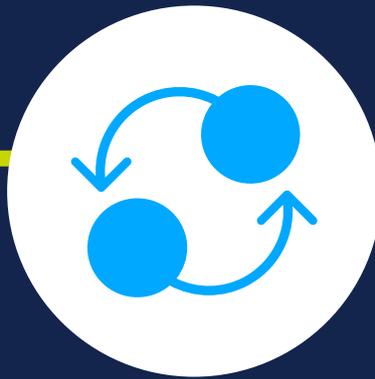


Join the 'SMART' revolution today and start saving time and money.



SMART
Connect
user guide

ESS | **SIMS**

***For help setting up call us on 03451 228 853
or email smartconnect@atozsupplies.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 **03451 228 853**, 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>

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.

Search by Company Registration Number

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

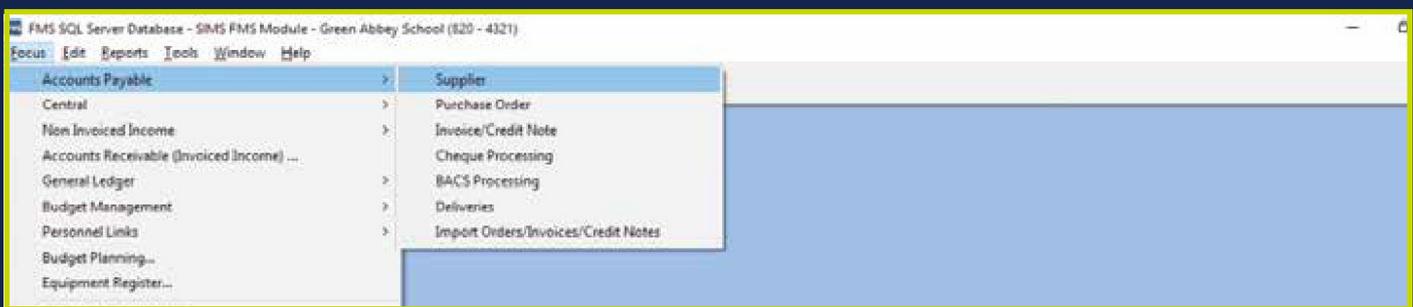
 I'm not a robot 

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 Education Supplies

2 Gregory Street,

Hyde, Cheshire, SK14 4HR.

VAT Number – GB125688644

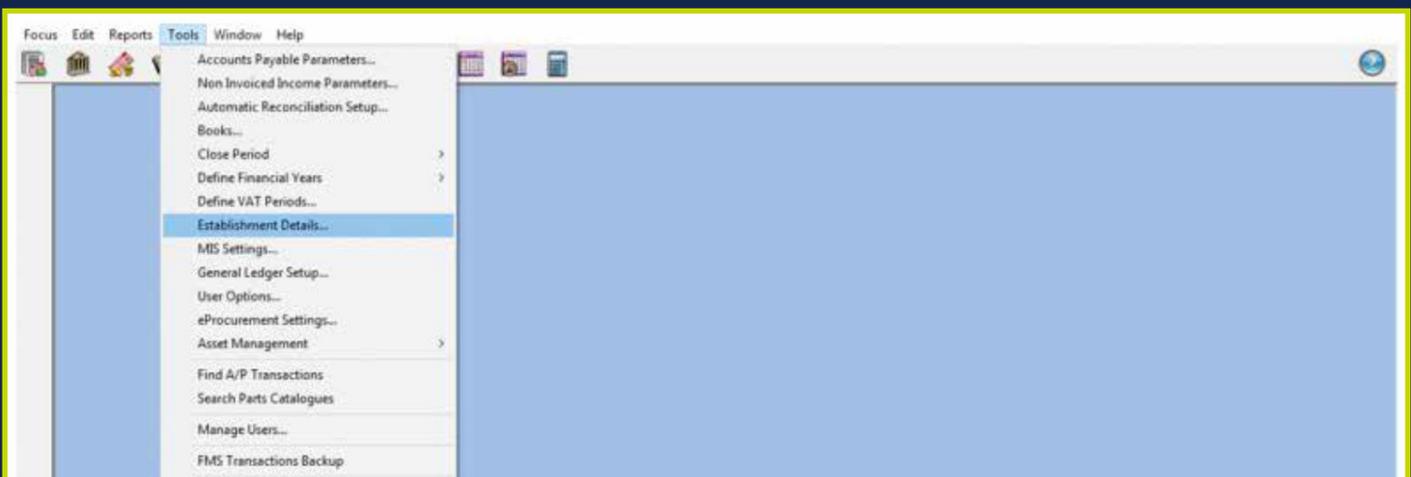
DUNS - 212273791

Telephone – 03451 228 853

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.

The screenshot shows the 'Establishment Details' window 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:

- 'Select: DUNS' points to the 'DUNS' radio button.
- 'Click: Save' points to the 'Save' button.
- 'Enter: Your DUNS Number' points to the '542199995' text field.

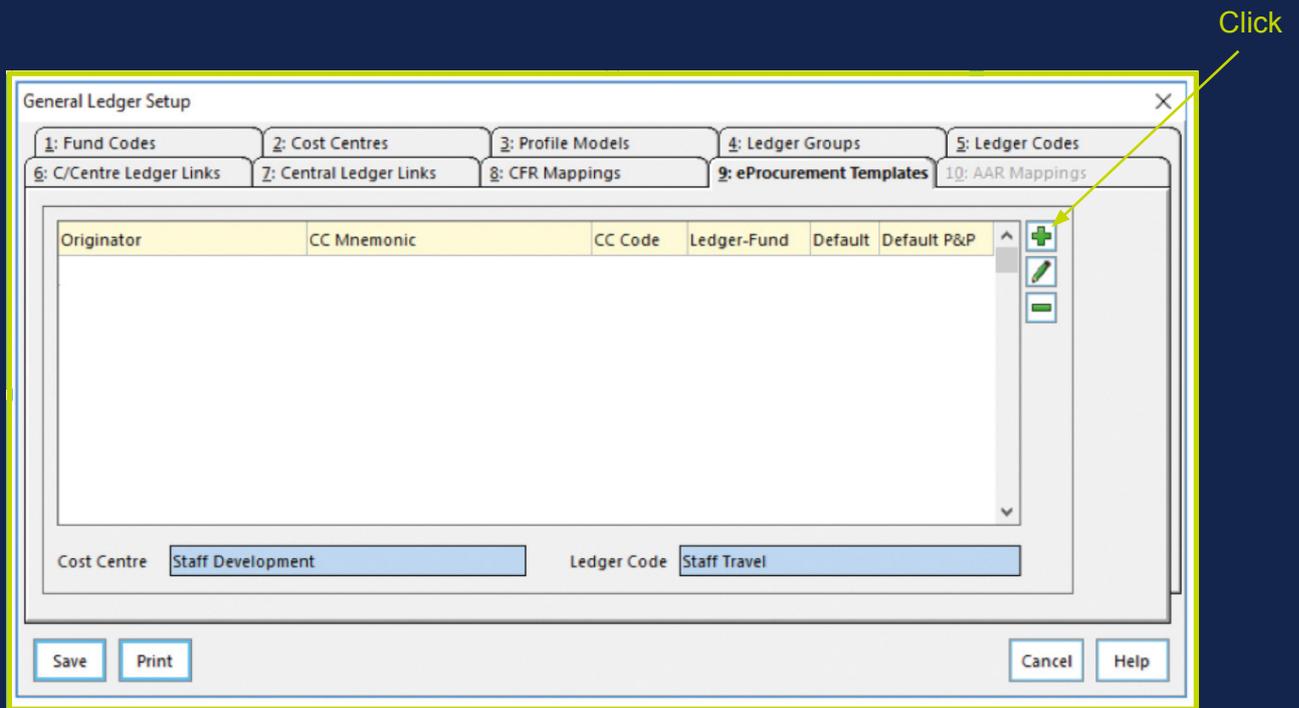
3. General ledger

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'

The screenshot shows the 'Tools' menu in the FMS application. 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 

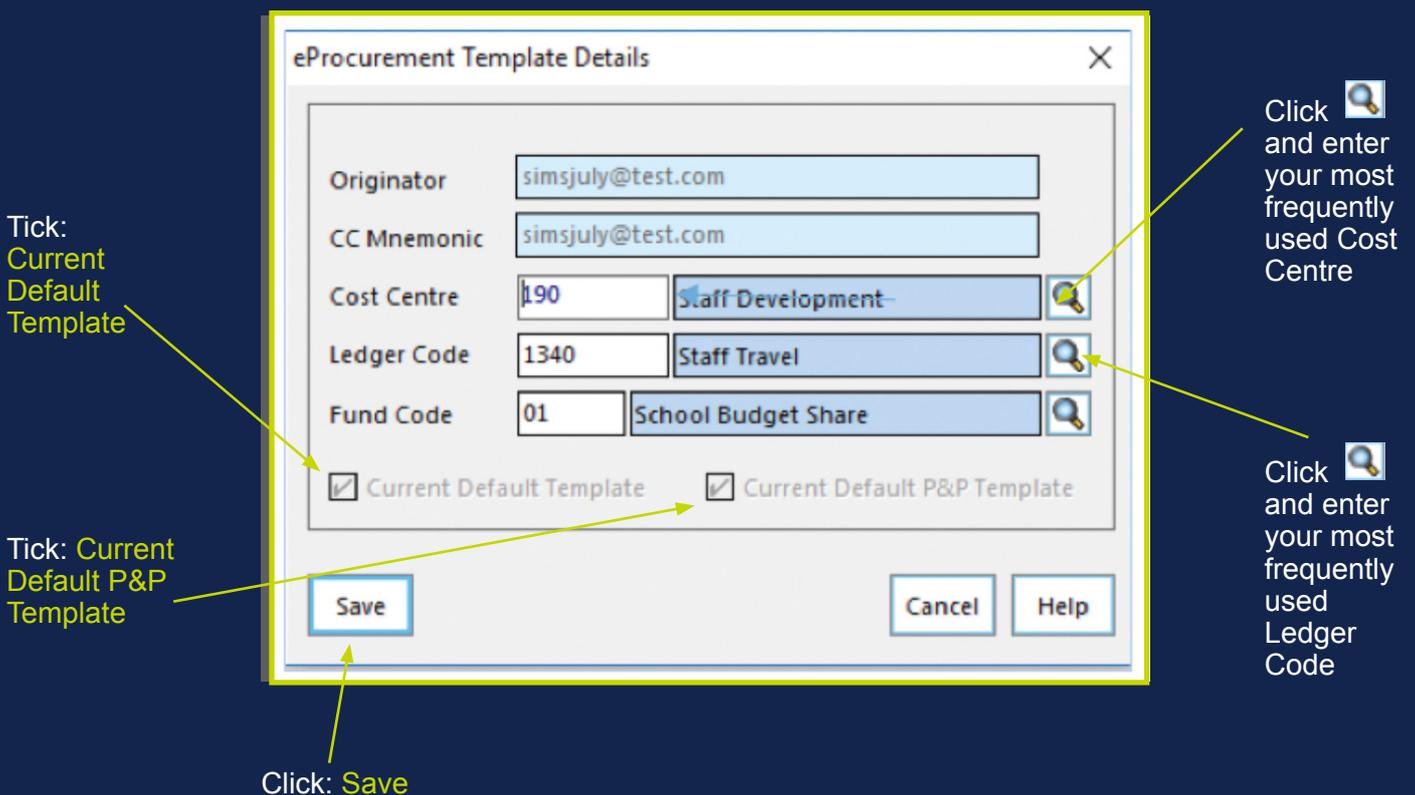


3.3 Next complete the pop up box using the below information for both open fields:

• **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.



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

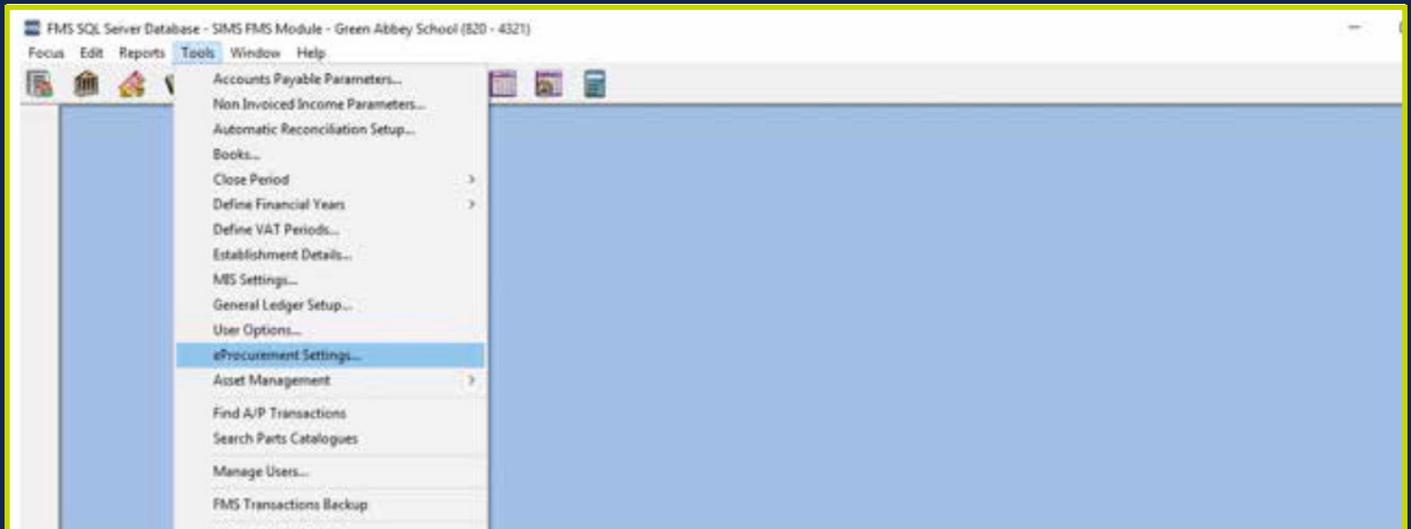
Originator	CC Mnemonic	CC Code	Ledger-Fund	Default	Default P&P	
simsjuly@test.com	simsjuly@test.com	190	1340-01	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	  

Cost Centre: Ledger Code:

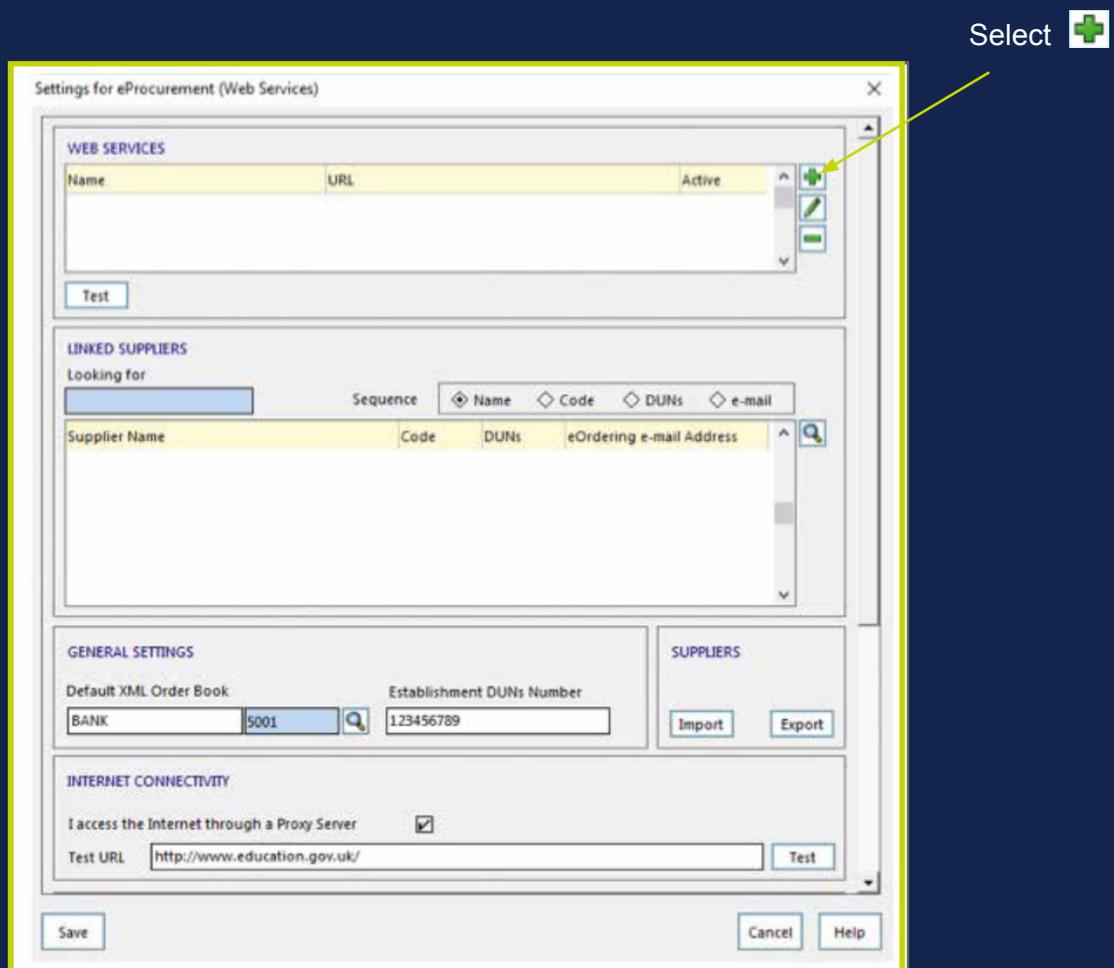
3.6 Click: **Save to complete.**

Section B: E-procurement Set-up

4.1 The next step is to enter the details to connect your SIMS FMS to our 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:



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'. An arrow points to 'Supplier' with the annotation 'Select Supplier'.
- Name:** Text box containing 'ATOZ Educational Supplies'. An arrow points to the search icon on the right with the annotation 'Select: AtoZ Educational Supplies'.
- URL:** Text box containing 'https://webfms.digital/atoz.aspx'. An arrow points to this field with the annotation 'Enter: http://webfms.digital/atoz.aspx'.
- Priority:** Text box containing '1'. An arrow points to this field with the annotation 'Enter: 1'.
- User ID:** Text box containing 'username@example.co.uk'. An arrow points to this field with the annotation 'Enter: AtoZ website email address'.
- Password:** Text box containing '*****'. An arrow points to this field with the annotation 'Enter: Your AtoZ password'.
- Active:** A checked checkbox. An arrow points to it with the annotation 'Tick: Active'.
- Password duration (in days):** Text box containing '999'. An arrow points to this field with the annotation 'Enter: 999 days'.
- Buttons:** 'Save', 'Cancel', and 'Help'.

Click: Save

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

Name	URL	Active
ATOZ Educational Supplies	https://webfms.digital/atoz.aspx	<input checked="" type="checkbox"/>

Click: Test

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

Information

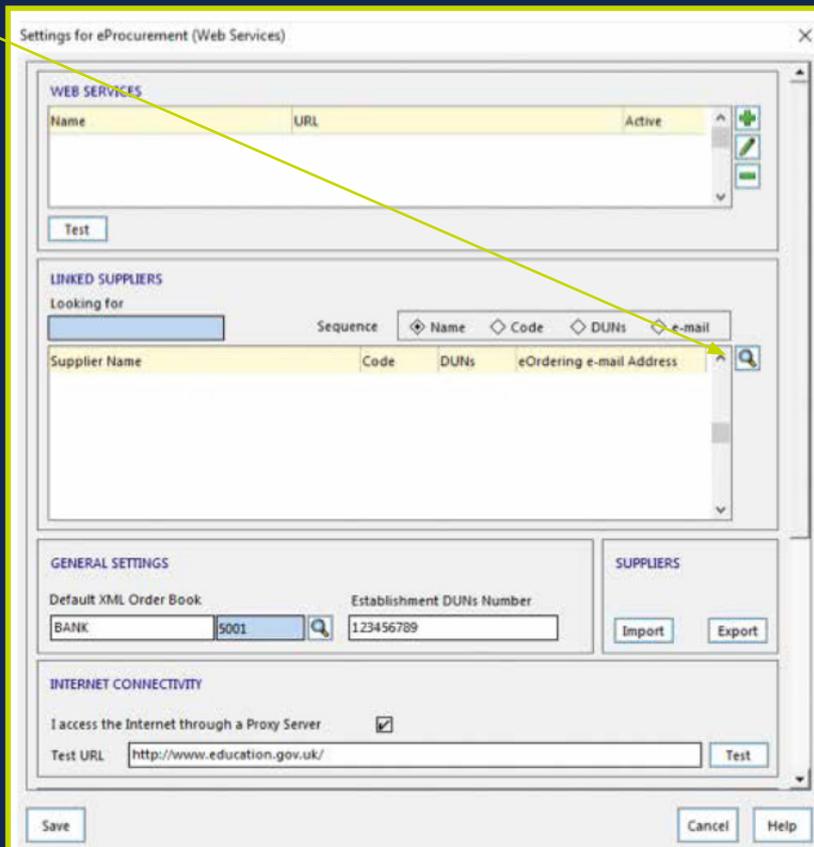
Web Service Connection OK

OK

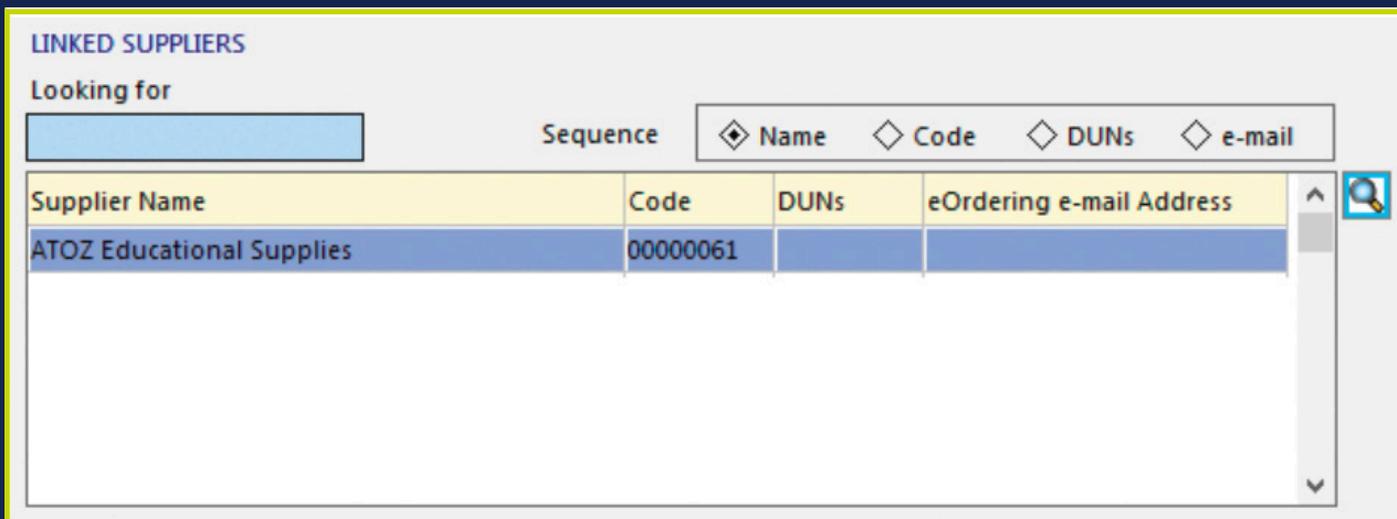
In the unlikely event of this showing a failed message, please contact our [Support Team](#) on 03451 228 853.

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 gls as a supplier to the gls 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.

GENERAL SETTINGS

Default XML Order Book: BANK 5001 [Search]

Establishment DUNS Number: 123456789

SUPPLIERS: Import Export

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

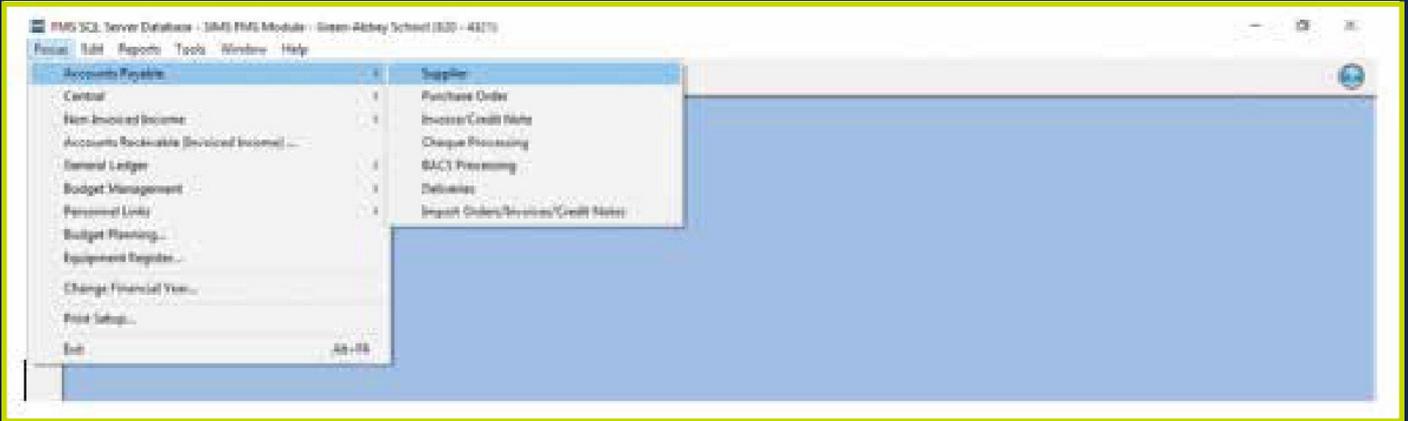
If you are unsure where to find this please refer to the 'Getting Started' section of this document.

Once all the details are entered, click: Save.

Section C: Supplier Set-up

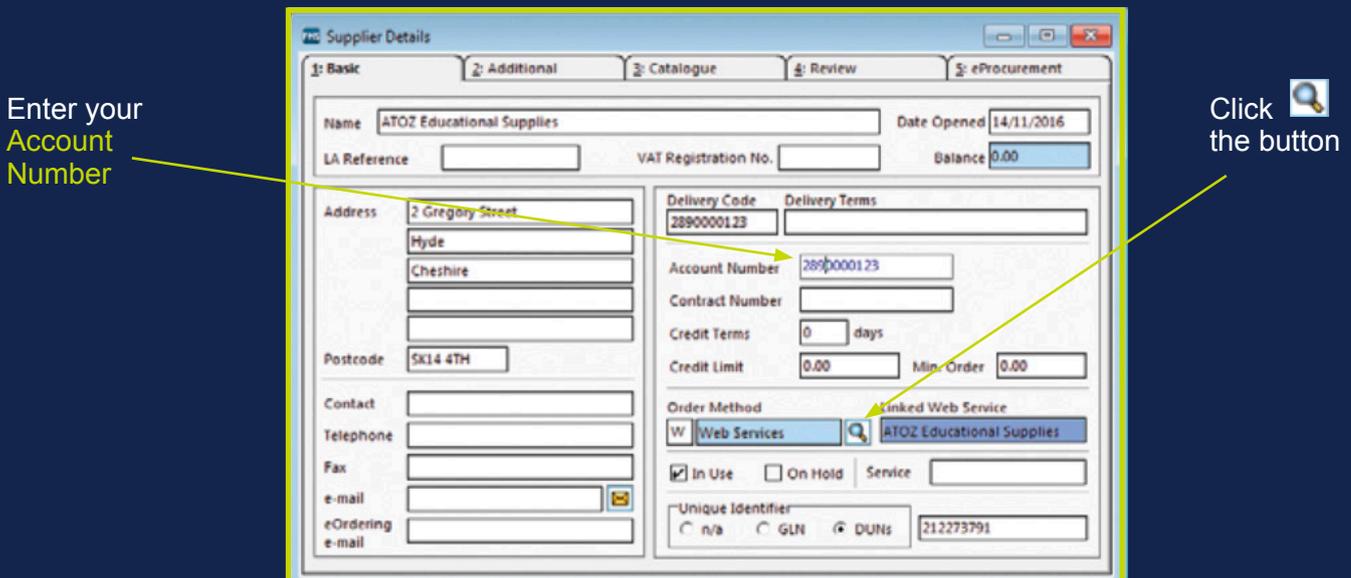
5.1 The next step is to enable AtoZ to process Web Service Orders.

Go to Focus > Accounts Payable > Supplier

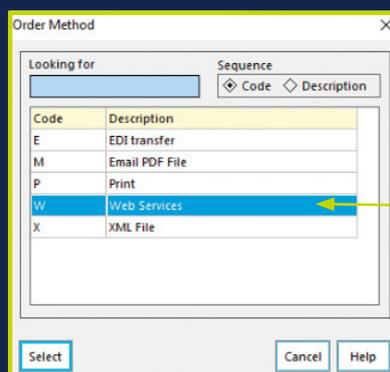


5.2 Find AtoZ and double click on the name.

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.



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 212273791.

The screenshot shows the 'Supplier Details' window with the 'Basic' tab selected. The 'Unique Identifier' section at the bottom right has three radio buttons: 'n/a', 'GLN', and 'DUNS'. The 'DUNS' radio button is selected, and the adjacent text field contains the number '212273791'. Other fields include Name 'ATOZ Educational Supplies', Date Opened '14/11/2016', Address '2 Gregory Street, Hyde, Cheshire, SK14 4TH', and Delivery Code '2890000123'. A yellow arrow points from the text above to the 'DUNS' radio button, and another yellow arrow points from the text above to the '212273791' text field.

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.

The screenshot shows the 'Supplier Details' window with the 'eProcurement' tab selected. The 'BASIC' section contains several fields: 'Purchasing Web Address', 'e-mail Address Source 1', 'e-mail Address Source 2', 'e-mail Address Destination', and 'XML Supplier Reference'. The 'XML Supplier Reference' field contains the text 'atozsupplies'. Below this is the 'OPTIONS' section with a checkbox 'Copy XML File to e-mail Address' and a text field. The 'ENCRYPTION' section has a checkbox 'Use File Encryption for Sending and Receiving' and two buttons: 'Import Public Key' and '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.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.

Your basket is ready to be imported in to FMS

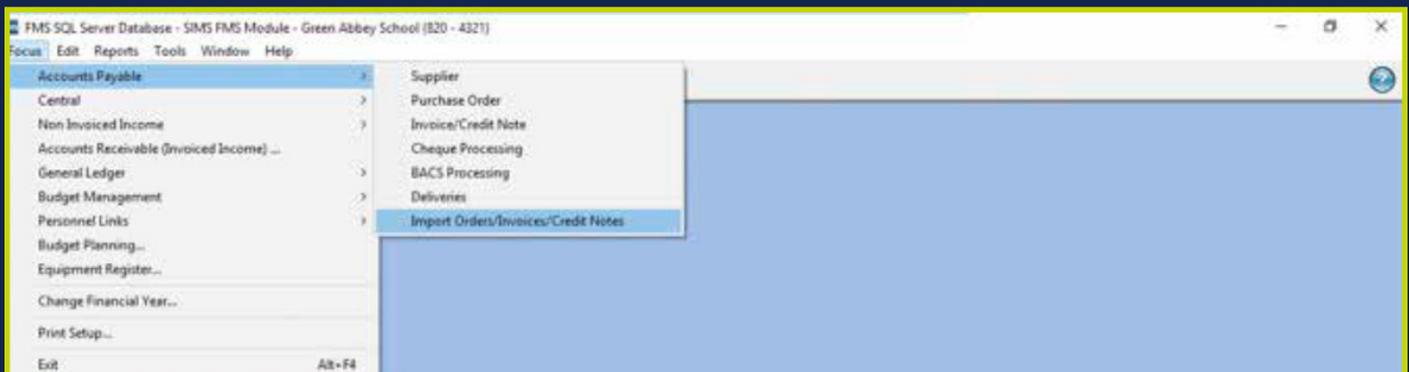
How to complete your order...

-  **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

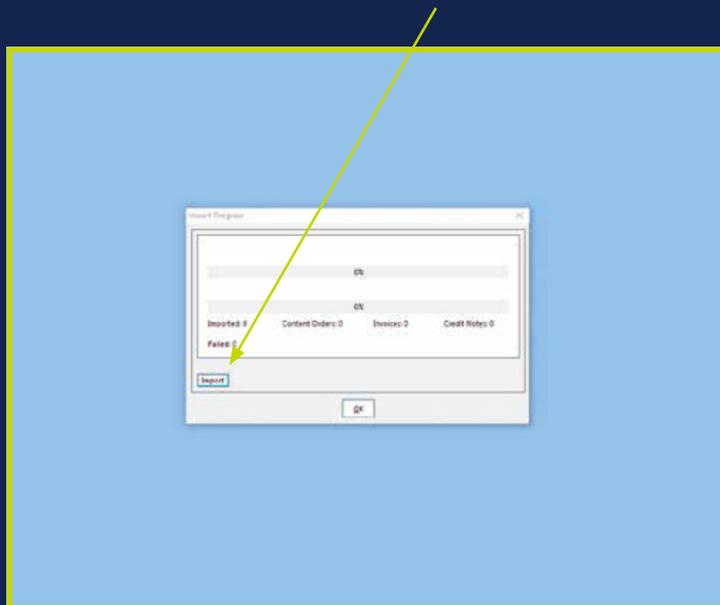
To Import Orders

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

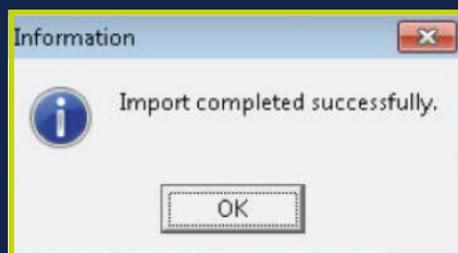


This will import any outstanding [Orders / Invoices / Credit Notes](#).

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: 03451 228 853.

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:

2 Gregory Street, Hyde, Cheshire, SK14 4TH

Source: First Output Method: Delivery Instruction: On Hold

Contact Name: Email: Order Method:

Special Instructions:

FMS Purchase Order Processing

Looking for: View:

Sequence: Order Number Date Source Ascending Descending

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	

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: 5239 Pay From: Bank Account Date: 18/11/2016

Supplier: ATOZ Educational Supplies
2 Gregory Street
Hyde
Cheshire
SK14 4TH

Delivery Address: Green Abbey School
Monkmoor Road
East Town
Eastshire
S12 5AP

Status: Printed

Source: FMS First Output Method: []

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

Order Method: Web Service

9. Invoices

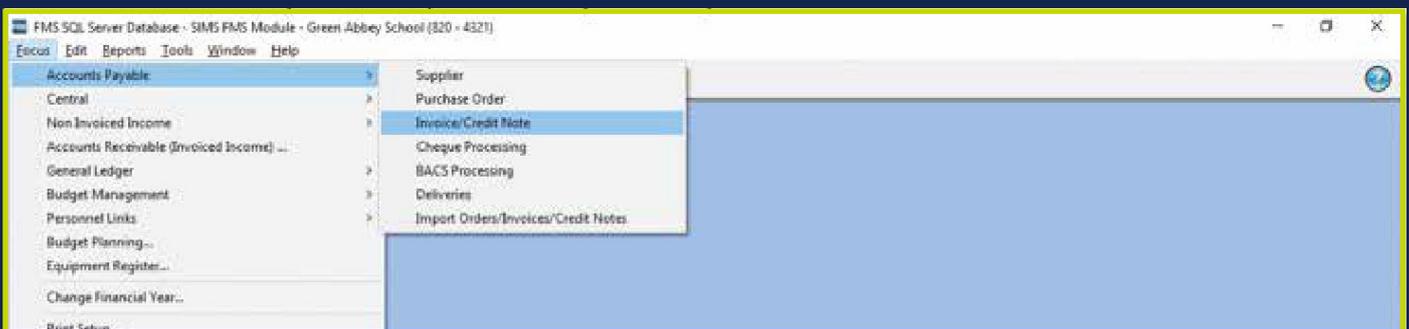
Your invoice will be available for import into FMS via the eProcurement hub once you have received your order. You will also receive to be able a copy of this invoice in the traditional manner.

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.



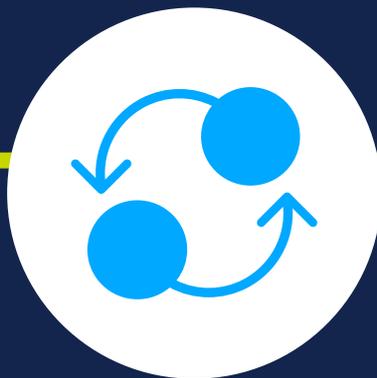
Invoice/Credit Note Processing

Looking for: [] Status: All Type: All

Sequence: Inv./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		ATOZ Educational Supplies	XML
0094282539	16/11/2016	00010207	45.73	Unauthorised	BANK005206		ATOZ Educational Supplies	XML
0094282540	17/11/2016	00010208	521.99	Unauthorised	BANK005226		ATOZ Educational Supplies	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 03451 228 853
or email smartconnect@atozsupplies.co.uk***