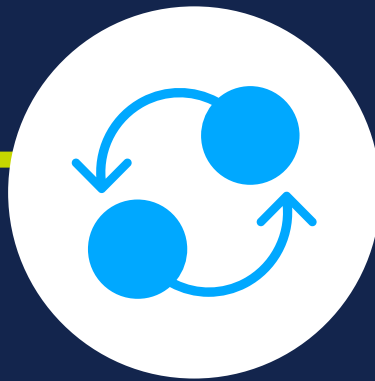




Join the 'SMART' revolution today and start saving time and money.



SMART Connect user guide

ESS | SIMS

***For help setting up call us on 03451 204 520
or email smartconnect@philipharris.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 204 520**, or email, smartconnect@philipharris.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 Philip Harris
2. Your Philip Harris Account Number
3. Your Philip Harris 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.

Company Name


Search Now

Search by Company Registration Number

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

Company Registration Number

☐ I'm not a robot


Privacy - Terms

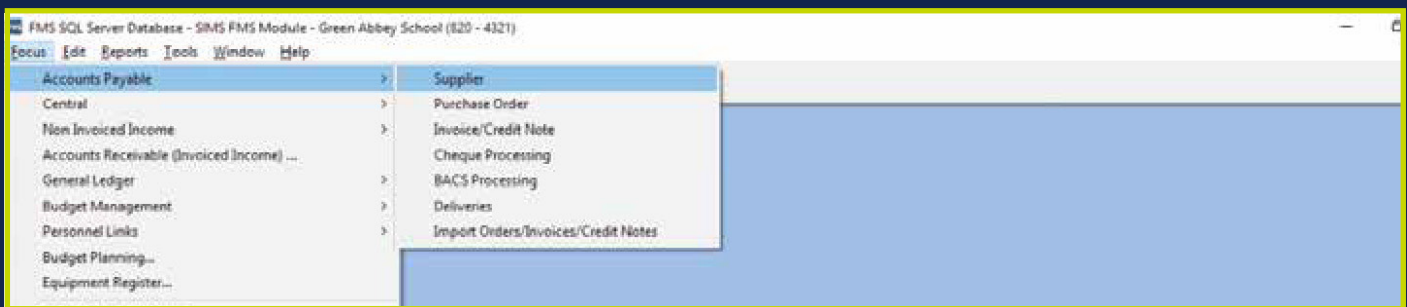
Search Now

Setting up your **SMART** Connect

Section A: Basic Set-up

1. Add Philip Harris as a supplier

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



1.2 Select the and enter the below details:

Philip Harris

2 Gregory Street,

Hyde, Cheshire, SK14 4HR.

VAT Number – GB125688644

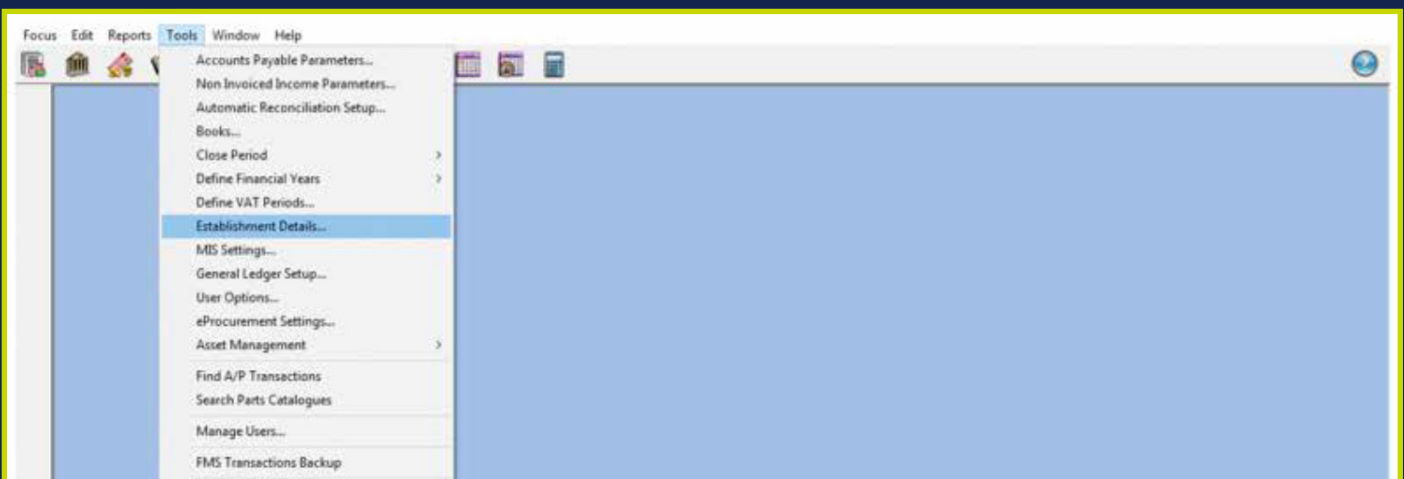
DUNS - 345735237

Telephone – 03451 204 520

Email Address – smartconnect@philipharris.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:

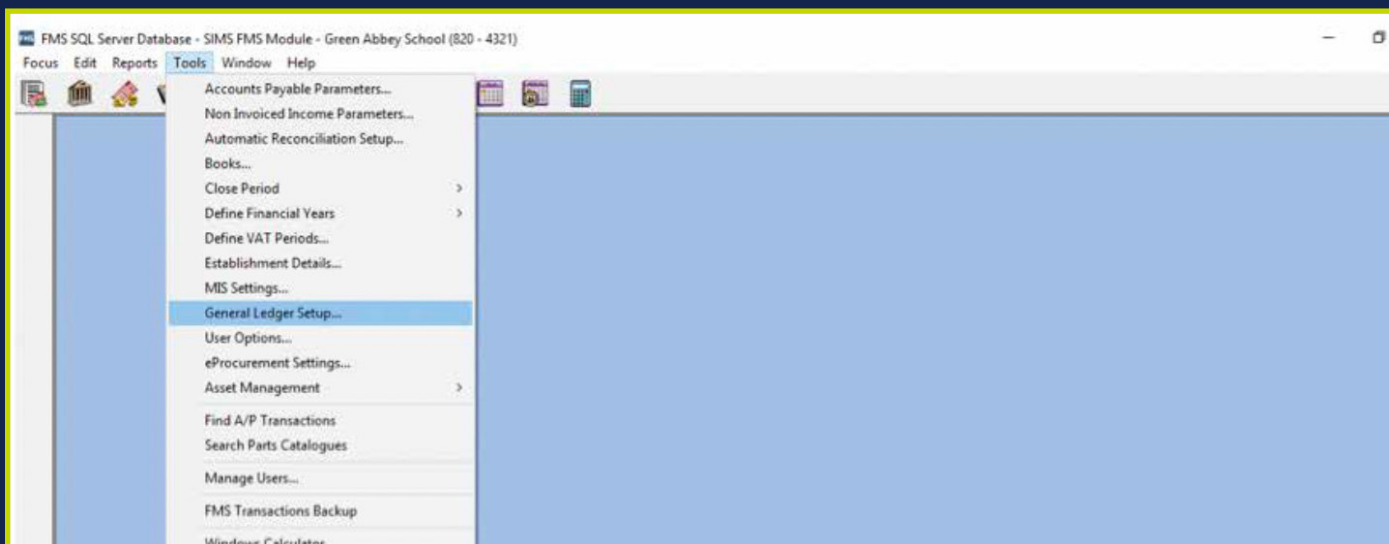
5: Email Setup		6: Interfaces		7: Scanned Documents			
1: Basic Details		2: Logo		3: System Parameters		4: eProcurement	
Name	Green Abbey School						
Code	4321	Companies House No.					
LA Code	820	VAT Registration No.					
Borough	Eastshire						
Payable to	Green Abbey School						
Address							
Monkmoor Road							
East Town							
Eastshire							
Postcode							
S12 5AP							
Telephone	01234 838080		Fax	01234 838091			
e-mail							
Unique Identifier							
<input type="radio"/> n/a <input type="radio"/> GLN <input checked="" type="radio"/> DUNS							
542199995							
DeMinimis Value							
1.00							
Save							
Cancel							
Help							

Annotations:

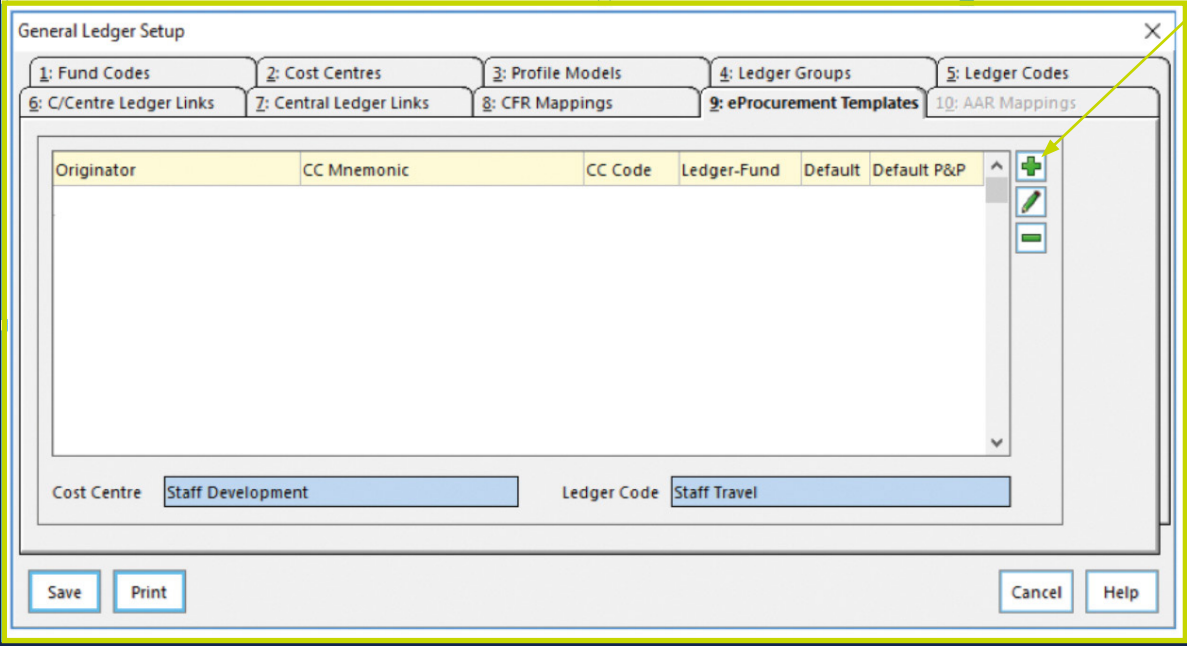
- Select: DUNS (points to the DUNS radio button)
- Click: Save (points to the Save button)
- Enter: Your DUNS Number (points to the DUNS number field)

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'



3.2 Proceed to Tab 9 – 'eProcurement Template' and add a new ledger by clicking the 



The 'General Ledger Setup' window displays a tabbed interface. The 'eProcurement Templates' tab is selected. It contains a table with columns: Originator, CC Mnemonic, CC Code, Ledger-Fund, Default, and Default P&P. A yellow arrow points to a green plus icon in the top right corner of the table, with the label 'Click'. Below the table, there are input fields for 'Cost Centre' (containing 'Staff Development') and 'Ledger Code' (containing 'Staff Travel'). At the bottom are buttons for 'Save', 'Print', 'Cancel', and 'Help'.

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

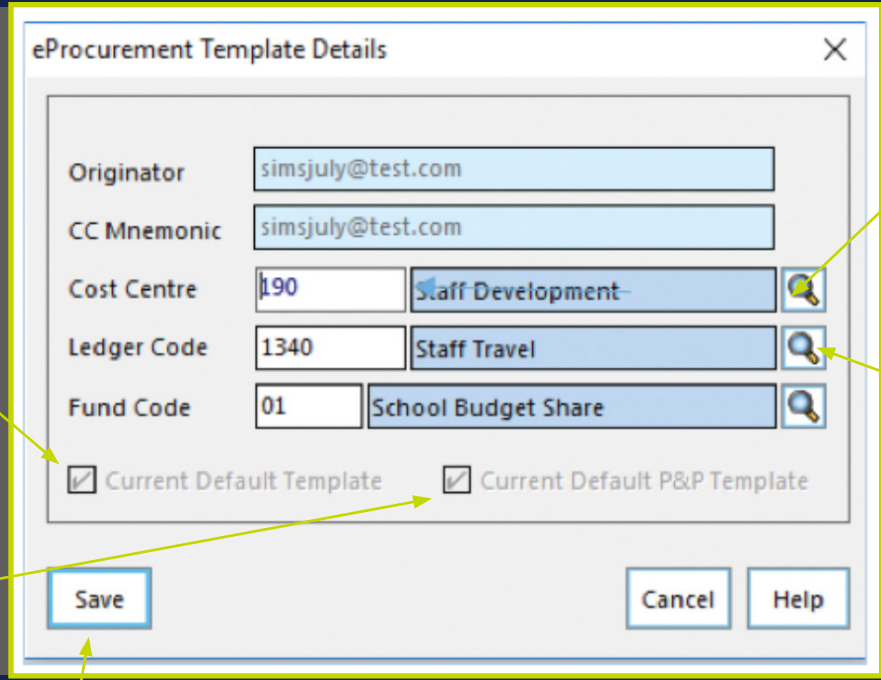
- **Originator and CC Mnemonic:**

This is your email address that you use on the Philip Harris 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.

Tick:
Current
Default
Template

Tick: Current
Default P&P
Template



The 'eProcurement Template Details' window contains the following fields and controls:

- Originator:** Text field with 'simsjuly@test.com'.
- CC Mnemonic:** Text field with 'simsjuly@test.com'.
- Cost Centre:** Text field with '190' and a dropdown menu showing 'Staff Development'. A yellow arrow points to the dropdown arrow icon with the label 'Click and enter your most frequently used Cost Centre'.
- Ledger Code:** Text field with '1340' and a dropdown menu showing 'Staff Travel'. A yellow arrow points to the dropdown arrow icon with the label 'Click and enter your most frequently used Ledger Code'.
- Fund Code:** Text field with '01' and a dropdown menu showing 'School Budget Share'.
- Current Default Template:** A checkbox that is ticked. A yellow arrow points to it with the label 'Tick: Current Default Template'.
- Current Default P&P Template:** A checkbox that is ticked. A yellow arrow points to it with the label 'Tick: Current Default P&P Template'.
- Buttons:** 'Save', 'Cancel', and 'Help' at the bottom. A yellow arrow points to the 'Save' button with the label 'Click: Save'.

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	✓	✓

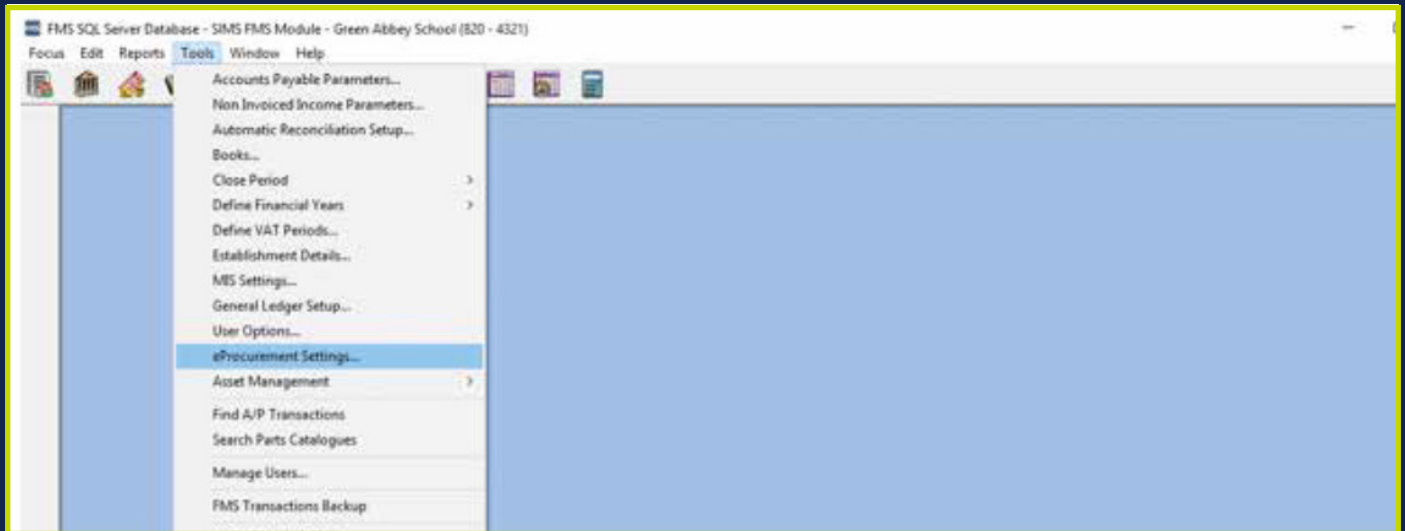
Cost Centre: Staff Development Ledger Code: Staff Travel

Save Print Cancel


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 Philip Harris 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:

A screenshot of the 'Settings for eProcurement (Web Services)' dialog box. The 'WEB SERVICES' section contains a table with columns 'Name', 'URL', and 'Active'. To the right of the table are three icons: a green plus icon (highlighted by a yellow arrow and the text 'Select '), a green pencil icon, and a green minus icon. Below the table is a 'Test' button. The 'LINKED SUPPLIERS' section has a 'Looking for' field, a 'Sequence' dropdown with options 'Name', 'Code', 'DUNs', and 'e-mail', and a table with columns 'Supplier Name', 'Code', 'DUNs', and 'eOrdering e-mail Address'. The 'GENERAL SETTINGS' section includes 'Default XML Order Book' (set to 'BANK') and 'Establishment DUNs Number' (set to '123456789'). The 'SUPPLIERS' section has 'Import' and 'Export' buttons. The 'INTERNET CONNECTIVITY' section has a checkbox 'I access the Internet through a Proxy Server' which is checked, and a 'Test URL' field containing 'http://www.education.gov.uk/'. At the bottom are 'Save', 'Cancel', and 'Help' buttons.

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'. 'Supplier' is selected.
- Name:** Text field containing 'Philip Harris'. A search icon is to the right.
- URL:** Text field containing 'https://webfms.digital/pharris.aspx'.
- Priority:** Text field containing '1'.
- User ID:** Text field containing 'username@example.com'.
- Password:** Password field containing '*****'.
- Active:** Check box, currently unchecked.
- Password duration (in days):** Text field containing '999'.
- Buttons:** 'Save', 'Cancel', and 'Help'.

Annotations and instructions:

- Enter: 1 (points to Priority)
- Enter: Philip Harris website email address (points to Name)
- Enter: Your Philip Harris password (points to Password)
- Click: Save (points to Save button)
- Enter: https://webfms.digital/pharris.aspx (points to URL)
- Select: Supplier (points to Supplier radio button)
- Select: Philip Harris (points to search icon next to Name)
- Tick: Active (points to Active checkbox)
- Enter: 999 days (points to Password duration)

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

The 'WEB SERVICES' section displays a table with the following data:

Name	URL	Active
Philip Harris	https://webfms.digital/pharris.aspx	<input type="checkbox"/>

Below the table is a 'Test' button. To the right of the table are icons for adding (+), editing (pencil), and deleting (-) services.

Click: Test (points to Test button)

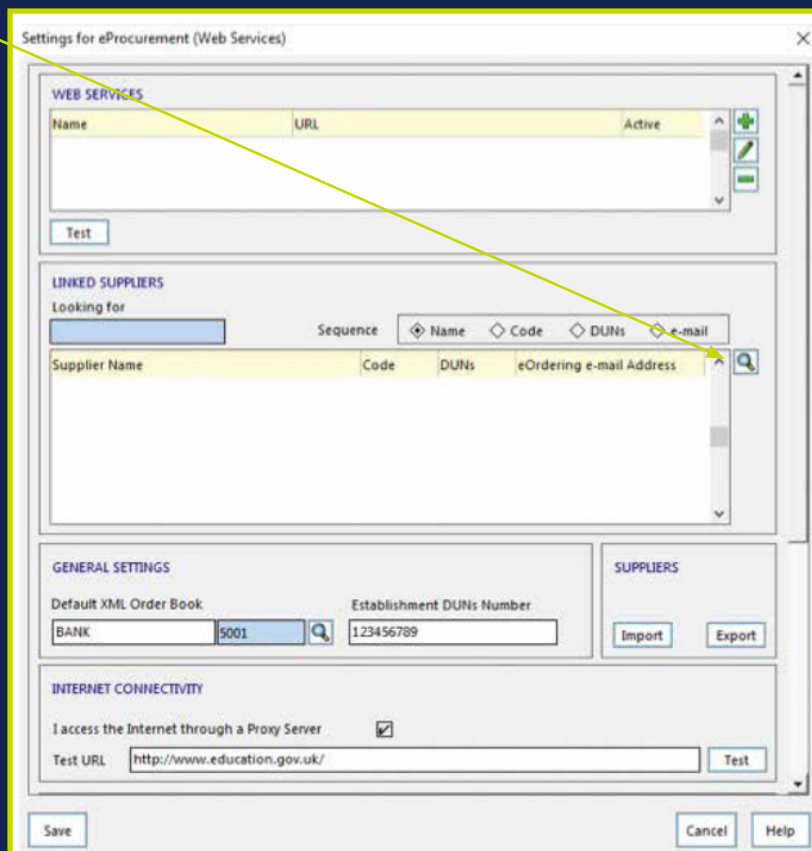
4.5 If the settings are correct the pop-up below will appear:

The 'Information' dialog box displays the message 'Web Service Connection OK' with an information icon and an 'OK' button.

In the unlikely event of this showing a failed message, please contact our [Support Team](#) on 03451 204 520.

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**



Settings for eProcurement (Web Services)

WEB SERVICES

Name	URL	Active
------	-----	--------

Test

LINKED SUPPLIERS

Looking for:

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

Supplier Name	Code	DUNs	eOrdering e-mail Address
---------------	------	------	--------------------------

GENERAL SETTINGS

Default XML Order Book:

Establishment DUNs Number:

SUPPLIERS

Import Export

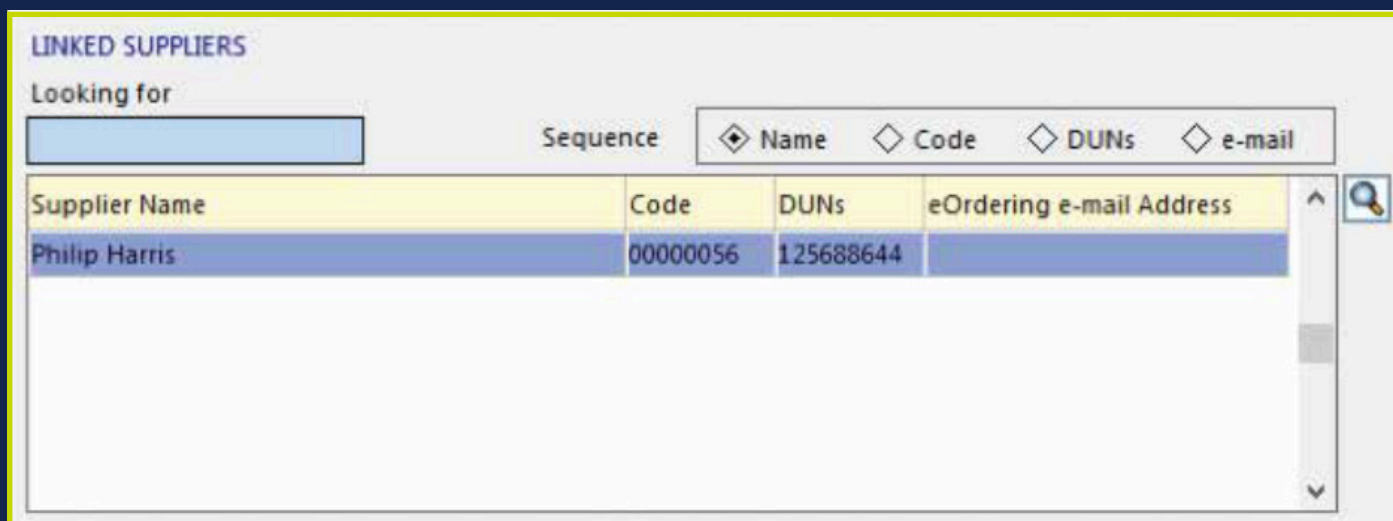
INTERNET CONNECTIVITY

I access the Internet through a Proxy Server: ☒

Test URL: Test

Save Cancel Help

4.7 In the 'Supplier Name' list select 'Philip Harris' so that it is highlighted and then click the 'Choose button'. Then click 'Update'. This links Philip Harris as a supplier to the Philip Harris web service details.



LINKED SUPPLIERS

Looking for:

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

Supplier Name	Code	DUNs	eOrdering e-mail Address
Philip Harris	00000056	125688644	

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

Establishment DUNS Number

BANK 5001 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.

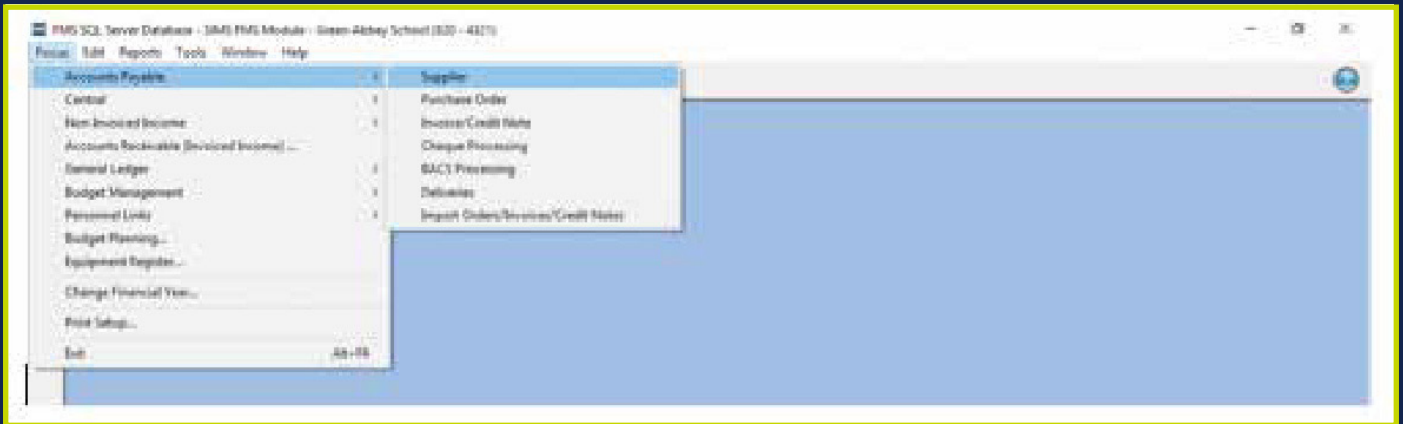
If you are unsure where to find this please refer to the 'Getting Started' section of this document.

Once all the details are entered, click: Save.

Section C: Supplier Set-up

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

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



5.2 Find **Philip Harris** 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.

A screenshot of the 'Supplier Details' form. The 'Basic' tab is selected. The 'Name' field contains 'Philip Harris'. The 'Address' field contains '2 Gregory Street, Hyde, Cheshire'. The 'Delivery Code' field contains '7430017072'. The 'Account Number' field also contains '7430017072'. The 'Order Method' section shows 'W Web Services' selected. A yellow arrow points from the text 'Enter your Account Number' to the 'Account Number' field. Another yellow arrow points from the text 'Click the button' to the magnifying glass icon next to the 'Web Services' option in the 'Order Method' section.

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**'.

A screenshot of the 'Order Method' dialog box. It shows a table with two columns: 'Code' and 'Description'. The rows are: E EDI transfer, M Email PDF File, P Print, W Web Services (highlighted), and X XML File. A yellow arrow points from the text 'Select (W) for Web Services' to the 'W Web Services' row.

5.5 In the unique identifier section select DUNS and enter gls DUNS Number which is 345735237.

The screenshot shows the 'PH5 Supplier Details' window with the 'Basic' tab selected. The form contains the following fields and values:

- Name: Philip Harris
- Date Opened: 13/10/2016
- LA Reference: (empty)
- VAT Registration No.: (empty)
- Balance: 521.99
- Address: 2 Gregory Street, Hyde, Cheshire, (empty), (empty)
- Postcode: SK14 4TH
- Contact: (empty)
- Telephone: (empty)
- Fax: (empty)
- e-mail: paul.willis@findel-education
- eOrdering e-mail: (empty)
- Delivery Code: 7430017072
- Delivery Terms: (empty)
- Account Number: 7430017072
- Contract Number: (empty)
- Credit Terms: 0 days
- Credit Limit: 0.00
- Min. Order: 0.00
- Order Method: W Web Services
- Linked Web Service: Philip Harris
- ☒ In Use ☐ On Hold Service: (empty)
- Unique Identifier: ☐ n/a ☐ GLN ☒ DUNS 345735237

Yellow arrows point from the text 'Select DUNS and enter 345735237' to the 'DUNS' radio button and the '345735237' text field.

Select
DUNS
and enter
345735237

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

The screenshot shows the 'PH5 Supplier Details' window with the 'eProcurement' tab selected. The form contains the following fields and values:

- Purchasing Web Address: (empty)
- e-mail Address Source 1: (empty)
- e-mail Address Source 2: (empty)
- e-mail Address Destination: (empty)
- XML Supplier Reference: philipharris
- Options: ☐ Copy XML File to e-mail Address
- Encryption: ☐ Use File Encryption for Sending and Receiving
- Buttons: Import Public Key, 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.philipharris.co.uk

- 5.1 Simply visit www.philipharris.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

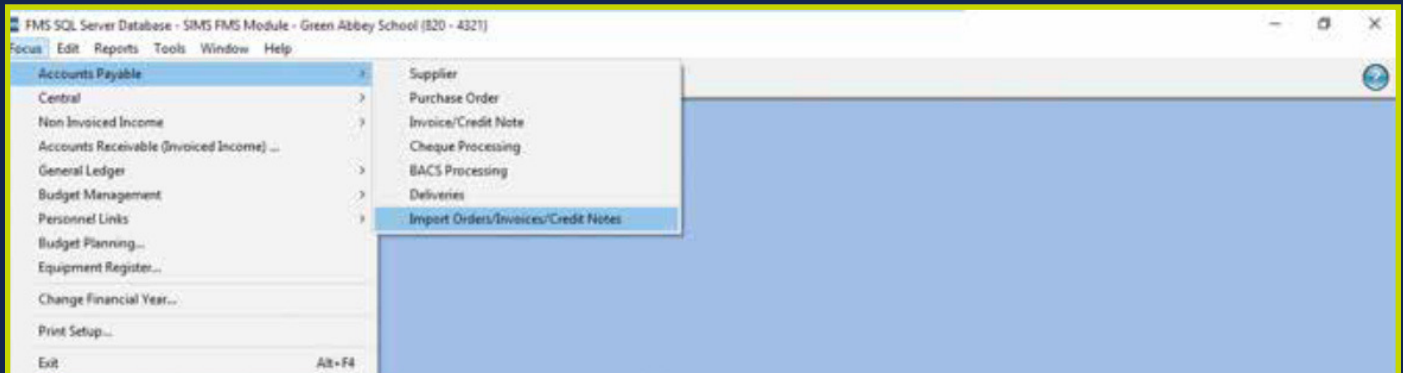
How to complete your order...

-  **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

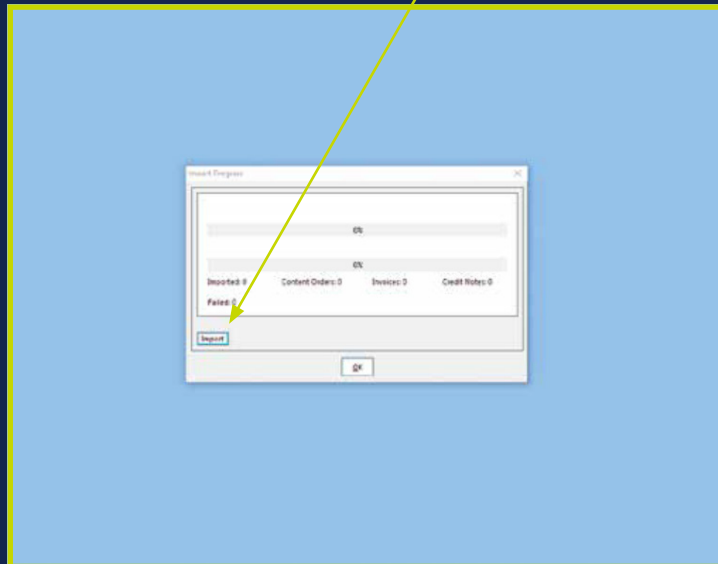
To Import Orders

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

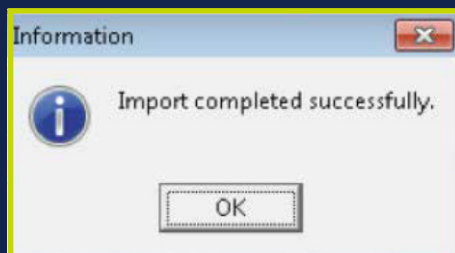


This will import any outstanding [Orders / Invoices / Credit Notes](#).

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 204 520.

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.

Purchase Order Processing

Book: Number: Pay From: Date:

Supplier:
2 Gregory Street
Hyde
Cheshire
SK14 4TH

Delivery Address:
Monkmoor Road
East Town
Eastshire
S12 5AP

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

Contact Name: Special Instructions:

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	Philip Harris	Not Yet Authorised	Print	FMS	SYS	
20/03/2017	#00008390 (BANK)	00000062	Philip Harris	Not Yet Authorised	Web Service	FMS	SYS	
08/03/2017	#00007389 (BANK)	00000062	Philip Harris	Not Yet Authorised	Web Service	FMS	SYS	
10/01/2017	#00007359 (BANK)	00000064	Philip Harris	Not Yet Authorised	Web Service	XML	new custom	
10/01/2017	#00007357 (BANK)	00000064	Philip Harris	Not Yet Authorised	Web Service	XML	new custom	
10/01/2017	#00007356 (BANK)	00000064	Philip Harris	Not Yet Authorised	Web Service	XML	new custom	
10/01/2017	#00007355 (BANK)	00000064	Philip Harris	Not Yet Authorised	Web Service	XML	New Custom	
10/01/2017	#00007354 (BANK)	00000064	Philip Harris	Not Yet Authorised	Web Service	XML	N/A	
10/01/2017	#00007353 (BANK)	00000064	Philip Harris	Not Yet Authorised	Web Service	XML	N/A	
15/12/2016	#00007352 (BANK)	00000064	Philip Harris	Not Yet Authorised	Web Service	XML	new custom	
14/12/2016	#00007351 (BANK)	00000059	Philip Harris	Not Yet Authorised	Web Service	XML	Pauline Salt	
14/12/2016	#00007350 (BANK)	00000059	Philip Harris	Not Yet Authorised	Web Service	XML	Pauline Salt	
14/12/2016	#00007349 (BANK)	00000059	Philip Harris	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: Pay From: **Bank Account** Date: **10/11/2016**

Supplier: **Philip Harris**
2 Gregory Street
Hyde
Cheshire
SK14 4TH

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

Status: **Not Yet Authorised**

Source: **XML** First Output Method:

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

Email: Order Method: **Web Service**

Contact Name: Special Instructions:

9. Invoices

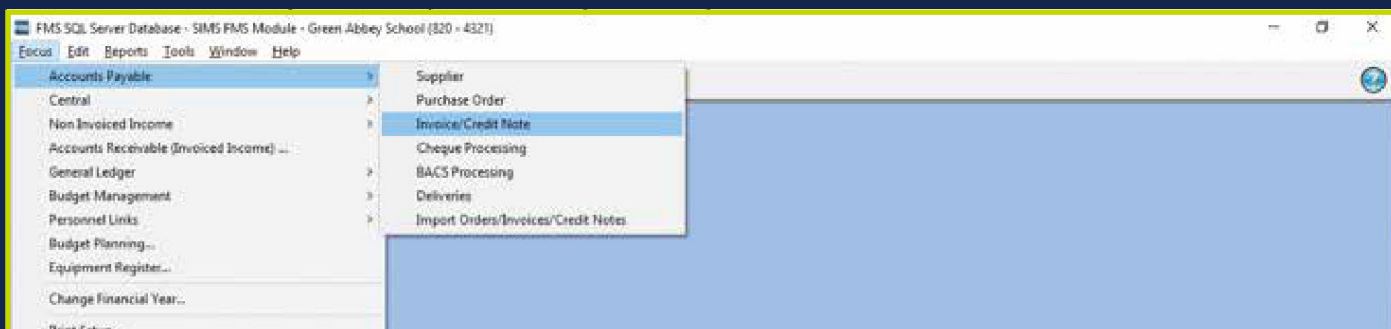
Your invoice will be available for import into FMS via the eProcurement hub once you have received your order. You will also receive to be able a copy of this invoice in the traditional manner.

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

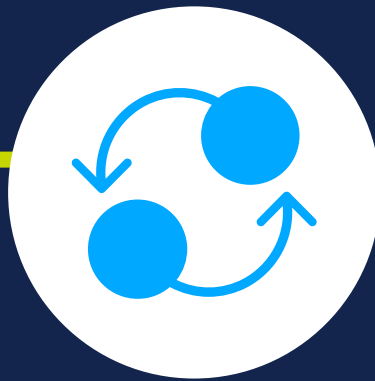
Looking for: Status: **All** Type: **All**

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
0094282338	16/11/2016	00010206	17.12	Unauthorised	BANK005204		Philip Harris	XML
0094282339	16/11/2016	00010207	45.73	Unauthorised	BANK005206		Philip Harris	XML
0094282540	17/11/2016	00010208	521.99	Unauthorised	BANK005226		Philip Harris	XML
0094282541	17/11/2016	00010209	45.22	Unauthorised	BANK005227		Philip Harris	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 204 520
or email smartconnect@philipharris.co.uk***

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