



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

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** 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:

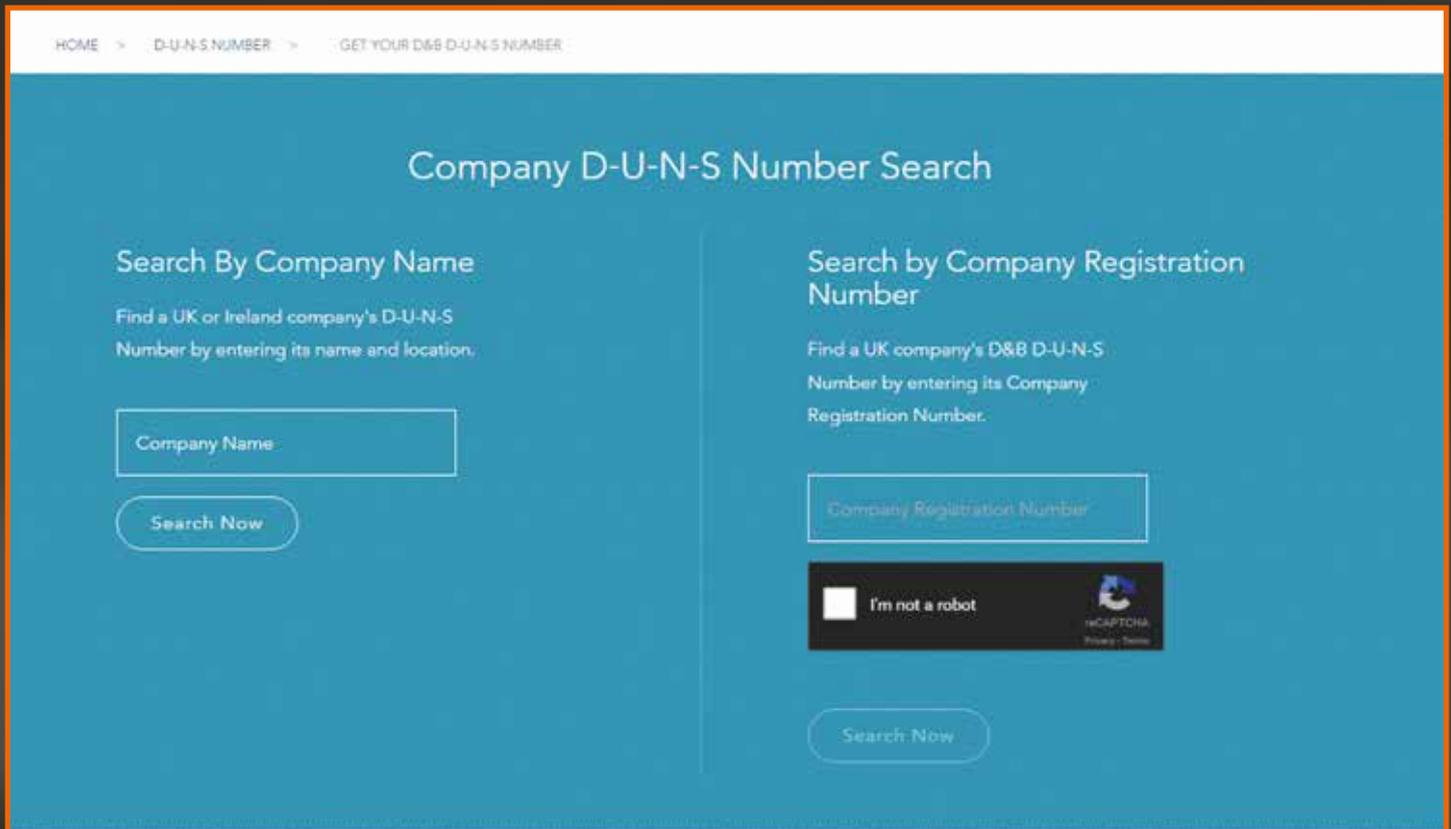
- 1. The email address you use to shop on SPA 4 Schools**
- 2. Your SPA 4 Schools Account Number**
- 3. Your SPA 4 Schools Website Password**
- 4. Your DUNS Number**

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, there is a navigation bar with links for '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'. There are two search options:

- Search By Company Name:** This section includes the instruction '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.
- Search by Company Registration Number:** This section includes the instruction '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 CAPTCHA widget with the text 'I'm not a robot' and the CAPTCHA logo, 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.

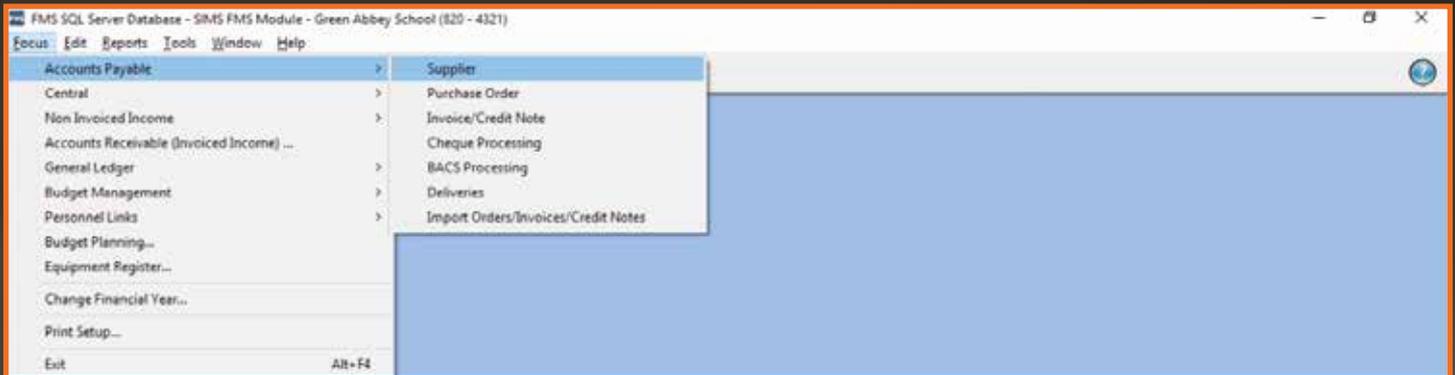
You can also find your DUNS number if you know your company registration number, by using the tool adjacent to Company Name search.

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

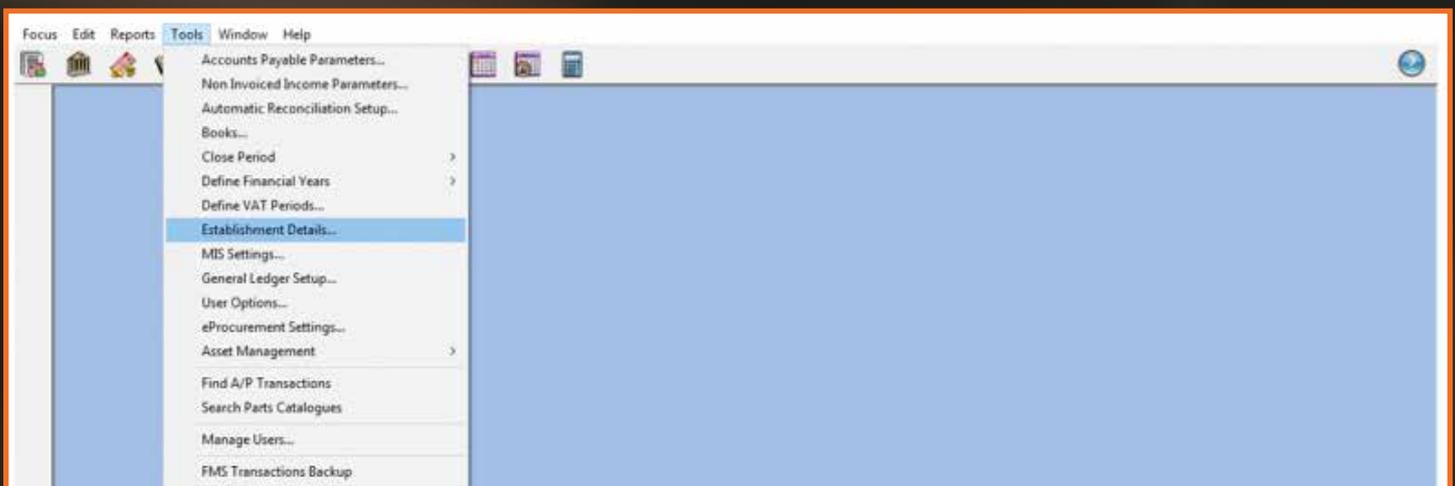
DUNS - 219349384

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' dialog box with the following fields and values:

- Name: Green Abbey School
- Code: 4321
- LA Code: 820
- Borough: Eastshire
- Payable to: Green Abbey School
- Address: Monkmoor Road, East Town, Eastshire
- Postcode: S12 5AP
- Telephone: 01234 838080
- Fax: 01234 838091
- e-mail: (empty)
- Unique Identifier: n/a, GLN, DUNS (542199995)
- DeMinimis Value: 1.00

Annotations with red arrows point to:

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

3. General Ledger

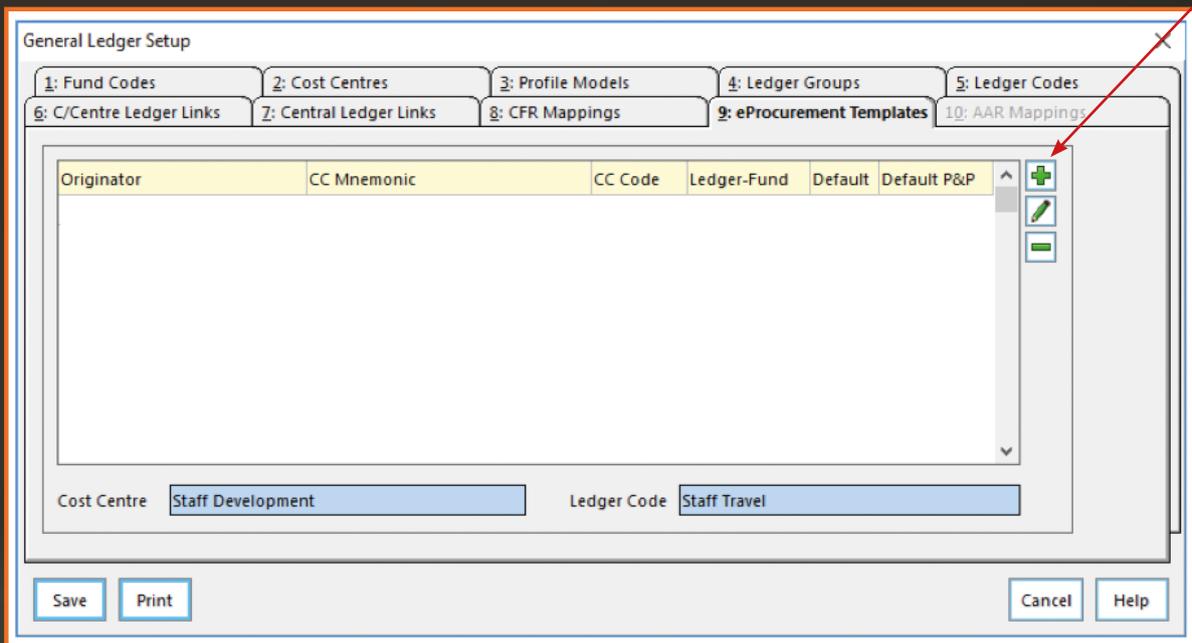
3.1 Next set up a general ledger template, this will ensure imported orders are assigned a cost centre and ledger code via 'Tools > General Ledger Setup'

The screenshot shows the 'Tools' menu in the SIMS FMS Module. The menu items are:

- Accounts Payable Parameters...
- Non Invoiced Income Parameters...
- Automatic Reconciliation Setup...
- Books...
- Close Period
- Define Financial Years
- Define VAT Periods...
- Establishment Details...
- MIS Settings...
- General Ledger Setup...
- User Options...
- eProcurement Settings...
- Asset Management
- Find A/P Transactions
- Search Parts Catalogues
- Manage Users...
- FMS Transactions Backup
- Windows Calculator

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

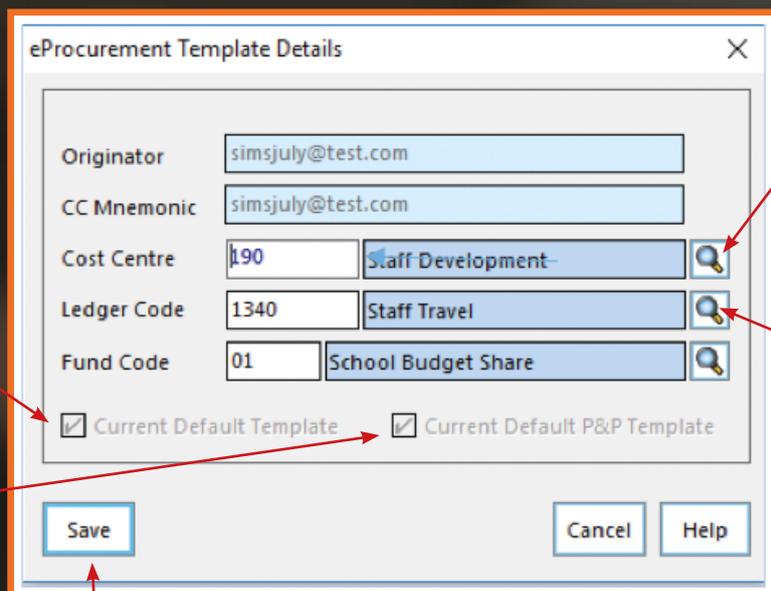
Click



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.



Click  and enter your most frequently used Cost Centre

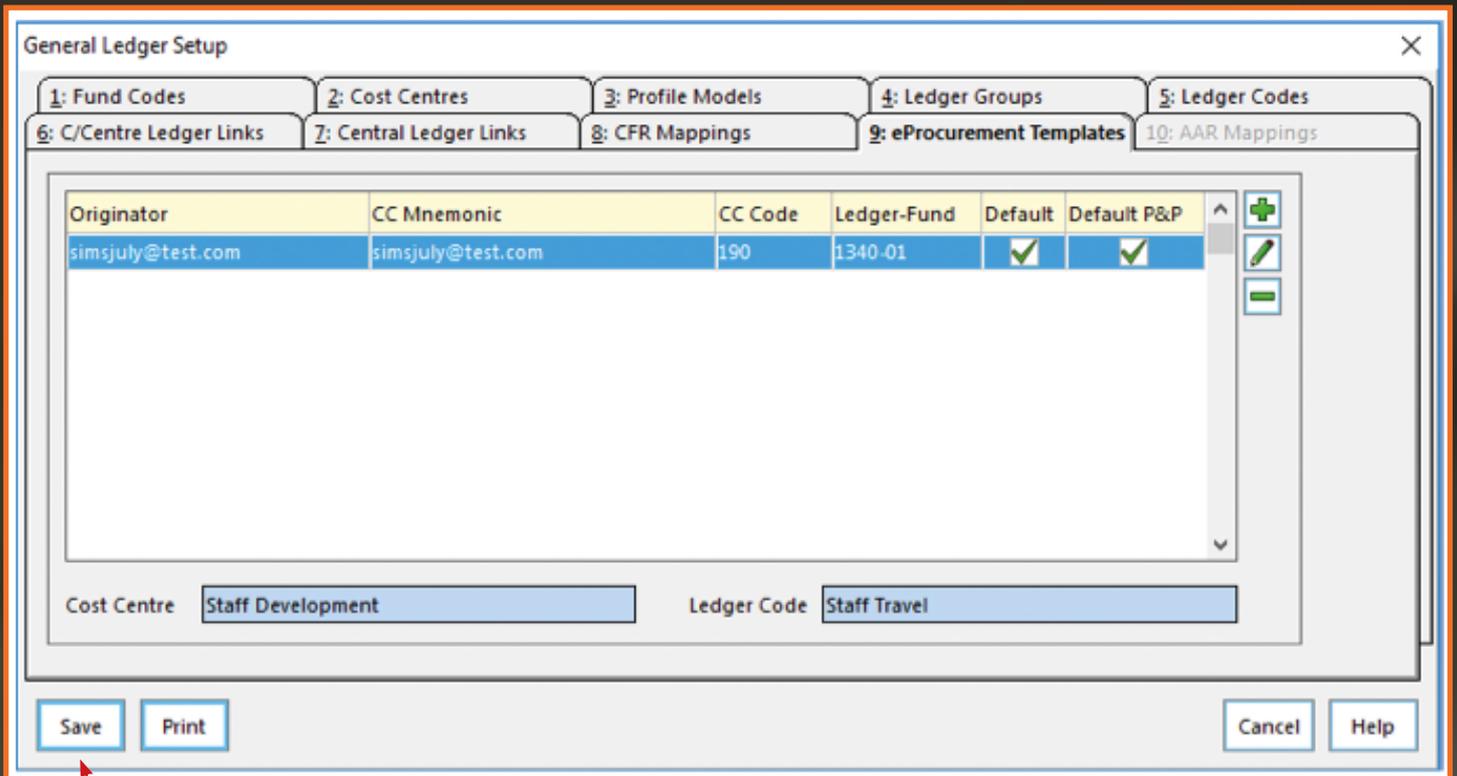
Click  and enter your most frequently used Ledger Code

Tick Current Default Template

Tick Current Default P&P Template

Save

3.5 You should now see the following screen:

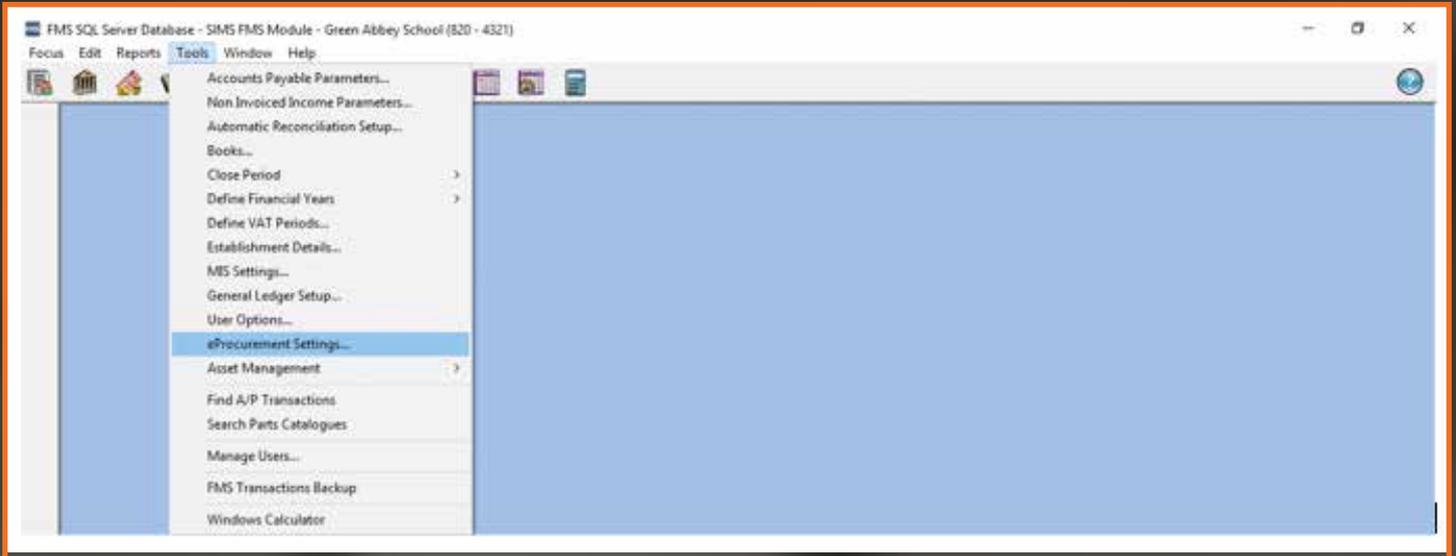


3.6 Press save to complete.

SECTION B: E-PROCUREMENT SET-UP

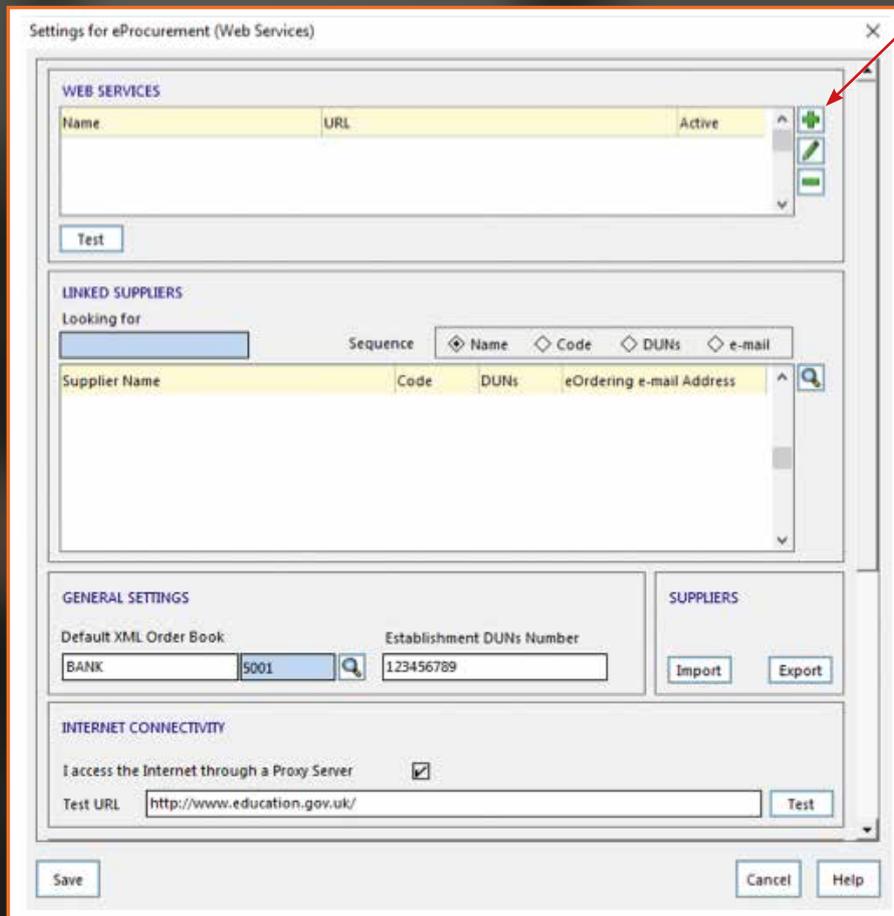
4.1 The next step is to enter the details to connect your SIMS FMS to our SPA 4 Schools website.

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:

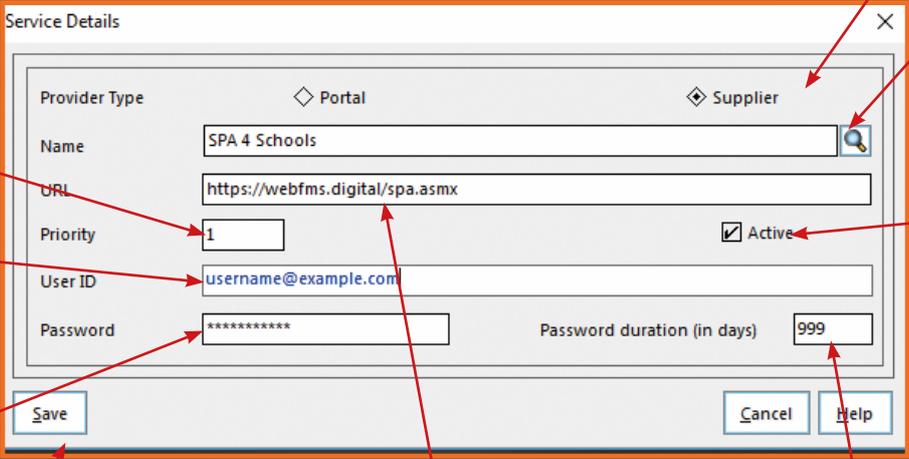
Select 

A screenshot of the "Settings for eProcurement (Web Services)" dialog box. The dialog has a close button (X) in the top right corner. It is divided into several sections:

- WEB SERVICES**: A table with columns "Name", "URL", and "Active". To the right of the table are three icons: a green plus sign (highlighted by a red arrow), a green pencil, and a green minus sign. Below the table is a "Test" button.
- LINKED SUPPLIERS**: A section with a "Looking for" text box, a "Sequence" dropdown menu (set to "Name"), and a search icon. Below is a table with columns "Supplier Name", "Code", "DUNs", and "eOrdering e-mail Address".
- GENERAL SETTINGS**: Contains "Default XML Order Book" (set to "BANK") and "Establishment DUNs Number" (set to "123456789").
- SUPPLIERS**: Contains "Import" and "Export" buttons.
- INTERNET CONNECTIVITY**: Contains a checkbox "I access the Internet through a Proxy Server" (checked) and a "Test URL" text box (set to "http://www.education.gov.uk/").

At the bottom of the dialog are "Save", "Cancel", and "Help" buttons.

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



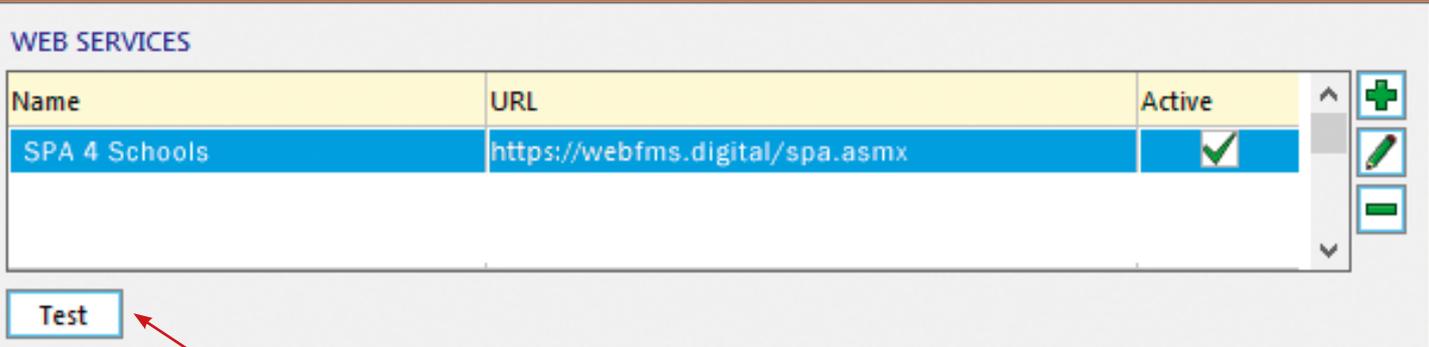
The 'Service Details' dialog box contains the following fields and controls:

- Provider Type:** Radio buttons for 'Portal' and 'Supplier'. 'Supplier' is selected.
- 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:** Checkmark box, which is checked.
- 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 checkbox.
- '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.

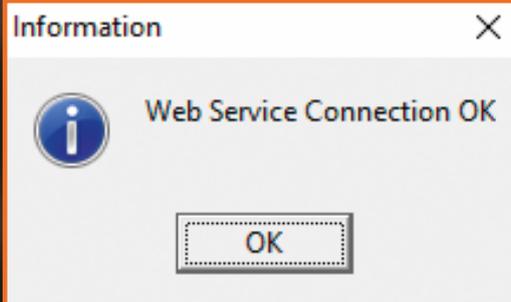


The 'WEB SERVICES' section displays a table with the following data:

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

Below the table is a 'Test' button. An annotation 'Click Test' points to this button.

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



The 'Information' dialog box displays the following message:

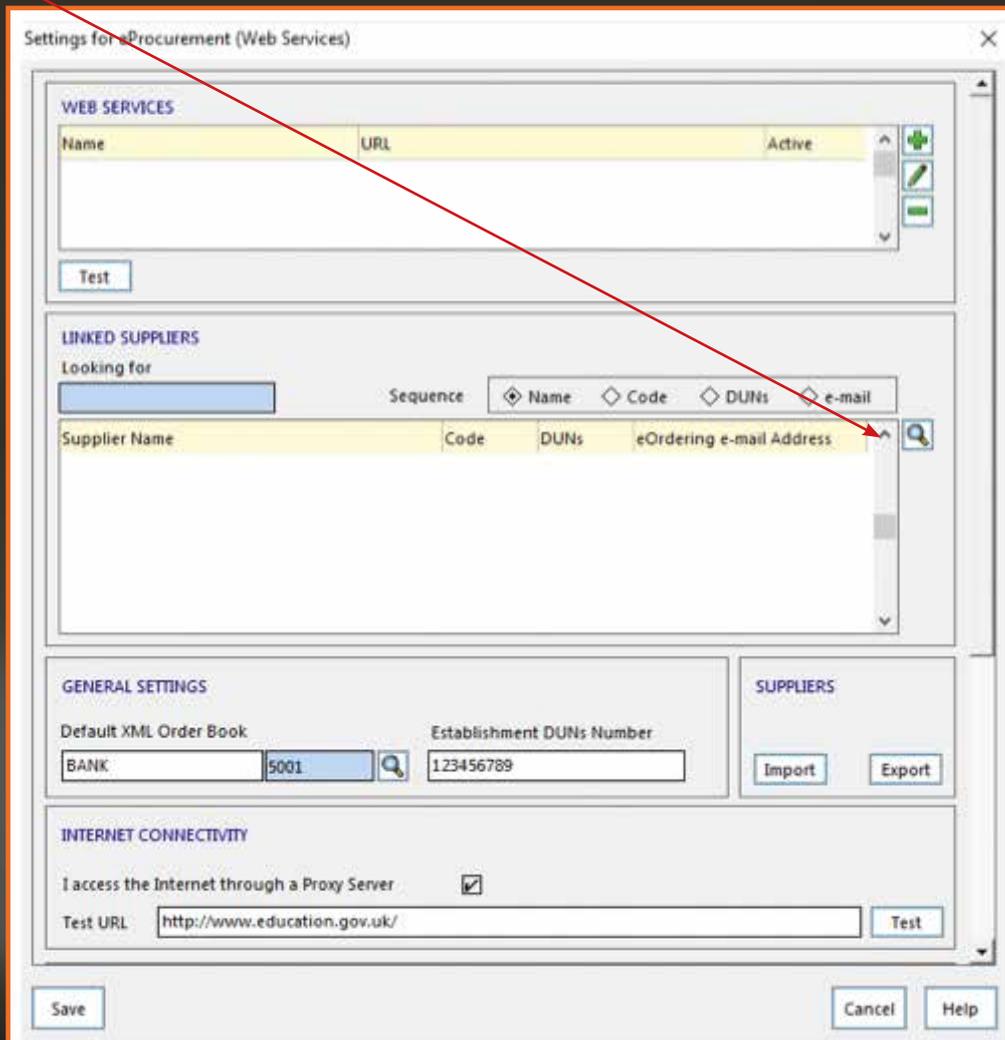
Web Service Connection OK

An 'OK' button is located at the bottom of the dialog.

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

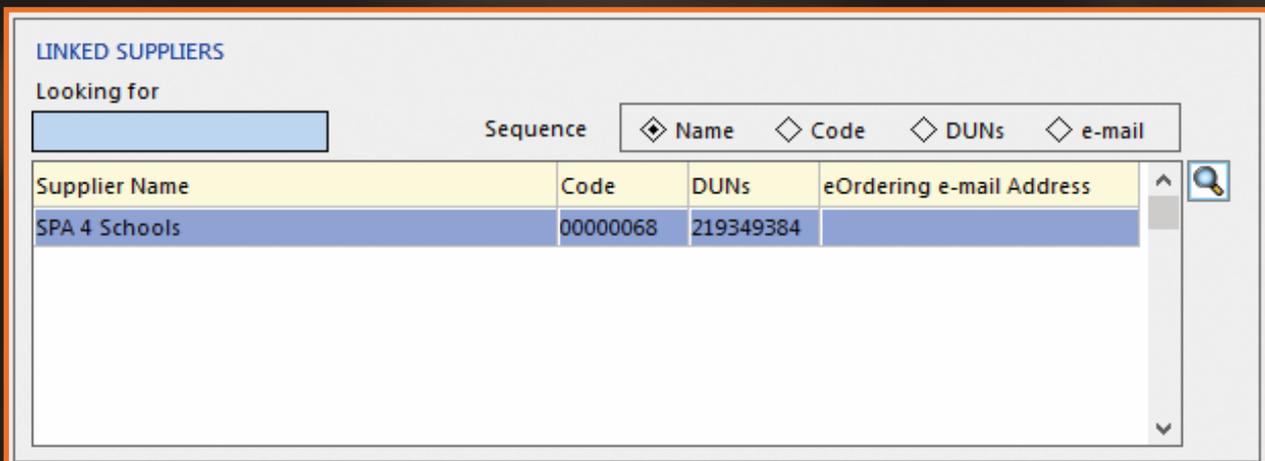
INTERNET CONNECTIVITY

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

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

Click Save

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

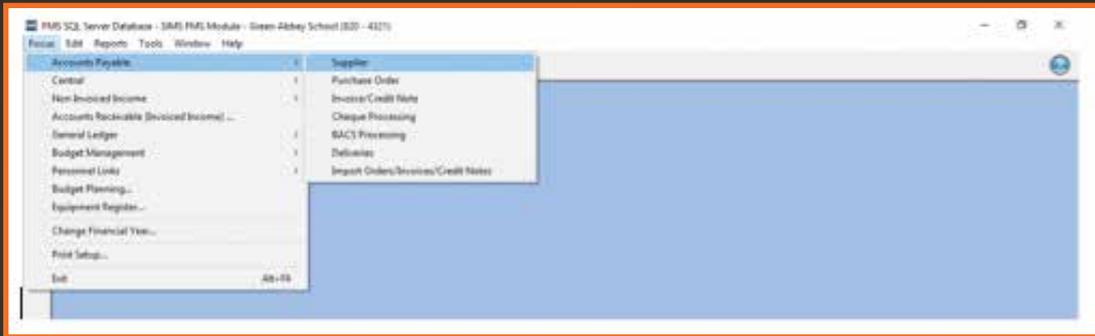
4.10 Check that your DUNS Number is in the 'Establishment DUNS Number' field too, if this information is missing, please add it.

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 'FMS Supplier Details' form. The '1: Basic' tab is active. The form contains fields for Name (SPA 4 Schools), Date Opened (19/04/2018), VAT Registration No., Balance (35.44), Address (Antrim Road), Postcode (BT24 8AN), Telephone (028 9756 2886), Fax (028 9756 3484), e-mail (sales@spa4schools.co.uk), and eOrdering e-mail. The 'Delivery Code' is SPAW000001 and the 'Account Number' is SPAW000001. The 'Order Method' is set to 'W - Web Services'. A search button is visible next to the 'Web Services' option. The 'Unique Identifier' is set to 'DUNS' with the value 219349384.

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 contains the following rows: E EDI transfer, M Email PDF File, P Print, W Web Services, X XML File. The 'W Web Services' row 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**.

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
Telephone: 028 9756 2886
Fax: 028 9756 3484
e-mail: sales@spa4schools.co.uk

Delivery Code: SPAW000001
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 gloseducational (as one word) in the XML Supplier Reference Field.

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

5.1 Simply visit 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.



Your basket is ready to be imported into your FMS

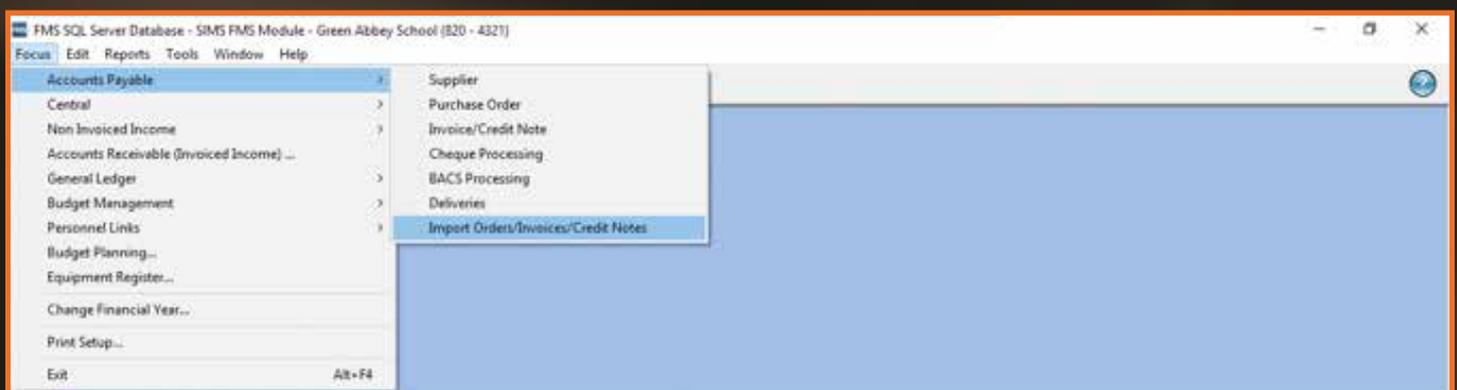
How to complete your order...

- Import Your Order in FMS**
Select Focus > Accounts Payable > Import Orders / Invoices / Credit Notes
- Purchase Orders in FMS**
Your order will appear in FMS at the top of the list of 'Not Yet Authorised' purchase orders. If required you can also adjust quantities or delete lines at this stage.
- Authorise and Send Order in FMS**
Select approve against your purchase order and click on the print button. At this point your order will be sent back to us ready to pack.

6. Import your order to SIMS

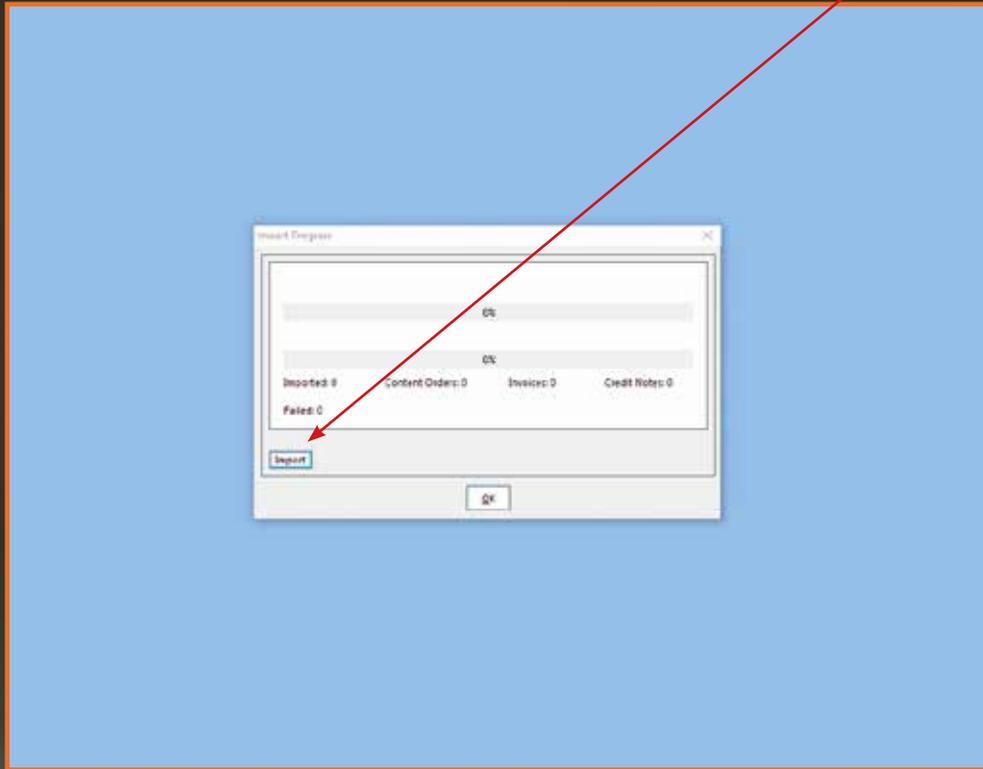
To Import Orders

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

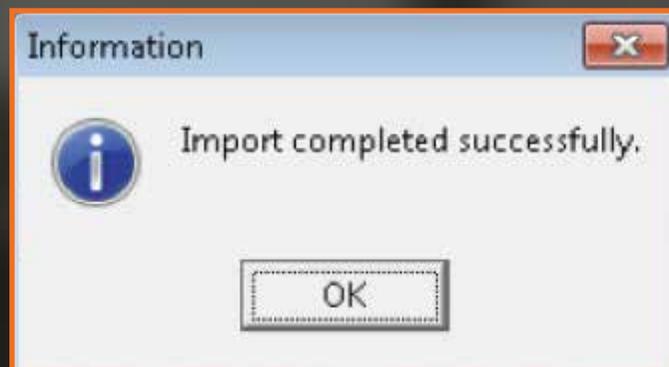


This will import any outstanding Orders / Invoices / Credit Notes.

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.

FHS Purchase Order Processing

Book: Number: Pay From: Date:

Supplier: Delivery Address: Status:

Antrim Road, BT24 8AN

Source: First Output Method: Delivery Instruction: On Hold

Contact Name: Email: Order Method:

Special Instructions:

FHS 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: Delivery Instruction: A.S.A.P. On Hold:

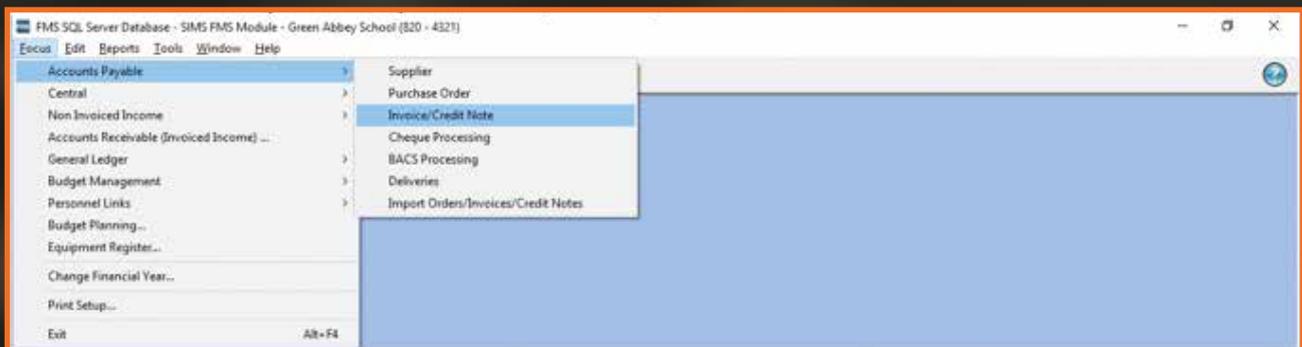
Contact Name: SPA4Schools Special Instructions: Order Method: Web Service

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	00010296	17.17	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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