AtoZ

Experts in
educational supplies

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 **03451 22 88 53** or email **smartconnect@atozsupplies.co.uk**

AtoZ 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

1.

Build and browse your basket

2.

Import your basket to your financial management system

3.

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 03451 22 88 53, or email, smartconnect@atozsupplies.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:

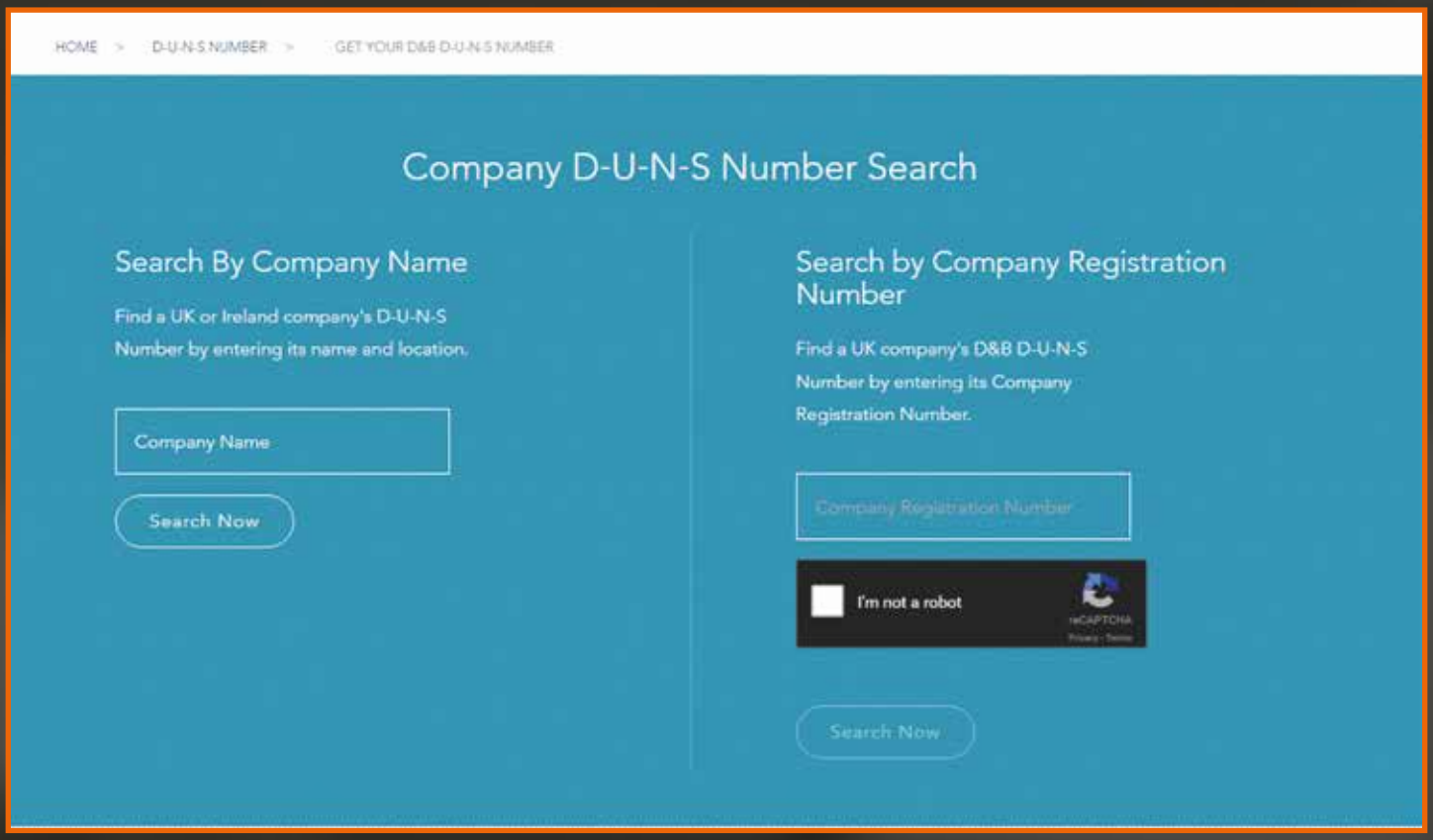
1. The email address you use to shop on AtoZ
2. Your AtoZ Account Number
3. Your AtoZ Website Password
4. Your DUNS Number

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



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.

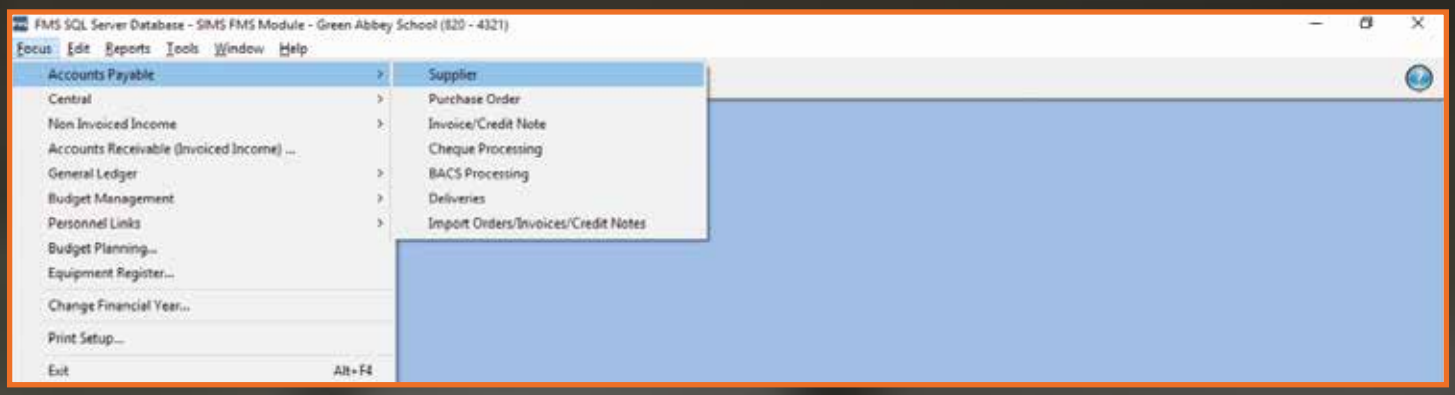
You can also find your DUNS number if you know your company registration number, by using the tool adjacent to Company Name search.

SETTING UP YOUR SMART CONNECT

SECTION A: BASIC SET-UP

1. Add AtoZ as a Supplier

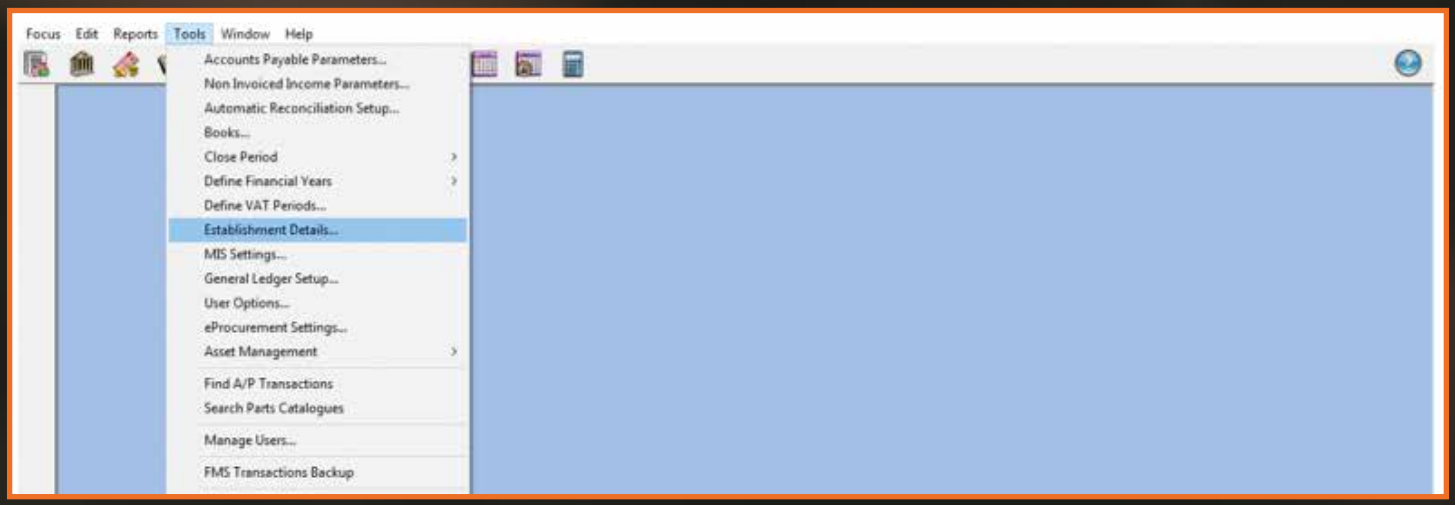
1.1 To set up AtoZ Education as a new supplier go to 'Focus > Accounts Payable > Supplier'



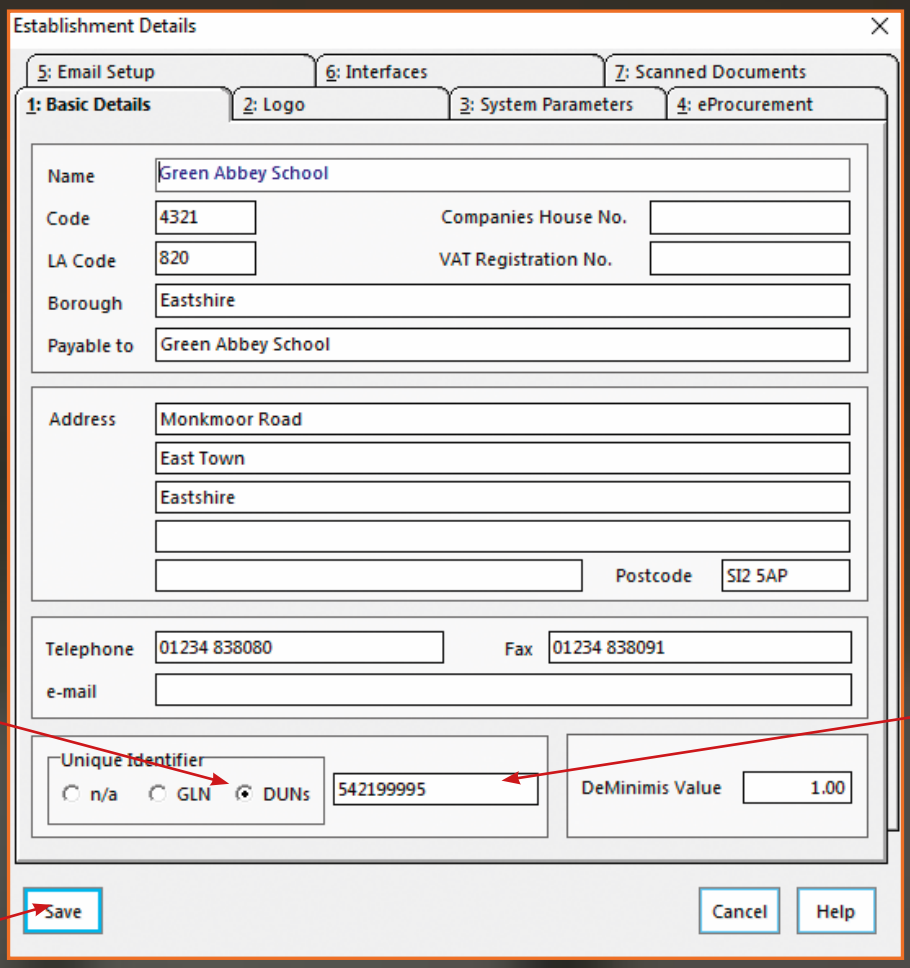
1.2 Select the and enter the below details:
AtoZ Educational Supplies
2 Gregory Street,
Hyde, Cheshire,
SK14 4TH
VAT Number – GB125688644
DUNS - 212273791
Telephone – 03451 22 88 53
Email Address – smartconnect@atozsupplies.co.uk

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.



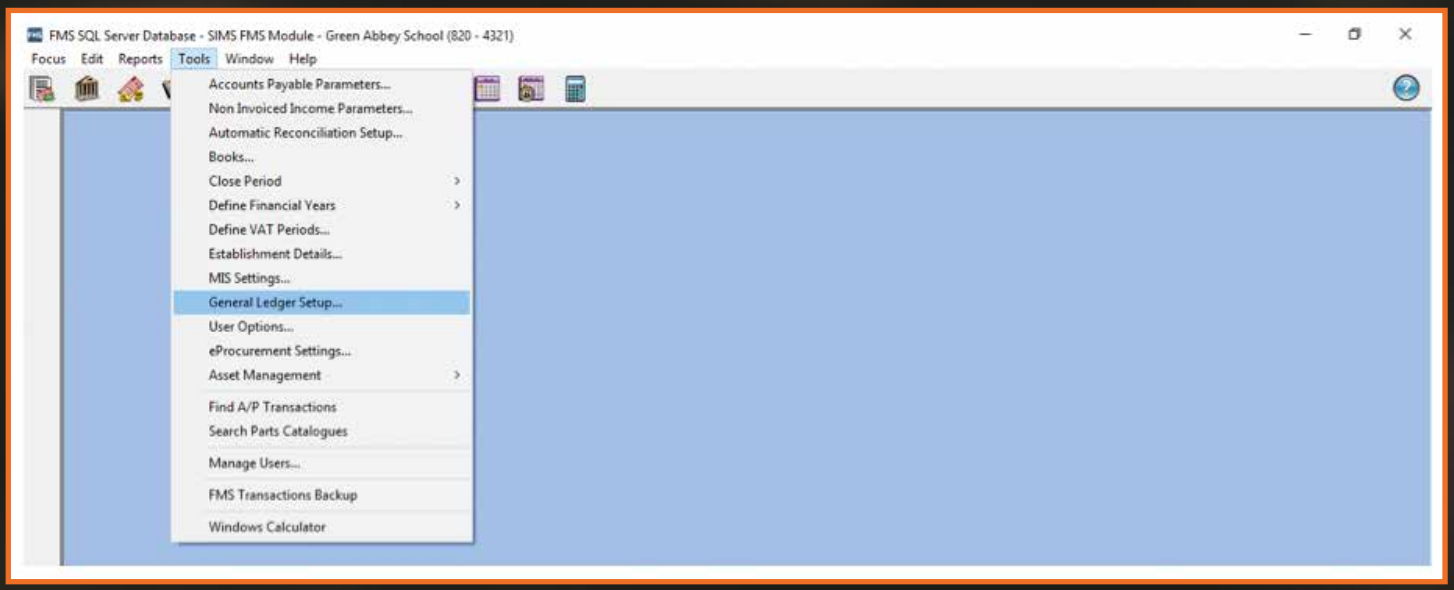
Select DUNS

Enter your DUNS Number

Save

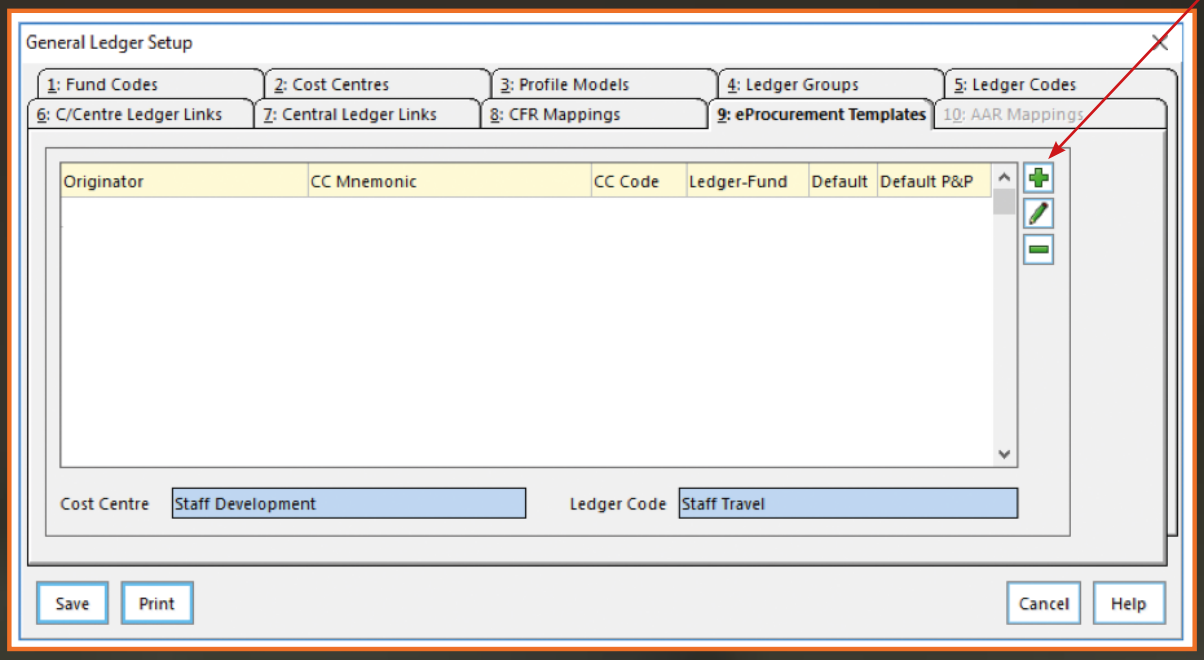
3. General Ledger

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

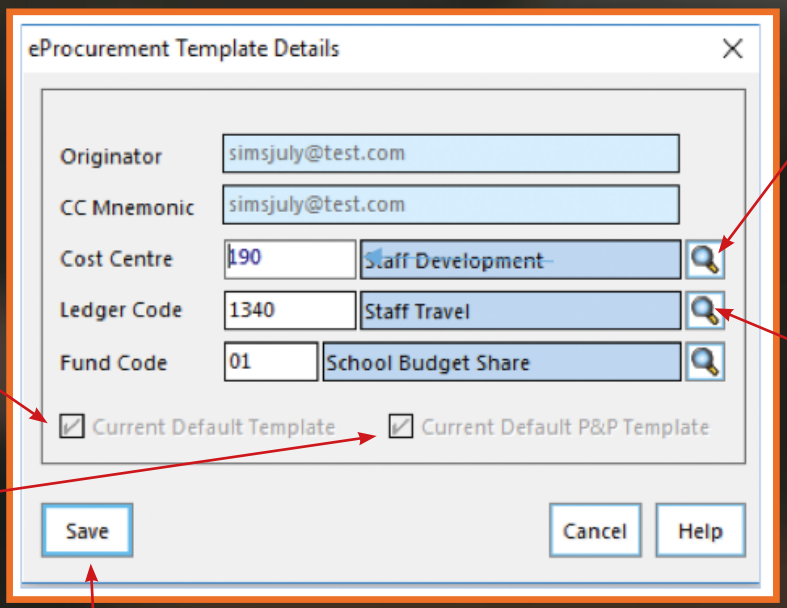
Click



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 AtoZ Education 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

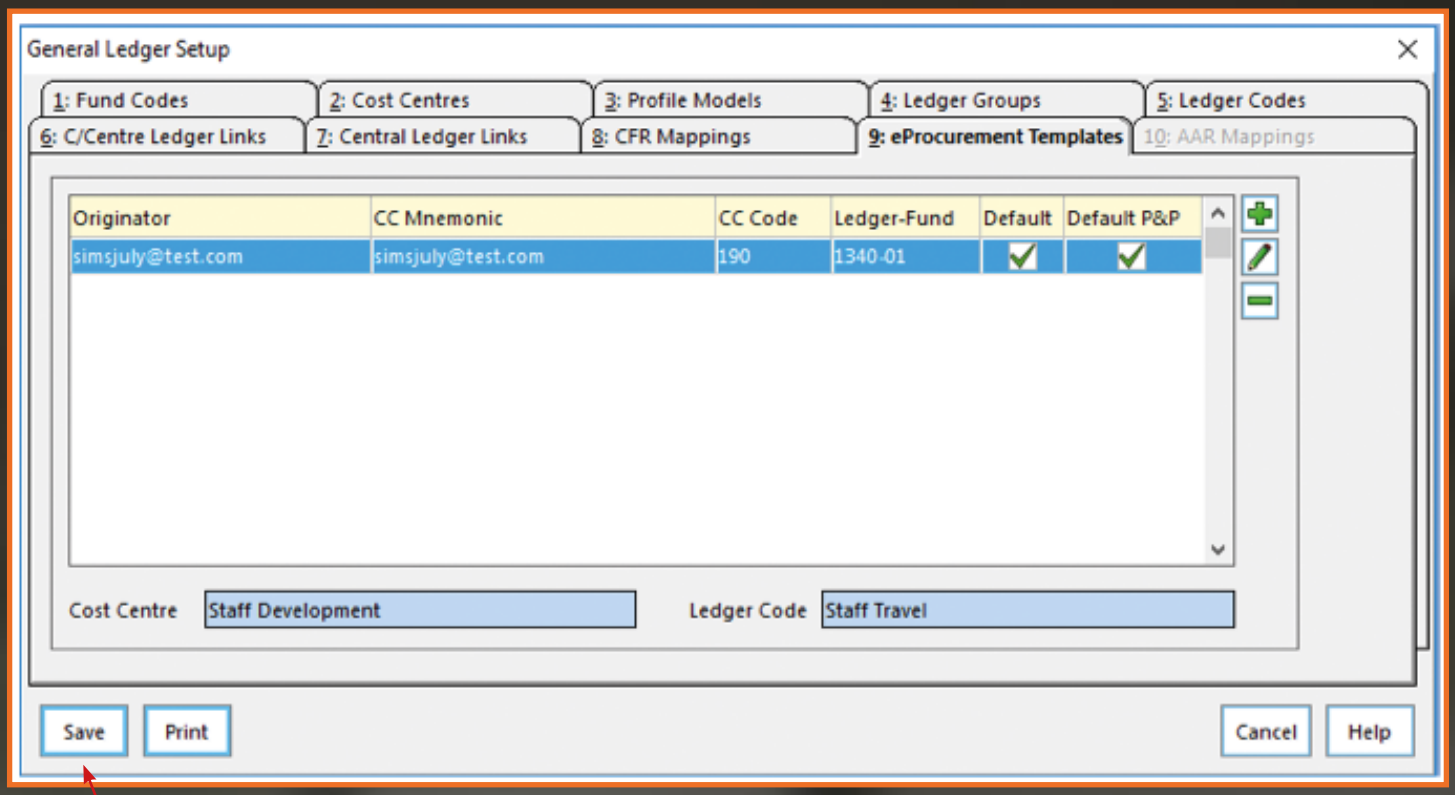
Click and enter your most frequently used Ledger Code

Tick Current Default Template

Tick Current Default P&P Template

Save

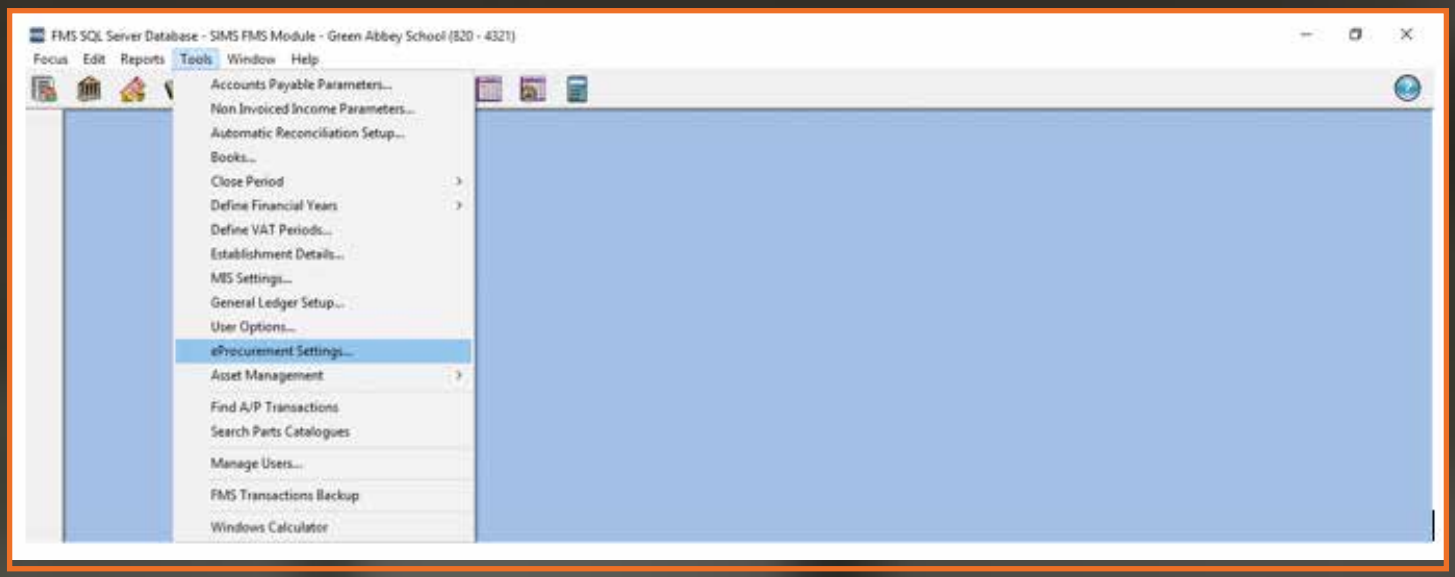
3.5 You should now see the following screen:



3.6 Press save to complete.

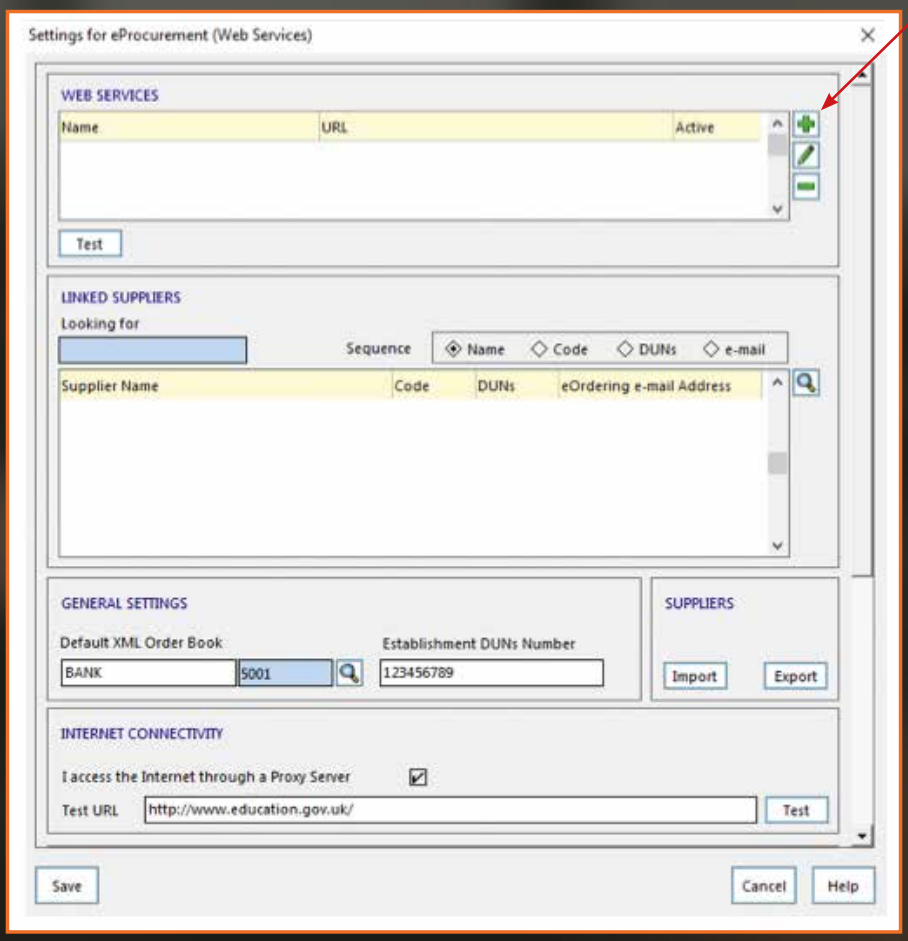
SECTION B: E-PROCUREMENT SET-UP

4.1 The next step is to enter the details to connect your SIMS FMS to our AtoZ Education Supplies 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.

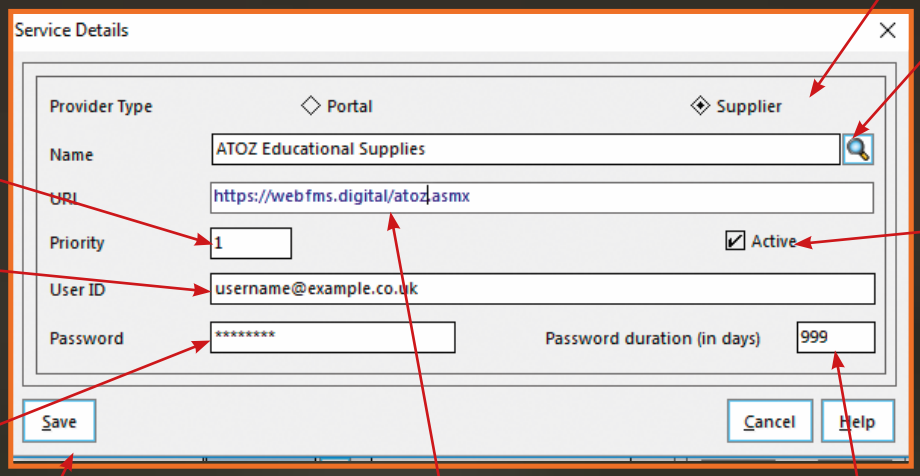


4.2 If this is editable select in the WEB SERVICES section to make an addition:

Select



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



Select Supplier

Select AtoZ Educational Supplies

Enter 1

Tick Active

Enter your AtoZ website email addresss

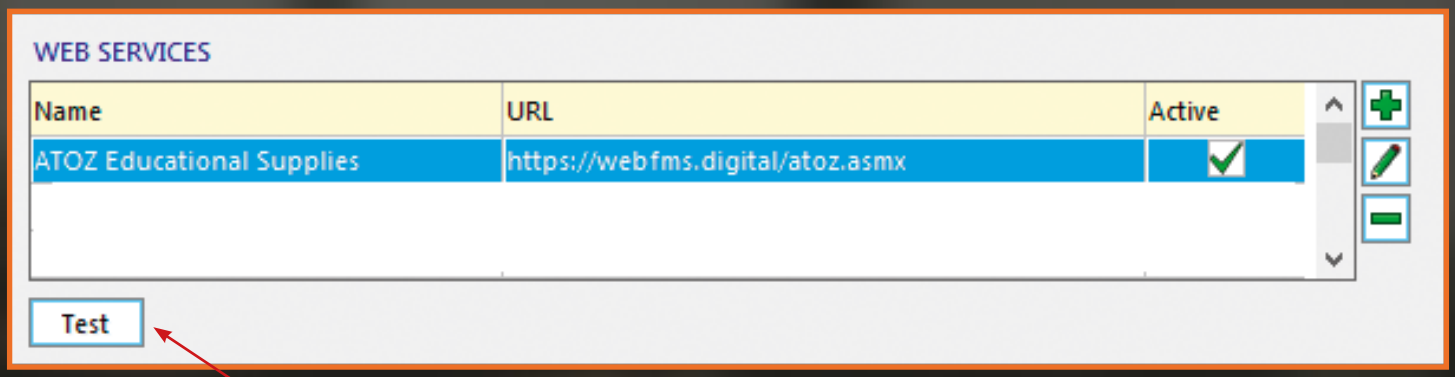
Enter your AtoZ password

Click Save

Enter: https://webfms.digital/atoz.asmx

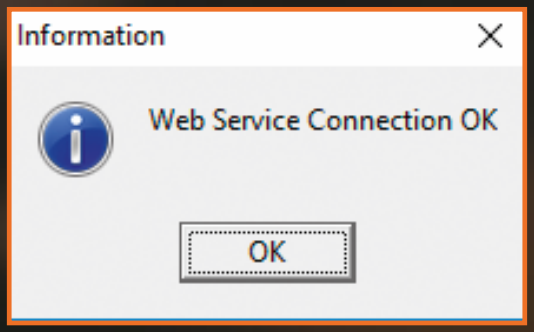
Enter 999 days

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



Click Test

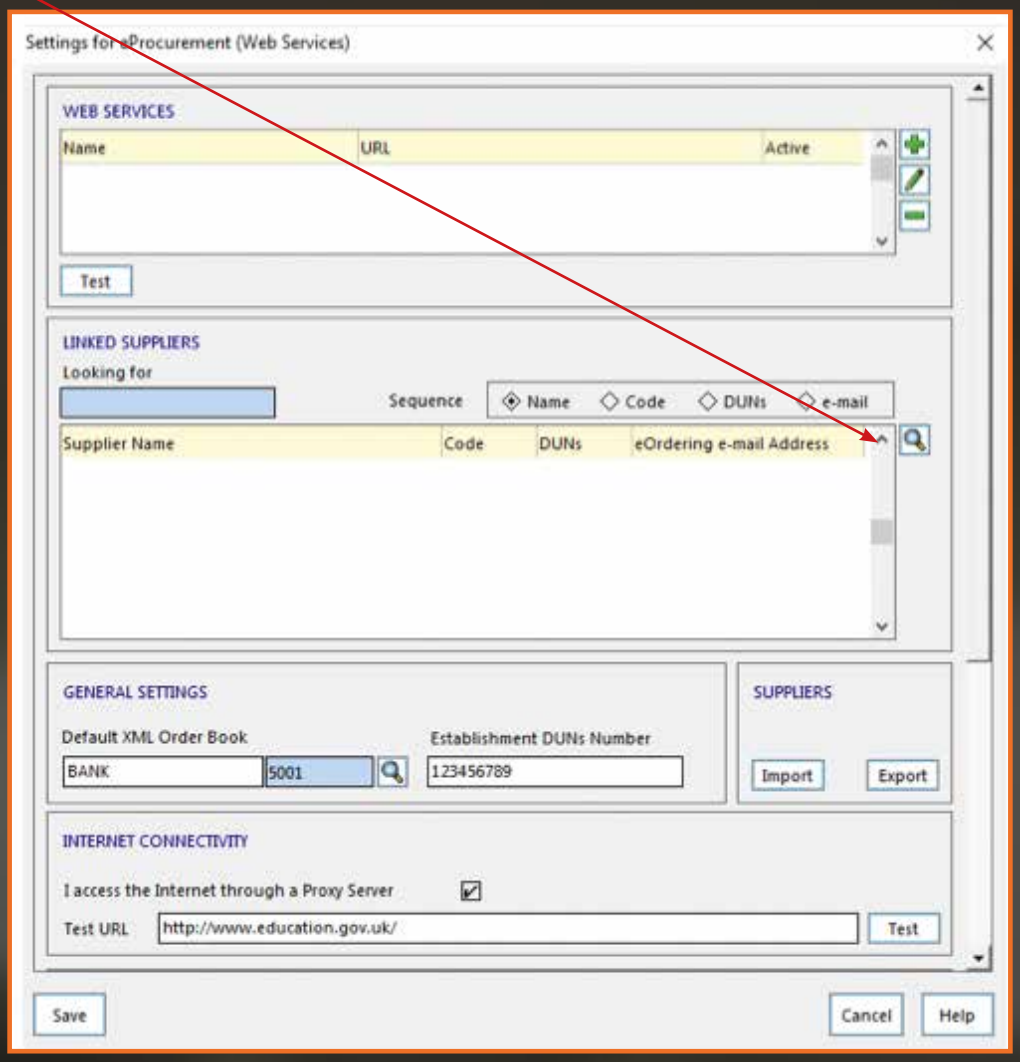
4.5 If the settings are correct the pop-up below will appear:



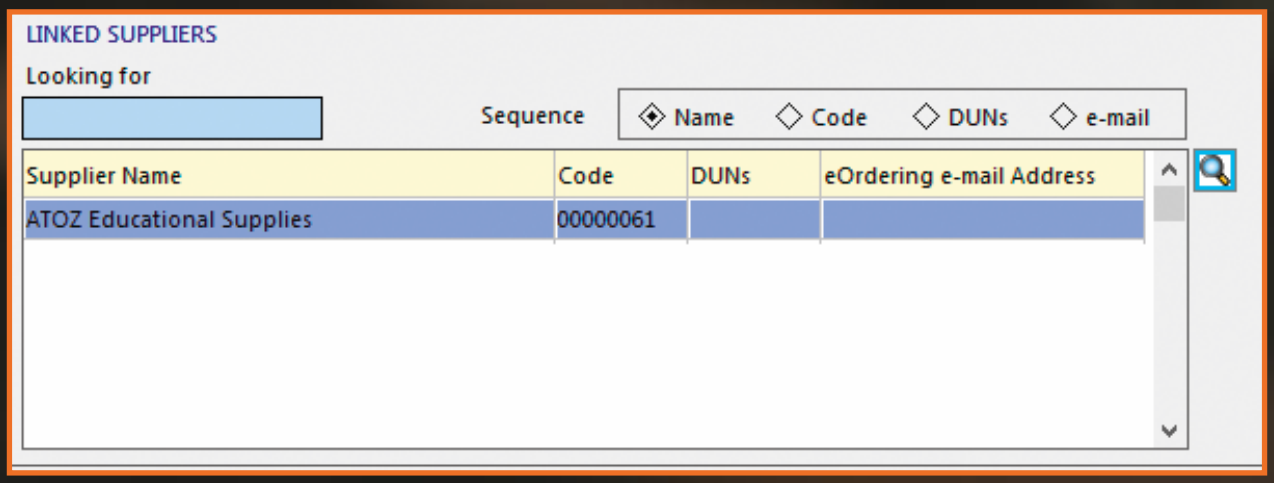
In the unlikely event of this showing a failed message, please contact our Support Team on 03451 22 88 53.

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 AtoZ Educational Supplies so that it is highlighted and then click the Choose button. Then click Update. This links AtoZ as a supplier to the AtoZ web service details.



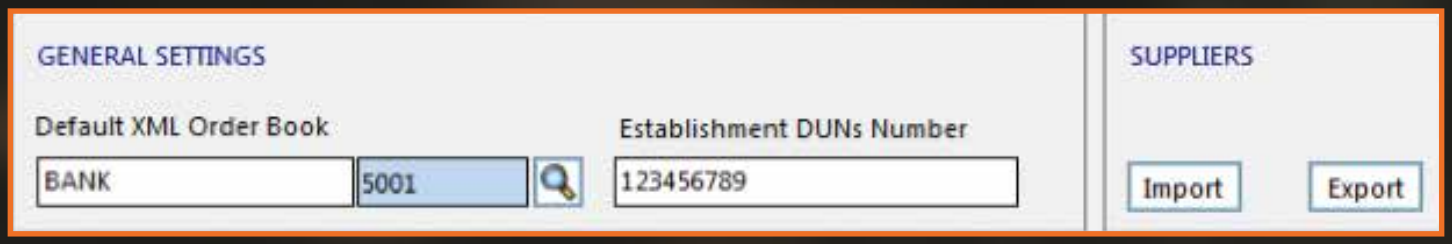
4.8 Next within the 'General Settings' section:

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.



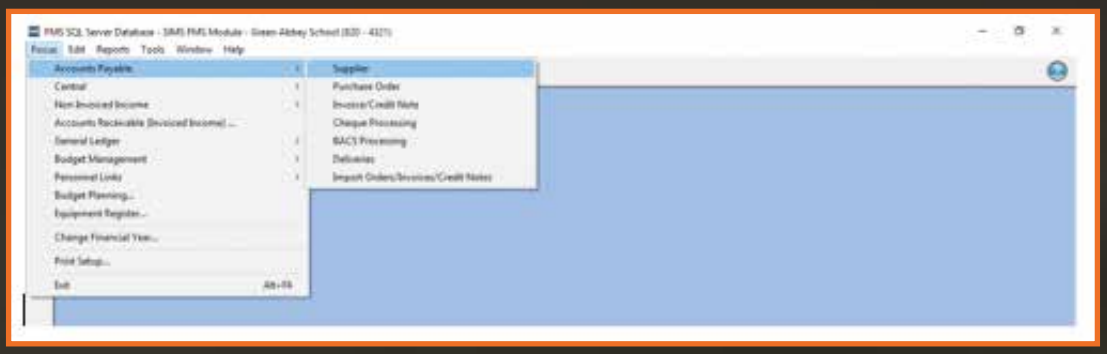
4.10 Check that your DUNS Number is in the 'Establishment DUNS Number' field too, if this information is missing, please add it.

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

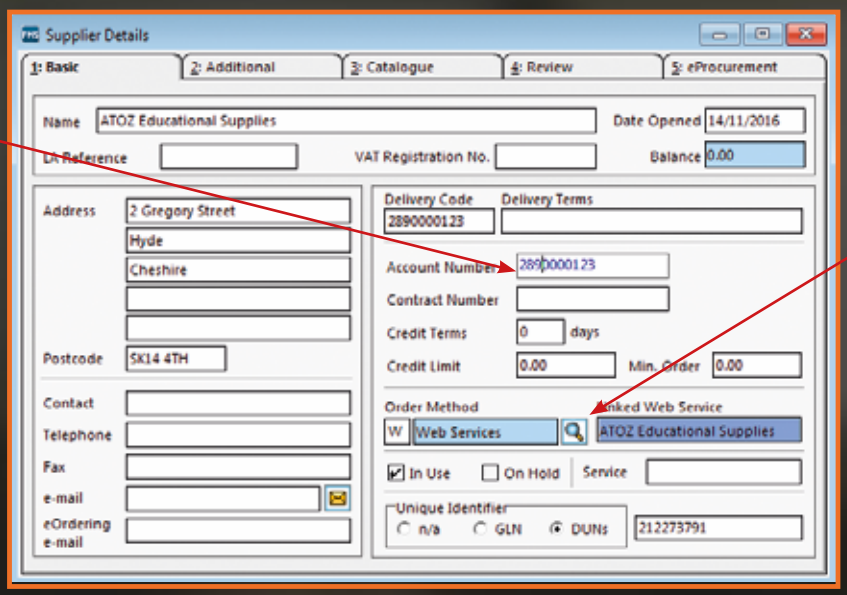
5.1 The next step is to enable AtoZ to process Web Service Orders.
Go to Focus > Accounts Payable > Supplier



5.2 Find AtoZ and double click on the name.

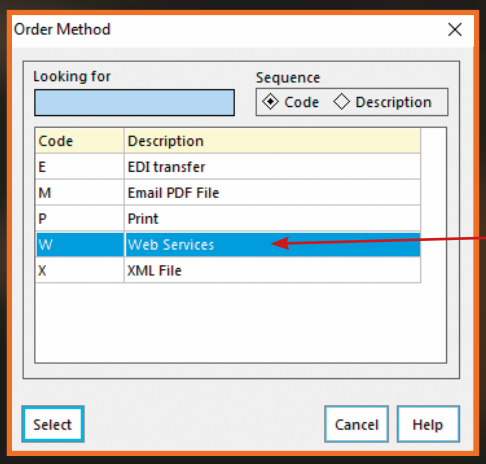
5.3 In tab '1: Basic' the Delivery Code needs to contain your account number e.g. 7430017072. The account number needs to be the same as in the Delivery Code and Account Number field.

Enter your Account Number here



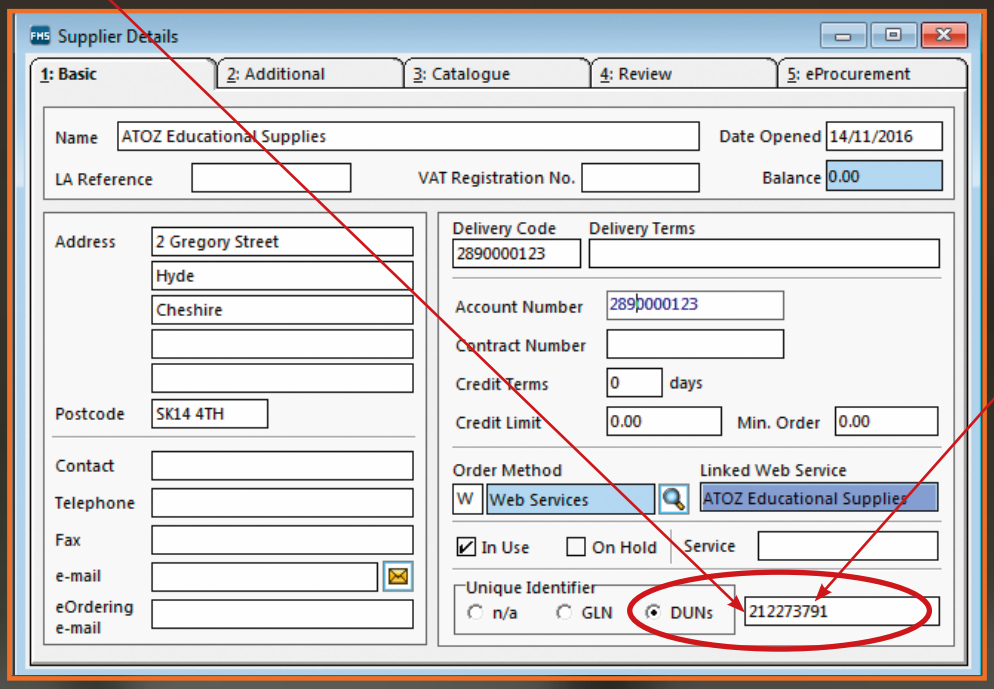
Click the button

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'.



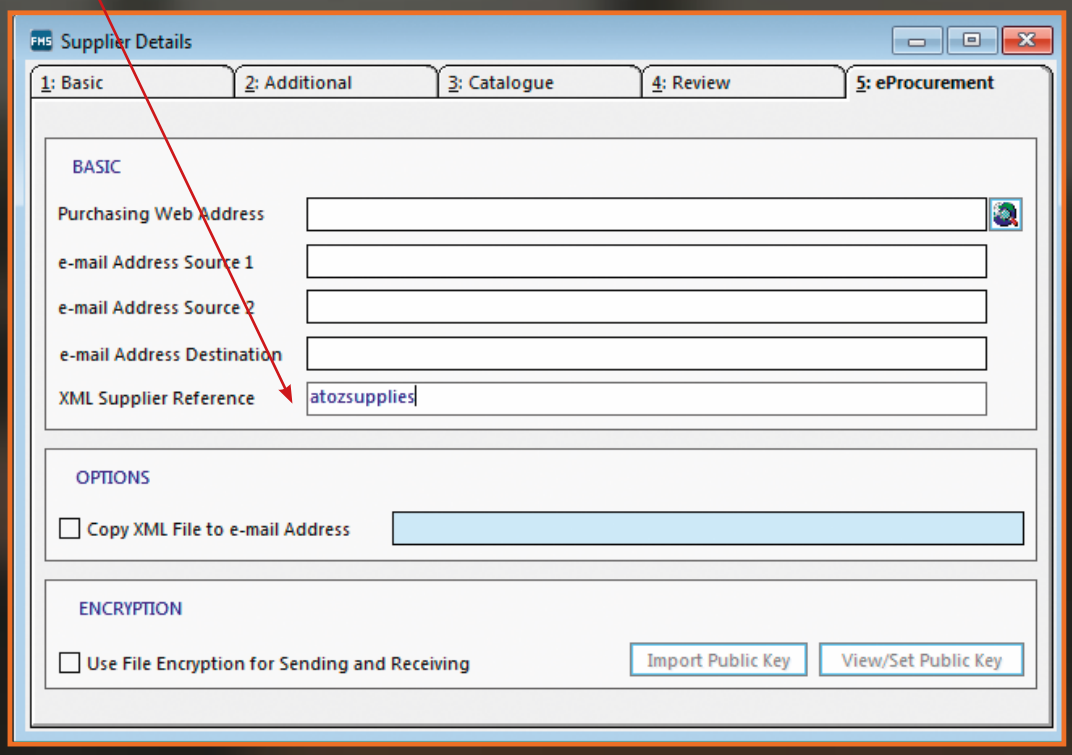
Select (W) for Web Services

5.5 In the unique identifier section select DUNS and enter AtoZ DUNS Number which is **212273791**.



Select DUNS and enter 212273791

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



5.7 Now save and close.

You are now ready to start ordering online via SIMS.

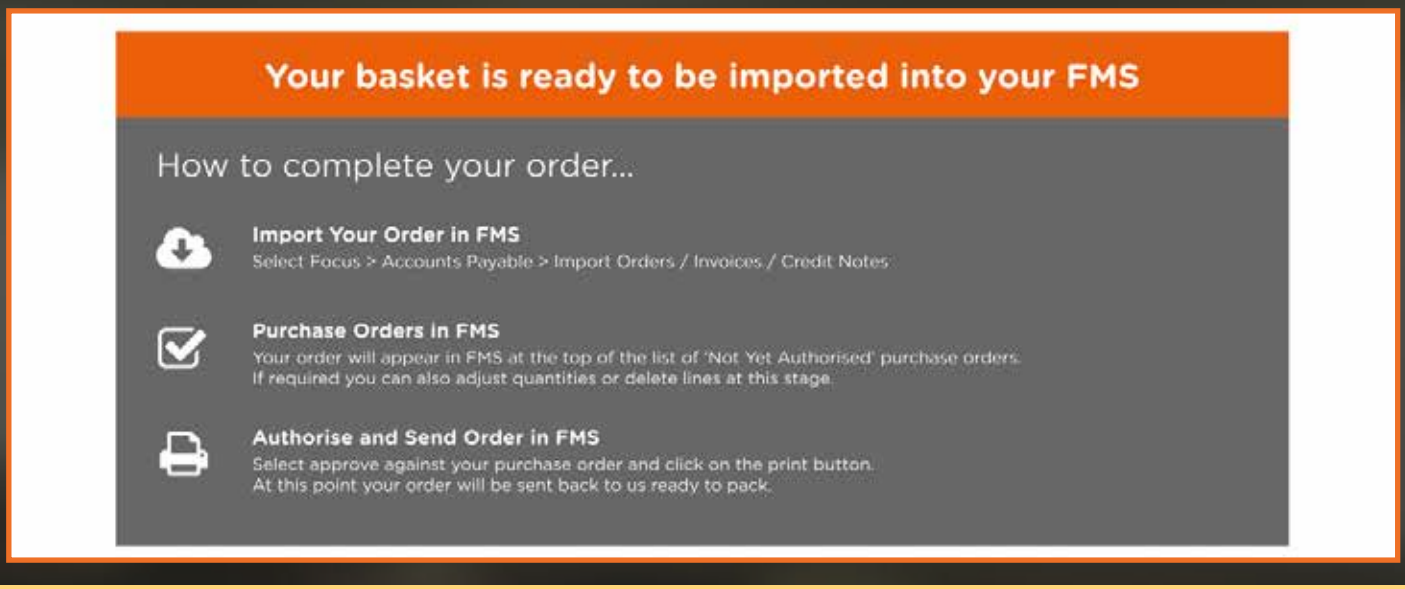
SECTION D: ORDERING ONLINE

5. Shopping on www.atozsupplies.co.uk

5.1 Simply visit www.atozsupplies.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).

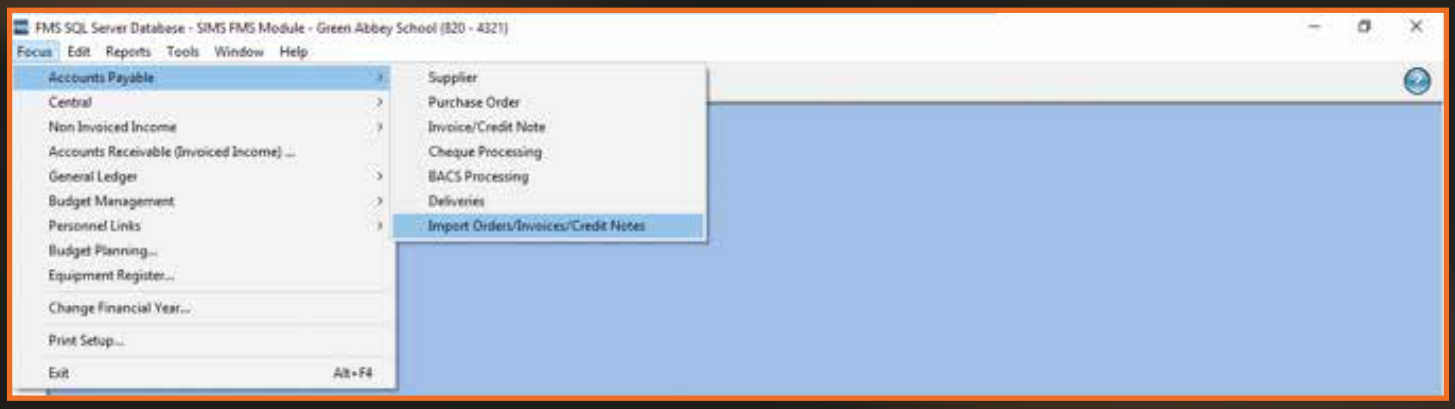
5.2 Once you have reviewed your basket and you are ready to checkout, during these steps you can check the correct account number and delivery address is assigned to the order.

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.



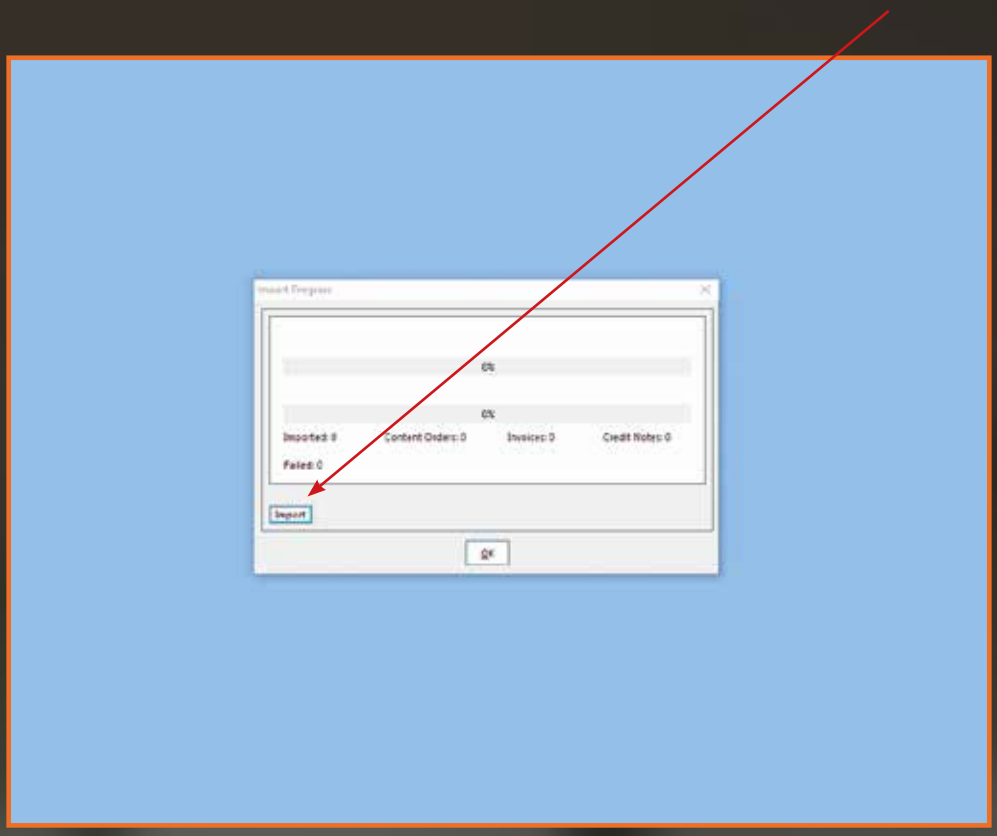
6. Import your order to SIMS

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

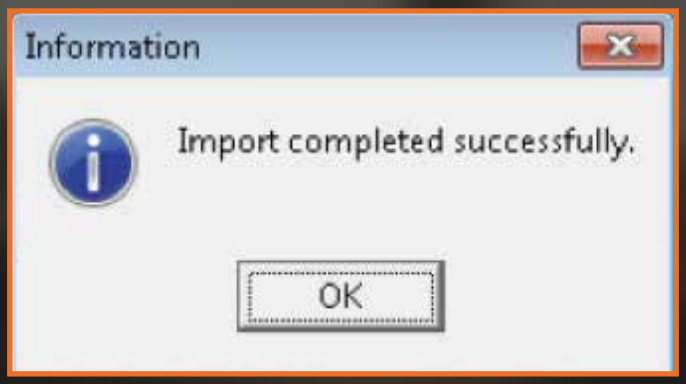


This will import any outstanding Orders / Invoices / Credit Notes.

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.



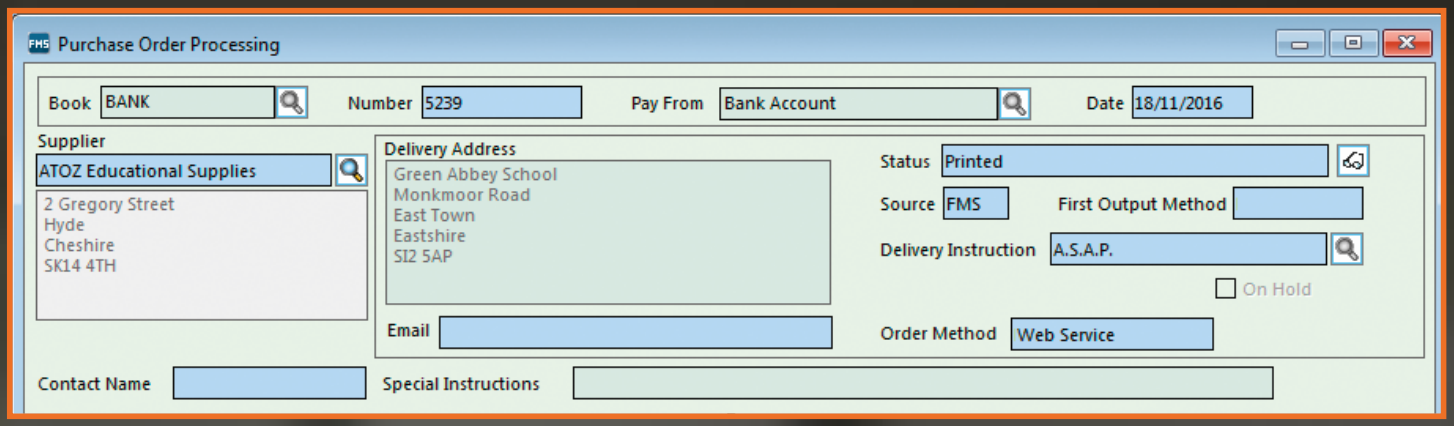
In the unlikely event of this failing, please contact our Support Team on: 03451 22 88 53.

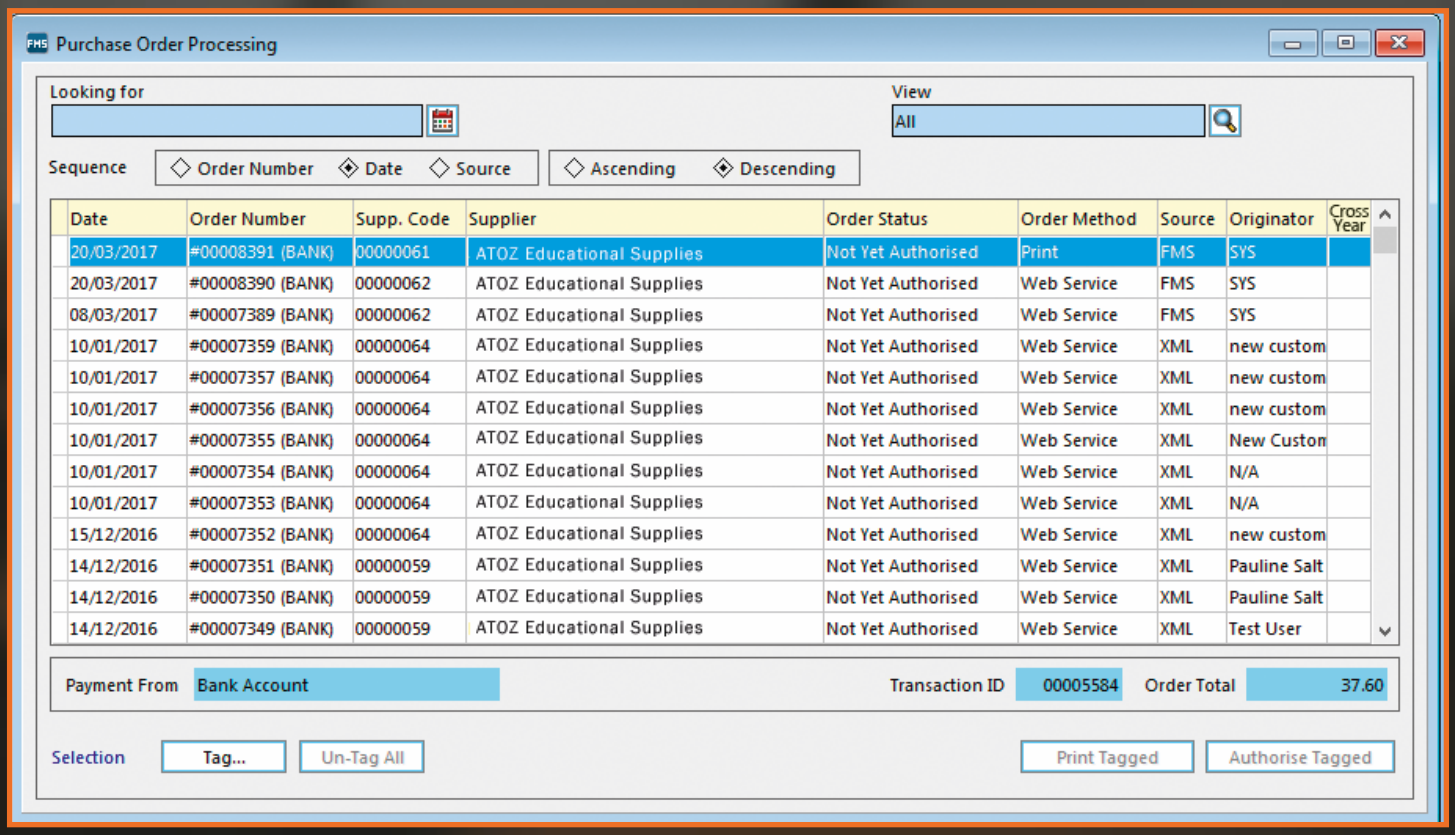
7. Purchase Orders

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.



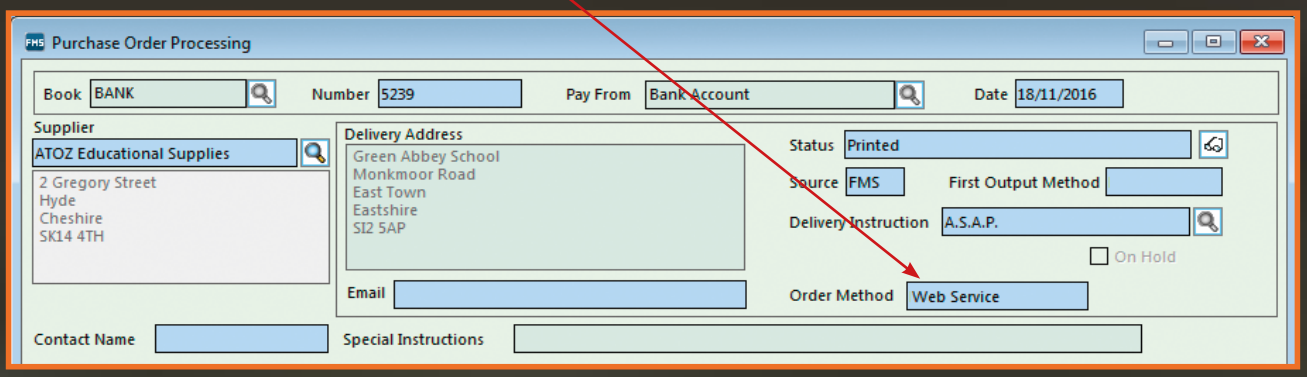


Date	Order Number	Supp. Code	Supplier	Order Status	Order Method	Source	Originator	Cross Year
20/03/2017	#00008391 (BANK)	00000061	ATOZ Educational Supplies	Not Yet Authorised	Print	FMS	SYS	
20/03/2017	#00008390 (BANK)	00000062	ATOZ Educational Supplies	Not Yet Authorised	Web Service	FMS	SYS	
08/03/2017	#00007389 (BANK)	00000062	ATOZ Educational Supplies	Not Yet Authorised	Web Service	FMS	SYS	
10/01/2017	#00007359 (BANK)	00000064	ATOZ Educational Supplies	Not Yet Authorised	Web Service	XML	new custom	
10/01/2017	#00007357 (BANK)	00000064	ATOZ Educational Supplies	Not Yet Authorised	Web Service	XML	new custom	
10/01/2017	#00007356 (BANK)	00000064	ATOZ Educational Supplies	Not Yet Authorised	Web Service	XML	new custom	
10/01/2017	#00007355 (BANK)	00000064	ATOZ Educational Supplies	Not Yet Authorised	Web Service	XML	New Custom	
10/01/2017	#00007354 (BANK)	00000064	ATOZ Educational Supplies	Not Yet Authorised	Web Service	XML	N/A	
10/01/2017	#00007353 (BANK)	00000064	ATOZ Educational Supplies	Not Yet Authorised	Web Service	XML	N/A	
15/12/2016	#00007352 (BANK)	00000064	ATOZ Educational Supplies	Not Yet Authorised	Web Service	XML	new custom	
14/12/2016	#00007351 (BANK)	00000059	ATOZ Educational Supplies	Not Yet Authorised	Web Service	XML	Pauline Salt	
14/12/2016	#00007350 (BANK)	00000059	ATOZ Educational Supplies	Not Yet Authorised	Web Service	XML	Pauline Salt	
14/12/2016	#00007349 (BANK)	00000059	ATOZ Educational Supplies	Not Yet Authorised	Web Service	XML	Test User	

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.

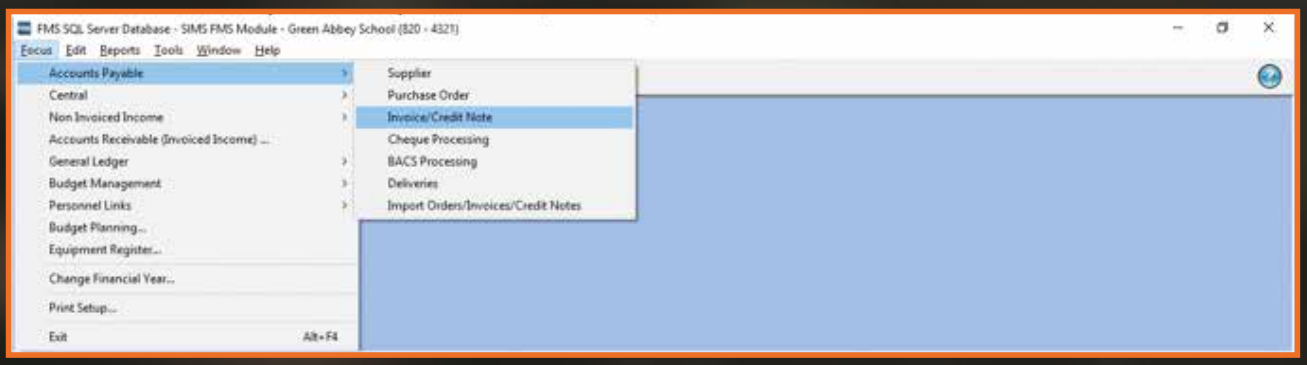


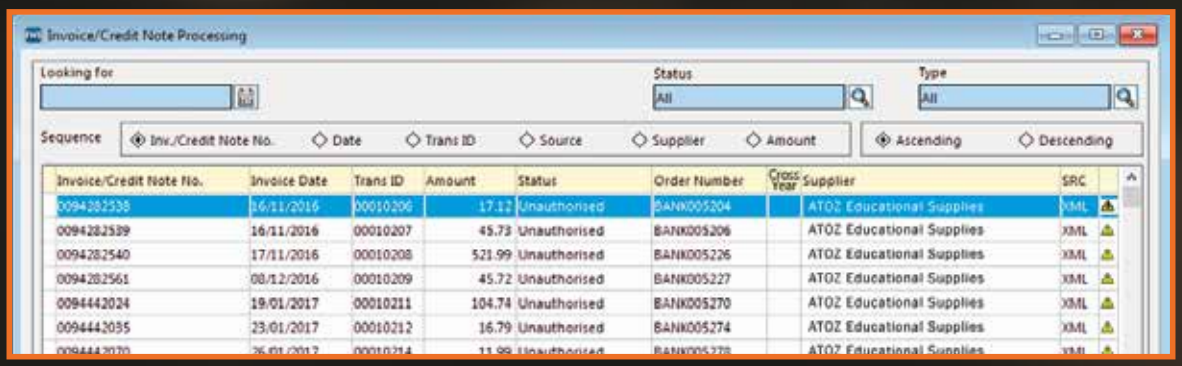
9. Invoices

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.





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