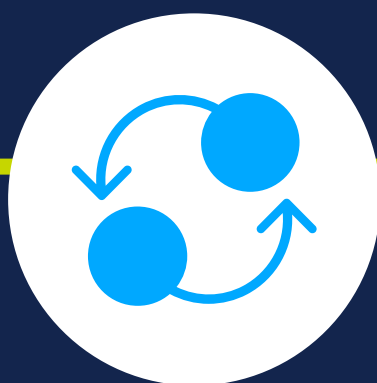


***Join the 'SMART' revolution today and
start saving time and money.***



SMART Connect user guide

ESS | SIMS

***For help setting up call us on 028 9756 2886
or email smartconnect@spa4schools.co.uk***

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



Build and browse
your basket



Import your basket to
your financial
management system



Complete the order
in your financial
management system

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
2. Your SPA Account Number
3. Your SPA 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>

[HOME](#) > [D-U-N-S NUMBER](#) > [GET YOUR D&B D-U-N-S NUMBER](#)

Company D-U-N-S Number Search

Search By Company Name

Find a UK or Ireland company's D-U-N-S Number by entering its name and location.

Company Name


Search Now

Search by Company Registration Number

Find a UK company's D&B D-U-N-S Number by entering its Company Registration Number.

Company Registration Number

☐ I'm not a robot


Privacy - Terms

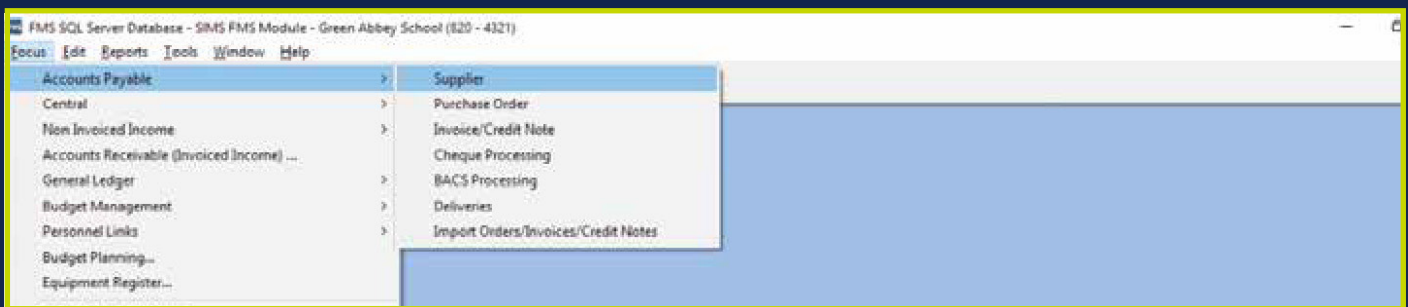
Search Now

Setting up your **SMART** Connect

Section A: Basic Set-up

1. Add SPA4Schools 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

2 Gregory Street,

Hyde, Cheshire, SK14 4HR.

VAT Number – GB125688644

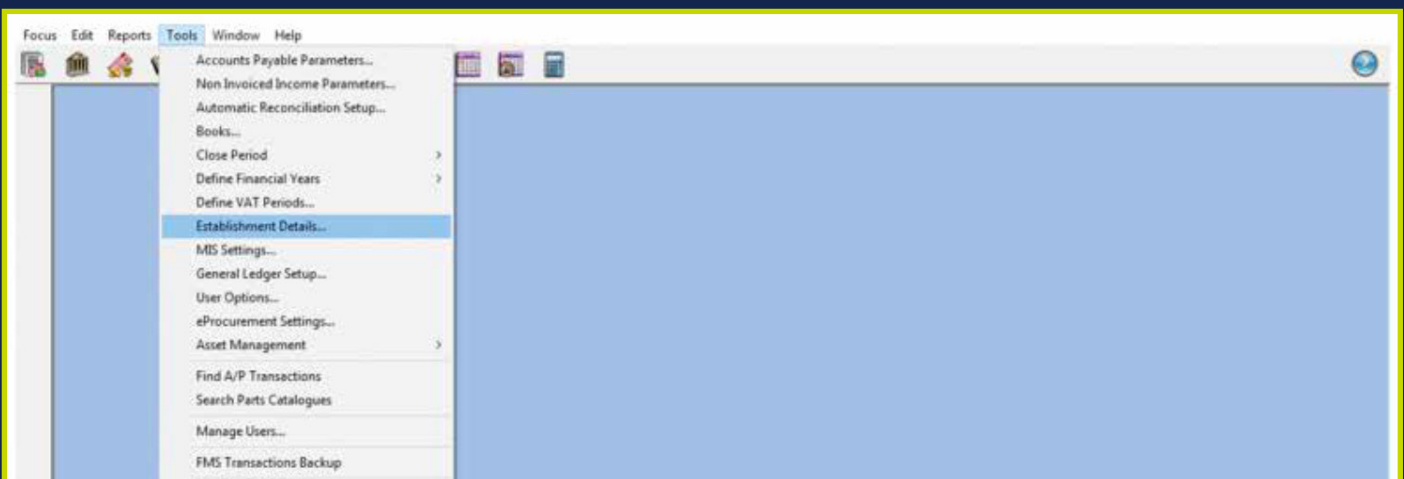
DUNS - 219349384

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:

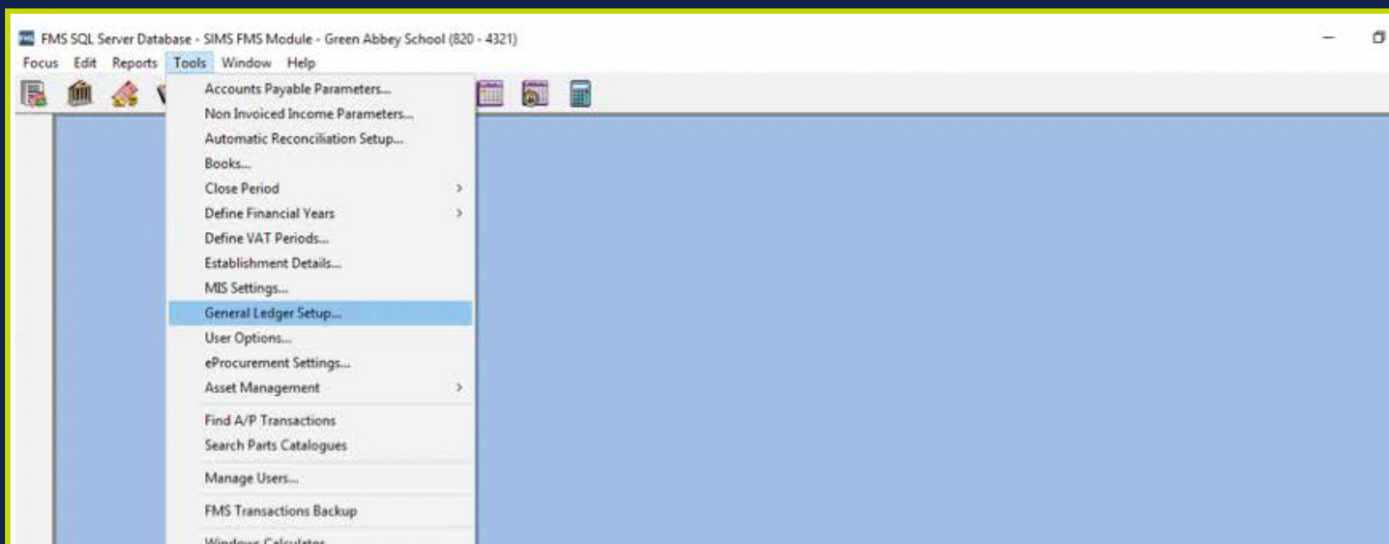
5: Email Setup		6: Interfaces		7: Scanned Documents				
1: Basic Details		2: Logo		3: System Parameters		4: eProcurement		
Name	Green Abbey School							
Code	4321	Companies House No.						
LA Code	820	VAT Registration No.						
Borough	Eastshire							
Payable to	Green Abbey School							
Address								
Monkmoor Road								
East Town								
Eastshire								
						Postcode	SI2 5AP	
Telephone	01234 838080			Fax	01234 838091			
e-mail								
Unique Identifier								
<input type="radio"/> n/a <input type="radio"/> GLN <input checked="" type="radio"/> DUNS								
						542199995		
						DeMinimis Value	1.00	
Save							Cancel	Help

Annotations:

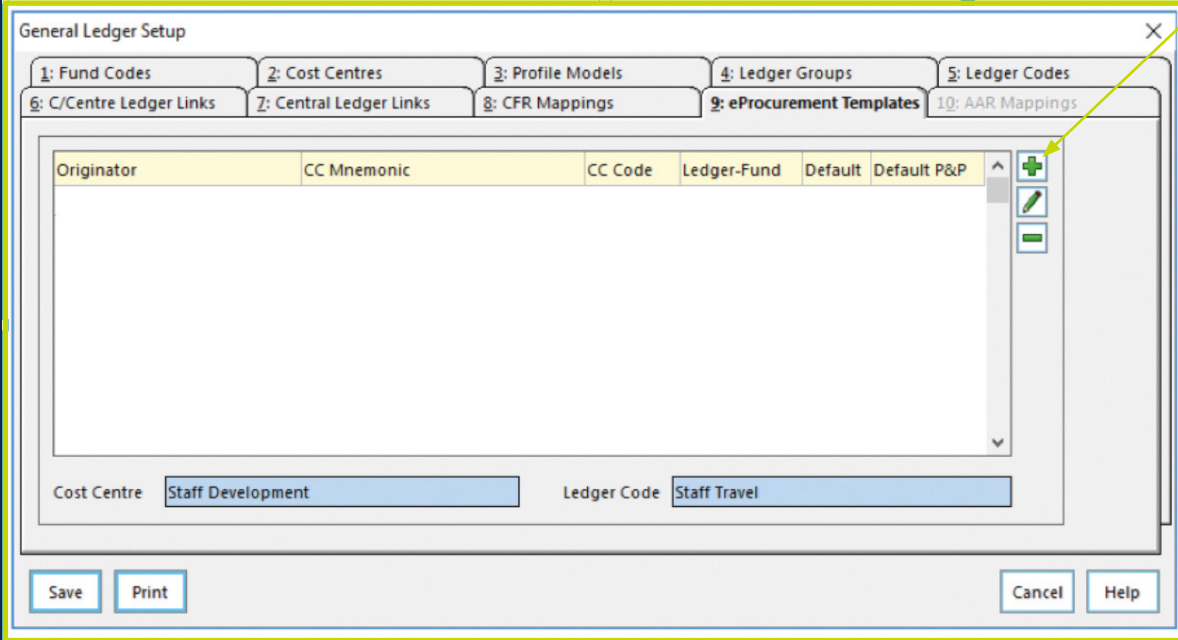
- Select: DUNS (points to the DUNS radio button)
- Click: Save (points to the Save button)
- Enter: Your DUNS Number (points to the DUNS number field)

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 



The 'General Ledger Setup' window shows a tabbed interface with 10 tabs. Tab 9, 'eProcurement Templates', is selected. It contains a table with columns: Originator, CC Mnemonic, CC Code, Ledger-Fund, Default, and Default P&P. A green plus icon in the top right corner of the table area is highlighted with a yellow arrow and the label 'Click'. 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:

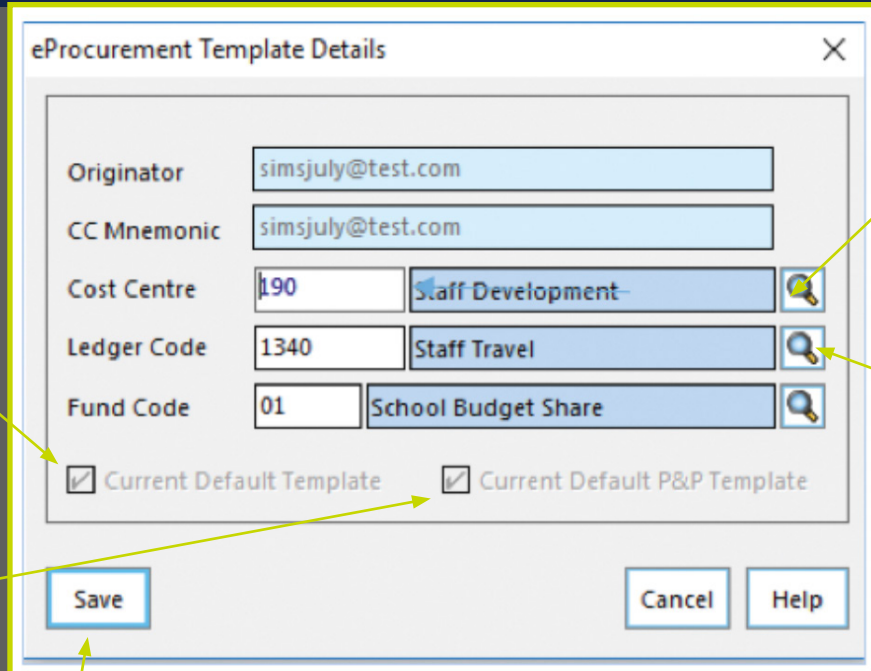
- **Originator and CC Mnemonic:**

This is your email address that you use on the SPA4Schools 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.

Tick:
Current
Default
Template

Tick: Current
Default P&P
Template



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

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

Click  and enter your most frequently used Cost Centre

Click  and enter your most frequently used Ledger Code

Click: Save

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	✓	✓

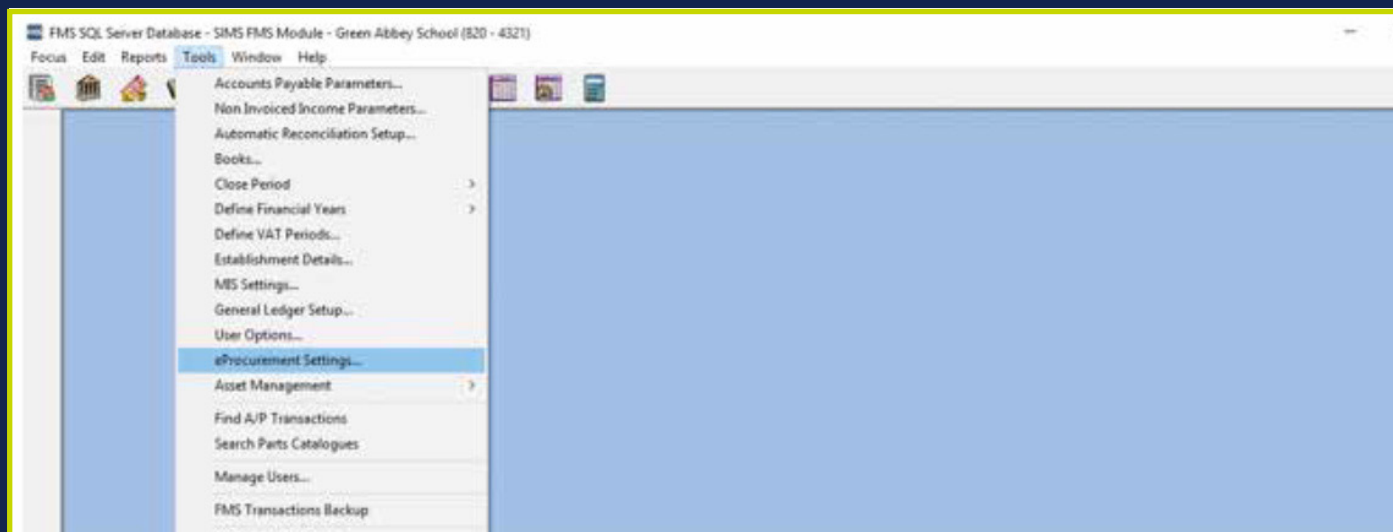
Cost Centre: Staff Development Ledger Code: Staff Travel

Save Print Cancel


3.6 Click: **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 SPA4Schools 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:

A screenshot of the 'Settings for eProcurement (Web Services)' dialog box. The 'WEB SERVICES' section is active, showing a table with columns 'Name', 'URL', and 'Active'. A green plus icon is visible in the top right corner of the table, with an arrow pointing to it from the text 'Select '. Below the table is a 'Test' button. The 'LINKED SUPPLIERS' section has a 'Looking for' field and a 'Sequence' dropdown with options: Name, Code, DUNs, e-mail. Below this is a table with columns 'Supplier Name', 'Code', 'DUNs', and 'eOrdering e-mail Address'. The 'GENERAL SETTINGS' section has fields for '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' which is checked, and a 'Test URL' field with the value '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' dialog box contains the following fields and controls:

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

Annotations with arrows point to the following elements:

- 'Enter: 1' points to the Priority field.
- 'Enter: SPA website email address' points to the User ID field.
- 'Enter: Your SPA password' points to the Password field.
- 'Click: Save' points to the Save button.
- 'Enter: http://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: SPA4Schools' points to the search icon next to the Name field.
- 'Select Supplier' points to the Supplier radio button.

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 the button.

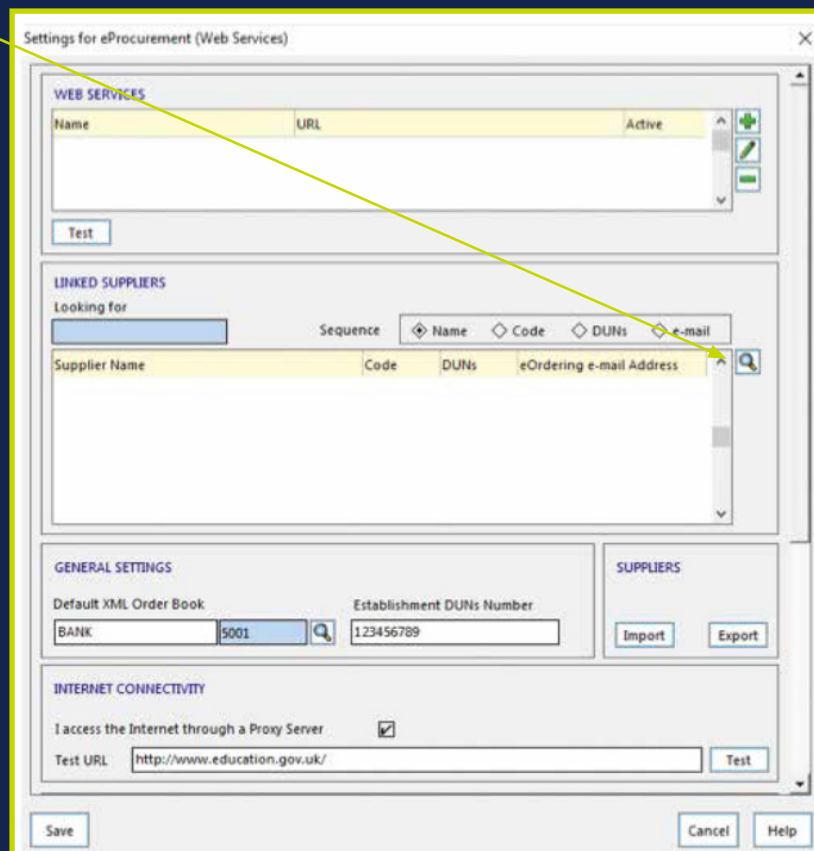
4.5 If the settings are correct the pop-up below will appear:

The 'Information' dialog box displays the message 'Web Service Connection OK' with an information icon and an 'OK' button.

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

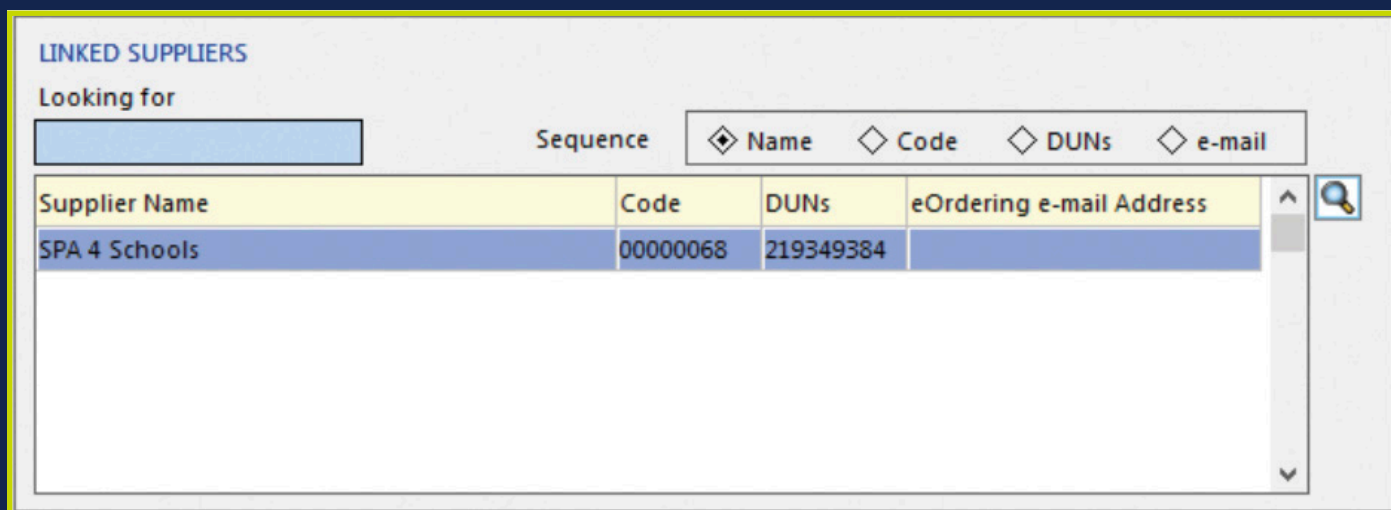
4.6 Now that the Web Service is set up, simply choose the one you have just created to link the supplier to the web service.

Select  within **Linked Suppliers**



The screenshot shows the 'Settings for eProcurement (Web Services)' dialog box. It has several sections: 'WEB SERVICES' with a table of Name, URL, and Active; 'LINKED SUPPLIERS' with a 'Looking for' field and a table with columns 'Supplier Name', 'Code', 'DUNs', and 'eOrdering e-mail Address'; 'GENERAL SETTINGS' with 'Default XML Order Book' (set to BANK) and 'Establishment DUNs Number' (123456789); and 'INTERNET CONNECTIVITY' with a checkbox for 'I access the Internet through a Proxy Server' and a 'Test URL' field. At the bottom are 'Save', 'Cancel', and 'Help' buttons. A yellow arrow points from the magnifying glass icon in the text above to the magnifying glass icon in the 'Linked Suppliers' table header.

4.7 In the 'Supplier Name' list select 'SPA4Schools' so that it is highlighted and then click the 'Choose button'. Then click 'Update'. This links SPA as a supplier to the SPA web service details.



The screenshot shows a close-up of the 'LINKED SUPPLIERS' section. It includes a 'Looking for' field, a 'Sequence' dropdown menu set to 'Name', and a table with the following data:

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 Box

Click: Save

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.

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

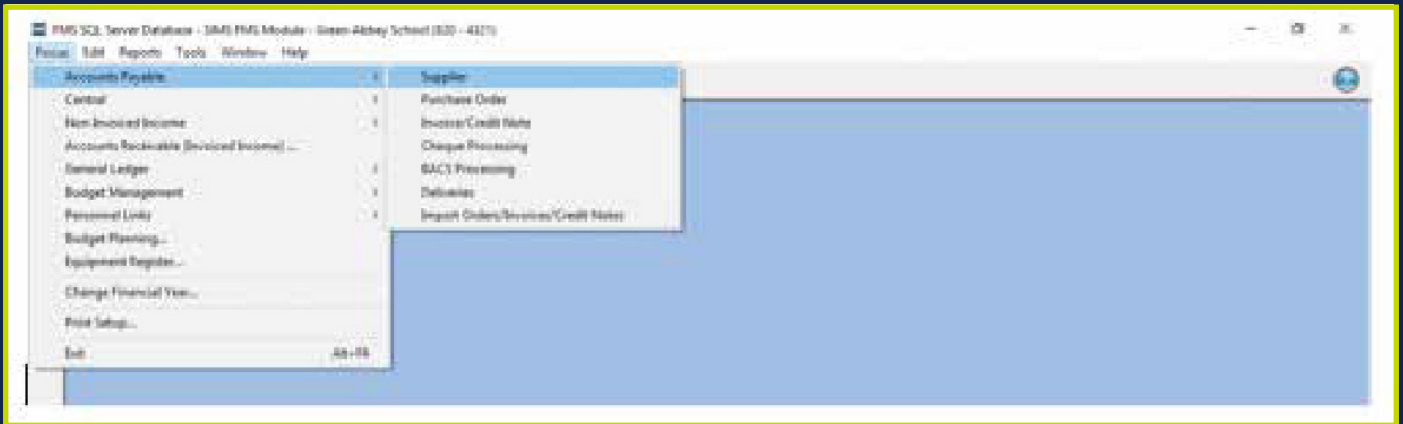
If you are unsure where to find this please refer to the 'Getting Started' section of this document.

Once all the details are entered, click: Save.

Section C: Supplier Set-up

5.1 The next step is to enable SPA to process Web Service Orders.

Go to Focus > **Accounts Payable** > **Supplier**



5.2 Find **SPA** 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.

A screenshot of the 'Supplier Details' form. The '1: Basic' tab is selected. The form contains fields for Name, LA Reference, VAT Registration No., Date Opened, Balance, Address, Postcode, Contact, Telephone, Fax, e-mail, and eOrdering e-mail. The 'Delivery Code' and 'Account Number' fields are both set to 'SPA000001'. The 'Order Method' section shows 'W Web Services' selected. Annotations include: 'Enter your Account Number' pointing to the 'Account Number' field, and 'Click the button' pointing to the magnifying glass icon next to the 'Web Services' option in the 'Order Method' section.

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 list of options with 'W Web Services' selected. The options are: E EDI transfer, M Email PDF File, P Print, W Web Services, and X XML File. The 'Select' button is highlighted.

Select (W) for Web Services

5.5 In the unique identifier section select DUNS and enter gls 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

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: SPA4School (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 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 in to FMS

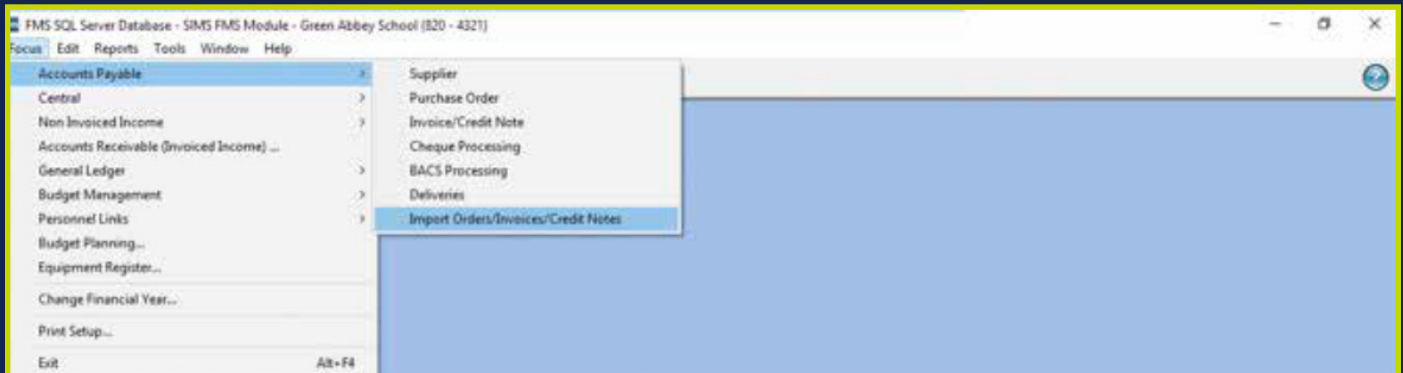
How to complete your order...

-  **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' purchased orders. If you require 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

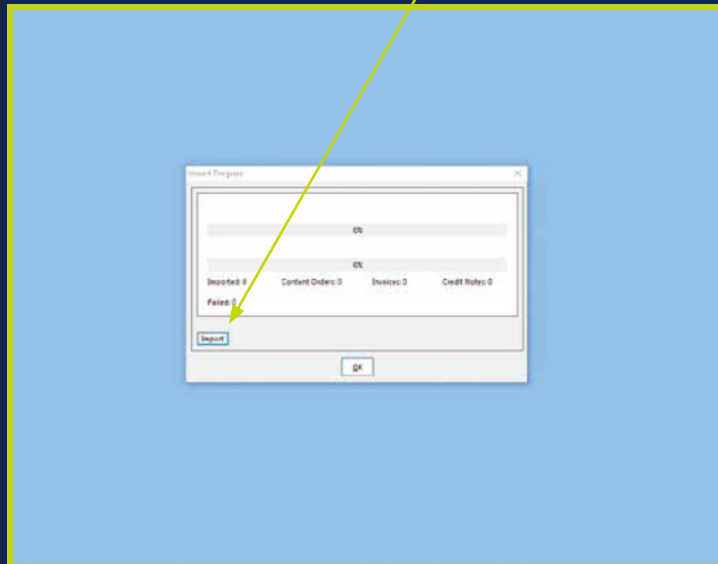
To Import Orders

6.1 Focus > [Accounts Payable](#) > [Import Orders / Invoices / Credit Notes](#)

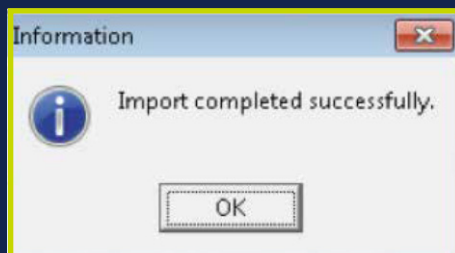


This will import any outstanding [Orders / Invoices / Credit Notes](#).

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.

Purchase Order Processing

Book Number Pay From Date

Supplier: Delivery Address:

Status: Source: First Output Method: Delivery Instruction: ☐ On Hold

Contact Name: Special Instructions:

Email: Order Method:

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**.

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

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.

FMS SQL Server Database - SIMS FMS Module - Green Abbey School (320 - 4321)

File Edit Reports Tools Window Help

Accounts Payable

- Supplier
- Purchase Order
- Invoice/Credit Note
- Cheque Processing
- BACS Processing
- Deliveries
- Import Orders/Invoices/Credit Notes
- Change Financial Year...

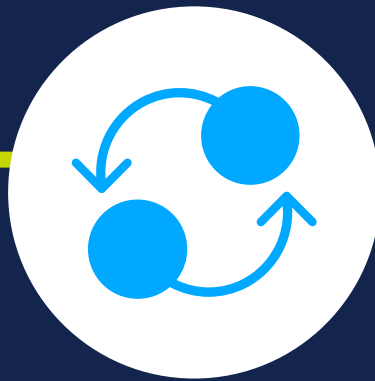
Invoice/Credit Note Processing

Looking for: Status: All Type: All

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

Invoice/Credit Note No.	Invoice Date	Trans ID	Amount	Status	Order Number	Cross 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
0094282541	17/11/2016	00010209	45.72	Unauthorised	BANK005227		SPA 4 Schools	XML

***Join the 'SMART' revolution today and
start saving time and money.***



SMART Connect user guide

ESS | SIMS

***For help setting up call us on 028 9756 2886
or email smartconnect@spa4schools.co.uk***