SIMS FMS – E-PROCUREMENT

EASY REFERENCE GUIDE FOR IMPLEMENTING SEAMLESS INTEGRATION ACROSS YOUR SCHOOL

To help make buying with us as easy as possible, we’ve introduced our new, fully integrated e-Procurement solution for SIMS FMS, offering you a quicker, more efficient way to place your orders.

With our new eProcurement solution, your ordering is fully compliant and will save you – and your colleagues across all departments in your school – time and money.

This quicker, more efficient way of ordering will also provide you with:

- **Complete financial management across your school** with all orders made across your site automatically importing into your FMS for approval/authorisation
- **No manual rekeying required** as your orders are immediately processed meaning a quicker, faster service to you
- **Access to the latest products and pricing** meaning your order and invoicing will always match
- **Best value** with all our latest offers and promotions regularly updated

This simple to use guide illustrates how easy it is to connect to our new eProcurement Web Service. If you have and problems with the Eureka4Schools website or web service, please call our Customer Services team on 0800 358 0085. If you are having problems with your SIMS FMS System, please phone Capita directly on 0800 170 7005 for assistance.
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Introduction

With SIMS FMS you can create the content of your order on the Eureka4Schools website, and then import it directly into SIMS for review and authorisation.

Once authorised, the order is sent to us through our eProcurement Service. We process your order and an email acknowledgement is sent directly back to you.

Using Eureka4Schools.co.uk allows multiple authorised people (eg Heads of Departments) to build an order using any internet-connected PC, at home or at work, with fully up-to-date stock levels and prices. Your SIMS administrator can then import these for review and authorisation.

Teacher, Head of Department, member of staff creates their order/s on the Eureka4Schools website

Requisition forms can be printed for internal approval and storing for full compliance

SIMS user retrieves the order/s into SIMS via the eProcurement Hub

The purchase order/s are reviewed and authorised like usual

The order/s are then sent directly to Eureka4Schools eProcurement Service for processing

This guide takes you through the steps required to create content orders on the website and retrieve them back into SIMS, via the eProcurement Service.

This service is FREE and fully compliant, with all requisitions available to print and save your records.
Before You Start

The steps needed to set up the web service ordering facility are clearly outlined in this document. However, before you begin, there are three bits of information needed to enable you to start ordering.

**eProcurement Option in SIMS FMS**

Many SIMS FMS systems have the Tools → eProcurement Settings option disabled. Please check if this area is greyed out, and if it is, please contact your SIMS representative to enable it, either at your Local Authority or contact Capita directly.

**DUNS Number**

If you do not know your DUNS number, please contact Dun & Bradstreet (D&B) on 0800 001 234, choosing option 3 when prompted or visit [https://www.dnb.co.uk/duns-number/lookup.html](https://www.dnb.co.uk/duns-number/lookup.html) where you will be send your number by email.

If D&B find that you do not already have a number set up, or if they give you a generic number, you will need to request to have a unique number set up. There is no charge for this, and the process takes 3-5 working days.

Once you have the above prepared, you’re ready to start setting up the web service ordering facility.
FMS Setup

To enable FMS to talk directly to our eProcurement Service the following steps need to be completed:

Check your Establishment Details

Set up your establishment in Tools > Establishment Details

In tab ‘1: Basic Details’. Your establishment details will already be populated. If not, please complete, including the DUNS number from the ‘Before you start’ section of this document.
Create A Eureka4Schools Web Account

Visit [https://www.eureka4schools.co.uk/customer/register](https://www.eureka4schools.co.uk/customer/register) and register for an online account. If you are an existing customer of Eureka4Schools, enter your Account Number or Last Order Number with us to ensure your web account is tied to your existing company account.

Once you have successfully registered for a web account, click the CAPITA SIMS FMS Integration option in your account management section.
On the next screen, choose a new username and password (these are the ones used to enable the eProcurement Web Service and are separate to those set up to register for your web account). Make sure to keep a note of the username and password as you will need these later. Add your DUNS Number and hit save.

**General Ledger Details**

Now we need to set up a general ledger template. This will allow incoming orders to be given a cost centre and a ledger code.

**Go to Tools > General Ledger Setup**
To add a new template go to the tab ‘9: eProcurement Templates’ and click the green plus symbol.

Now complete the pop-up box with the below information:

Originator = The Username you created in the CAPITA SIMS FMS Integration area of your web account.

CC Mnemonic = The Username you created in the CAPITA SIMS FMS Integration area of your web account.

For more information visit www.eureka4schools.co.uk/page/SIMS-FMS-Guide
Click the magnifying glass symbol next to Cost Centre field and select the default Cost Centre for this template. (NB You can subsequently change the Cost Centre details when you have a purchase order in the system.

![Cost Centre window]

Now click the magnifying glass symbol next to the Ledger Code and select the default ledger code that you would like to use.

![Ledger Codes window]

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 for which you most commonly use to order with us.

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 the Set Default Template.

Tick the Set Default P&P Template.

Now save the Procurement Template.
**Supplier Set up:**

Now you can set up Eureka4Schools as a supplier.

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

![Image of software interface showing Supplier setup]

Click the green plus button to add a new supplier

![Image of software interface with supplier details]

For more information visit www.eureka4schools.co.uk/page/SIMS-FMS-Guide
In tab ‘1: Basic’ the Delivery Code needs to be set to NXTDAY to ensure you guarantee your Free Next Day Delivery from the point the order is approved. The rest of our details can be seen in the screenshot below. **Note: You will need to save the newly created supplier with Order Method ‘Print’ for now. We will change this to ‘Web Services’ once we have created the service in eProcurement Settings.**

In the unique identifier section select DUNS and enter Eureka4Schools’ DUNs Number which is **239624583**.
eProcurement Settings

Now you need to enter the details to connect to the Eureka4Schools eProcurement Web Service.

Select Tools > eProcurement Settings

If this is greyed out please refer to the ‘before your start’ section of this document.

In the Web Services section at the top click on the green plus symbol to add a new service.
Enter the following details: Provider Type = Supplier

Name = Hit the Magnifying Glass and find the Eureka! Direct supplier created in the previous step.

URL = https://sims-live.cmuk.org/public-soap.asmx

Priority = 10

Active = Yes

User ID & Password = These are the details you created in the CAPITA SIMS FMS Integration area of your web account.

Password Duration = 100 Days

Now save these settings. **Note: Please leave a couple of minutes between Saving and Testing as some time is needed for the changes to be picked up by both systems.**

After a couple of minutes, click on the ‘Test’ button. This will try connecting to the Eureka4Schools eProcurement Web Service. If all the settings are correct it will show:
Select the Web Service that you have just created and then click the magnifying glass symbol in the ‘Linked Suppliers’ section.

In the ‘Available Suppliers’ list select the Eureka! Direct Supplier created earlier so that it is highlighted and then click the Choose button.

Now click update.

This links Eureka! Direct as a supplier to the Eureka4Schools web service details.
Within the ‘General Settings’ section:

Select your “Default XML Order Book” for orders to be assigned when they are imported using this method.

Check your DUNS Number is in the ‘Establishment DUNS Number’ field – if not, please add it. Refer to the ‘Before you start’ section of this document for your DUNS number.

Now that the Web Service has been linked to the supplier, return to the Focus > Accounts Payable > Supplier and change the ‘Order Method’ for Eureka! Direct to Web Services. You can do this by clicking on the magnifying glass next to order method.

which gives you a list options available for sending the Purchase Orders. Select ‘W – Web Services’.
If everything has been completed correctly, the supplier account for Eureka! Direct should look like the below image. You are now ready to integrate your web order into SIMS FMS!
Ordering Online

To use the SIMS FMS option, you will need to be logged in to the site before completing your order. Log in at https://www.eureka4schools.co.uk/customer/login using the details you first used to create your web account.

Build an order on the Eureka4Schools website. Once you have added your required products, proceed to the checkout from the cart.
Checkout

At Step 1 of the checkout, select the SIMS FMS (Capita) payment option and continue.

The delivery and contact details step must be completed. You can amend these details on the order in your SIMS FMS system at a later time if required.
Complete your order as usual and we will automatically generate your order as a quote for your SIMS FMS system ready to be imported and approved.
Processing Orders and Invoices in SIMS FMS

**Importing**

To import your content orders from Eureka4Schools into FMS click on
`Focus > Accounts Payable > Import Orders / Invoices / Credit Notes`
When the Import Progress box appears click on the ‘Import’ button.

The system will now connect to our eProcurement Hub and import any content orders and invoices.

Once completed you will be told how many orders and invoices have been imported.
**Viewing Purchase Orders**

The new orders will now 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.
**Sending Orders**

Once authorised, click on the print button, this will send the orders back to the eProcurement web Service. 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.
Receiving Invoices

Once you have received your order from us your invoice will be available for collection into FMS via the eProcurement Web Service. NB You will also continue to receive a copy of this invoice in the traditional manner.

Import the invoices by using the same option as you did for importing orders.

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

When an invoice has been downloaded go to:

Focus > Accounts Payable > Invoice / Credit Note and your invoice will be in the list.

You are then able to process your invoice as normal.

Further Information

Visit https://www.eureka4schools.co.uk/page/SIMS-FMS-Guide