



**WebFMS**  
User Guide

- ✓ Seamless integration with your FMS
- ✓ Control spend
- ✓ Order online, no rekeying needed

# Philip Harris WebFMS

If you are looking to save time and money on your procurement then our WebFMS 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 integration 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 integration 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



## GETTING STARTED

To setup WebFMS we need to make a couple of simple changes to your account.

Before proceeding with the rest of the guide, **please call 03451 120 4520, or email, [webfms@philipharris.co.uk](mailto:webfms@philipharris.co.uk)** and one of our team will activate your account so that you are ready to complete your integration 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.

### 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   
reCAPTCHA  
Privacy - Terms

Simply enter your establishment name into the **Search By Company Name search box**. To help the refinement process, you can also add your postcode and postal town.

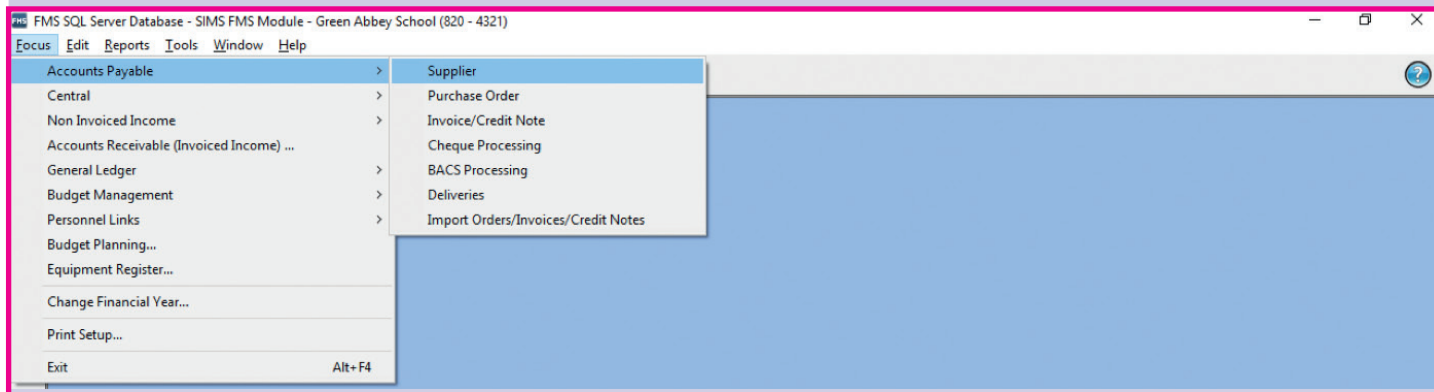
You can also find your DUNS number if you know your company registration number, by using


# SETTING UP YOUR FMS

## 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 Education

2 Gregory Street,

Hyde, Cheshire, SK14 4TH

VAT Number – GB125688644

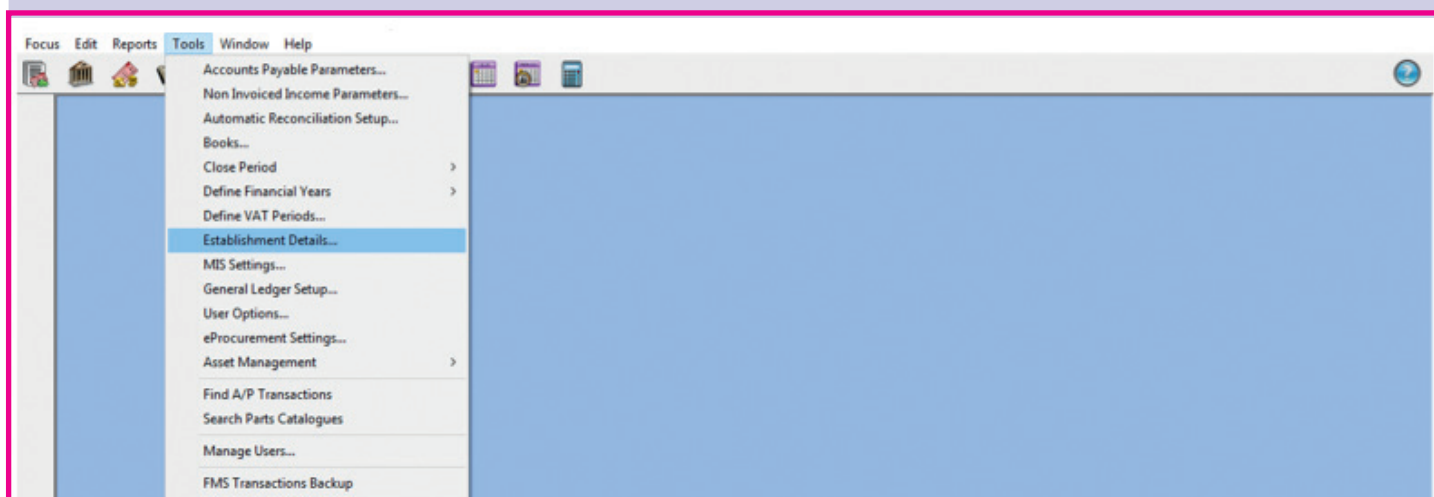
DUNS - 345735237

Telephone – 03451 120 4520

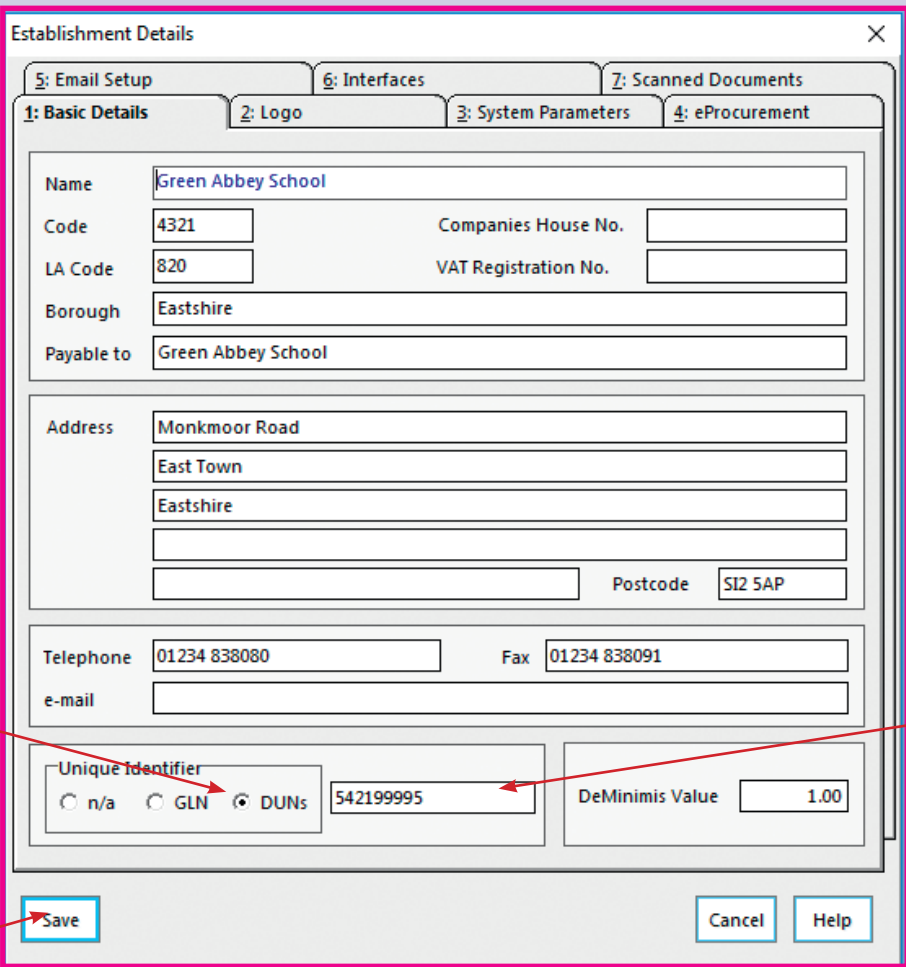
Email Address – orders@philipharris.co.uk

### 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:

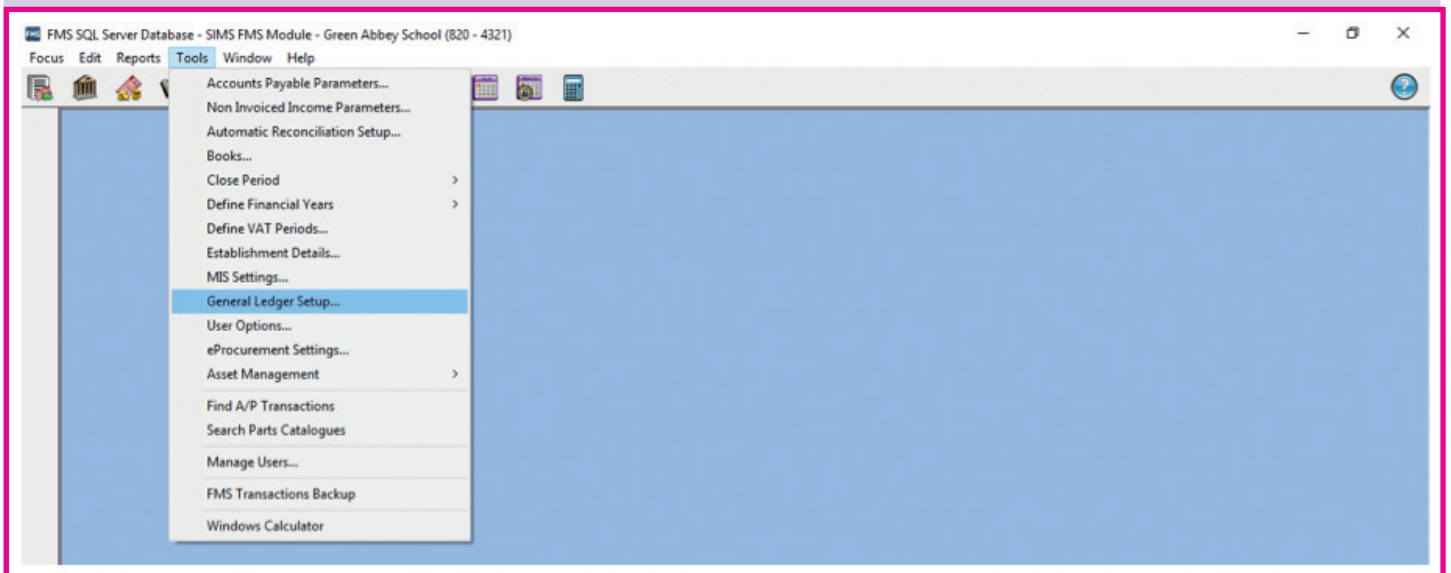
- Name: Green Abbey School
- Code: 4321
- LA Code: 820
- Borough: Eastshire
- Payable to: Green Abbey School
- Address: Monkmoor Road, East Town, Eastshire, Postcode: S12 5AP
- Telephone: 01234 838080, Fax: 01234 838091
- e-mail: (empty)
- Unique Identifier:  n/a,  GLN,  DUNs (542199995)
- DeMinimis Value: 1.00

Annotations with red arrows point to:

- 'Select DUNS' pointing to the 'DUNs' radio button.
- 'Enter your DUNS Number' pointing to the '542199995' text box.
- 'Save' pointing to the 'Save' button.

### 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'

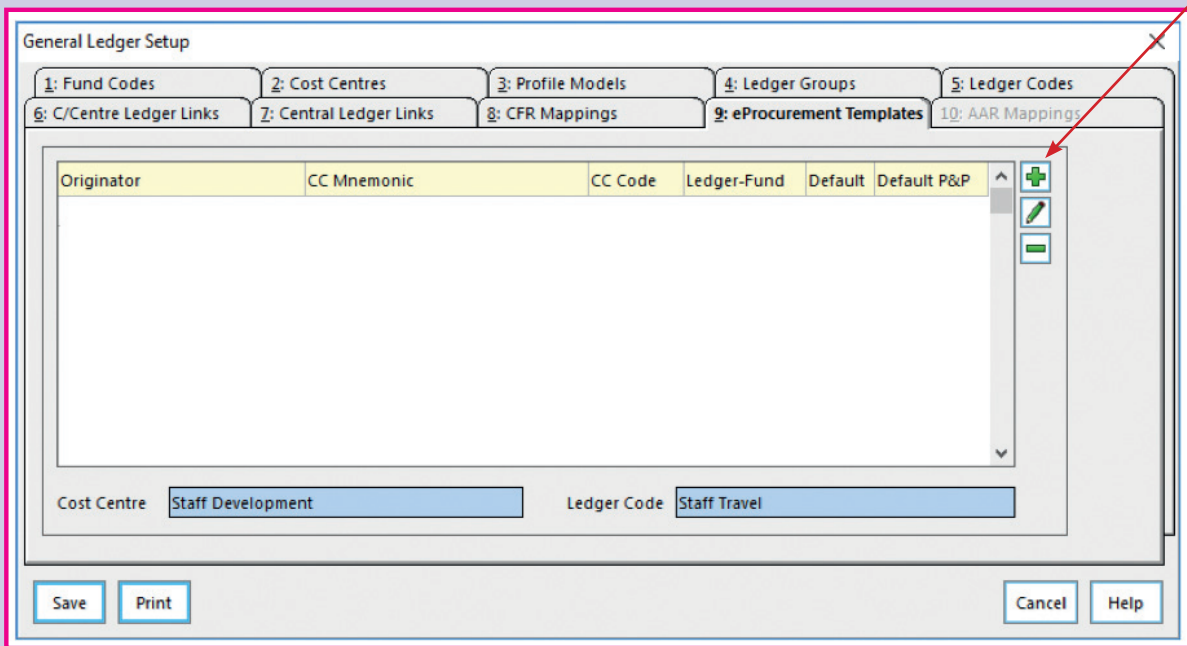


The screenshot shows the 'Tools' menu in the 'SIMS FMS Module' application. The menu items are:

- 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 

Click



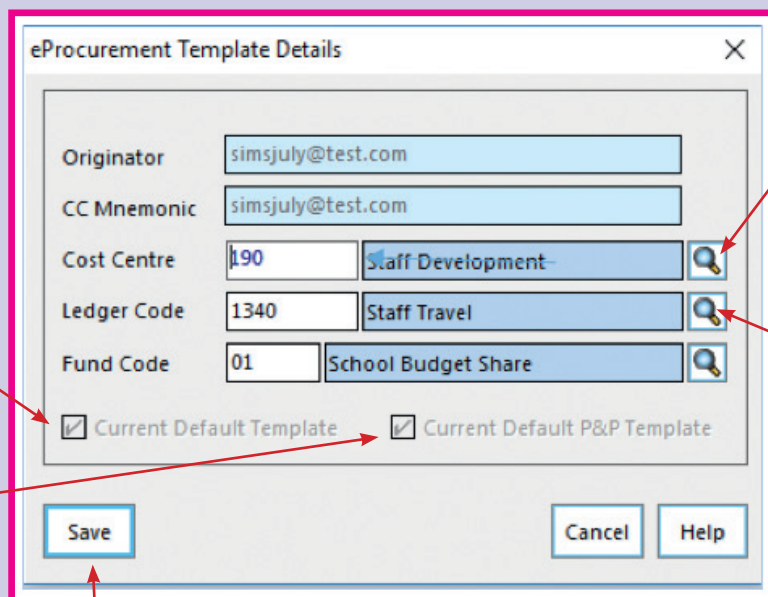
**3.3** Next complete the pop up box using the below information for both open fields:


- Originator and CC Mnemonic: This is your email address that you use on the Philip Harris 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.

Tick Current Default Template

Tick Current Default P&P Template

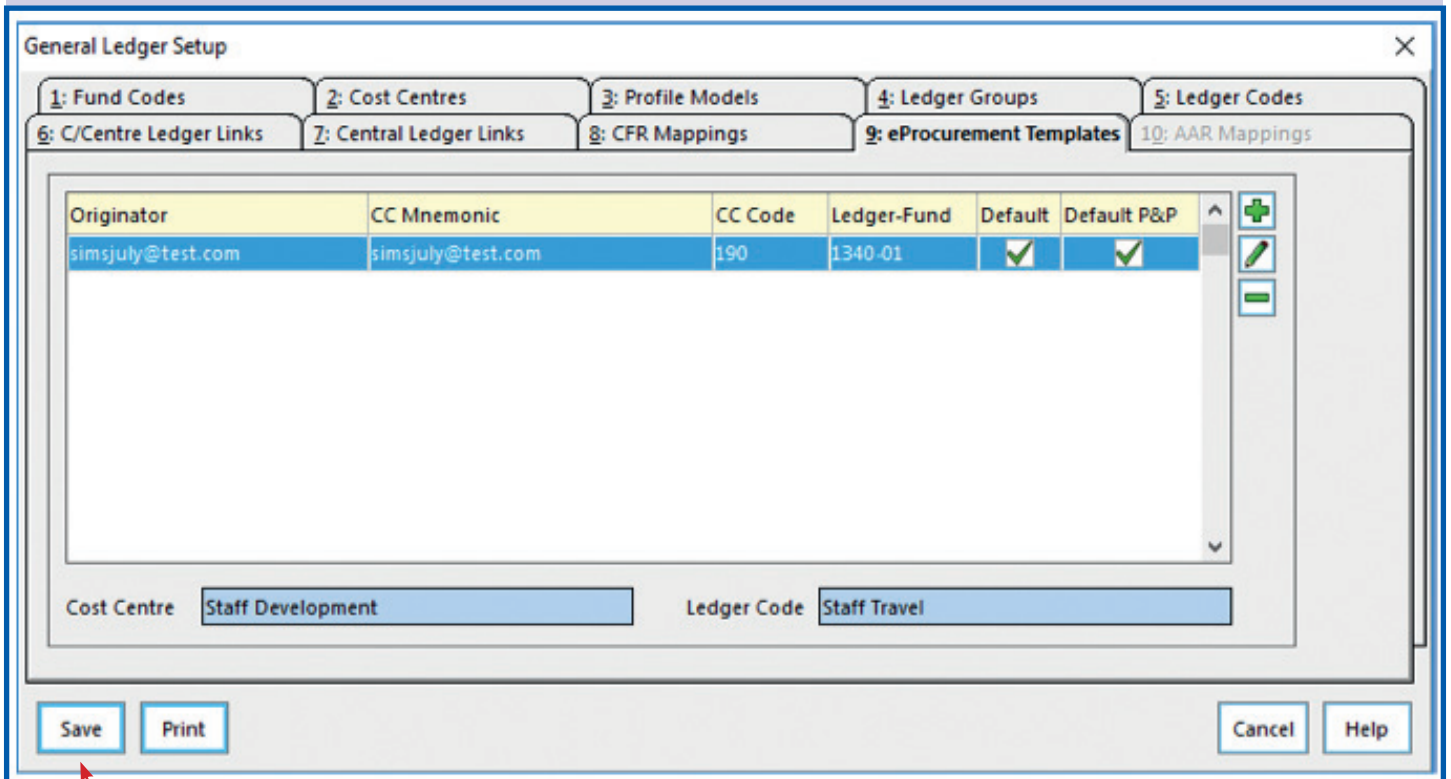


Click  and enter your most frequently used Cost Centre

Click  and enter your most frequently used Ledger Code

Save

3.5 You should now see the following screen:

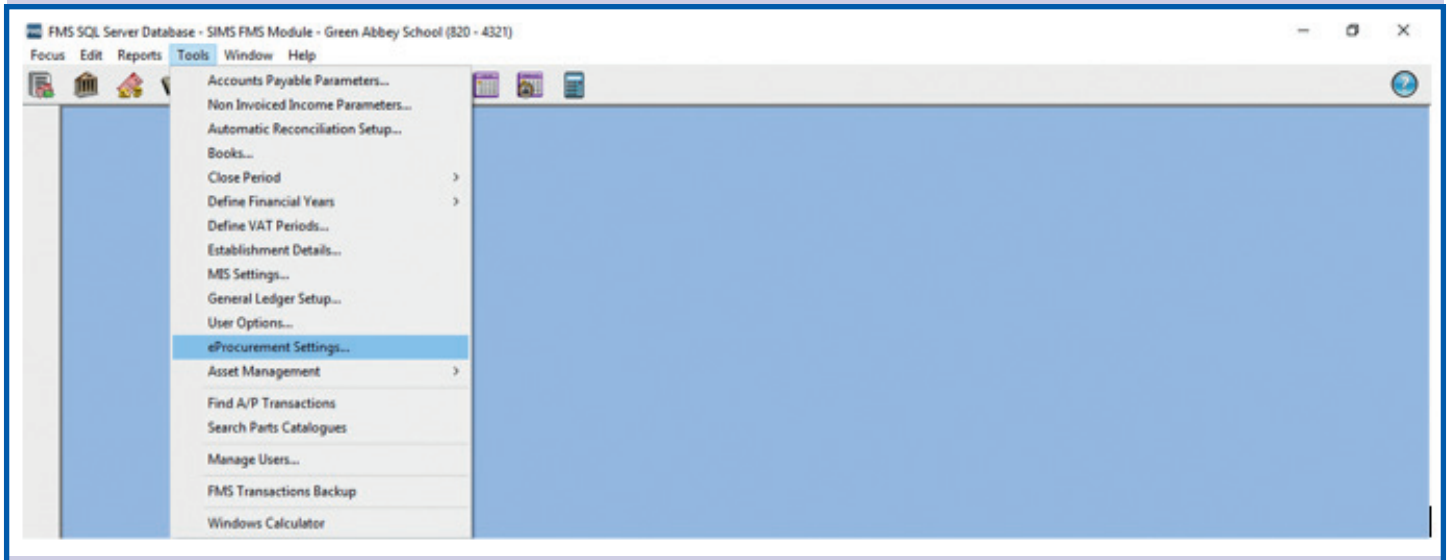


3.6 Press save to complete.

## SECTION B: E-PROCUREMENT SET-UP

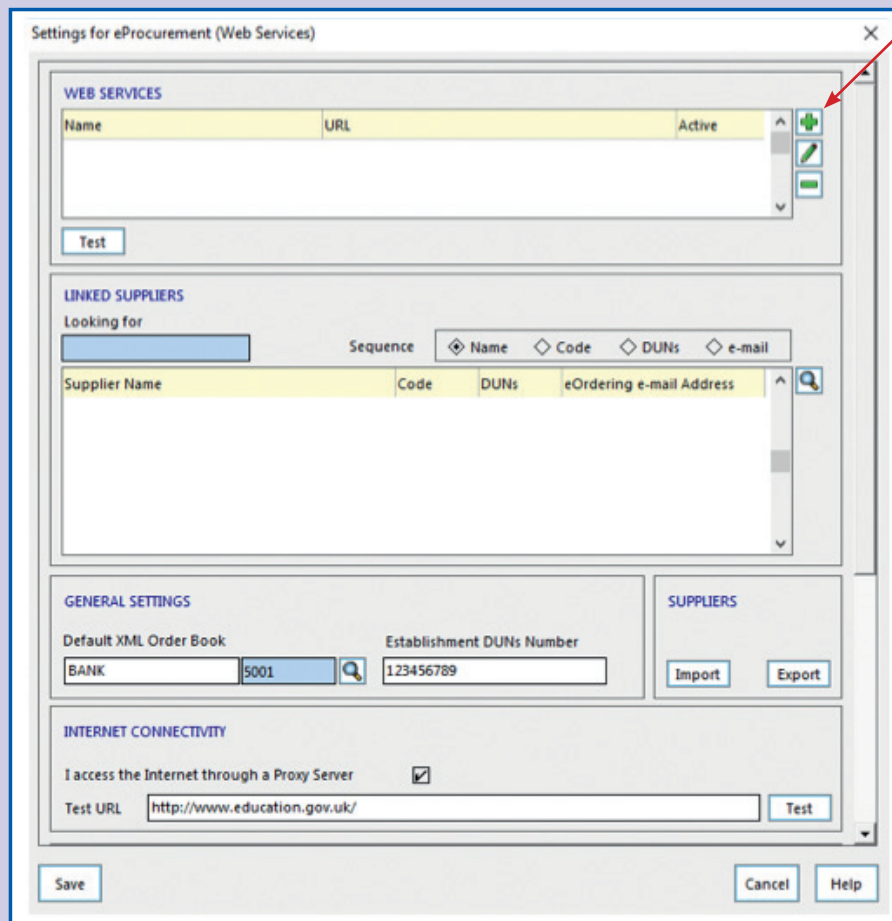
**4.1** The next step is to enter the details to connect your SIMS FMS to our Philip Harris Education website.

Go to 'Tools > eProcurement Settings'. If this is greyed out please refer to the 'Getting Started' section of this document to activate the option.



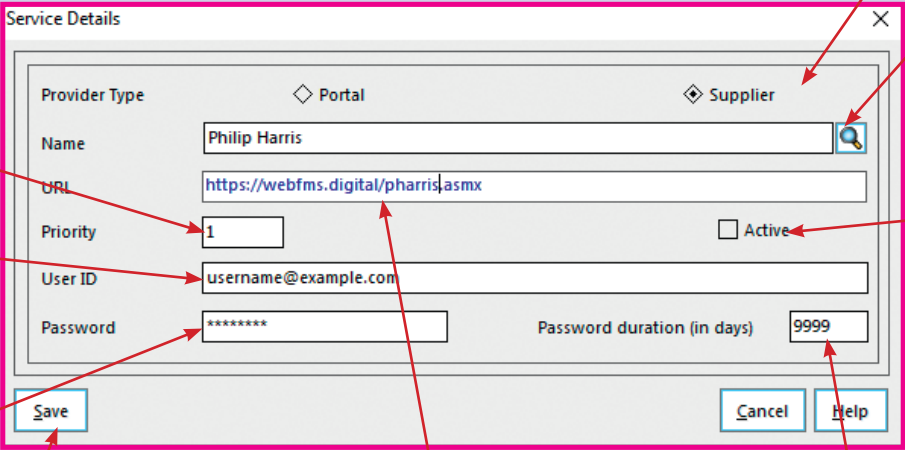
**4.2** If this is editable select  in the WEB SERVICES section to make an addition:

Select 

A screenshot of the 'Settings for eProcurement (Web Services)' dialog box. The 'WEB SERVICES' section contains a table with columns 'Name', 'URL', and 'Active'. A red arrow points to a green plus icon in the right-hand column of this table. Below the table is a 'Test' button. The 'LINKED SUPPLIERS' section has a 'Looking for' field 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 checked checkbox for 'I access the Internet through a Proxy Server' 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:



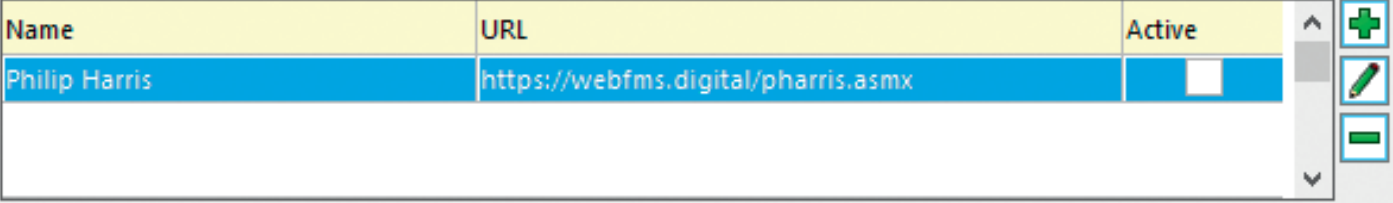
The 'Service Details' dialog box contains the following fields and controls:

- Provider Type:** Portal (selected), Supplier
- Name:** Philip Harris
- URL:** https://webfms.digital/pharris.asmx
- Priority:** 1
- Active:**
- User ID:** username@example.com
- Password:** \*\*\*\*\*
- Password duration (in days):** 9999
- Buttons:** Save, Cancel, Help

Annotations and instructions:

- Enter 1 (points to Priority)
- Enter your Philip Harris website email address (points to User ID)
- Enter your Philip Harris password (points to Password)
- Click Save (points to Save button)
- Enter: https://webfms.digital/pharris.asmx (points to URL)
- Enter 999 days (points to Password duration)
- Select Supplier (points to Supplier radio button)
- Select Philip Harris Education (points to Name field)
- Tick Active (points to Active checkbox)

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



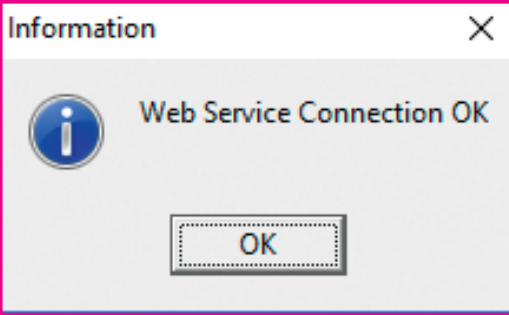
The 'WEB SERVICES' section displays a table with the following data:

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

Below the table is a 'Test' button.

Click Test

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




The 'Information' dialog box displays the following message:

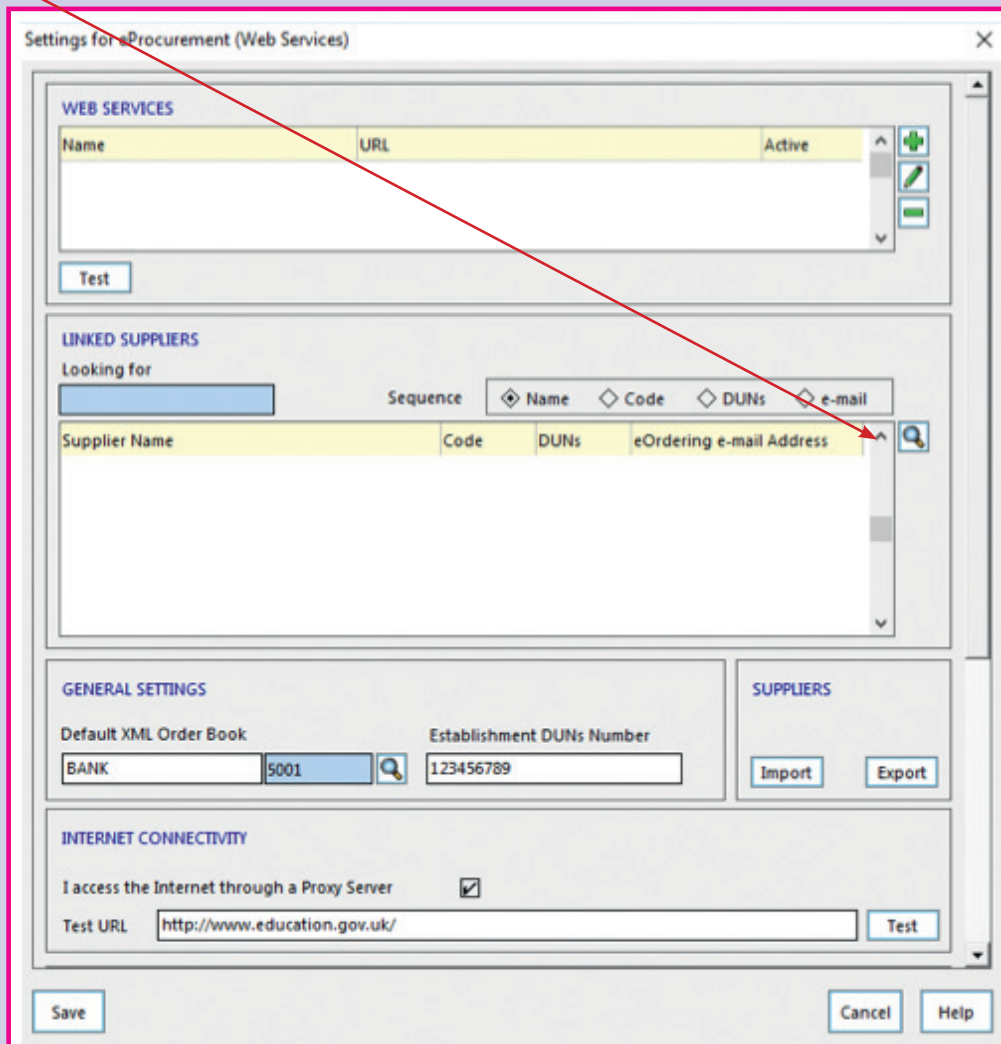
Web Service Connection OK

OK

In the unlikely event of this showing a failed message, please contact our Support Team on 03451 120 4520.

**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

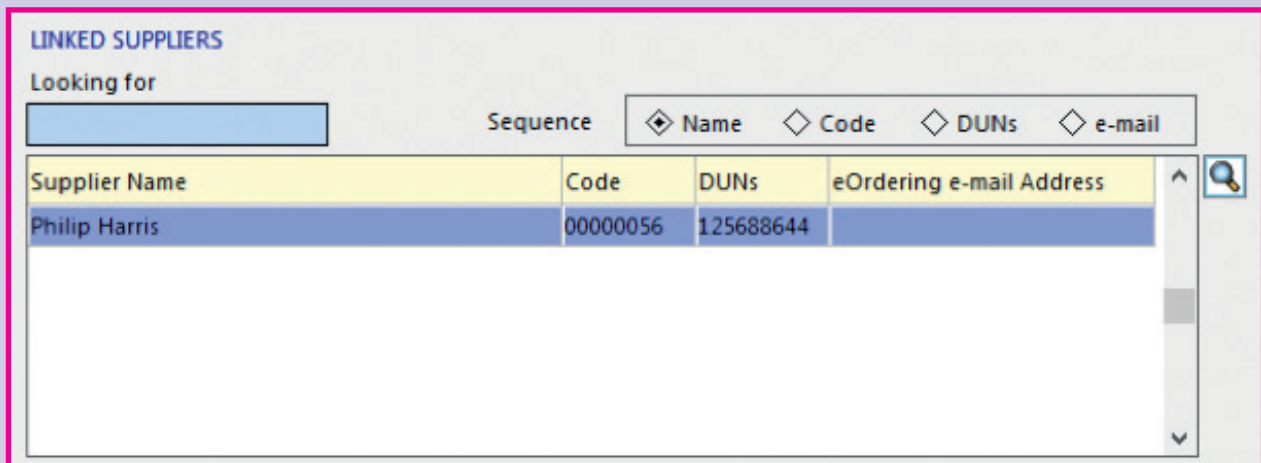
**INTERNET CONNECTIVITY**

I access the Internet through a Proxy Server

Test URL:  Test

Save Cancel Help

**4.7** In the 'Supplier Name' list select Philip Harris Education 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 Book

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

Establishment DUNs Number: 123456789

SUPPLIERS

Import Export

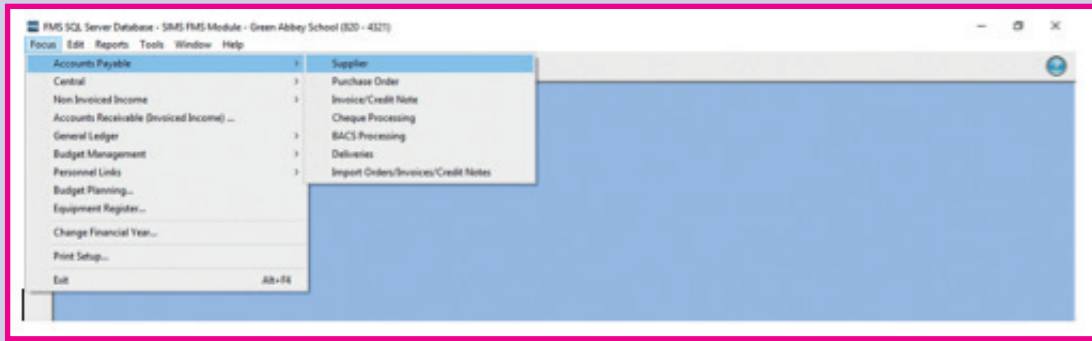
**4.10** Check that your DUNS Number is in the 'Establishment DUNS Number' field too, if this information is missing, please add it.

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 Philip Harris 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.

Enter your Account Number here

A screenshot of the 'Supplier Details' window for 'Philip Harris'. The 'Basic' tab is active. Fields include: Name (Philip Harris), Date Opened (13/10/2016), VAT Registration No., Balance (521.99), Address (2 Gregory Street, Hyde, Cheshire, SK14 4TH), Contact, Telephone, Fax, e-mail (paul.willis@findel-education), and eOrdering e-mail. The 'Delivery Code' is 7430017072, and the 'Account Number' is also 7430017072. The 'Order Method' is set to 'Web Services' with a search icon. The 'Unique Identifier' is DUNs 345735237.

Click the  button

**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 has a table with columns 'Code' and 'Description'. The 'W' row is selected.

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

Select

Cancel Help

Select (W) for Web Services

**5.5** In the unique identifier section select DUNS and enter Philip Harris DUNS Number which is **345735237**.

Supplier Details

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

Name Philip Harris Date Opened 13/10/2016

LA Reference VAT Registration No. Balance 521.99

Address 2 Gregory Street  
Hyde  
Cheshire

Postcode SK14 4TH

Contact  
Telephone  
Fax  
e-mail paul.willis@findel-education

Delivery Code 7430017072 Delivery Terms

Account Number 7430017072

Contract Number

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

Unique Identifier  
 n/a  GLN  DUNS 345735237

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.

Supplier Details

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

BASIC

Purchasing Web Address

e-mail Address Source 1

e-mail Address Source 2

e-mail Address Destination

XML Supplier Reference philipharris

OPTIONS

Copy XML File to e-mail Address

ENCRYPTION

Use File Encryption for Sending and Receiving

Import Public Key View/Set Public Key

**5.7** Now save and close.

**You are now ready to start ordering online via SIMS.**

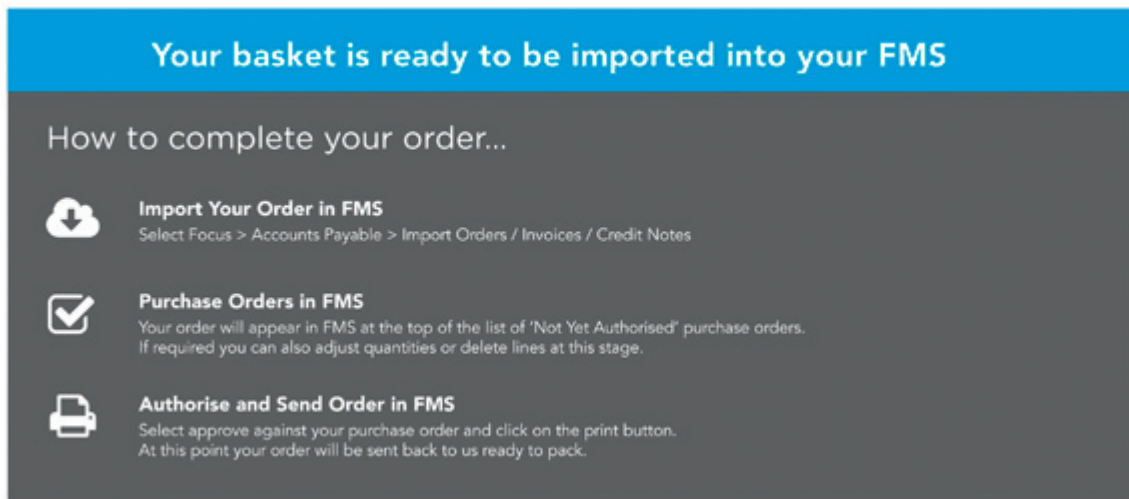
## SECTION D: ORDERING ONLINE

### 5. Shopping on www.philipharris.co.uk

**5.1** Simply visit [www.philipharris.co.uk](http://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 into your FMS**

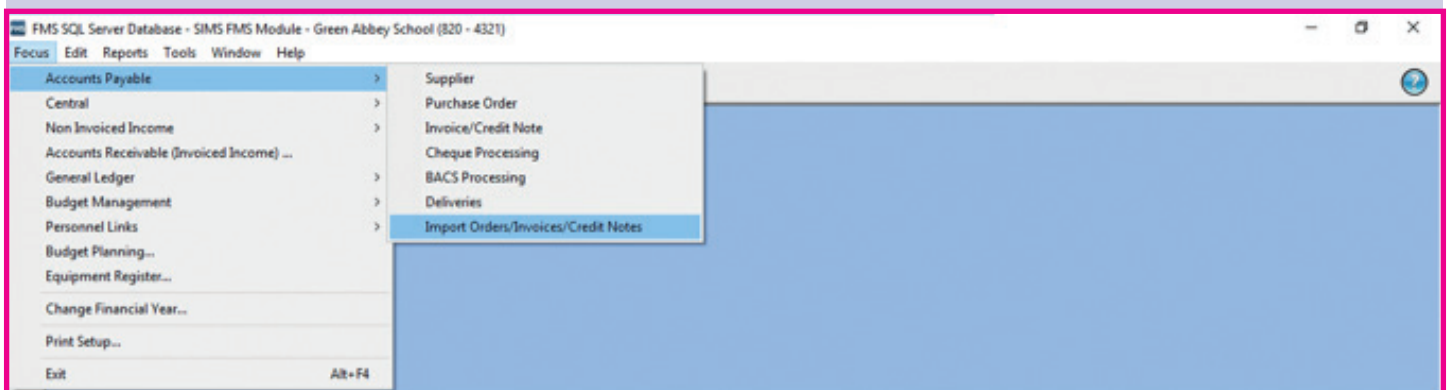
How to complete your order...

- 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' purchase orders. If required 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

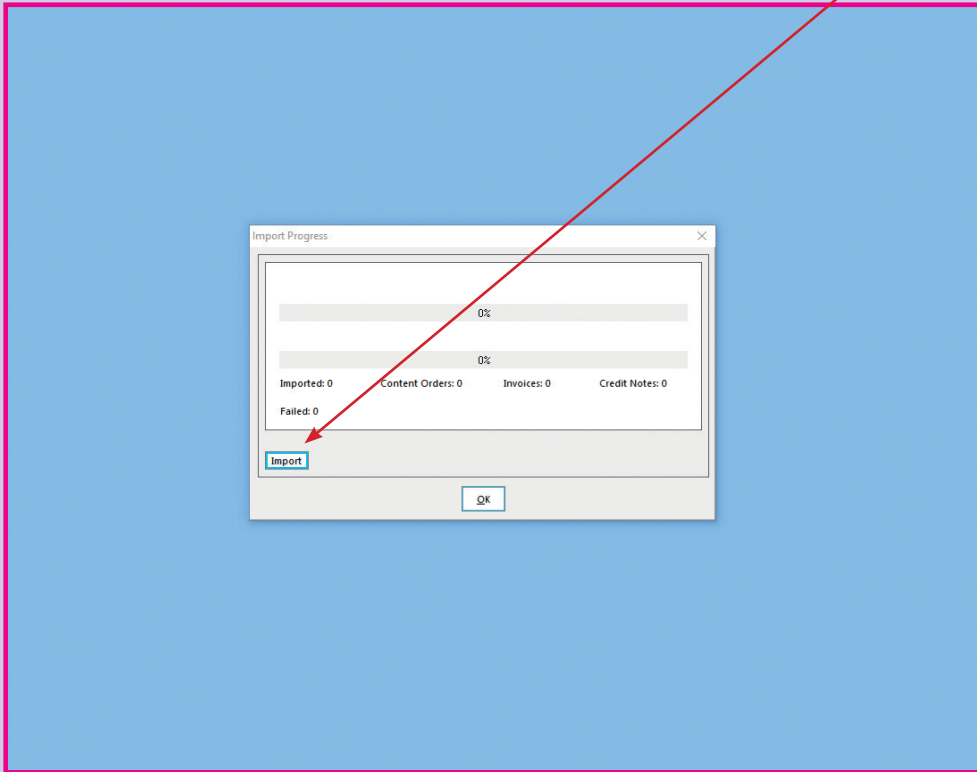
#### To Import Orders

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

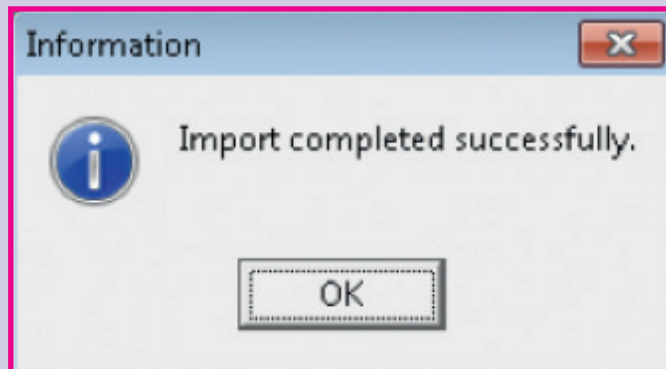


This will import any outstanding Orders / Invoices / Credit Notes.

**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 120 4520.

# 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.

**FHS Purchase Order Processing**

Book  Number  Pay From  Date

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

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

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

Contact Name:  Special Instructions:

**FHS Purchase Order Processing**

Looking for:  View:

Sequence:

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.

FMS 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

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.

FMS SQL Server Database - SIMS FMS Module - Green Abbey School (820 - 4321)

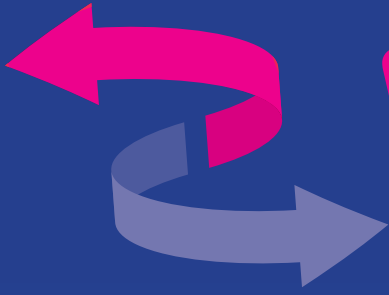
Focus > Accounts Payable > Invoice/Credit Note

FMS Invoice/Credit Note Processing

Looking for:    Status: All    Type: All

Sequence:    Inv./Credit Note No.    Date    Trans ID    Source    Supplier    Amount    Cross Year    Supplier    SRC

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		Philip Harris	XML
0094282539	16/11/2016	00010207	45.73	Unauthorised	BANK005206		Philip Harris	XML
0094282540	17/11/2016	00010208	521.99	Unauthorised	BANK005226		Philip Harris	XML
0094282561	08/12/2016	00010209	45.72	Unauthorised	BANK005227		Philip Harris	XML
0094442024	19/01/2017	00010211	104.74	Unauthorised	BANK005270		Philip Harris	XML
0094442035	23/01/2017	00010212	16.79	Unauthorised	BANK005274		Philip Harris	XML
0094442070	26/01/2017	00010214	11.99	Unauthorised	BANK005278		Philip Harris	XML



# WebFMS

## User Guide

