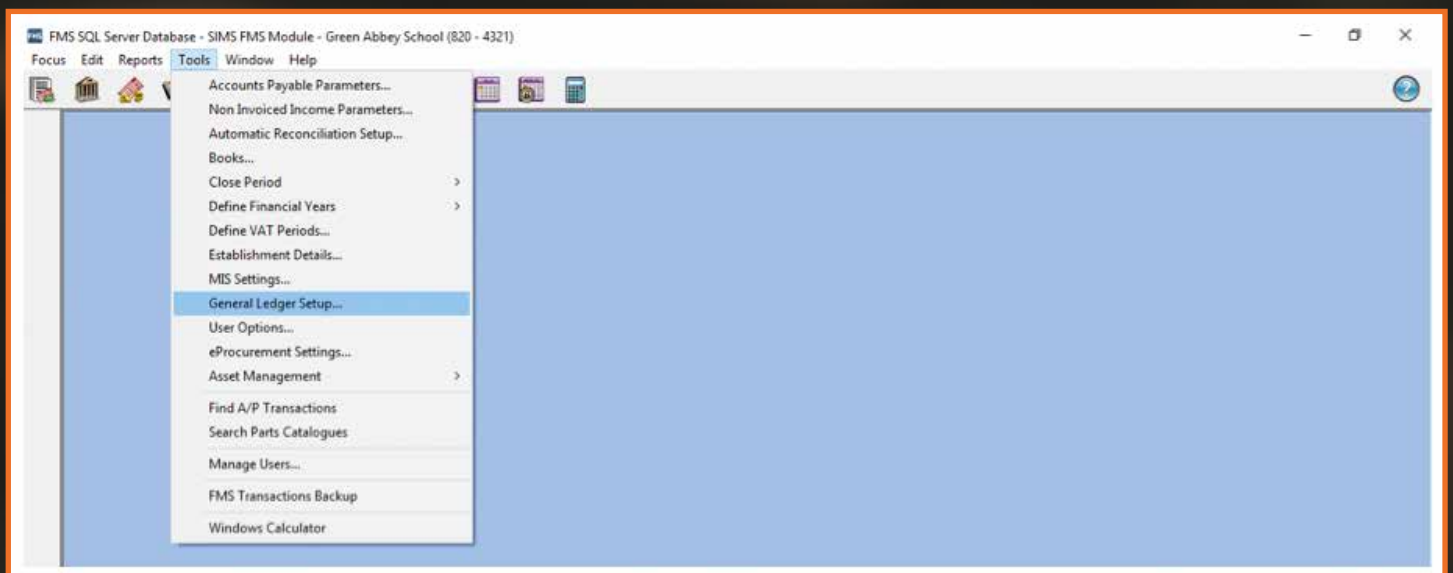
5: Email Setup		6: Interfaces		7: Scanned Documents			
1: Basic Details		2: Logo		3: System Parameters		4: eProcurement	
Name	Green Abbey School						
Code	4321	Companies House No.					
LA Code	820	VAT Registration No.					
Borough	Eastshire						
Payable to	Green Abbey School						
Address							
Monkmoor Road							
East Town							
Eastshire							
Postcode							
S12 5AP							
Telephone	01234 838080		Fax	01234 838091			
e-mail							
Unique Identifier				DeMinimis Value			
<input type="radio"/> n/a <input type="radio"/> GLN <input checked="" type="radio"/> DUNS		542199995		1.00			

Annotations:


- Red arrow pointing to the 'DUNS' radio button: Select DUNS
- Red arrow pointing to the '542199995' text box: Enter your DUNS Number
- Red arrow pointing to the 'Save' button: Save

## 3. General Ledger

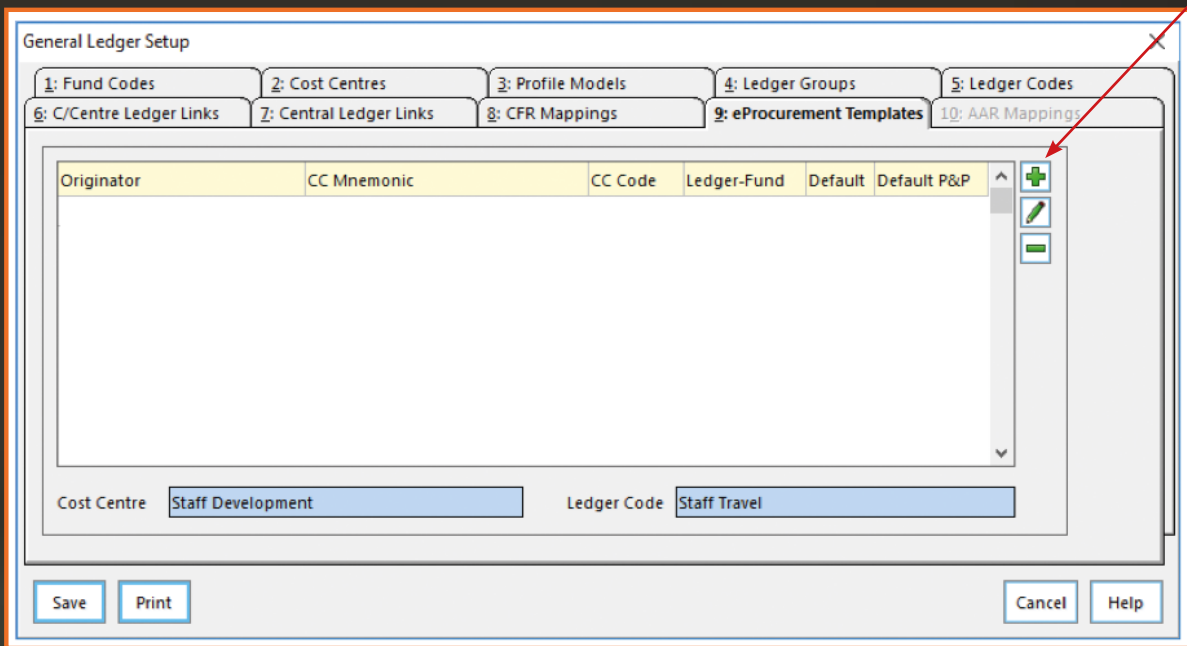
**3.1** Next set up a general ledger template, this will ensure imported orders are assigned a cost centre and ledger code via 'Tools > General Ledger Setup'





**3.2** Proceed to Tab 9 – ‘eProcurement Template’ and add a new ledger by clicking the 


Click

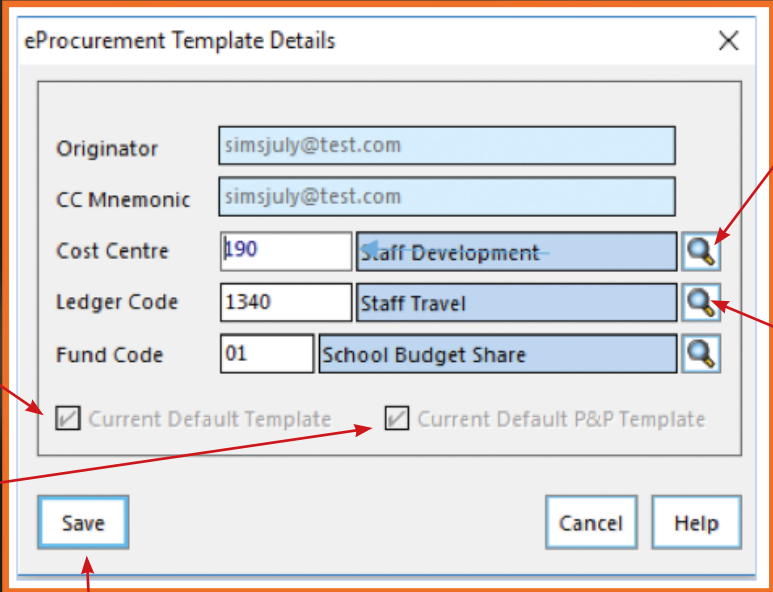


The 'General Ledger Setup' window shows a tabbed interface with tabs for Fund Codes, Cost Centres, Profile Models, Ledger Groups, Ledger Codes, C/Centre Ledger Links, Central Ledger Links, CFR Mappings, eProcurement Templates, and AAR Mappings. The 'eProcurement Templates' tab is active, displaying a table with columns: Originator, CC Mnemonic, CC Code, Ledger-Fund, Default, and Default P&P. A red arrow points to a green plus icon in the right-hand toolbar of the table, indicating where to click to add a new ledger. Below the table, there are input fields for 'Cost Centre' (containing 'Staff Development') and 'Ledger Code' (containing 'Staff Travel'). At the bottom are buttons for 'Save', 'Print', 'Cancel', and 'Help'.

**3.3** Next complete the pop up box using the below information for both open fields:

- Originator and CC Mnemonic: This is your email address that you use on the SPA 4 Schools website



**3.4** Then click  next to Cost Centre field and select the default Cost Centre for this template. The cost centre that you choose will depend on your own establishment's preferences and the available types, but in general it will be the category which you most commonly use. Any cost centre and ledger code applied to an incoming order can be amended in your FMS system once the order has been imported.



The 'eProcurement Template Details' window contains the following fields and controls:

- Originator:** Text field with value 'simsjuly@test.com'.
- CC Mnemonic:** Text field with value 'simsjuly@test.com'.
- Cost Centre:** Text field with value '190' and a dropdown menu showing 'Staff Development'. A red arrow points to a search icon (magnifying glass) to the right of the dropdown.
- Ledger Code:** Text field with value '1340' and a dropdown menu showing 'Staff Travel'. A red arrow points to a search icon (magnifying glass) to the right of the dropdown.
- Fund Code:** Text field with value '01' and a dropdown menu showing 'School Budget Share'. A red arrow points to a search icon (magnifying glass) to the right of the dropdown.
- Current Default Template:** A checkbox that is currently checked.
- Current Default P&P Template:** A checkbox that is currently unchecked.
- Buttons:** 'Save', 'Cancel', and 'Help' at the bottom.

Annotations with red arrows:

- From the top right: 'Click  and enter your most frequently used Cost Centre' points to the search icon next to the Cost Centre dropdown.
- From the bottom right: 'Click  and enter your most frequently used Ledger Code' points to the search icon next to the Ledger Code dropdown.
- From the bottom left: 'Tick Current Default Template' points to the 'Current Default Template' checkbox.
- From the bottom left: 'Tick Current Default P&P Template' points to the 'Current Default P&P Template' checkbox.
- From the bottom left: 'Save' points to the 'Save' button.

3.5 You should now see the following screen:

General Ledger Setup

1: Fund Codes

2: Cost Centres

3: Profile Models

4: Ledger Groups

5: Ledger Codes

6: C/Centre Ledger Links

7: Central Ledger Links

8: CFR Mappings

9: eProcurement Templates

10: AAR Mappings

Originator	CC Mnemonic	CC Code	Ledger-Fund	Default	Default P&P
simsjuly@test.com	simsjuly@test.com	190	1340-01	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Cost Centre

Staff Development

Ledger Code

Staff Travel

Save

Print

Cancel

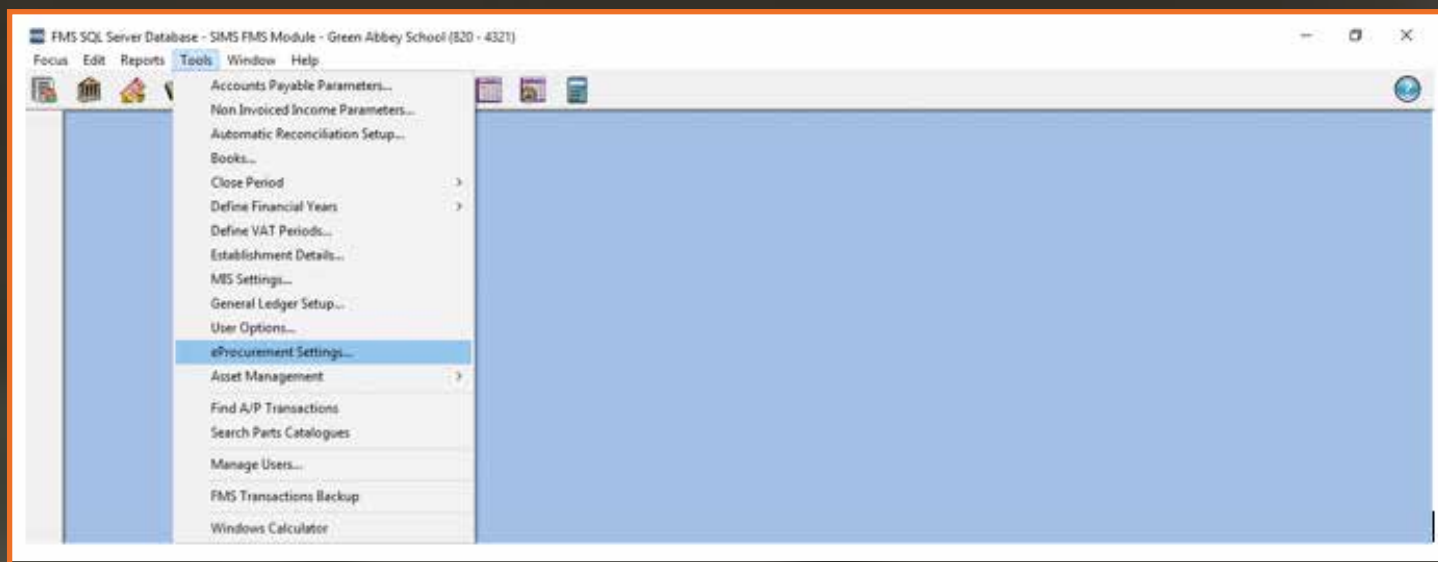
Help

3.6 Press save to complete.

## SECTION B: E-PROCUREMENT SET-UP

**4.1** The next step is to enter the details to connect your SIMS FMS to our SPA 4 Schools website.

Go to 'Tools > eProcurement Settings'. If this is greyed out please refer to the 'Getting Started' section of this document to activate the option.



**4.2** If this is editable select  in the WEB SERVICES section to make an addition:

Select 

A screenshot of the 'Settings for eProcurement (Web Services)' dialog box. The 'WEB SERVICES' section contains a table with columns 'Name', 'URL', and 'Active'. A red arrow points to a green plus icon in the top right corner of this section. Below the table is a 'Test' button. The 'LINKED SUPPLIERS' section has a 'Looking for' field, a 'Sequence' dropdown (currently set to 'Name'), and a table with columns 'Supplier Name', 'Code', 'DUNs', and 'eOrdering e-mail Address'. The 'GENERAL SETTINGS' section includes 'Default XML Order Book' (set to 'BANK') and 'Establishment DUNs Number' (set to '123456789'). The 'SUPPLIERS' section has 'Import' and 'Export' buttons. The 'INTERNET CONNECTIVITY' section has a checkbox 'I access the Internet through a Proxy Server' (checked) and a 'Test URL' field (set to 'http://www.education.gov.uk/'). At the bottom are 'Save', 'Cancel', and 'Help' buttons.



**4.3** On the pop-up screen you will need to enter the responses below:

The 'Service Details' window contains the following fields and controls:

- Provider Type:** Radio buttons for 'Portal' (selected) and 'Supplier'.
- Name:** Text box containing 'SPA 4 Schools'.
- URL:** Text box containing 'https://webfms.digital/spa.asmx'.
- Priority:** Text box containing '1'.
- User ID:** Text box containing 'username@example.com'.
- Password:** Text box containing '\*\*\*\*\*'.
- Password duration (in days):** Text box containing '999'.
- Active:** Check box, which is ticked.
- Buttons:** 'Save', 'Cancel', and 'Help'.

Annotations with red arrows point to the following elements:

- 'Enter 1' points to the Priority field.
- 'Enter your SPA 4 Schools website email address' points to the User ID field.
- 'Enter your SPA 4 Schools password' points to the Password field.
- 'Click Save' points to the Save button.
- 'Enter: https://webfms.digital/spa.asmx' points to the URL field.
- 'Enter 999 days' points to the Password duration field.
- 'Tick Active' points to the Active check box.
- 'Select Supplier' points to the Supplier radio button.
- 'Select SPA 4 Schools' points to the Name field.

**4.4** Now save these settings and click to Test the connection, directly below the web services box.

The 'WEB SERVICES' section displays a table with the following data:

Name	URL	Active
SPA 4 Schools	https://webfms.digital/spa.asmx	<input checked="" type="checkbox"/>

Below the table is a 'Test' button, which is highlighted by a red arrow and the annotation 'Click Test'.

**4.5** If the settings are correct the pop-up below will appear:


The 'Information' window displays the following message:

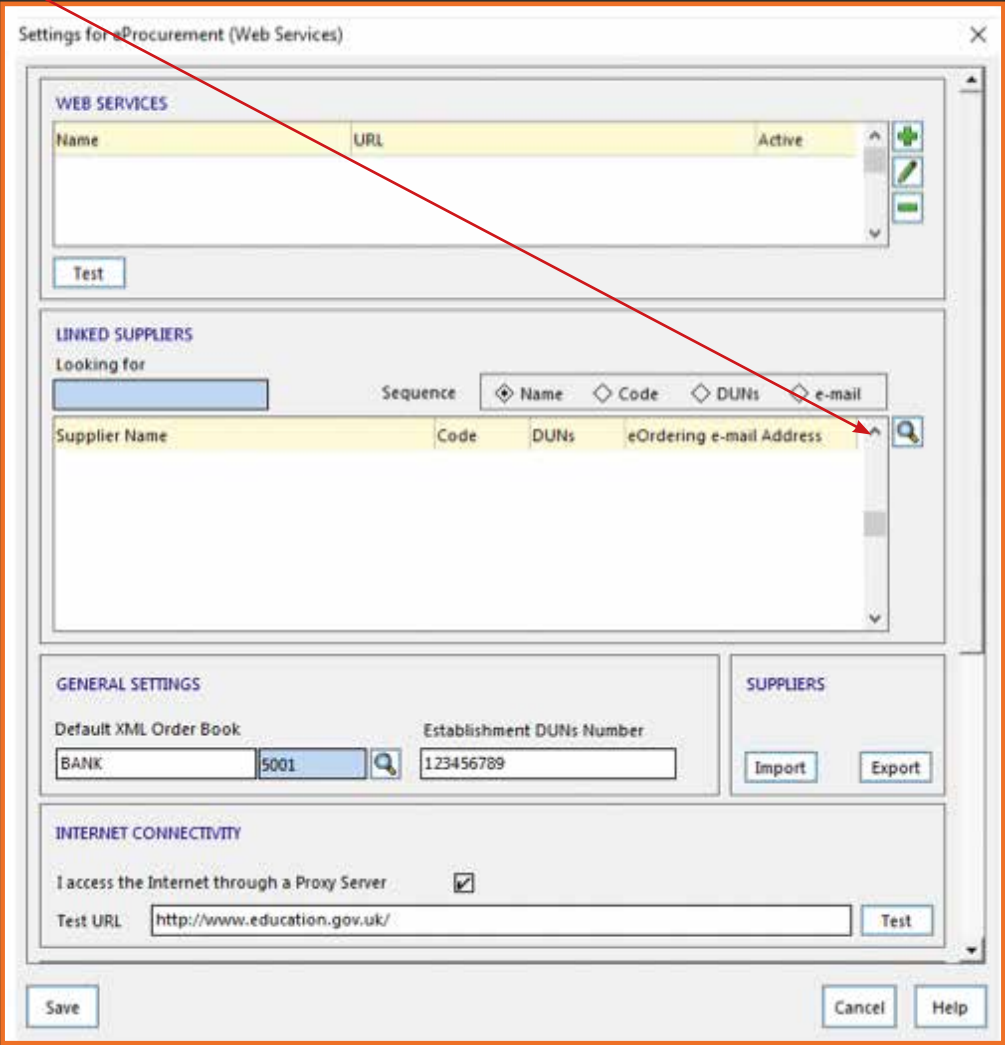
**Web Service Connection OK**

Below the message is an 'OK' button.

In the unlikely event of this showing a failed message, please contact our Support Team on 028 9756 2886.

**4.6** Now that the Web Service is set up, simply choose the one you have just created to link the supplier to the web service.

Select  within Linked Suppliers



Settings for eProcurement (Web Services)

**WEB SERVICES**

Name	URL	Active
------	-----	--------

Test

**LINKED SUPPLIERS**

Looking for:

Sequence: ☒ Name ☐ Code ☐ DUNs ☐ e-mail

Supplier Name	Code	DUNs	eOrdering e-mail Address
---------------	------	------	--------------------------

**GENERAL SETTINGS**

Default XML Order Book:  Establishment DUNs Number:

**SUPPLIERS**

Import Export

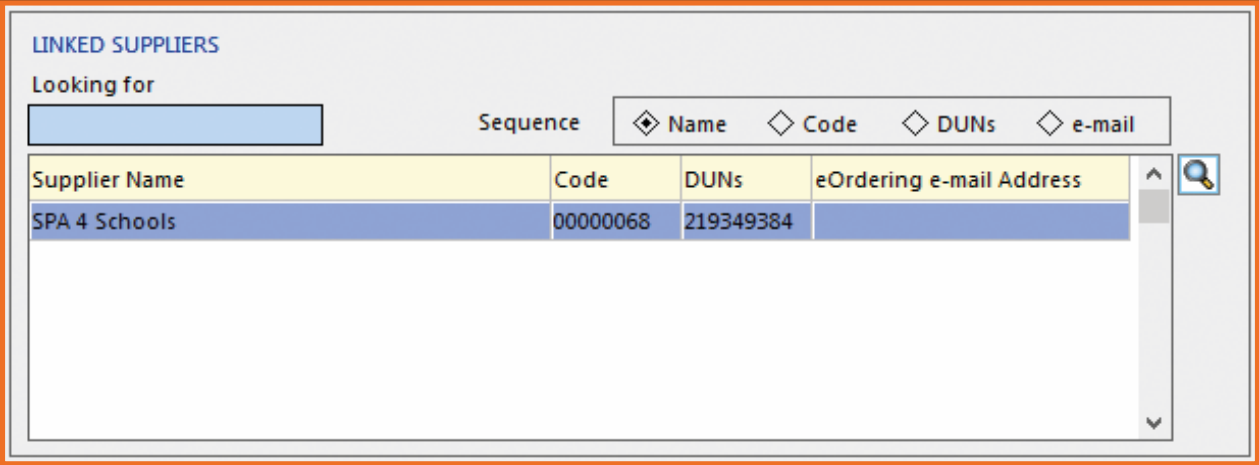
**INTERNET CONNECTIVITY**

I access the Internet through a Proxy Server ☒

Test URL:  Test

Save Cancel Help

**4.7** In the 'Supplier Name' list select SPA 4 Schools so that it is highlighted and then click the Choose button. Then click Update. This links SPA 4 Schools as a supplier to the SPA 4 School web service details.



**LINKED SUPPLIERS**

Looking for:

Sequence: ☒ Name ☐ Code ☐ DUNs ☐ e-mail

Supplier Name	Code	DUNs	eOrdering e-mail Address
SPA 4 Schools	00000068	219349384	

4.8 Next within the 'General Settings' section:

Select your Default Order Book

Click Save

Settings for eProcurement (Web Services)

WEB SERVICES

Name	URL	Active
------	-----	--------

Test

LINKED SUPPLIERS

Looking for

Sequence

Supplier Name

Code

DUNS

eOrdering e-mail Address

GENERAL SETTINGS

Default XML Order Book

Establishment DUNS Number

INTERNET CONNECTIVITY

I access the Internet through a Proxy Server

Test URL

Save

Cancel

Help

Enter your DUNS number. If you are unsure what this is, refer to "finding your DUNS Number" in this guide.

4.9 Select your 'Default XML Order Book' for orders to be assigned to when they are imported using this eProcurement method.

GENERAL SETTINGS

Default XML Order Book

Establishment DUNS Number

BANK

5001

123456789

Import

Export

SUPPLIERS

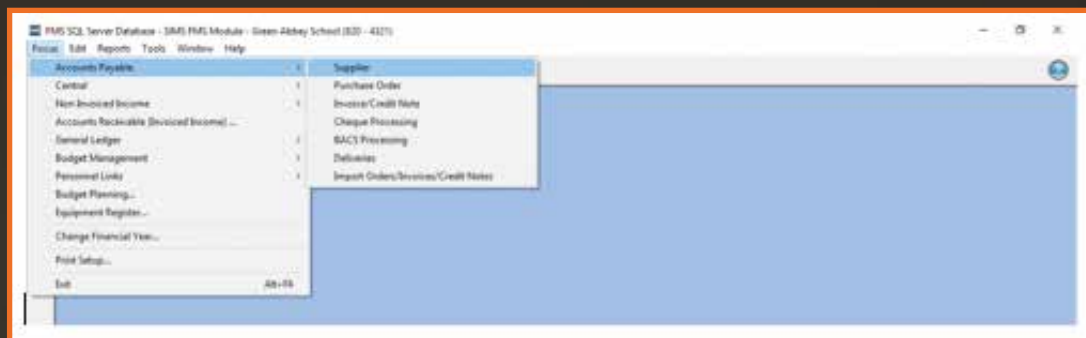
4.10 Check that your DUNS Number is in the 'Establishment DUNS Number' field too, if this information is missing, please add it.

If you are unsure where to find this please refer to the 'Getting Started' section of this document.

Once all the details are entered, **click Save**.

## SECTION C: SUPPLIER SET-UP

**5.1** The next step is to enable SPA 4 School to process Web Service Orders. Go to Focus > Accounts Payable > Supplier



**5.2** Find SPA 4 School and double click on the name.

**5.3** In tab '1: Basic' the Delivery Code needs to contain your account number e.g. 7430017072. The account number needs to be the same as in the Delivery Code and Account Number field.

Enter your Account Number here

A screenshot of the 'Supplier Details' form for 'SPA 4 Schools'. The form has five tabs: '1: Basic', '2: Additional', '3: Catalogue', '4: Review', and '5: eProcurement'. The '1: Basic' tab is active. It contains fields for Name, Date Opened, VAT Registration No., Balance, Address, Postcode, Contact, Telephone, Fax, e-mail, and eOrdering e-mail. The 'Delivery Code' is set to 'SPA000001'. The 'Account Number' is also set to 'SPA000001'. The 'Order Method' is set to 'W' (Web Services). The 'Unique Identifier' is set to 'DUNs' with the value '219349384'.

Enter your Account Number here

Click the button

**5.4** The Order Method section on this tab gives you a list of options available for sending the Purchase Orders. Select 'W - Web Services'.

A screenshot of the 'Order Method' dialog box. It shows a table with columns 'Code' and 'Description'. The table lists four options: 'E' (EDI transfer), 'M' (Email PDF File), 'P' (Print), and 'W' (Web Services). The 'W' option is highlighted. There are 'Select', 'Cancel', and 'Help' buttons at the bottom.

Select (W) for Web Services

**5.5** In the unique identifier section select DUNS and enter SPA 4 Schools DUNS Number which is **219349384**.

FMS Supplier Details

1: Basic 2: Additional 3: Catalogue 4: Review 5: eProcurement

Name SPA 4 Schools Date Opened 19/04/2018

LA Reference VAT Registration No. Balance 35.44

Address Antrim Road

Postcode BT24 8AN

Contact

Telephone 028 9756 2886

Fax 028 9756 3484

e-mail sales@spa4schools.co.uk

eOrdering e-mail

Delivery Code SPAW000001 Delivery Terms

Account Number SPAW000001

Contract Number

Credit Terms 0 days

Credit Limit 0.00 Min. Order 0.00

Order Method W Web Services Linked Web Service SPA 4 Schools

☒ In Use ☐ On Hold Service

Unique Identifier

☐ n/a ☐ GLN ☒ DUNS 219349384

Select DUNS and enter 219349384

**5.6** Then proceed to tab '5: eProcurement' and enter glseducational (as one word) in the XML Supplier Reference Field.

FMS Supplier Details

1: Basic 2: Additional 3: Catalogue 4: Review 5: eProcurement

BASIC

Purchasing Web Address

e-mail Address Source 1

e-mail Address Source 2

e-mail Address Destination

XML Supplier Reference spa4schools

OPTIONS

☐ Copy XML File to e-mail Address

ENCRYPTION

☐ Use File Encryption for Sending and Receiving

Import Public Key View/Set Public Key

**5.7** Now save and close.

**You are now ready to start ordering online via SIMS.**



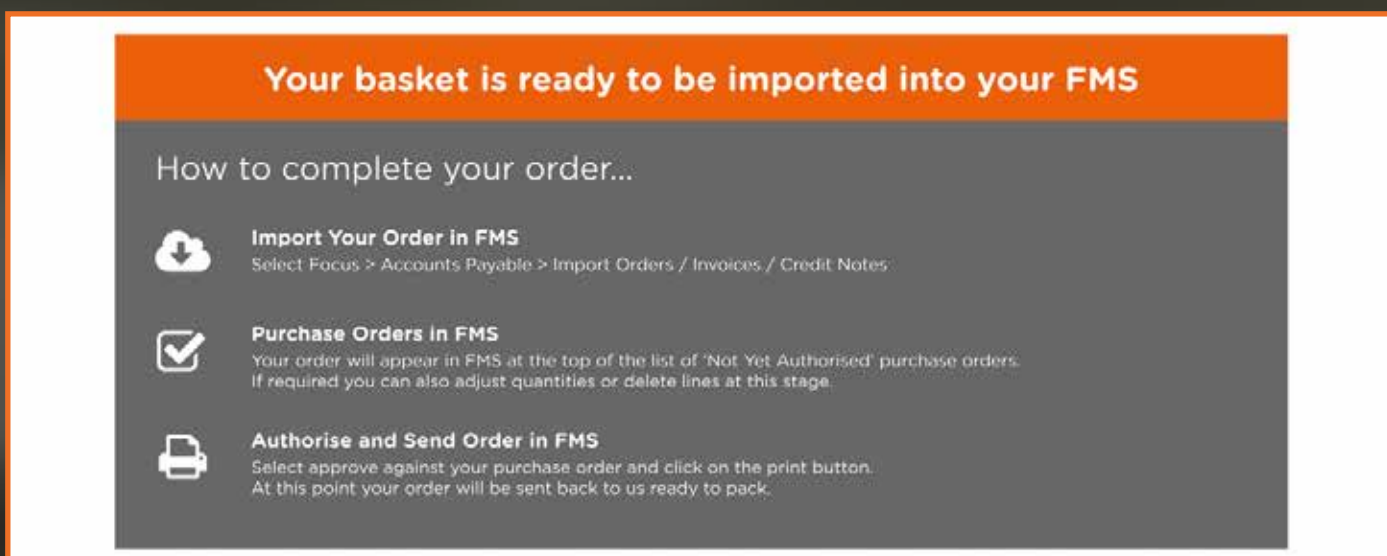
## SECTION D: ORDERING ONLINE

### 5. Shopping on [www.spa4schools.co.uk](http://www.spa4schools.co.uk)

**5.1** Simply visit [www.spa4schools.co.uk](http://www.spa4schools.co.uk) and add all the items you want to purchase to your basket (you can choose to login before you start shopping or during checkout).

**5.2** Once you have reviewed your basket and you are ready to checkout, during these steps you can check the correct account number and delivery address is assigned to the order.

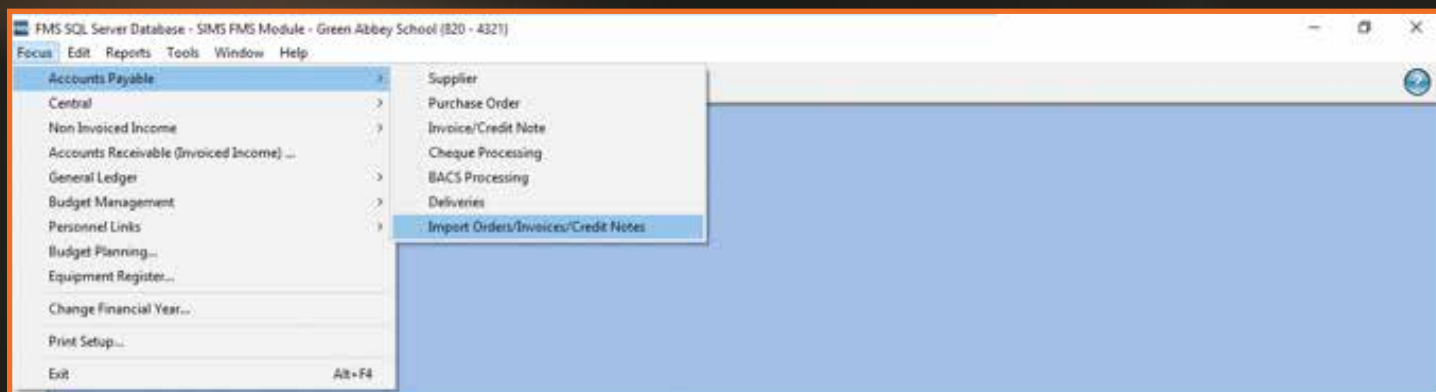
**5.3** Once you have placed your order on the website you will receive the below message confirming the order is to be imported into your SIMS FMS.



### 6. Import your order to SIMS

#### To Import Orders

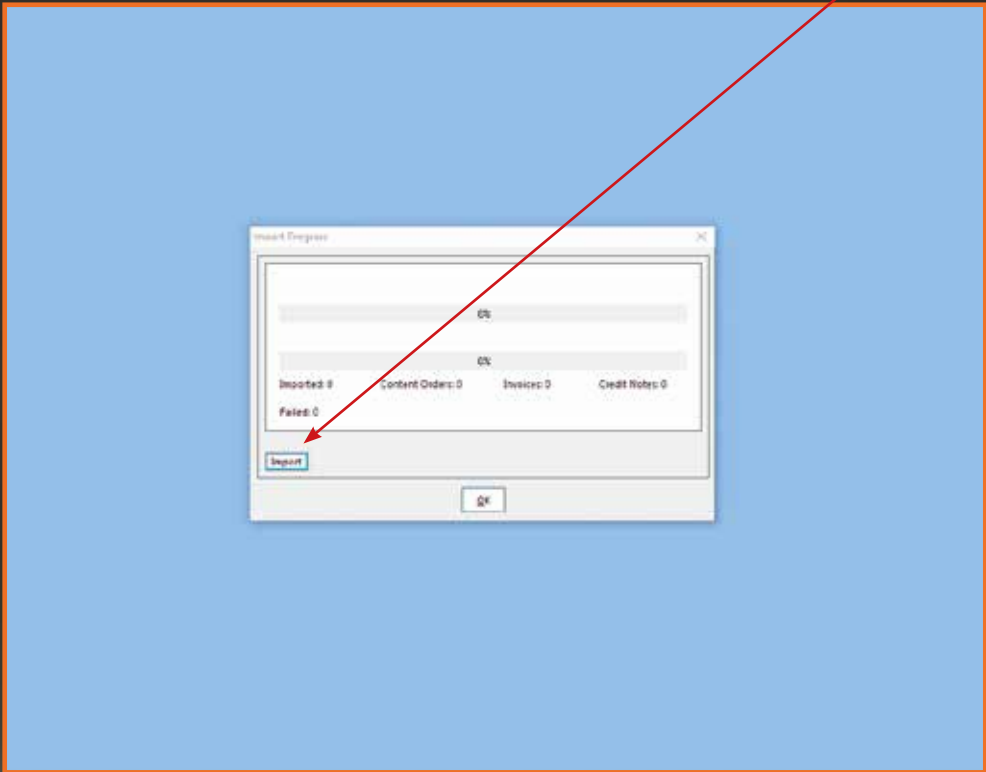
**6.1** Focus > Accounts Payable > Import Orders / Invoices / Credit Notes



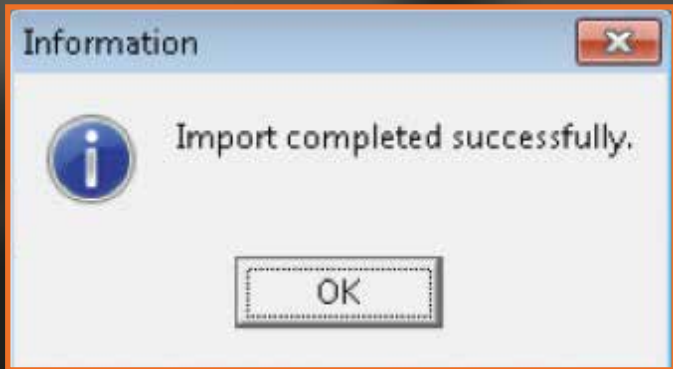
This will import any outstanding Orders / Invoices / Credit Notes.



**6.2** When the Import Progress box appears click on the 'Import' button.



**6.3** The system will now connect to our eProcurement website and import any content orders and invoices. You will see an import complete message.



In the unlikely event of this failing, please contact our Support Team on: 028 9756 2886.

## 7. Purchase Orders

**7.1** Your new purchase orders will appear at the top of the list of 'Not Yet Authorised' purchase orders.

Orders which have been imported via the website can only have order line quantities amended or lines deleted, you are unable to add new lines at this point.

**Please note:** The special instructions on the order will be FAO the person who placed the order, anything after the FAO will be printed on the label of the box.

FMS Purchase Order Processing

Book  Number  Pay From  Date

Supplier  Delivery Address  Status

Antrim Road  
BT24 8AN

Source  First Output Method

Delivery Instruction  ☐ On Hold

Email  Order Method

Contact Name  Special Instructions

FMS Purchase Order Processing

Looking for  View

Sequence

Date	Order Number	Supp. Code	Supplier	Order Status	Order Method	Source	Originator	Cross Year
04/05/2018	#00012676 (BANK)	00000068	SPA 4 Schools	Not Yet Authorised	Web Service	XML	Paul Willis	
27/03/2018	#00012669 (BANK)	00000062	WnW SIMS	Not Yet Authorised	Web Service	XML	Paul Willis	
15/03/2018	#00012665 (BANK)	00000062	WnW SIMS	Not Yet Authorised	Web Service	XML	Paul Willis	
07/03/2018	#00012661 (BANK)	00000058	GLS EDUCATIONAL SUPPLIES LTD	Not Yet Authorised	Web Service	XML	Paul Willis	
07/03/2018	#00012660 (BANK)	00000058	GLS EDUCATIONAL SUPPLIES LTD	Not Yet Authorised	Web Service	XML	Paul Willis	
06/02/2018	#00012581 (BANK)	00000058	GLS EDUCATIONAL SUPPLIES LTD	Not Yet Authorised	Web Service	XML	Paul Willis	
06/02/2018	#00012580 (BANK)	00000058	GLS EDUCATIONAL SUPPLIES LTD	Not Yet Authorised	Web Service	XML	Paul Willis	
30/01/2018	#00012553 (BANK)	00000062	WnW SIMS	Not Yet Authorised	Web Service	XML	Paul Willis	
25/01/2018	#00012552 (BANK)	00000058	GLS EDUCATIONAL SUPPLIES LTD	Not Yet Authorised	Web Service	XML	Paul Willis	
10/01/2018	#00012546 (BANK)	00000058	GLS EDUCATIONAL SUPPLIES LTD	Not Yet Authorised	Web Service	XML	Paul Willis	
04/01/2018	#00012544 (BANK)	00000058	GLS EDUCATIONAL SUPPLIES LTD	Not Yet Authorised	Web Service	XML	Paul Willis	
12/12/2017	#00012543 (BANK)	00000062	WnW SIMS	Not Yet Authorised	Web Service	XML	Paul Willis	
20/11/2017	#00012531 (BANK)	00000058	GLS EDUCATIONAL SUPPLIES LTD	Not Yet Authorised	Web Service	XML	Paul Willis	

Payment From  Transaction ID  Order Total

Selection

## 8. Authorising & Sending Orders

**8.1** Once authorised, click on the print button, this will send the orders back to the eProcurement Hub. If you need a printed copy for your records click on print again, select 'print single file' and this will send a copy to your printer.

The order method will be web service.

FMS Purchase Order Processing

Book: **BANK** Number: Pay From: **Bank Account** Date: **04/05/2018**

Supplier: **SPA 4 Schools**  
Antrim Road  
BT24 8AN

Delivery Address: **Donkey Abbey School**  
Monkmoor Road  
East Town  
Eastshire  
SI2 5AP

Status: **Not Yet Authorised**

Source: **XML** First Output Method: **A.S.A.P.**

Delivery Instruction: **A.S.A.P.** ☐ On Hold

Email: Order Method: **Web Service**

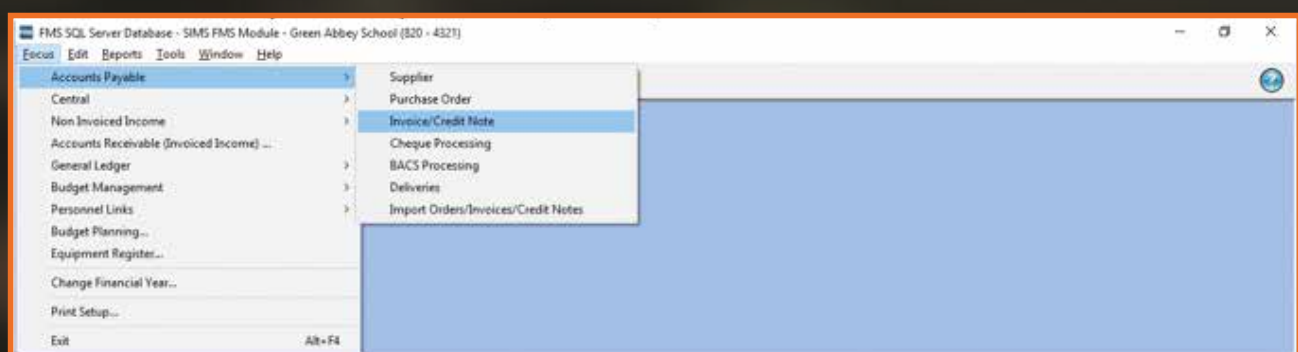
Contact Name: **SPA4Schools** Special Instructions:

## 9. Invoices

Your invoice will be available for import into FMS via the eProcurement hub once you have received your order. You will also receive to be able a copy of this invoice in the traditional manner.

**9.1** To import the invoices use the same option as you did for importing orders.  
Focus > Accounts Payable > Import Orders/Invoices/Credit Notes

**9.2** When an invoice has been downloaded go to:  
Focus > Accounts Payable > Invoice / Credit Note and your invoice will be in the list.



Invoice/Credit Note Processing

Looking for: Status: All Type: All

Sequence: Invo./Credit Note No. Date Trans ID Source Supplier Amount Ascending Descending

Invoice/Credit Note No.	Invoice Date	Trans ID	Amount	Status	Order Number	Gross Year	Supplier	SRC
0094282538	16/11/2016	00010206	17.12	Unauthorised	BANK005204		SPA 4 Schools	XML
0094282539	16/11/2016	00010207	45.73	Unauthorised	BANK005206		SPA 4 Schools	XML
0094282540	17/11/2016	00010208	521.99	Unauthorised	BANK005226		SPA 4 Schools	XML
0094282561	08/12/2016	00010209	45.72	Unauthorised	BANK005227		SPA 4 Schools	XML
0094442024	19/01/2017	00010211	104.74	Unauthorised	BANK005270		SPA 4 Schools	XML
0094442035	23/01/2017	00010212	16.79	Unauthorised	BANK005274		SPA 4 Schools	XML
0094442070	26/01/2017	00010214	11.98	Unauthorised	BANK005278		SPA 4 Schools	XML



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SAVING UP TO **1 HOUR PER DAY**



# SMART CONNECT USER GUIDE

CAPITA |

SIMS

helping  
schools  
inspire

For help setting up call us on **028 9756 2886** or email [smartconnect@spa4schools.co.uk](mailto:smartconnect@spa4schools.co.uk)

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