



SIMS FMS
Quick Link

Customer How-to Guide





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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".

ESPO Products ▾ Frameworks ▾ Suppliers ▾ About ESPO ▾

Register Log In Wishlist Basket

Search ESPO Products or Frameworks

REGISTRATION

Please select the option below that applies best to your needs. If you are unsure, please visit our [FAQs section](#).

I would like to register my organisation to use ESPO

Register >

I need a user account (my organisation already uses ESPO)

Create user account >

I am a supplier

Register >

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

Which ordering method would you like to use? *

Please Select

Please Select

Standard

Content Ordering

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>

ESPO Products Frameworks Suppliers About ESPO Register Log In Wishlist Basket

Search ESPO Products or Frameworks

Home / Request to change ordering method form

REQUEST TO CHANGE ORDERING METHOD FORM

Request To Change Ordering Method Form

Save valuable time and enjoy the full online experience of [espo.org](https://www.espo.org) while still processing your orders through your own software, by linking your buying process through one of our e-procurement solutions.

If you would like to change your account to one of the following methods, please complete the form below and our team will be able to set this up for you.

- Standard - when you place an order, it will be sent directly to ESPO
- Content Ordering - when you create an order on our website, it will be sent to you by email for you to manually import into your finance software where you can authorise it before placing with ESPO
- SIMS FMS Quick Link - this integration method will allow you to create orders on the website as normal, and then transfer your order directly into SIMS, where you can put the order through your own authorisation process, before placing it with ESPO

Please note that there are additional ordering methods that don't require you to complete this form. To find out about our full range of options, please visit our [E-procurement options](#) page.



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

Which ordering method would you like to use? *

Standard

Content Ordering

SIMS FMS Quick Link

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

If you have selected SIMS FMS Quick Link: DUNS

This is required to integrate the ESPO website with your SIMS FMS software. If

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).

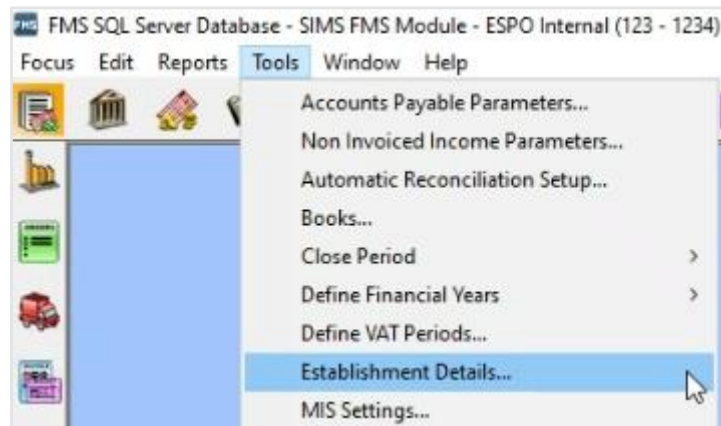


Getting set up – SIMS FMS

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**

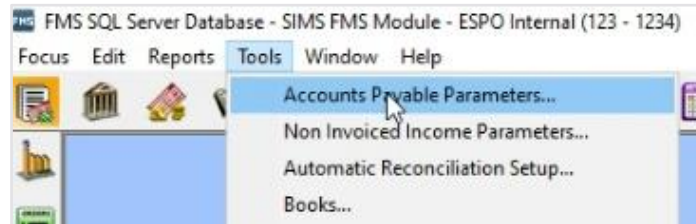
Enter your **DUNS number** here. This is the same number that you entered on your Registration form or Request to Change Ordering Method form previously in the section [Getting set up – ESPO website](#).

Click **Save**.

A screenshot of the 'Establishment Details' form in the SIMS FMS software. The '1: Basic Details' tab is selected and highlighted with a pink oval. The form contains various fields for school information. A pink rectangle highlights the 'Basic Details' section, which includes fields for Name (ESPO School), Code (1234), Companies House No., LA Code (123), VAT Registration No., Borough, Payable to, Address (Barnsdale Way, Grove Park, Enderby), and Postcode (LE19 1ES). Below this, the 'Unique Identifier' section has three radio buttons: 'n/a', 'GLN', and 'DUNS'. The 'DUNS' radio button is selected and highlighted with a pink oval, and the corresponding field contains the number '22222222'. The 'DeMinimis Value' field is set to '1.00'. At the bottom, there are 'Save', 'Cancel', and 'Help' buttons.



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**.

Accounts Payable Parameters

4: Cheque Layout / BACS Parameters 5: Deliveries 6: Email pdf Orders

1: Order Header 2: Order Print Details 3: Authorisation Slips

Supplier Address Header

Delivery Address Header

Delivery Address Text

ESPO Internal
Barnsdale Way
Grove Park
Enderby
LE19 1ES

General Order Prefix

Top Margin (Inches) 0.0

Bottom Margin (Inches) 0.0

Extra Copies 0

☐ First Copy as XML

Copy to

☒ Underline Order Number ☒ Print "Date:" & "Order No:"

☒ Window Envelope ☐ Use Pre-printed Stationery

☒ Underline Special Instructions

Purchase Order

Date: 27/06/2024
Order No: ABC1234567

SIMS Supply Ltd.
Fox Works Cycle
Coxon House
Durant Road
Tunsthorpe

ESPO Internal
Barnsdale Way
Grove Park
Enderby

Customer Ref: ab c1234567 Delivery ASAP
Special Instructions: Please Deliver before 11:00am to Reception

Description	Unit Cost	Qty.	Disc%	Total
-------------	-----------	------	-------	-------

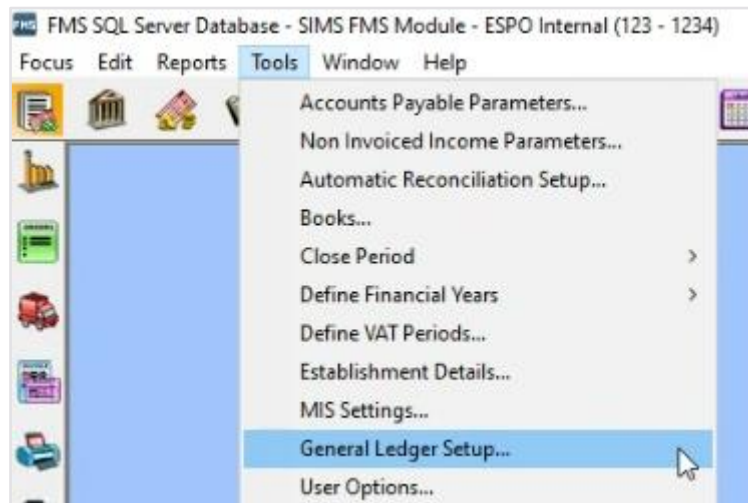
Printed Orders... PDF Orders... XML Orders... Test Print

Save Cancel Help



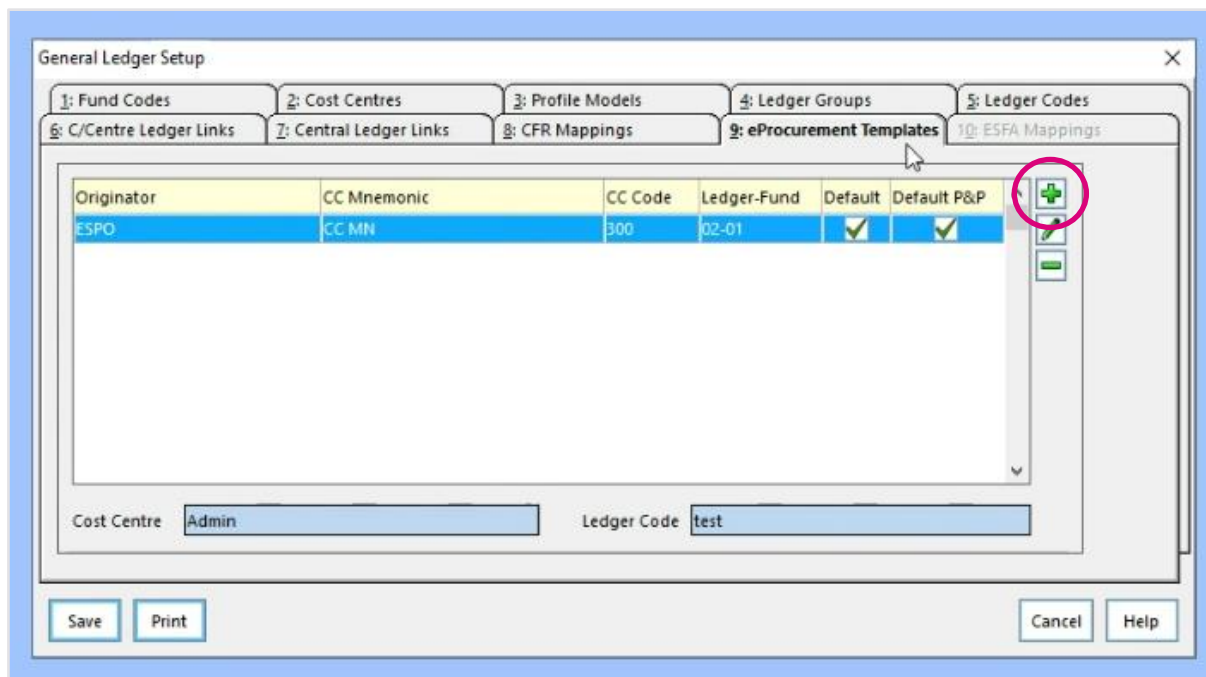
Part 2 – General ledger setup

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

The screenshot shows the 'General Ledger Setup' window with several tabs: 1: Fund Codes, 2: Cost Centres, 3: Profile Models, 4: Ledger Groups, 5: Ledger Codes, 6: C/Centre Ledger Links, 7: Centres, 8: ESFA Mappings, and 9: ESFA Mappings. The 'eProcurement Template Details' dialog box is open, displaying the following fields:

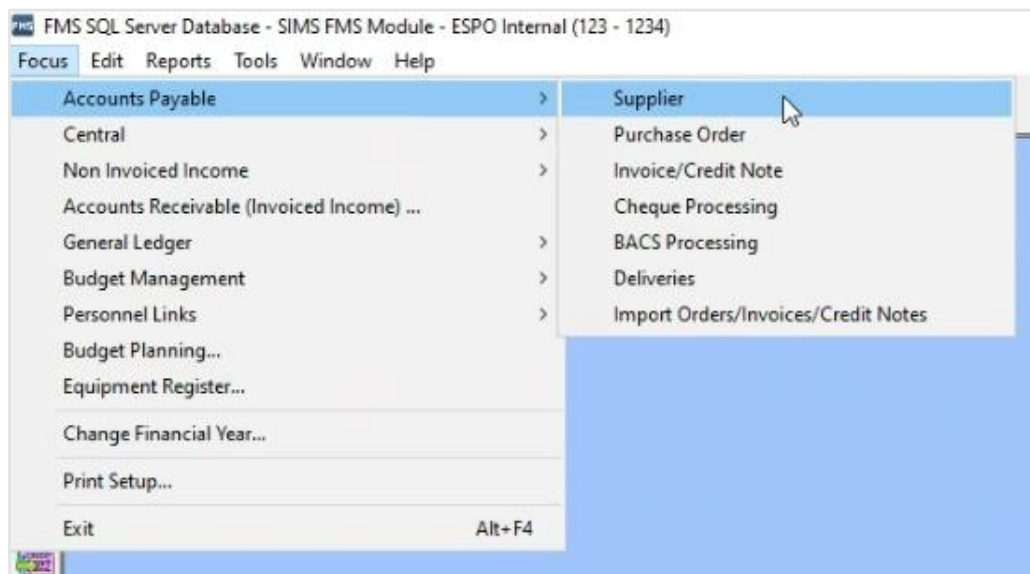
- Originator: Your Organisation Name
- CC Mnemonic: CC MN
- Cost Centre: 300 (with a magnifying glass icon and 'Admin' selected)
- Ledger Code: 02 (with a magnifying glass icon and 'test' selected)
- Fund Code: 01 (with a magnifying glass icon and 'Expenditure' selected)
- ☒ Set Default Template
- ☒ Set Default P&P Template

Buttons at the bottom of the dialog include 'Save', 'Cancel', and 'Help'. The 'General Ledger Setup' window also has 'Save', 'Print', 'Cancel', and 'Help' buttons at the bottom.



Part 3 – Supplier

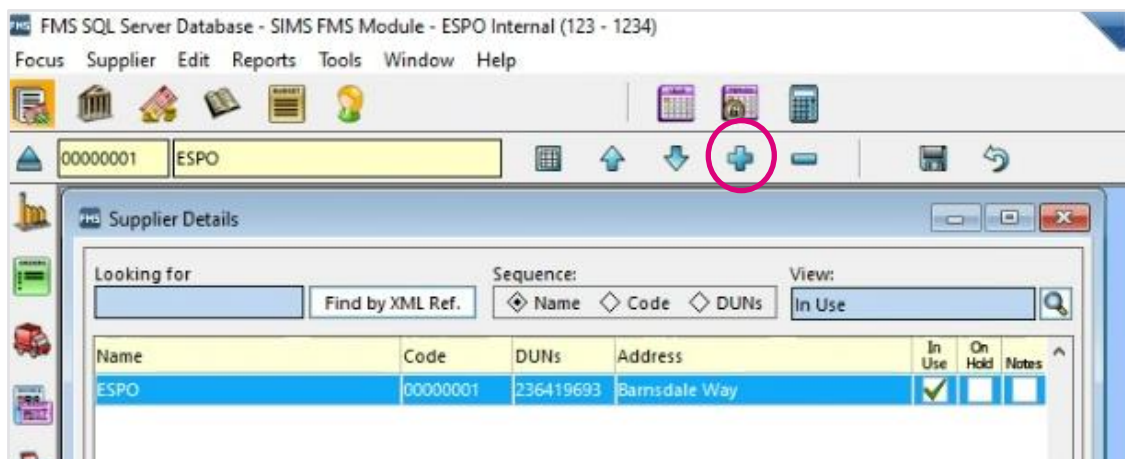
Click on **Focus > Accounts Payable > Supplier**.



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.

FMS SQL Server Database - SIMS FMS Module - ESPO Internal (123 - 1234)

Focus Supplier Edit Reports Tools Window Help

00000001 ESPO Web

Supplier Details

1: Basic 2: Additional 3: Catalogue 4: Review 5: eProcurement

Name: ESPO Web Date Opened: 10/05/2024

LA Reference: VAT Registration No.: Balance: 0.00

Address: Barnsdale Way
Grove Park
Enderby
Leicester

Postcode: LE19 1ES

Contact: ESPO

Telephone: Fax: e-mail: support@espo.org eOrdering e-mail:

Delivery Code: Delivery Terms:

Account Number: 68870 Contract Number: Credit Terms: 0 days Credit Limit: 0.00 Min. Order: 0.00

Order Method: W Web Services Linked Web Service: ESPO

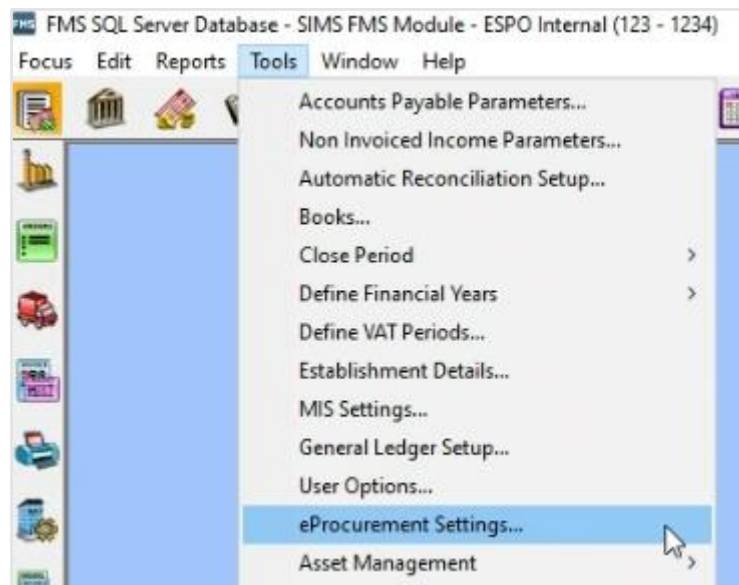
☒ In Use ☐ On Hold Service: Unique Identifier: ☐ n/a ☐ GLN ☒ DUNs 236419693



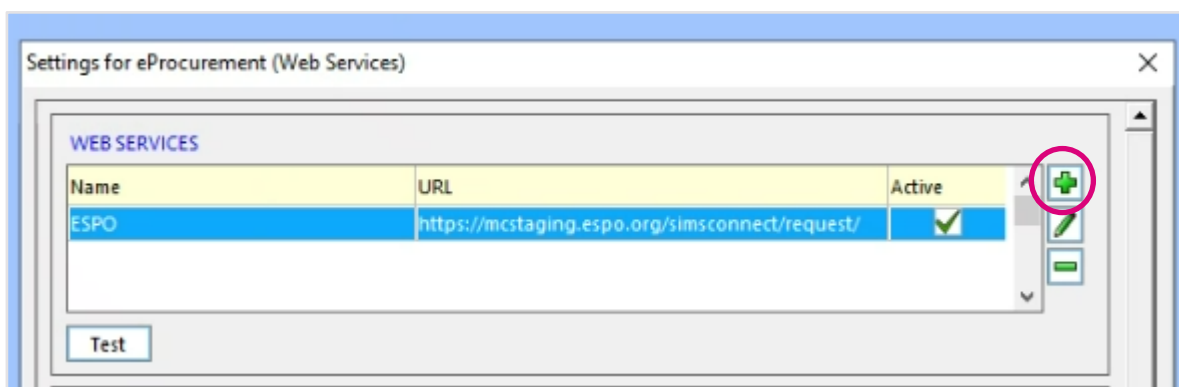
Part 4 – eProcurement settings (web service)

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

The screenshot shows a 'Service Details' dialog box. It has two tabs: 'Portal' (selected) and 'Supplier'. The form contains the following fields: 'Name' (ESPO), 'URL' (https://www.espo.org/simsconnect/request/), 'Priority' (1), 'User ID' (your.email@company.com), 'Password' (masked with asterisks), and 'Password duration (in days)' (500). There is an 'Active' checkbox which is checked. At the bottom left, the 'Save' button is circled in red. At the bottom right, there are 'Cancel' and 'Help' buttons.

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

The screenshot shows the ESPO website interface. The top navigation bar includes 'Products', 'Frameworks', 'Suppliers', 'About ESPO', and 'Test'. The user is logged in as 'Hi, Matt! - Log Out'. The left sidebar shows a menu with 'My profile', 'My organisation', 'Organisation users' (highlighted), 'Wishlist', 'Account overview', 'Order history', 'Invoice history', and 'Address book'. The main content area is titled 'ORGANISATION USERS' and contains a table with the following data:

ID	NAME	EMAIL	ROLE	TEAM	STATUS
1349			Default User	-	Active
28805			Company Administrator	-	Active
40676			Default User	-	Active
64406			Default User	-	Active

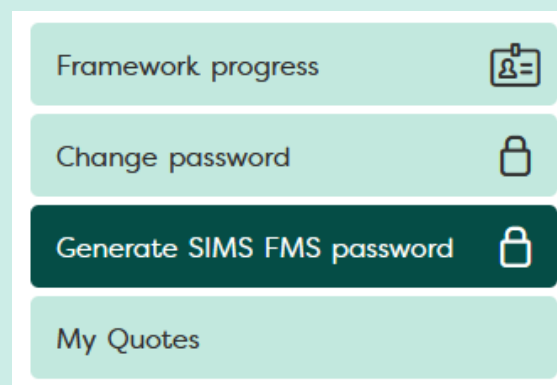
The 'Company Administrator' role in the second row is circled in red.



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**

GENERATE SIMS FMS PASSWORD

Please press the button below to generate a new password for your SIMS FMS Quick Link integration.

Please remember to copy the password as soon as it is generated, as it will disappear when you refresh or change the page.

Please note that generating a new password will immediately invalidate your previous password, so please only generate a new password if you are ready to copy this into your SIMS FMS software straight away.

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: MAGRf91LAf0vQxmbPgXYI1MBK

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.

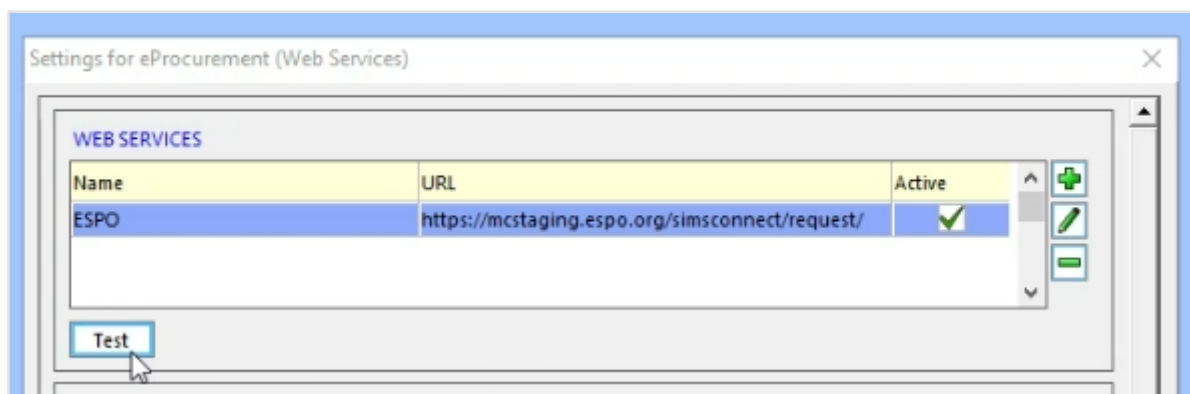
Please note: When you generate a new password, it will immediately invalidate any previous password you are using. So when you generate a new password, be sure to **enter this in your SIMS FMS software immediately**, otherwise you will no longer be able to import orders or transfer these back to ESPO.

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**.



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**.

Settings for eProcurement (Web Services)

WEB SERVICES

Name	URL	Active
ESPO	https://mcstaging.espo.org/simsconnect/request/	<input checked="" type="checkbox"/>

Test

LINKED SUPPLIERS

Looking for

Sequence ☒ Name ☐ Code ☐ DUNs ☐ e-mail

Supplier Name	Ordering e-mail Address
ESPO	

Information

Internet Connection OK

OK

GENERAL SETTINGS

Default XML Order Book: BANK 4001

Establishment DUNs Number: 22222222

Import Export

INTERNET CONNECTIVITY

I access the internet through a Proxy Server ☒

Test URL: http://www.education.gov.uk/ Test

Save Cancel Help

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.

Settings for eProcurement (Web Services)

GENERAL SETTINGS

Default XML Order Book: BANK Establishment DUNs Number: 4001 22222222

SUPPLIERS

Import Export

INTERNET CONNECTIVITY

I access the Internet through a Proxy Server ☒

Test URL: http://www.education.gov.uk/ Test

DEFAULT PROXY SETTINGS

☒ Detect Server from user's settings

☐ Use the following Proxy Server

Address: e.g. http://ProxyServer:123

☒ Use user's network credentials

☐ Use the following credentials

User Name: Domain: Password Required: ☐ Password:

Save Cancel Help



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.

Settings for eProcurement (Web Services)

WEB SERVICES

Name	URL	Active
ESPO	https://www.espo.org/simsconnect/request/	✓

Test

LINKED SUPPLIERS

Looking for:

Sequence: Name Code DUNs e-mail

Supplier Name	Code	DUNs	eOrdering e-mail Address
ESPO Web	00000001	236419693	

GENERAL SETTINGS

Default XML Order Book: 4001 Establishment DUNs Number: 22222222

SUPPLIERS

Import Export

INTERNET CONNECTIVITY

I access the Internet through a Proxy Server ☒

Test URL: http://www.education.gov.uk/ Test

Save Cancel Help



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**

Choose Suppliers for ESPO Web Service

Available Suppliers

Looking for

Supplier Name	DUNS	Code	eOrdering e-mail Address	Web Service Name
ESPO Web	236419693	00000001		

Sequence: ☒ Name ☐ DUNS **Choose** Choose All Remove Remove All

Linked Suppliers

Looking for

Supplier Name	DUNS	Code	eOrdering e-mail Address	Web Service Name

Update Cancel Help

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.



Settings for eProcurement (Web Services)

WEB SERVICES

Name	URL	Active
ESPO	https://www.espo.org/simsconnect/request/	<input checked="" type="checkbox"/>

Test


LINKED SUPPLIERS

Looking for

Sequence: ☐ Name ☐ Code ☐ DUNs ☐ e-mail

Supplier Name	Code	DUNs	eOrdering e-mail Address
ESPO Web	00000001	236419693	

GENERAL SETTINGS

Default XML Order Book: 

SUPPLIERS

Import Export

INTERNET CONNECTIVITY

I access the Internet through a Proxy Server ☒

Test URL: Test

Save Cancel Help

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

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

Select Default XML Order Book

Looking for

Prefix	Start No
BANK	4001

Select Cancel Help



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.

Prefix	Start	End	Next	Status	Payment Source
BANK	4001	5000	4008	Open	Central

Default XML Order Book: BANK 4001

Buttons: Save, Cancel, Help

Please set this up as required by your organisation, but you could for example use 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.

Prefix: BANK

Start Number: 5001

End Number: 6000

Payment Source: Central

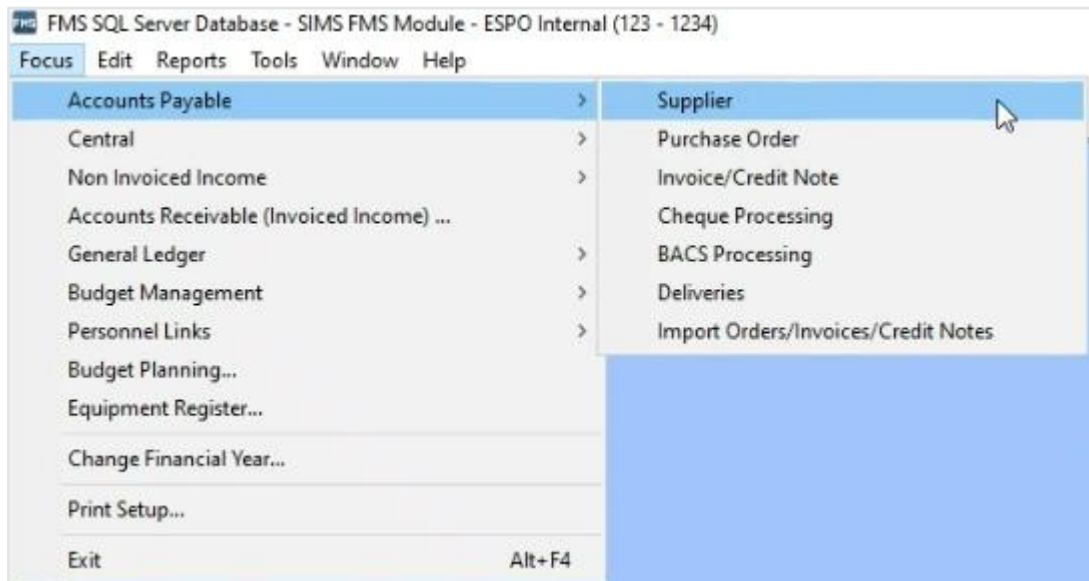
Buttons: Save, Cancel, Help

You can now go back to **Tools** > **eProcurement Settings** > **General Settings** to choose this as your **Default XML Order Book**.

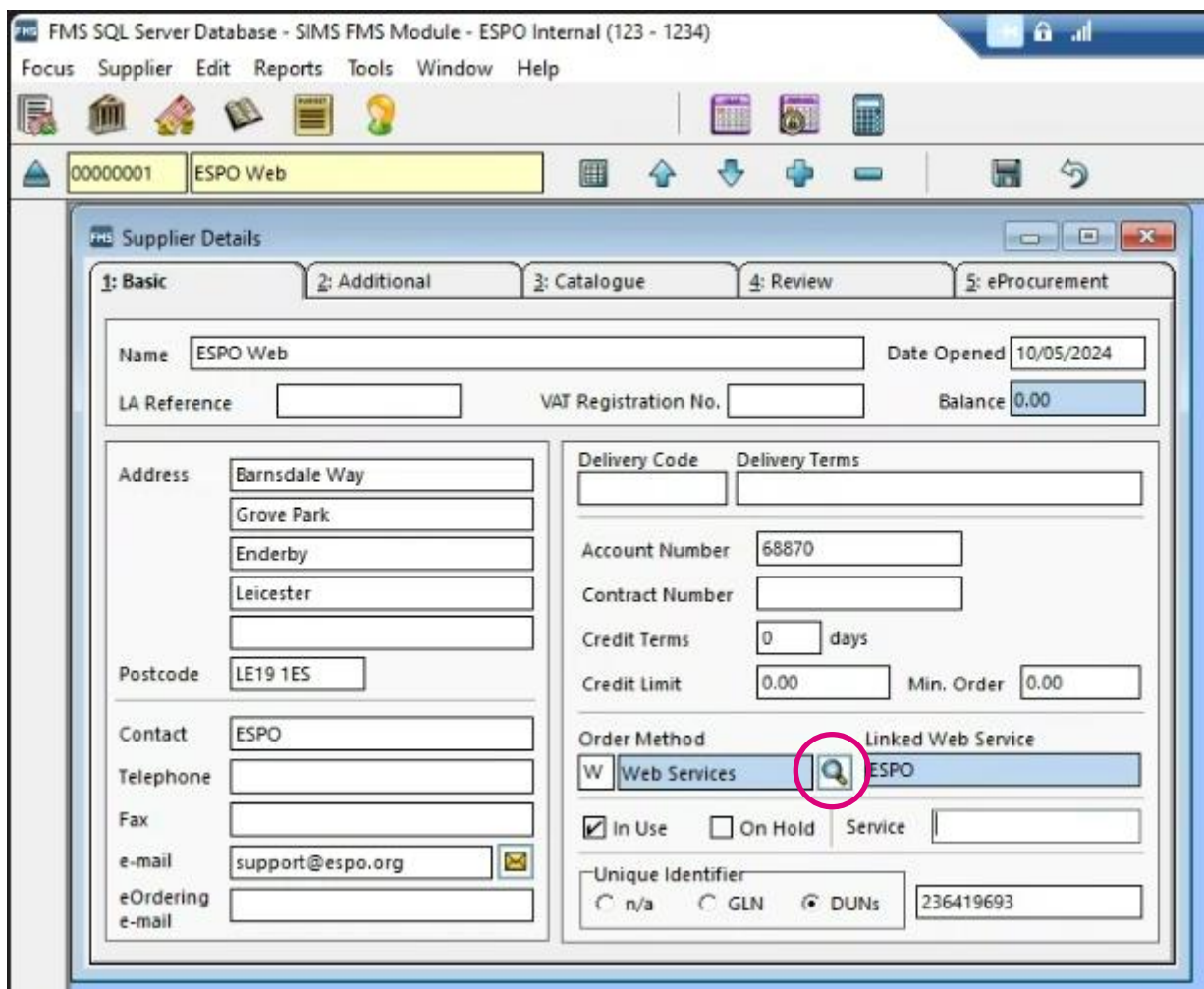


Part 6 – Supplier (add web order method)

Click **Focus** > **Accounts Payable** > **Supplier**.

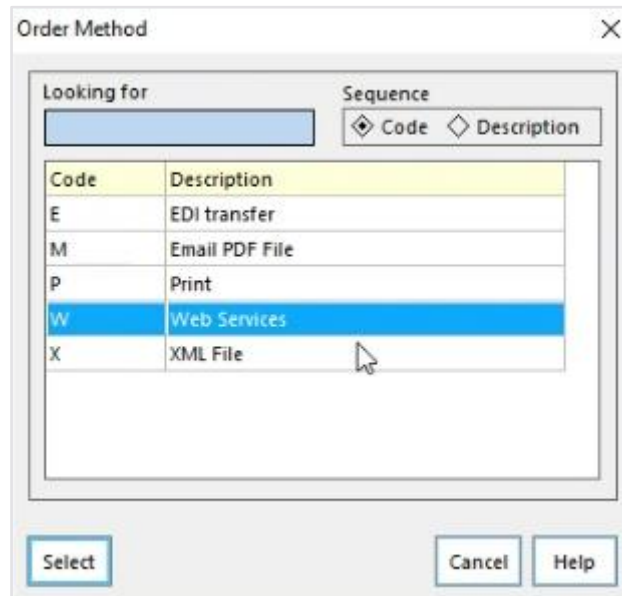


On the tab **1: Basic**, underneath **Order Method** click the magnifying glass.





Click **W Web Services** and press **Select**.



The 'Order Method' dialog box is shown. It has a 'Looking for' field and a 'Sequence' section with 'Code' and 'Description' options. Below is a table with the following data:

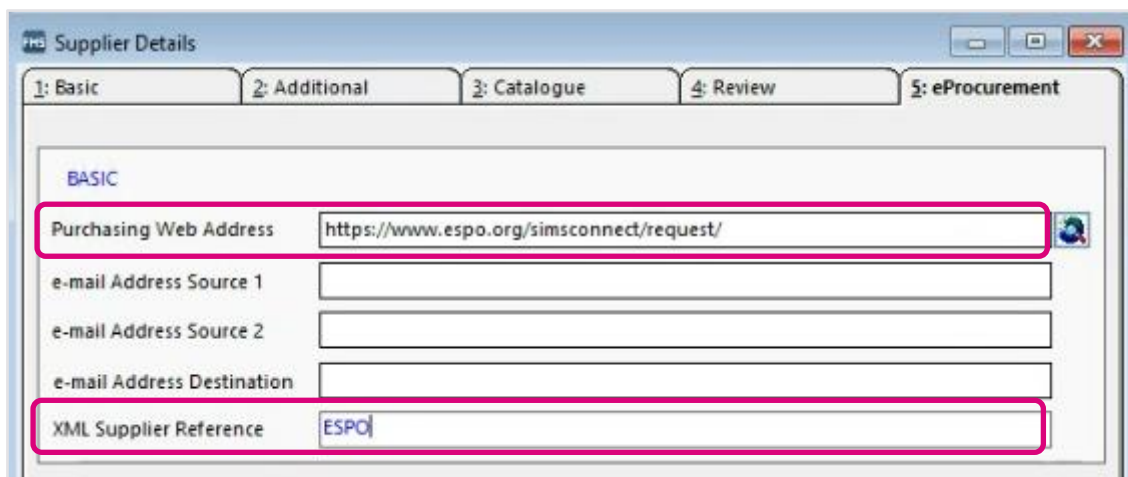
Code	Description
E	EDI transfer
M	Email PDF File
P	Print
W	Web Services
X	XML File

The 'Web Services' row is highlighted in blue. At the bottom are 'Select', 'Cancel', and 'Help' buttons.

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



The 'Supplier Details' window is shown with the '5: eProcurement' tab selected. The 'BASIC' section contains the following fields:

- Purchasing Web Address: <https://www.espo.org/simsconnect/request/>
- e-mail Address Source 1: (empty)
- e-mail Address Source 2: (empty)
- e-mail Address Destination: (empty)
- XML Supplier Reference: ESPO

The 'Purchasing Web Address' and 'XML Supplier Reference' fields are highlighted with pink boxes. A blue save icon is visible at the top right of the window.


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**.

BASKET

ITEM	PRICE	QTY	SUBTOTAL
 A4 MULTI-PURPOSE PAPER 80GSM 80gsm 96520	£18.95	- 5 +	£94.75

[Continue Shopping](#)

SUMMARY

[Select a delivery method](#)

Subtotal	£94.75
VAT	£18.95
ORDER TOTAL	£113.70

[Proceed to checkout >](#)

Hi, Matt! - Log Out

Account


Wishlist

Basket

5 items in Basket

Basket Subtotal
£94.75

[Proceed to Checkout >](#)



A4 MULTI-PURPOSE PAPER
80GSM
80gsm
96520
£18.95

Qty: - 5 +

[View and Edit Basket](#)



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**.

REVIEW AND PAYMENT

Offer code Apply code

Payment type

Invoice

Customer order reference ⓘ

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.

ESPO Products Frameworks Suppliers About ESPO Test Hi - Log Out Account Wishlist

Search ESPO Products or Frameworks

LOG IN DELIVERY REVIEW & PAYMENT CONFIRMATION

THANK YOU

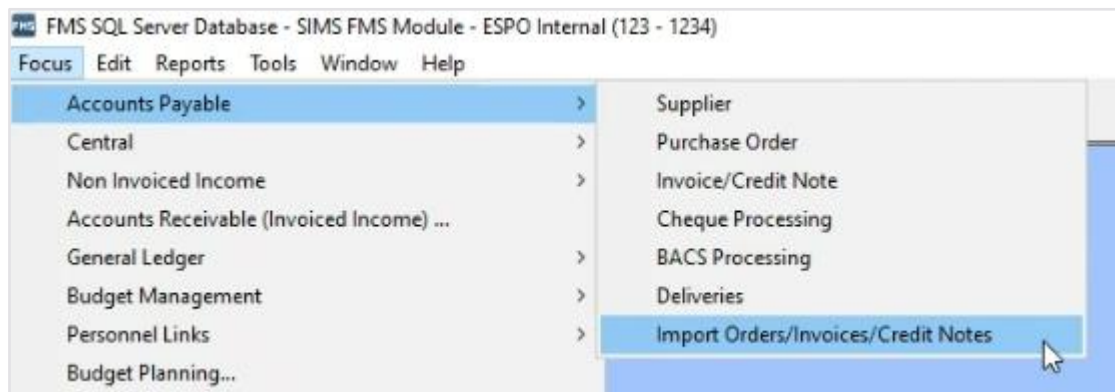
Thank you for creating your order. Your order is now ready to be transferred to your SIMS FMS software. Information about how to do this can be found [here](#). Please note that your order has not yet been sent to ESPO, this needs to be done via your usual authorisation process within your SIMS FMS software.



Importing and submitting your order – SIMS FMS

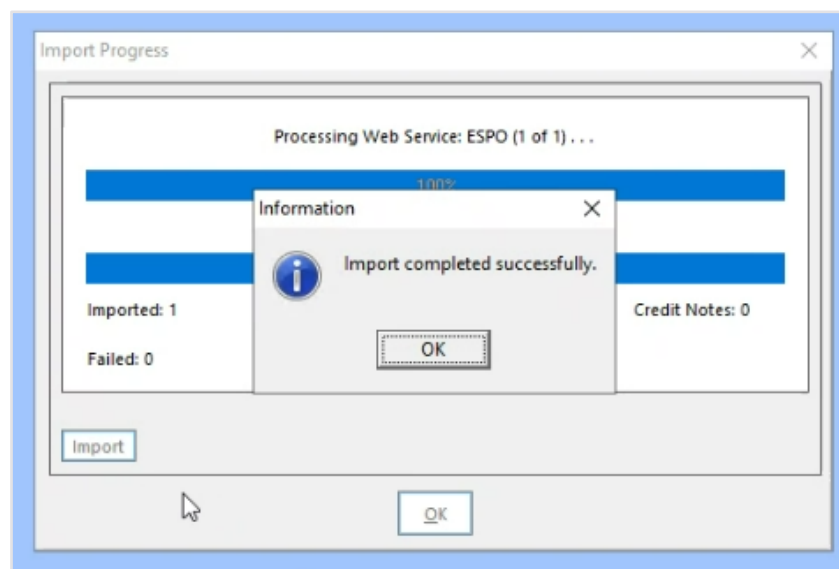
Part 1 – Import your order

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



Click **Import**.

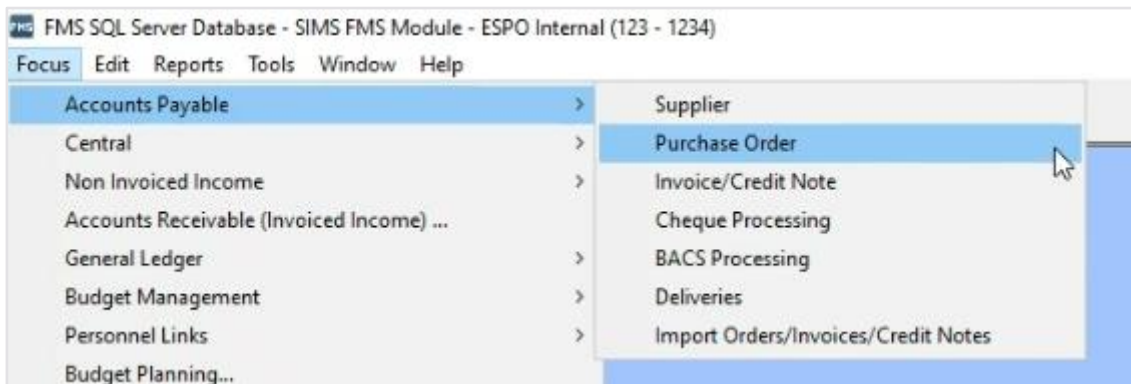
If your order import has been successful, you should see a confirmation message.





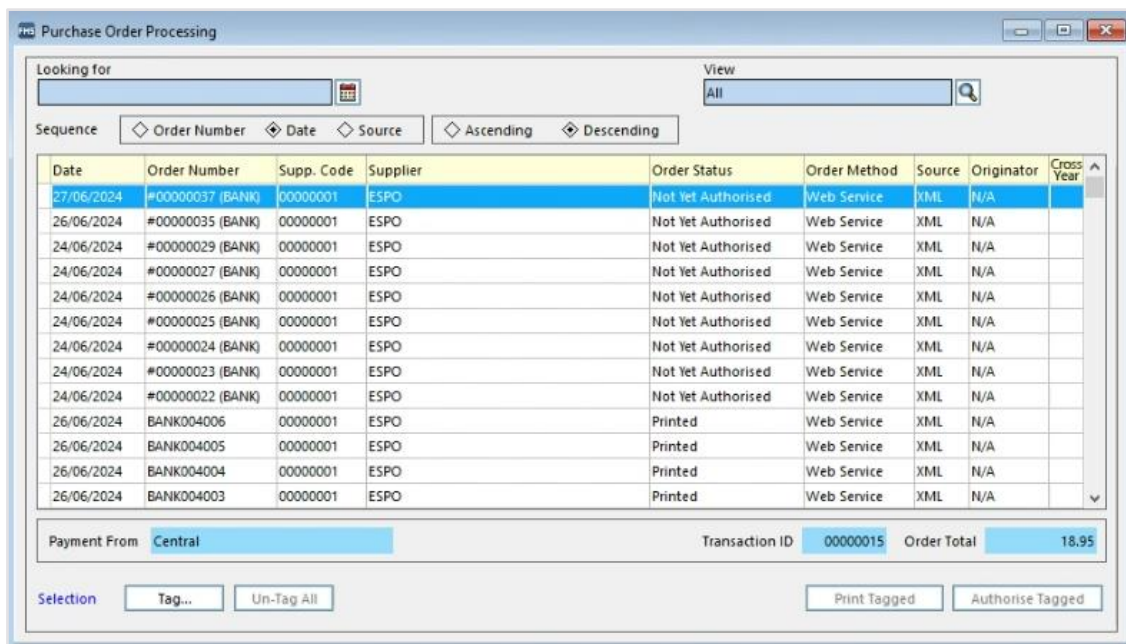
Part 2 – Review and update your order

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.



Purchase Order Processing

Book: Number: Pay From: Date:

Supplier: Delivery Address: Status:

Source: First Output Method: Delivery Instruction: ☐ On Hold

Email: Order Method:

Contact Name: Special Instructions:

Line No.	Part No.	Description	Qty	Unit Cost	Disc%	Line Net Total	I	S
1	96520	COPIER PAPER,SHIRES Multi-Purpose White,A4,Box of,5 reams	1	18.950	0.00	18.95		

Ledger Code: Cost Centre:

Selection:

Transaction ID: 00000015 Total Order Value (Net):

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	
Ledger Code	02	test	
Fund Code	01	Expenditure	
VAT Code	1	Stationery	

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	

Budget Remaining

Cost Centre	-1,358.00
Combination	-1,358.00

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).

FMS SQL Server Database - SIMS FMS Module - ESPO Internal (123 - 1234)

Focus Purchase Order Edit Reports Tools Window Help

#00000037 (BANK) ESPO

Purchase Order Processing

Book: Number: Pay From: Date:

Supplier: Delivery Address:

Status: Source: First Output Method: Delivery Instruction: ☐ On Hold

Email: Order Method:

Contact Name: Special Instructions:

Line No.	Part No.	Description	Qty	Unit Cost	Disc%	Line Net Total	I	S
1	96520	COPIER PAPER, SHIRES Multi-Purpose White, A4, Box of, 5 reams	1	18.950	0.00	18.95		

Ledger Code: Cost Centre:

Selection:

Transaction ID: 00000015 Total Order Value (Net):



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

The screenshot shows the 'Purchase Order Processing' window in the SIMS FMS application. The window title is 'FMS SQL Server Database - SIMS FMS Module - ESPO Internal (123 - 1234)'. The menu bar includes 'Focus', 'Purchase Order', 'Edit', 'Reports', 'Tools', 'Window', and 'Help'. The toolbar contains various icons for file operations and navigation. The main form displays the following information:

- Book:** BANK
- Number:** 4007
- Pay From:** Central
- Date:** 27/06/2024
- Supplier:** ESPO (Barnsdale Way, Grove Park, Enderby, Leicester, LE19 1ES)
- Delivery Address:** ESPO Internal, Barnsdale Way, Grove Park, Enderby
- Status:** Authorised (circled in red)
- Source:** XML
- First Output Method:** (empty)
- Delivery Instruction:** A.S.A.P.
- On Hold:** ☐
- Order Method:** Web Service
- Contact Name:** (empty)
- Special Instructions:** (empty)
- Ledger Code:** (02) test
- Cost Centre:** (300) Admin
- Selection:** Tag All, Un-Tag All
- Processing:** Processing, Edit Tagged
- Transaction ID:** 00000015
- Total Order Value (Net):** 18.95

Line No.	Part No.	Description	Qty	Unit Cost	Disc%	Line Net Total	I	S
1	96520	COPIER PAPER,SHIRES Multi-Purpose White,A4,Box of,5 reams	1	18.950	0.00	18.95		

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

This screenshot is identical to the previous one, but with the 'Print/Dispatch Order' button in the toolbar highlighted by a red circle. The button is represented by a printer icon.



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.