spa⁴ schools
Northern Ireland

Join the 'SMART' revolution today and start saving time and money.
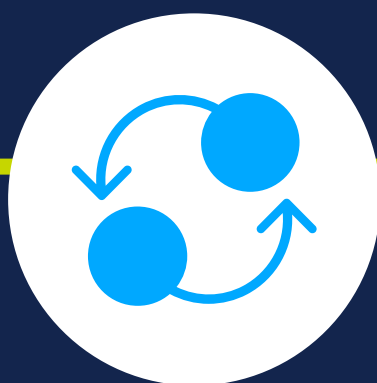
SMART Connect user guide

ESS | SIMS

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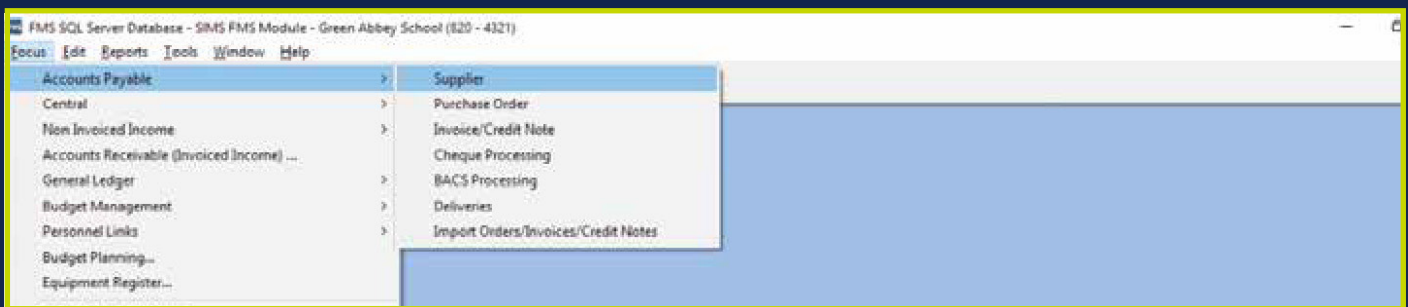https://www.dnb.co.uk/duns-number/lookup.html

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:
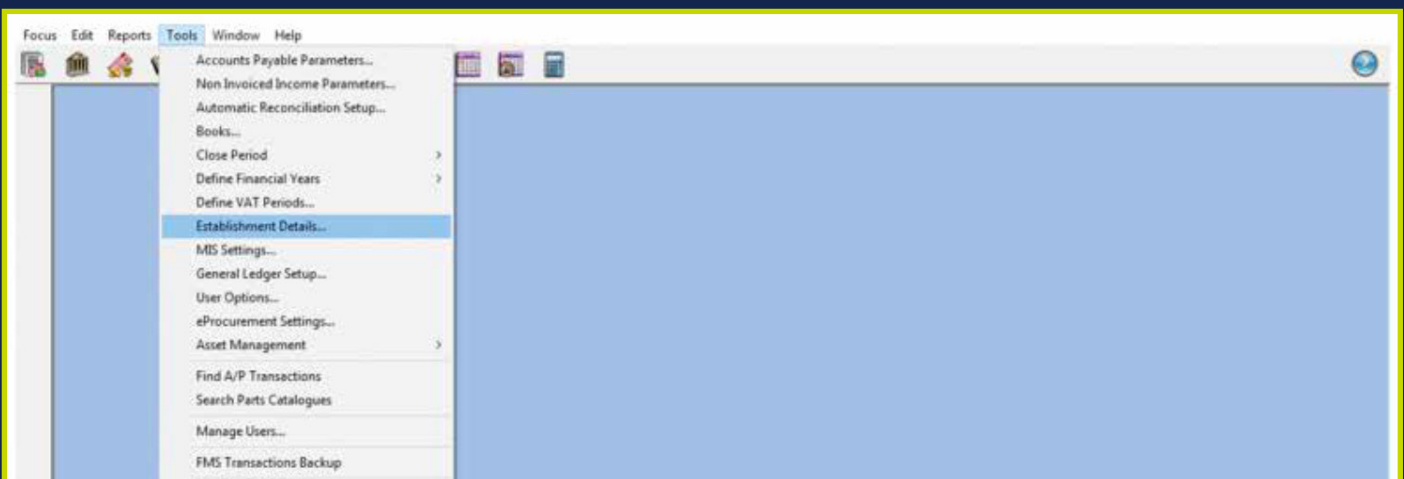SPA 4 Schools
2 Gregory Street,
Hyde, Cheshire, SK14 4HR.
VAT Number – GB125688644
DUNS - 219349384
Telephone – 028 9756 2886
Email Address – smartconnect@spa4schools.co.uk

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.

Select: DUNS

Click: Save

Enter: Your DUNS Number

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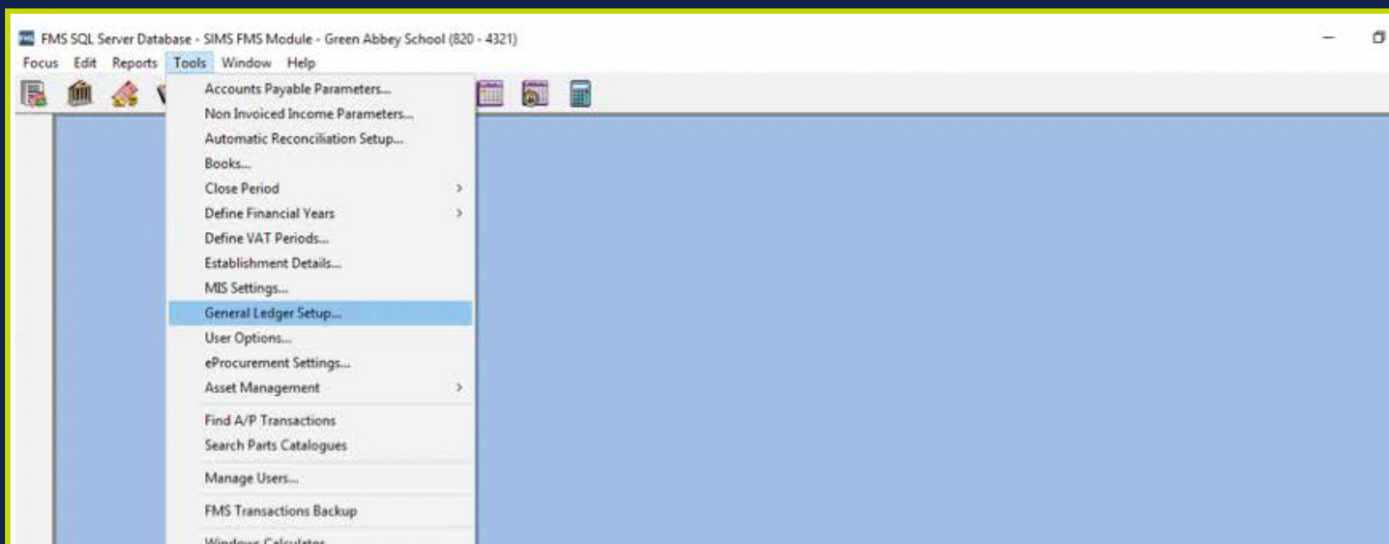
3.2 Proceed to Tab 9 – 'eProcurement Template' and add a new ledger by clicking the ⊞

Click

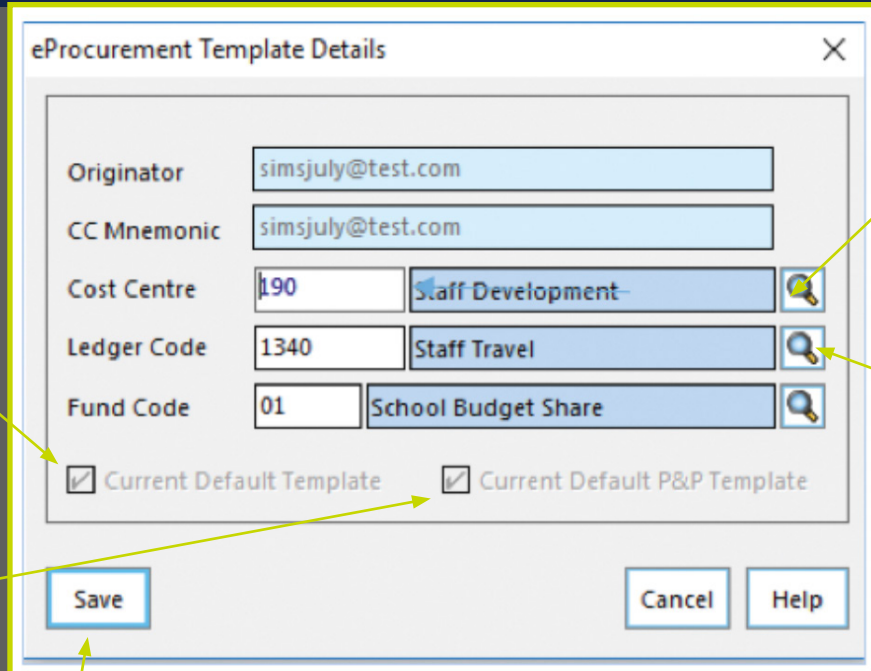3.3 Next complete the pop up box using the below information for both open fields:
• Originator and CC Mnemonic:
This is your email address that you use on the SPA4Schools website

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 thecategory 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

Tick: Current Default Template

Tick: Current Default P&P Template

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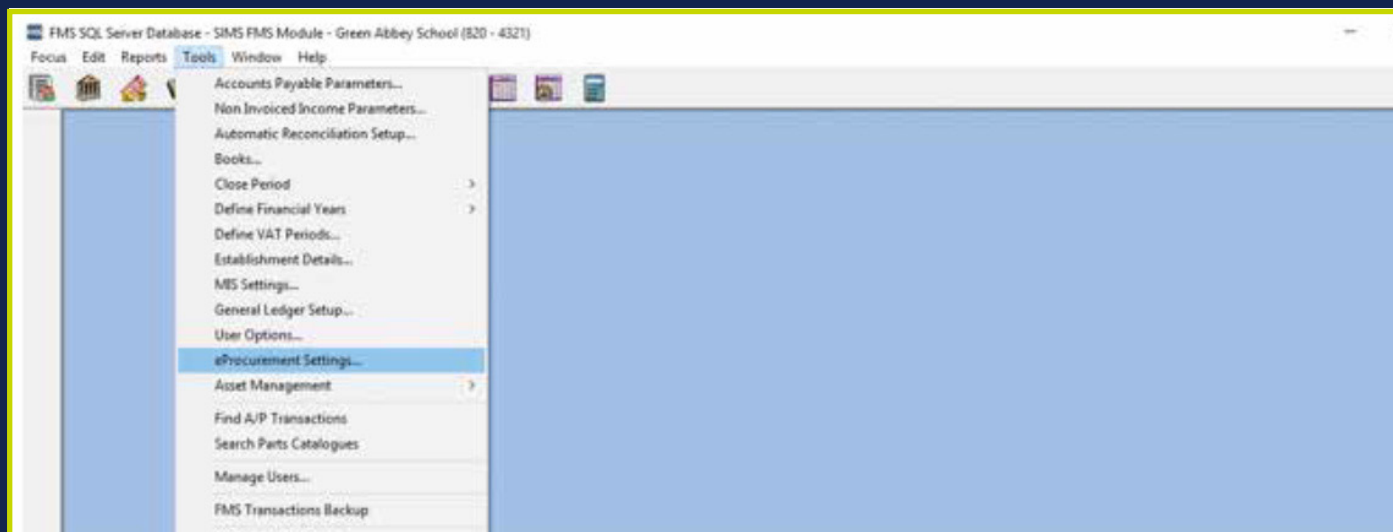
4.2 If this is editable select ✚ in the WEB SERVICES section to make an addition:

Select ✚

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

Select
Supplier

Enter: 1

Select:
SPA4Schools

Enter: SPA
website email
address

Enter: Your
SPA password

Tick: Active

Click: Save   Enter: http://webfms.digital/spa.asmx   Enter: 999 days

Service Details

Provider Type	◇ Portal	◉ Supplier
Name	SPA 4 Schools	🔍
URL	https://webfms.digital/spa.asmx	
Priority	1	☑ Active
User ID	username@example.com	
Password	***********	Password duration (in days) 999

Save   Cancel   Help

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

WEB SERVICES

Name	URL	Active	
SPA 4 Schools	https://webfms.digital/spa.asmx	✔	

Test

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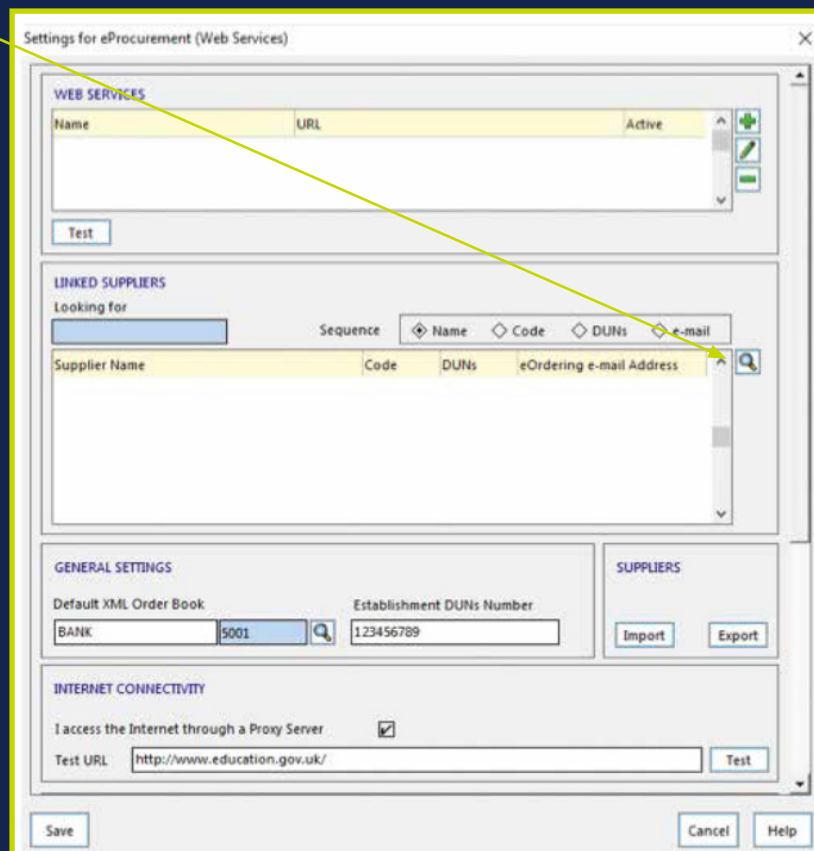
4.5 If the settings are correct the pop-up below will appear:

Information   ✕

ⓘ   Web Service Connection OK

OK

In the unlikely event of this showing a failed message, please contact our Support Team on 028 9756 2886.
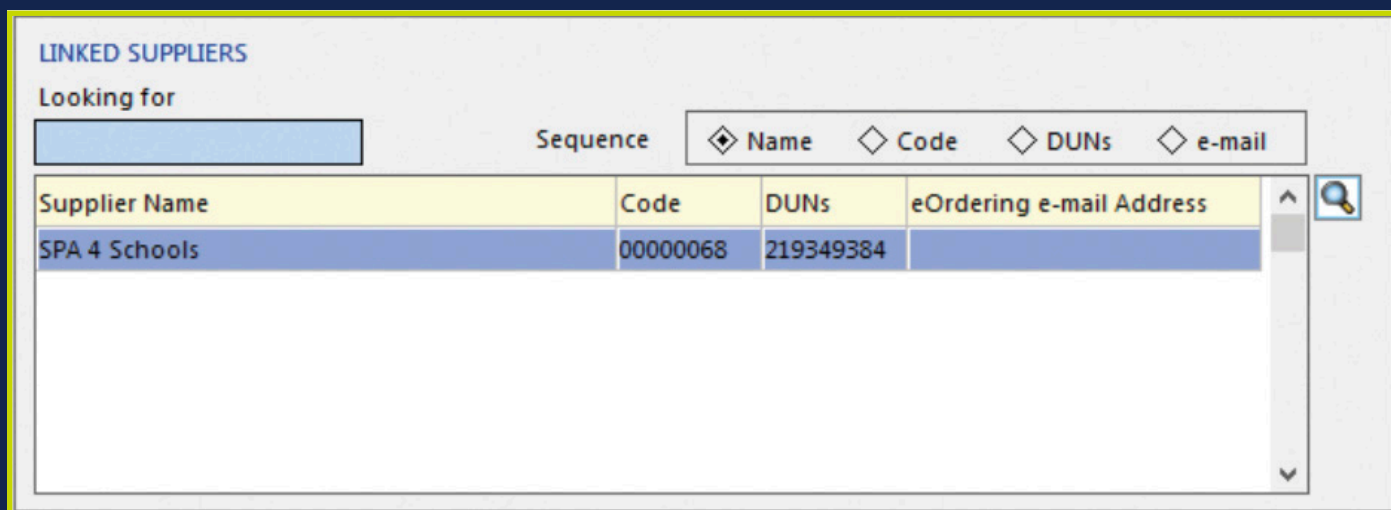
4.6 Now that the Web Service is set up, simply choose the one you have just created to link the supplier to the web service.

Select 🔍 within Linked Suppliers

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.

4.8 Next within the 'General Settings' section:

Select your:
Default
Order Box

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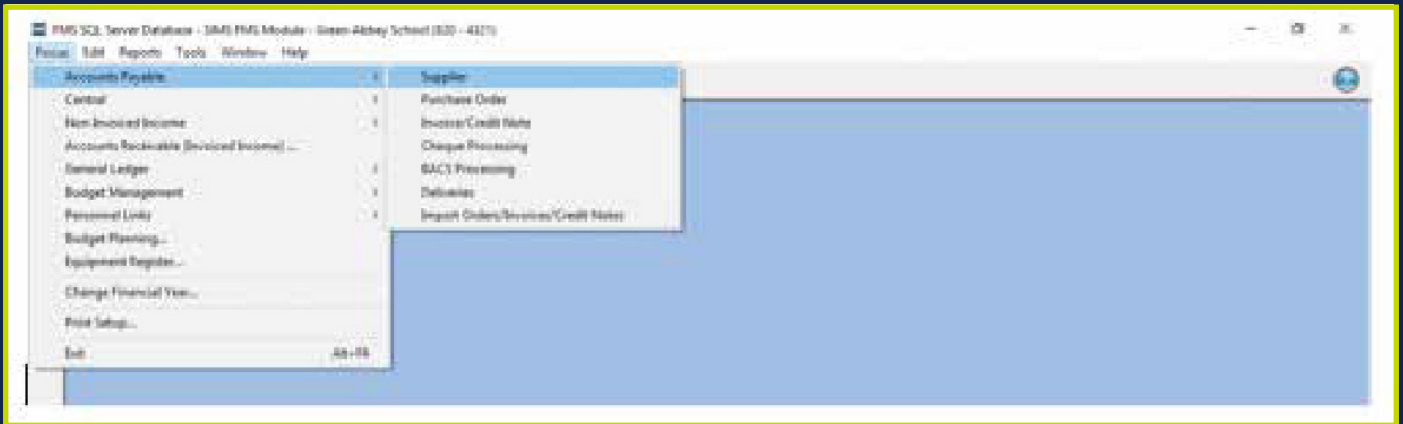
If you are unsure where to find this please refer to the 'Getting Started' section of this document.

Once all the details are entered, click: Save.

Section C: Supplier Set-up

5.1 The next step is to enable SPA 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.

Enter your
Account
Number

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'.

Select (W)
for Web Services

5.5 In the unique identifier section select DUNS and enter gls DUNS Number which is 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.

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.
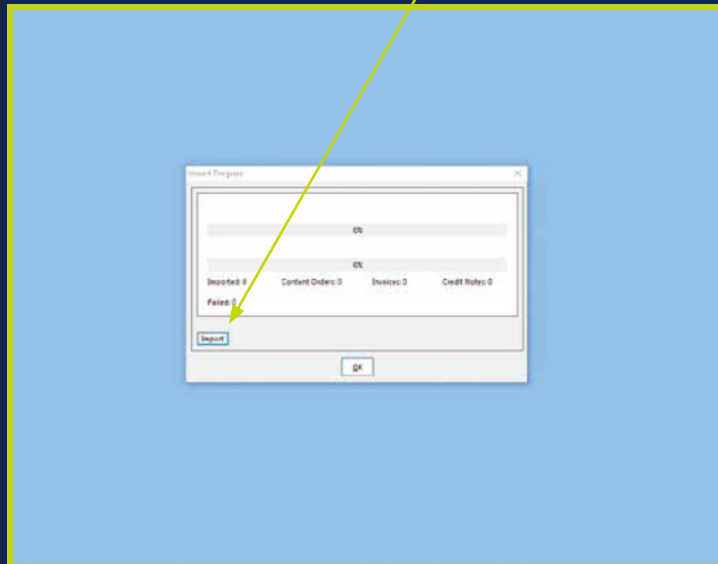
6. Import your order to SIMS

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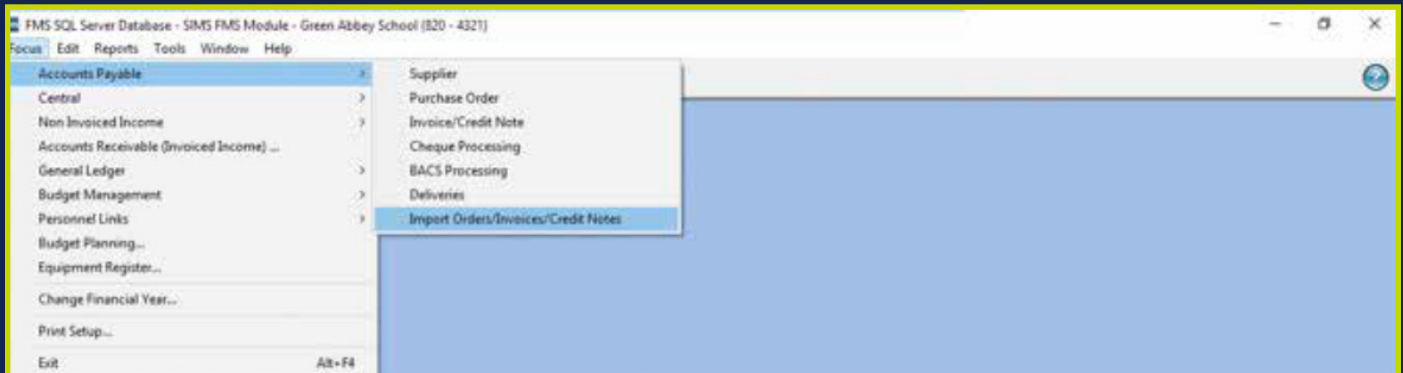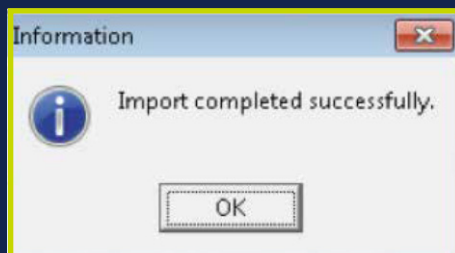

This will import any outstanding Orders / Invoices / Credit Notes.

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.

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.

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.