ESPO

SIMS FMS Quick Link

Customer How-to Guide

Contents

Introduction to SIMS FMS Quick Link

SIMS FMS Quick Link is an integration method will allow you to create orders on the website as normal, and then transfer your order directly into SIMS FMS, where you can put the order through your own authorisation process, before placing it with ESPO.

Please ensure that you have authorisation from your organisation to change your ordering method. The change will apply to all staff members connected to your organisation's website account. In some cases, the ordering method you use may be determined by your parent organisation, for example a Local Authority or Multi Academy Trust.

Your parent organisation or a contracted external company may also be able to provide you with IT support, which may be required when making updates within your SIMS FMS software.

Full terms and conditions relating to placing orders via SIMS FMS can be found here: https://www.espo.org/sims-fms-orders-terms-and-conditions/

Getting set up – ESPO website

Option 1 – New customers

(If you are an existing customer, please go to Option 2 – Existing Customers below.)

If your organisation doesn't already have an ESPO account, please go to https://www.espo.org.

Click on **Register** at the top of any page, followed by the **Register** button underneath the option "I would like to register my organisation to use ESPO".

In the field "Which ordering method would you like to use" please select **SIMS FMS Quick Link**.

In the new field that appears, enter your **DUNS number**.

Which ordering method would you like to use? *

SIMS FMS Quick Link ⌄

DUNS * ⓘ

This is required to integrate the ESPO website with your SIMS FMS software. If you are unsure what your DUNS number is, or you don't currently have one, you can look this up or apply for one here: https://www.dnb.co.uk/duns-number/lookup.html.

Your account will need to be activated by ESPO before you can log in or start using the SIMS FMS Quick Link function. Once this has been completed, you will be advised by email. You can then follow the instructions in the Getting Set Up – SIMS FMS section below.

Option 2 – Existing customers

If you already have an ESPO account, you can send us a request to convert your account to a SIMS FMS ordering account. To do this, please complete our Request to Change Ordering Method form which can be found here: https://www.espo.org/change-ordering-method

In the field "Which ordering method would you like to use" please select **SIMS FMS Quick Link**.

In the field "If you have selected SIMS FMS Quick Link: DUNS", enter your **DUNS number**.

This is required to integrate the ESPO website with your SIMS FMS software. If you are unsure what your DUNS number is, or you don't currently have one, you can look this up or apply for one here: https://www.dnb.co.uk/duns-number/lookup.html.

Your account will need to be updated by ESPO before you can log in or start using the SIMS FMS Quick Link function. Once this has been completed, you will be advised by email. You can then follow the instructions in the Getting Set Up – SIMS FMS section below.

If your account is set to the SIMS FMS Quick Link ordering method, all orders you create on our website will need to be transferred to SIMS FMS and authorised. You will not be able to place standard web orders or content orders. You will however still be able to place orders by telephone or email directly with our Customer Services team (if your organisation's processes or policies allow that).
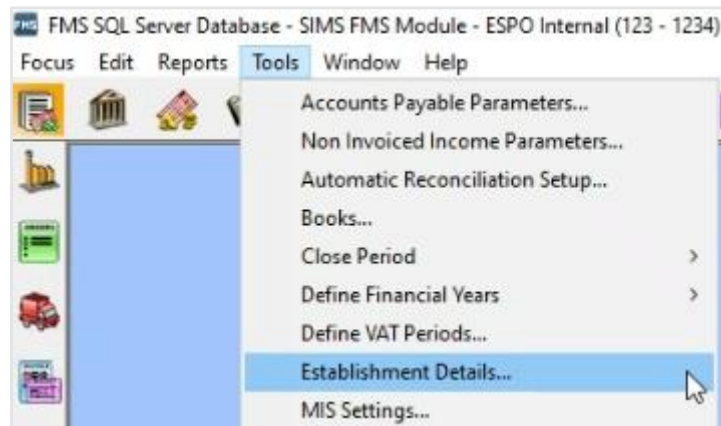
Getting set up – SIMS FMS

Part 1 – Establishment details

Open your SIMS FMS software as normal.

Click on **Tools** > **Establishment Details**

Click on the tab **1: Basic Details**.

Check that your school details here are all completed and correct. (This is the details of your school, not ESPO).

Go to the **Unique Identifier** section in the bottom left
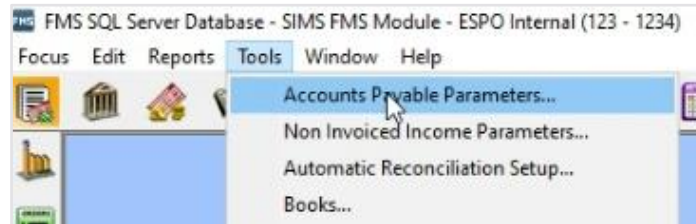
Select the option **DUNs**

Enter your **DUNS number** here. This is the same number that you entered on your Registration form or Request to Change Ordering Method form previously in the section Getting set up – ESPO website.

Click **Save**.

Click **Tools** > **Accounts Payable Parameters**.

Go to the tab **1: Order Header**.

Check in the field **Delivery Address Text** that your school address is correct.
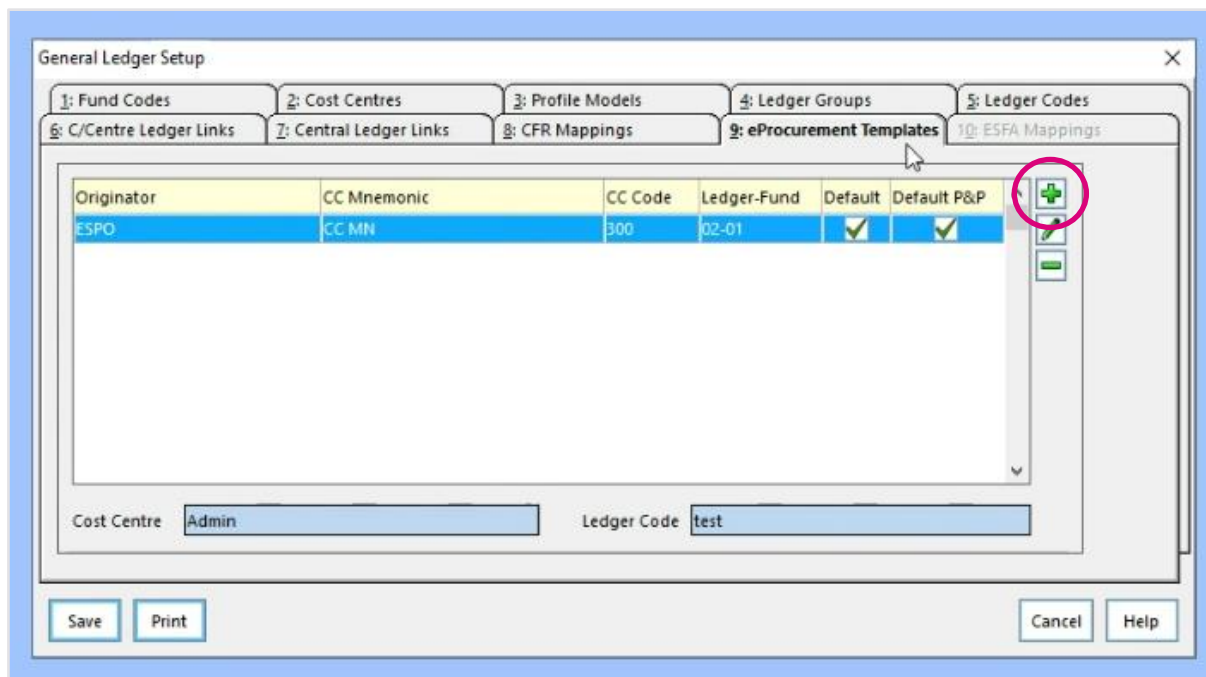
Click **Save**.

Part 2 – General ledger setup

Click **Tools** > **General Ledger Setup**.
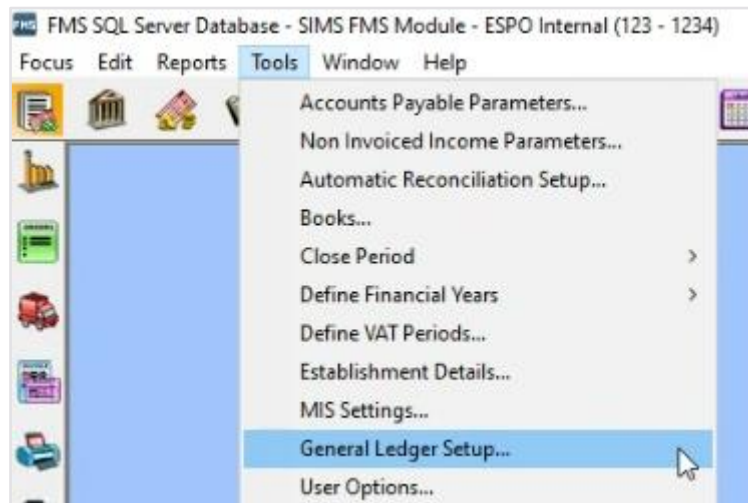
Click on the tab **9: eProcurement Templates**.

Click the green **+** icon on the top right to create a new eProcurement template.

Enter the details as follows:

- **Originator**: Your organisation's name
- **CC Mnemonic**: CC MN
- **Cost Centre**: Press the magnifying glass icon and select a default cost centre for electronic orders to be assigned to. This can be changed for individual orders or product lines after your orders are imported.
- **Ledger Code**: Press the magnifying glass icon and select a default ledger code for electronic orders to be assigned to by default. This can be changed for individual orders or product lines after your orders are imported
- Tick the box **Set Default Template**
- Tick the box **Set Default P&P Template**
- Click **Save** on the eProcurement Template Details window
- Click **Save** on the General Ledger Setup window

Part 3 – Supplier

Click on **Focus** > **Accounts Payable** > **Supplier**.
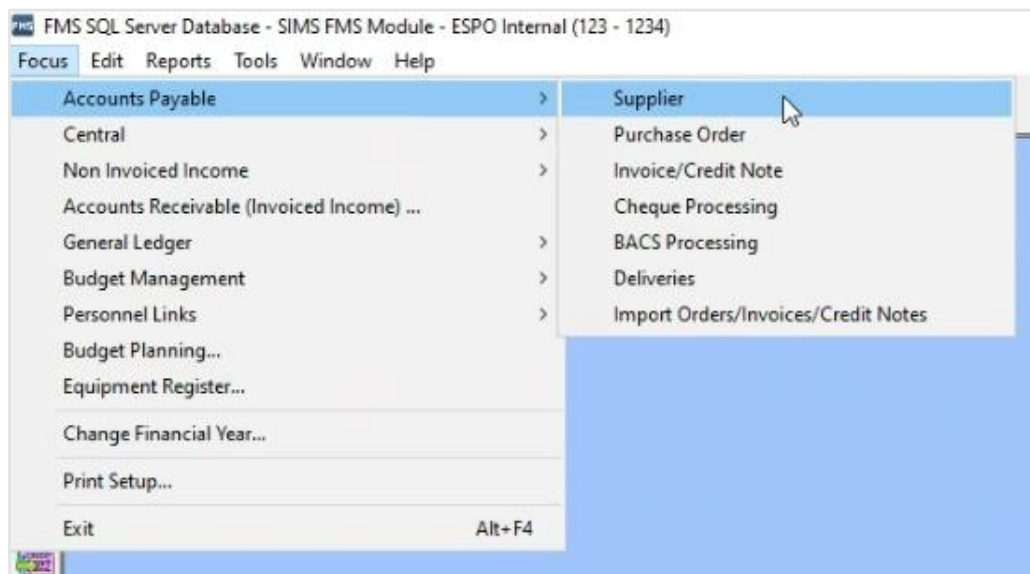
You will see the Supplier Details screen, containing a list of suppliers.

We suggest creating a new supplier for orders made through this integration, even if you already have a supplier for ESPO listed. To do this, click the blue **+** icon at the top of the screen.

Or if you prefer (or if your organisation's policy recommends this), you can click on the existing supplier for ESPO or Eastern Shires Purchasing Organisation, if there is one. In this case, please follow the steps below to ensure the details are correct.
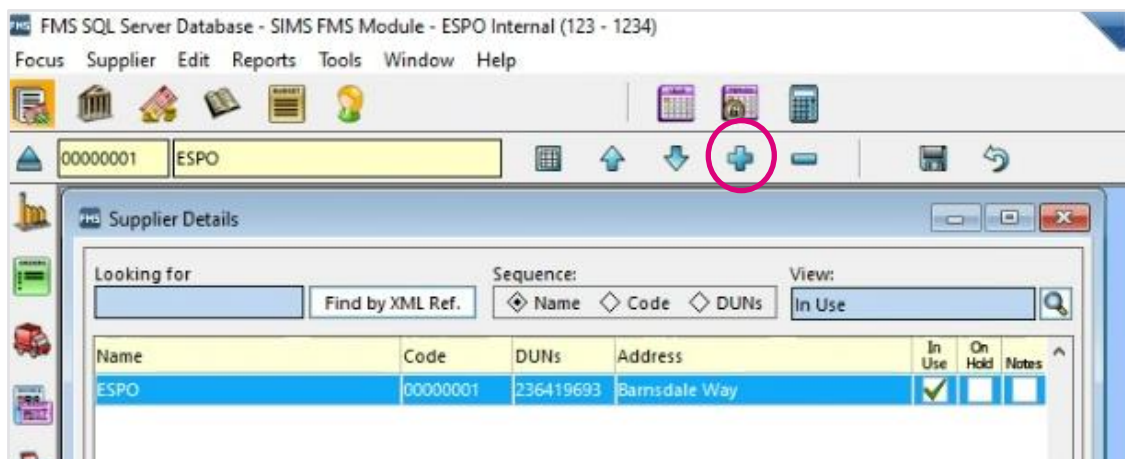
Complete the details as follows:

- **Name**: ESPO Web
- **VAT Registration No**.: 705-1805-61
- **Address**: Barnsdale Way, Grove Park, Enderby, Leicester
- **Postcode**: LE19 1ES
- **Contact**: ESPO
- **Telephone**: 0116 265 7901
- **Email**: support@espo.org
- **Account Number**: Your ESPO account number e.g. 123456/001
- **Order Method** and **Linked Web Service**: Leave these blank or as they are for now - these will be updated later
- **Unique Identifier**: Select the option DUNs and enter the number **236419693**. (This is ESPO's DUNS number, rather than your organisation's.)

Click the blue save icon at the top of the screen.

Part 4 – eProcurement settings (web service)

Click **Tools** > **eProcurement Settings**.

> If this is greyed out, make sure you are logged into SIMS FMS using a user account with full Administrator privileges. If you are still unable to access this screen, please speak to your SIMS FMS support provider.
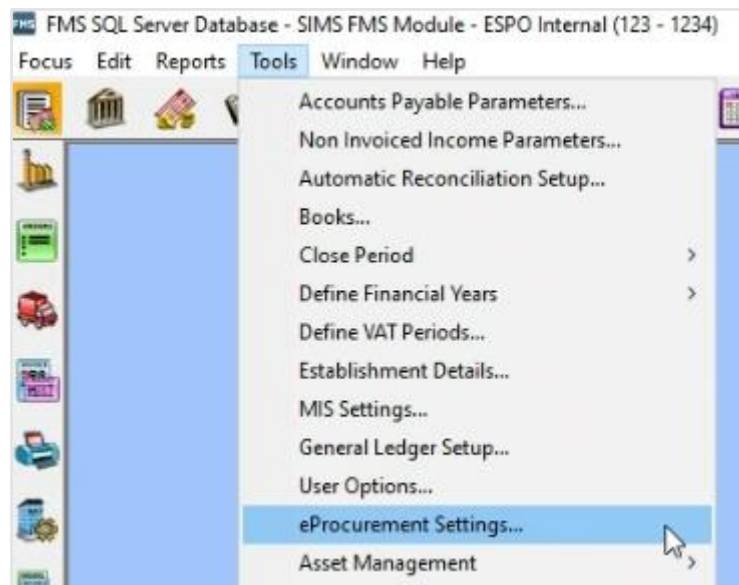
In the Web Services section (at the top), click the green **+** icon.
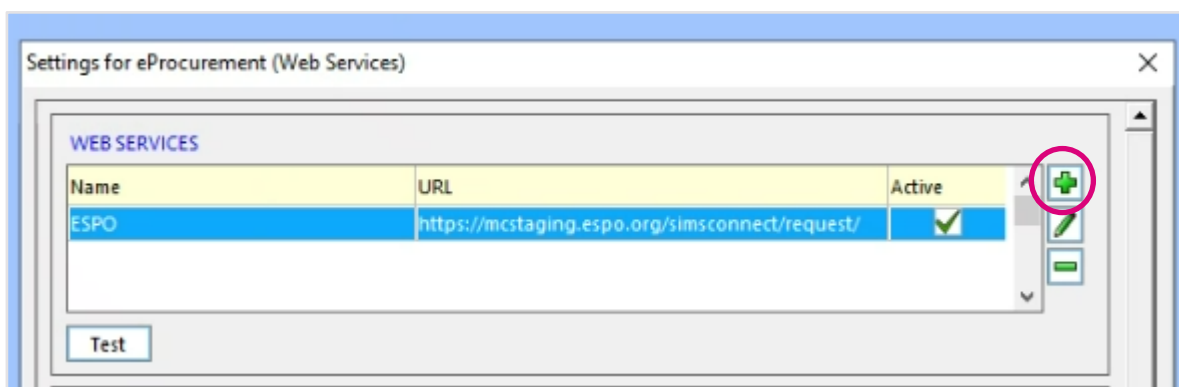
In the Service Details window, enter the following details:

- **Provider Type**: Supplier
- **Name**: ESPO
- **URL**: https://www.espo.org/simsconnect/request/
- **Priority**: 1
- **Active**: Please tick this box
- **User ID**: The email address of the admin user on your web account *(see note A below)*

- **Password**: This is generated from the Generate SIMS FMS Password page on your web account *(see note B below)*
- **Password duration**: 90 *(see note C below)*

Once you have entered the required details press **Save** on the Service Details box

Note A: For the User ID please enter the email address of the admin user for your organisation. If you're not sure who this is:

- Log into your ESPO website account
- Click the **Account** icon on the top right which will take you to the My Profile page
- Click on **Organisation Users** on the left hand side
- You will see that one of the users has a role set as **Company Administrator** – this is the email address to use

Please note, in order to generate a password on the next step, this email address needs to be a real email address within your organisation. If this shows a placeholder address (e.g. 123456@espo.org) please email registration@espo.org and ask them to change the admin user of your organisation, providing them with the name and email address that you require for the new admin user.

Note B: The password entered here is a new one specifically for SIMS FMS, which is different to the password you use to log into the ESPO website. To generate this password:

- Log into the ESPO website as your organisation's admin user (see above to identify who this is)
- Click the **Account** icon on the top right which will take you to the My Profile page
- Click on **Generate SIMS FMS Password** in the left hand menu
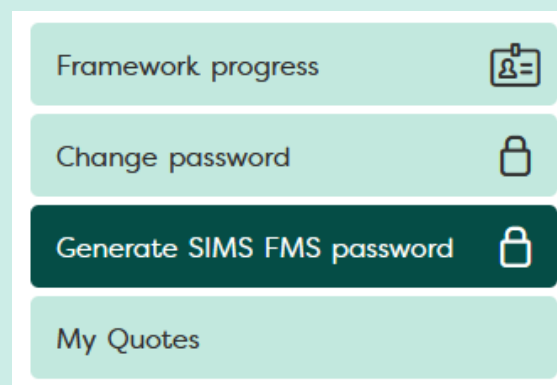
- Click **Generate SIMS FMS Password**

Your new password will be shown in a green box at the top of the screen.

Your SIMS password has been updated to the following: MAGRf91LAf0vQxmbPgXYl1MBK

Important: You should copy or make a note of this password immediately, as it will not be shown again if you refresh or change the page.
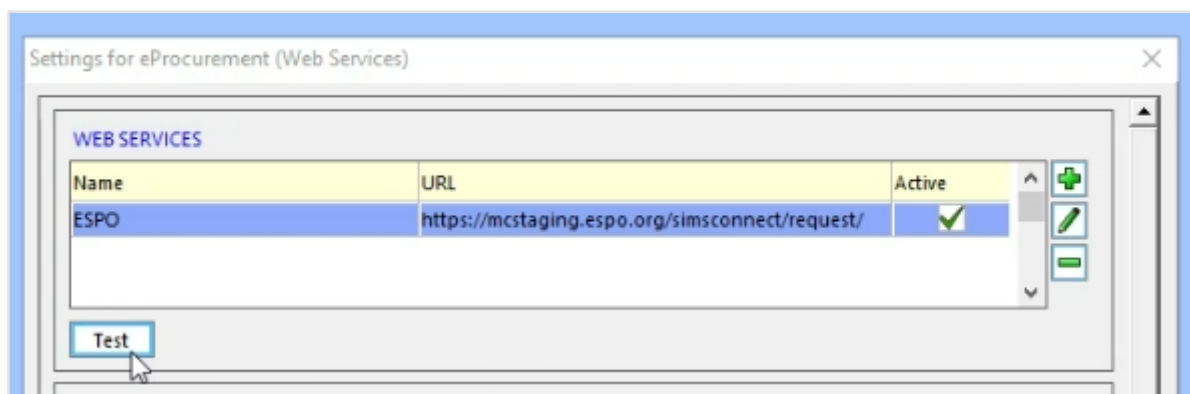
Please note: When you generate a new password, it will immediately invalidate any previous password you are using. So when you generate a new password, be sure to **enter this in your SIMS FMS software immediately**, otherwise you will no longer be able to import orders or transfer these back to ESPO.

Note C: The **password duration** is the number of days after which your current password will expire. When this happens, the admin user will need to return to the ESPO website and generate a new password in order to continue using the integration. You may wish to make a note in your calendar to remind you to generate a new password before the current one expires.

We would suggest that you use the number **90**. You may enter a smaller number if you wish, or if your IT support team suggest you do so. For security reasons we do not recommend that you enter a number larger than 90.

You should now be back on the Settings for eProcurement (Web Services) page

In the Web Services section, press **Test**.

Settings for eProcurement (Web Services)				✕
WEB SERVICES				
Name	URL		Active	
ESPO	https://mcstaging.espo.org/simsconnect/request/		✓	
Test				

You should see a message that says 'Web Service Connection OK'. If this shows, please go directly to Part 5 – eProcurement settings (linked suppliers and general settings).

If you see an error message, you need to determine whether the error is with SIMS FMS connecting to the internet, or SIMS FMS connecting to ESPO's web service.

- Scroll down to the section named Internet Connectivity
- If you access the internet through a proxy server, tick the box. If you are unsure of this, please ask your IT support team.
- Enter the web address of any known website and press **Test**.

If the message says, "Internet Connection OK", then it is possible the web service details you entered previously (above) may not be correct. Please double check these, and re-generate your password if necessary.

If the internet connection test fails, you may need to scroll down further to the **Default Proxy Settings** section and enter the required details here. Your IT support team may be able to help you with this.

Part 5 – eProcurement settings (linked suppliers and general settings)

You now need to link the ESPO web service to the ESPO Web supplier.

Still on the eProcurement Setting page (**Tools** > **eProcurement Settings**), in the section Linked Suppliers, click on the magnifying glass to open the Choose Suppliers window.

The Choose Suppliers window should now be open.

- In the Available Suppliers list (the top section), click on **ESPO Web**
- Click **Choose** in the middle of the window
- ESPO Web should now be in the Linked Suppliers list (the bottom section)
- Click **Update**

Back on the eProcurement Settings page again, look under General Settings.

Check that your **Establishment DUNs Number** is correct. This should automatically be shown based on what you entered previously. If it's not correct, please go back to the section Getting set up – ESPO website > Part 1 – establishment details to update this.

Underneath **Default XML Order Book**, click the magnifying glass.

Choose the default order book for electronic orders to be assigned to and press **Select**.

If you don't have an order book set up, please follow these steps to create one.

Select **Tools** > **Books** to open the Define Books window

Go to the tab **1: Order Books**

Press the green **+** icon to create a new book.

Please set this up as required by your organisation, but you could for example user these details:

- **Prefix**: BANK
- **Start Number**: 4001
- **End Number**: 5000
- **Payment Source**: Bank Account

Click **Save** on the Add Order Book window.

Click **Save** on the Define Books window.

You can now go back to **Tools** > **eProcurement Settings** > **General Settings** to choose this as your **Default XML Order Book**.
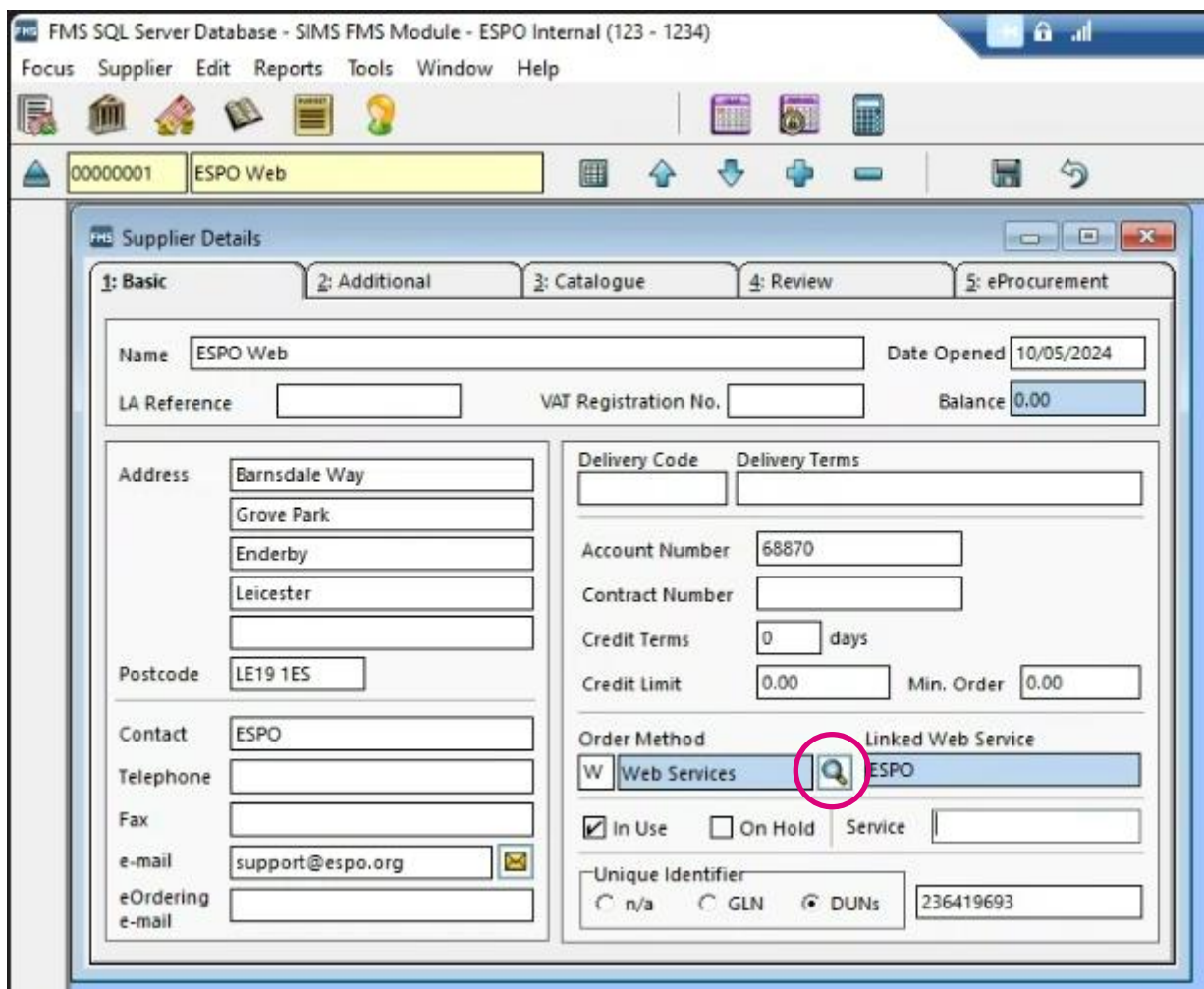
Part 6 – Supplier (add web order method)

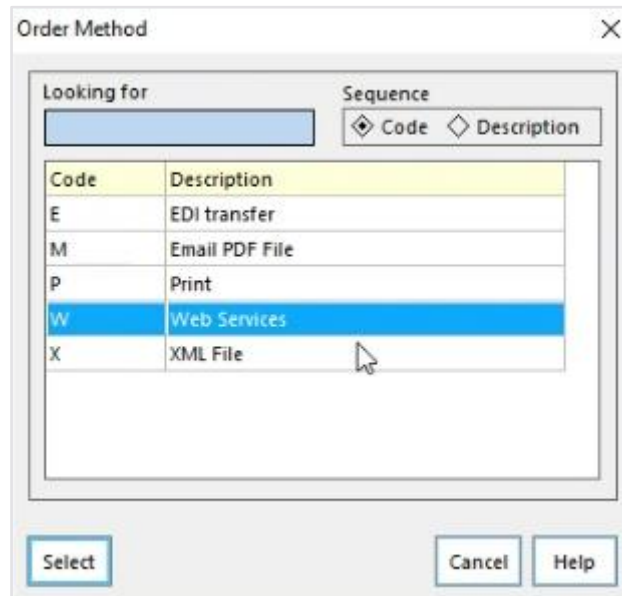Click **Focus** > **Accounts Payable** > **Supplier**.
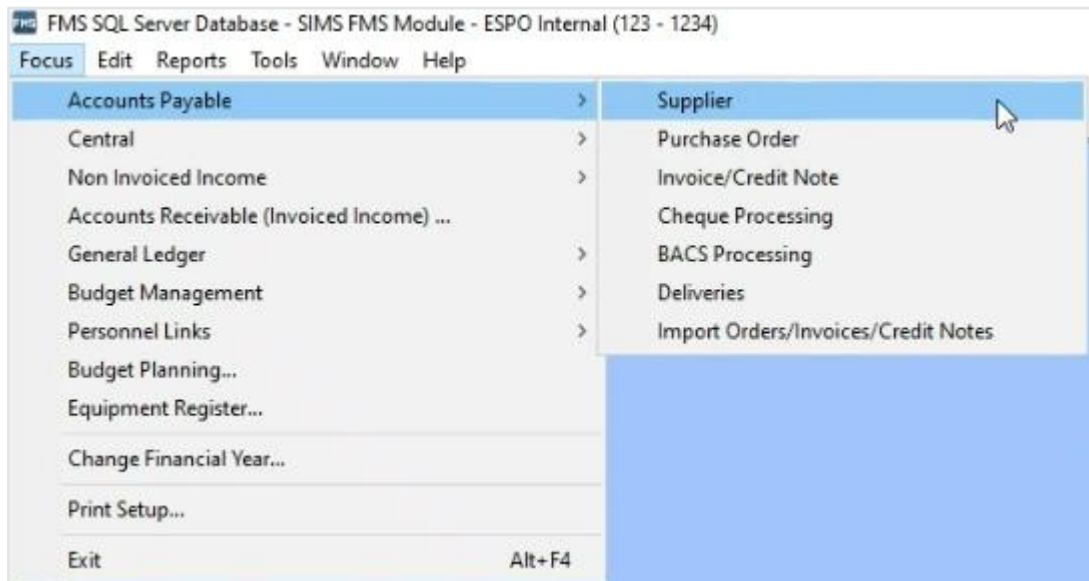
On the tab **1: Basic,** underneath **Order Method** click the magnifying glass.

Click **W Web Services** and press **Select**.
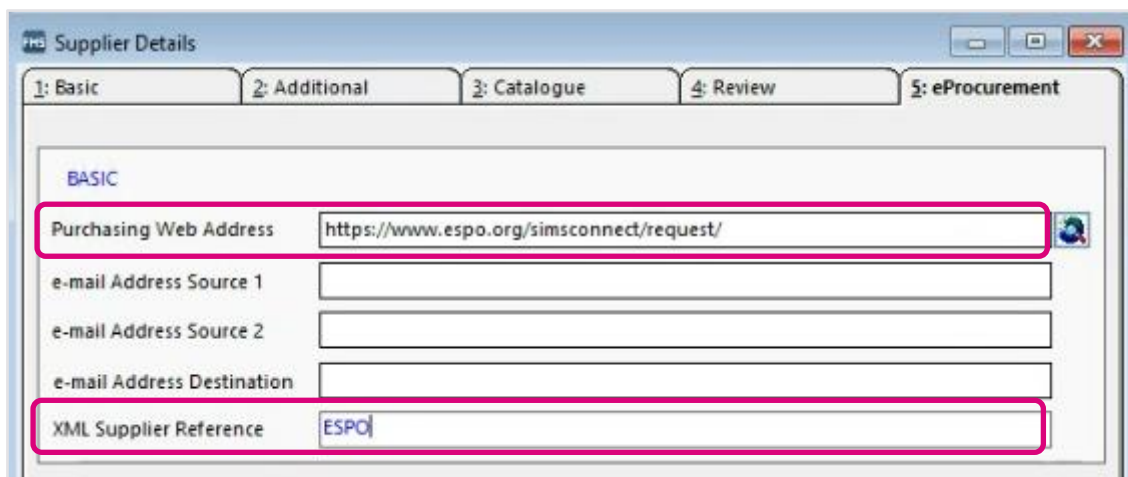
Click on the tab **5: eProcurement**.

Enter the following details:

- **Purchasing web address**: https://www.espo.org/simsconnect/request/
- **XML Supplier Reference**: ESPO
- (No other fields are required to be filled in)
- Click the blue **save** icon at the top of the screen

Your SIMS FMS software should now be connected to the ESPO website, and you can now place orders using the SIMS FMS Quick Link method.

Creating your order – ESPO website

- Go to the ESPO website and log in.
- Add items to your basket as normal
- When you're happy with the items you've selected, on the basket page (or the basket popup menu), press **Proceed to Checkout**.

Within the checkout section, complete the details as you normally would,

Delivery page:

- **Address**
- **Special instructions**, if required
- **Delivery method**
- **Delivery date**, if required
- Click **Confirm**

Review and Payment page

- **Offer code**, if required
- **Customer order reference**, if required

Please note: if you enter a customer order reference number here it will not show within your SIMS FMS software, but it will still be sent through to ESPO with your order and included in any relevant documents.

When you're happy with your order, click **Export SIMS FMS Order**.

You will then be shown a thank you screen. Your order is now ready to be imported into your SIMS FMS software. Please note that the order will not be sent to ESPO until you authorise and print it through SIMS FMS.
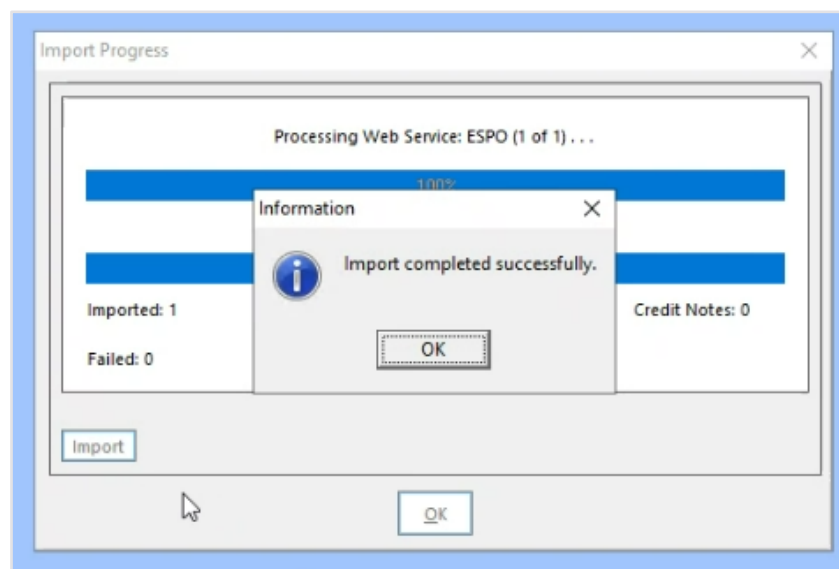
Importing and submitting your order – SIMS FMS

Part 1 – Import your order

Click on **Focus** > **Accounts Payable** > **Import Orders/Invoices/Credit Notes**.
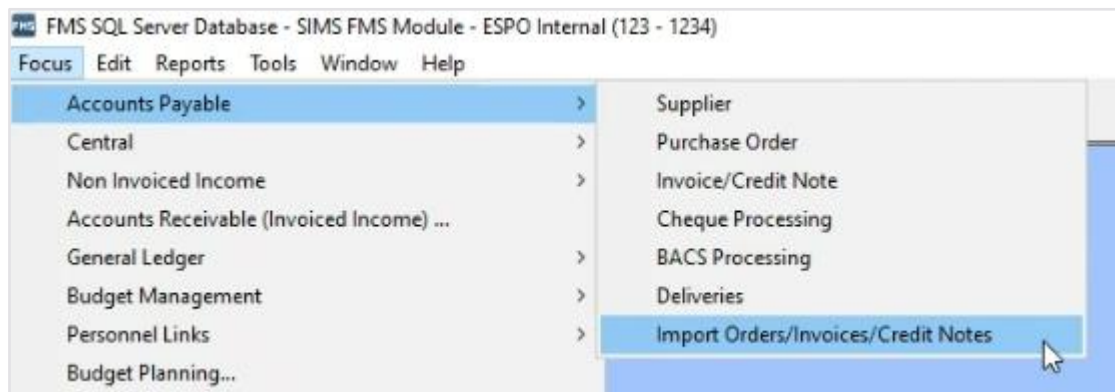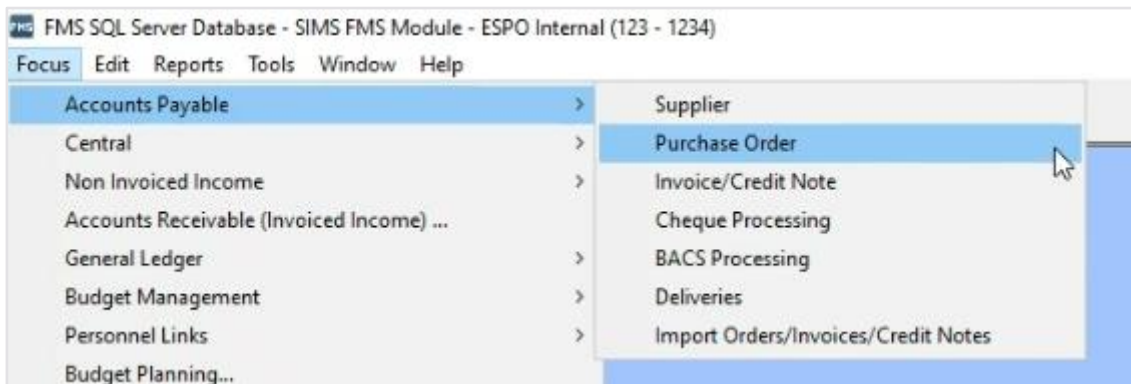

Click **Import**.

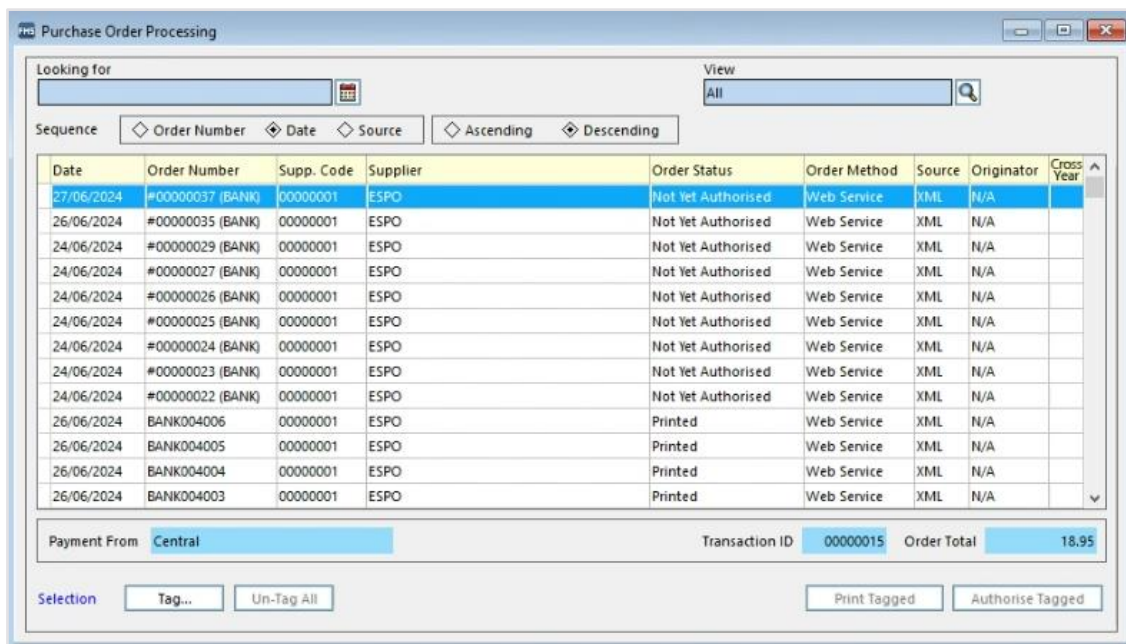If you order import has been successful, you should see a confirmation message.

Part 2 – Review and update your order

Click **Focus** > **Accounts Payable** > **Purchase Order**.

You will see a list of orders, with different Order Status values as follows:

- **Not Yet Authorised** – this order has not yet been placed with ESPO
- **Printed** – this order has been placed with ESPO

Click on one of the orders in the **Not Yet Authorised** status to open it.

Check the details are correct. On your order, you can amend the following details:

- Product lines can be deleted
- Product quantities can be changed up or down
- Special instructions can be updated
- Cost centre, ledger and fund can be updated – click a product line and then the pencil icon to open the following menu where this can be done.

Order Line Details

Cost Centre	300	Admin	🔍	**Budget Remaining**
Ledger Code	02	test	🔍	Cost Centre -1,358.00
Fund Code	01	Expenditure	🔍	Combination
VAT Code	1	Stationery	🔍	-1,358.00

Line Type
◉ Standard   ◇ Book

Part Number   96520   Select Part...

Description

Quantity   1   Unit Cost   18.950   Order Unit   EA
Discount%   0.00   Total Cost   18.95   Contract

Save   Cancel   Help

Any changes made to your delivery address in SIMS FMS will not be reflected in your final order. Your order will retain the delivery address that you chose at the checkout stage on the ESPO website.

Part 3 – Authorise and print your order

You are now ready to authorise and print your order. Below is a very simple authorisation process, however your organisation may have a different or more complex authorisation process to this.

Click **Authorise** (the green tick icon at the top of the screen).

The order status should now show as **Authorised**.

Click **Print/Dispatch Order** (the printer icon at the top of the screen).

Your order status will now show as **Printed**.

Your order will now be sent to ESPO and processed as normal. You will usually be sent an order confirmation email immediately to confirm we have received the order, followed by an order acknowledgement email.

Please note: If you print an order in SIMS FMS multiple times, only the first time will trigger the order to be sent through to ESPO. If you need to re-order the same products, please return to the ESPO website and create a new order.