HOPE
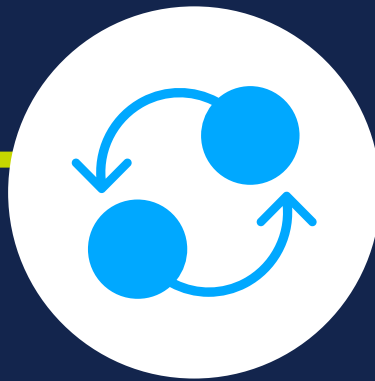## is (all) you need

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

SMART
Connect
user guide

ESS | SIMS

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.
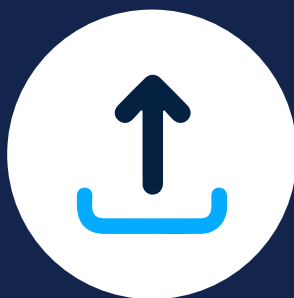
This new and efficient way of ordering is free to setup and you can benefit from;

• 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 20 20 55**, or email, **smartconnect@hope-education.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 Hope
2. Your Hope Education Account Number
3. Your Hope Education 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
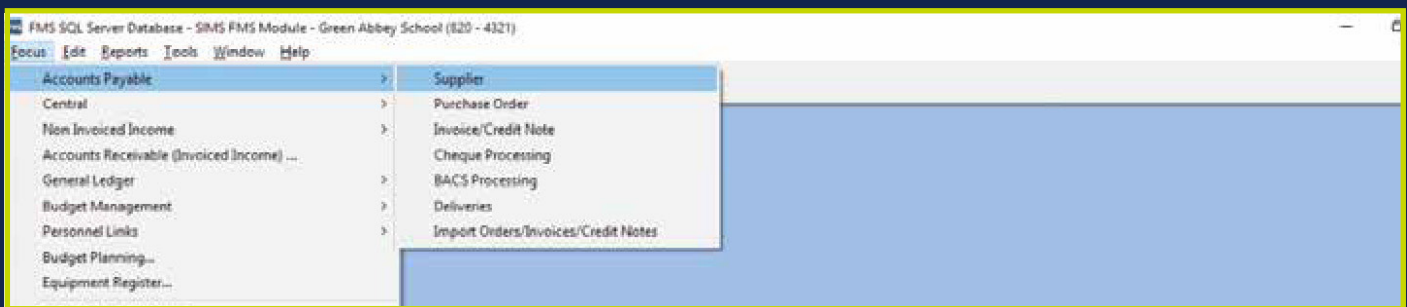
Setting up your SMART Connect

Section A: Basic Set-up

1. Add Hope Education as a supplier

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

1.2 Select the and enter the below details:
Hope Education
2 Gregory Street,
Hyde, Cheshire, SK14 4HR.
VAT Number – GB125688644
DUNS - 212786214
Telephone – 03451 20 20 55
Email Address – smartconnect@hope-education.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'
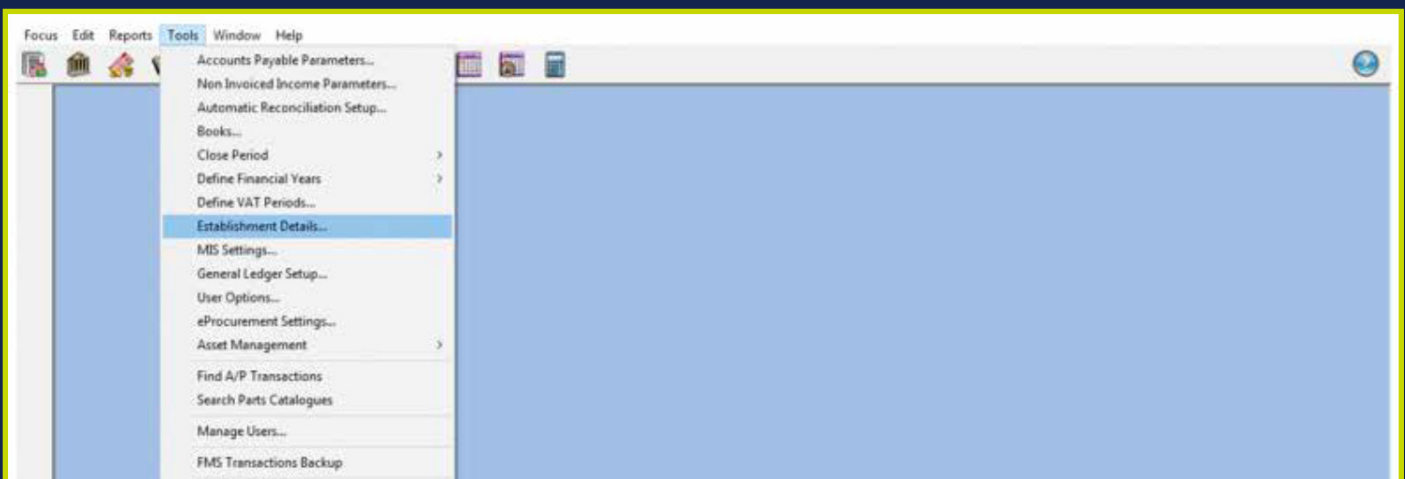
2.2 Check the details held on Tab 1 – Basic Details, including the DUNS number, and edit where necessary.

Select:
DUNS

Click:
Save

Enter:
Your
DUNS
Number

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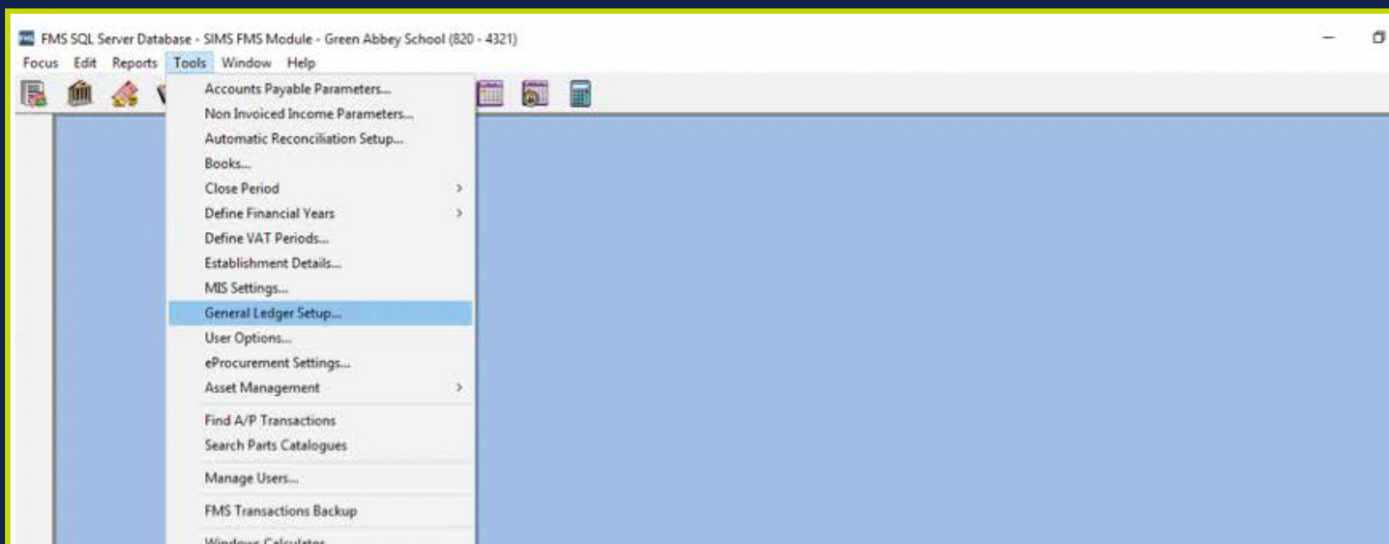
3.2 Proceed to Tab 9 – 'eProcurement Template' and add a new ledger by clicking the ➕

Click

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

Cost Centre Staff Development   Ledger Code Staff Travel

Save   Print   Cancel   Help

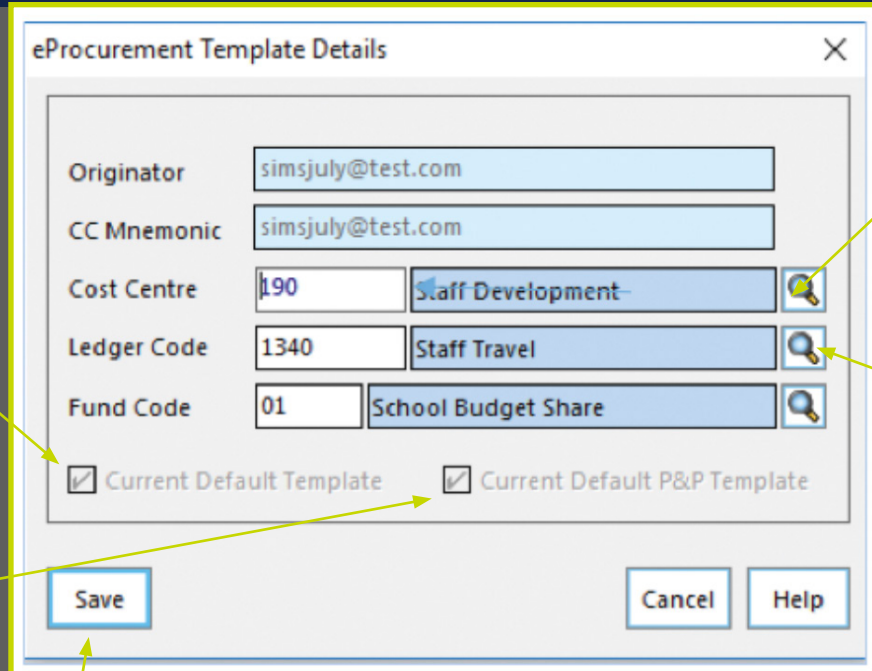3.3 Next complete the pop up box using the below information for both open fields:
• Originator and CC Mnemonic:
This is your email address that you use on the Hope Education website

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 thecategory 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.

eProcurement Template Details ✕

Click 🔍
and enter
your most
frequently
used Cost
Centre

Tick:
Current
Default
Template

Originator	simsjuly@test.com
CC Mnemonic	simsjuly@test.com
Cost Centre	190	Staff Development	🔍
Ledger Code	1340	Staff Travel	🔍
Fund Code	01	School Budget Share	🔍

☑ Current Default Template   ☑ Current Default P&P Template

Save   Cancel   Help

Tick: Current
Default P&P
Template

Click 🔍
and enter
your most
frequently
used
Ledger
Code

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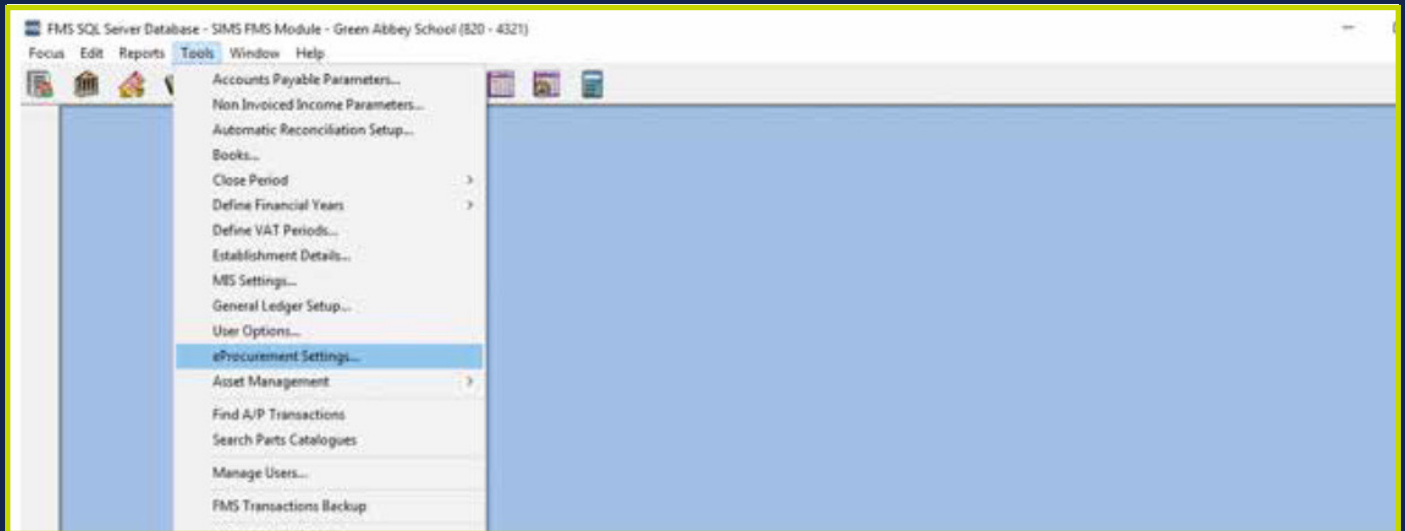
4.2 If this is editable select ➕ in the WEB SERVICES section to make an addition:

Select ➕

4.3 On the pop-up screen you will need to enter the responses below:

Select
Supplier

Enter: 1

Enter:
Hope Education
website
email address

Enter: Your
Hope Education
password

Service Details   ✕

Provider Type   ◇ Portal   ◉ Supplier

Name   Hope Education   🔍

URL   https://webfms.digital/hope.asmx

Priority   1   ☑ Active

User ID   username@example.com

Password   **********   Password duration (in days) 999

Save   Cancel   Help

Select:
Hope Education

Tick: Active

Click: Save   Enter: http://webfms.digital/hope.asmx   Enter: 999 days

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

WEB SERVICES

Name	URL	Active
Hope Education	https://webfms.digital/hope.asmx	☑

Test

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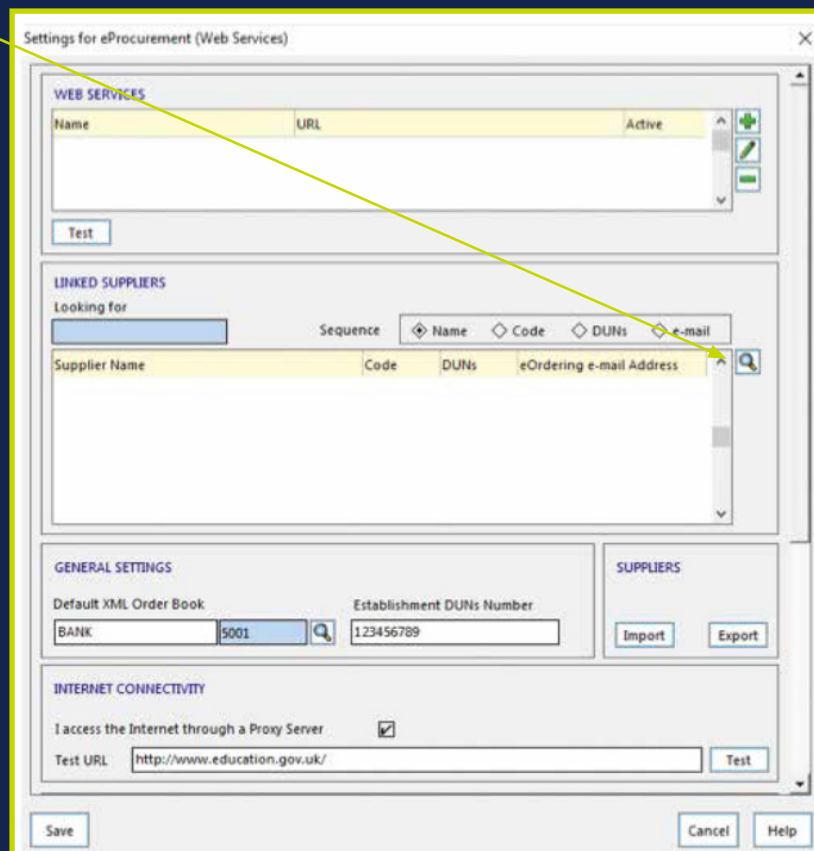
4.5 If the settings are correct the pop-up below will appear:

Information   ✕

ⓘ Web Service Connection OK

OK

In the unlikely event of this showing a failed message, please contact our Support Team on 03451 20 20 55.

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

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

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.

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 Hope to process Web Service Orders.

Go to Focus > Accounts Payable > Supplier
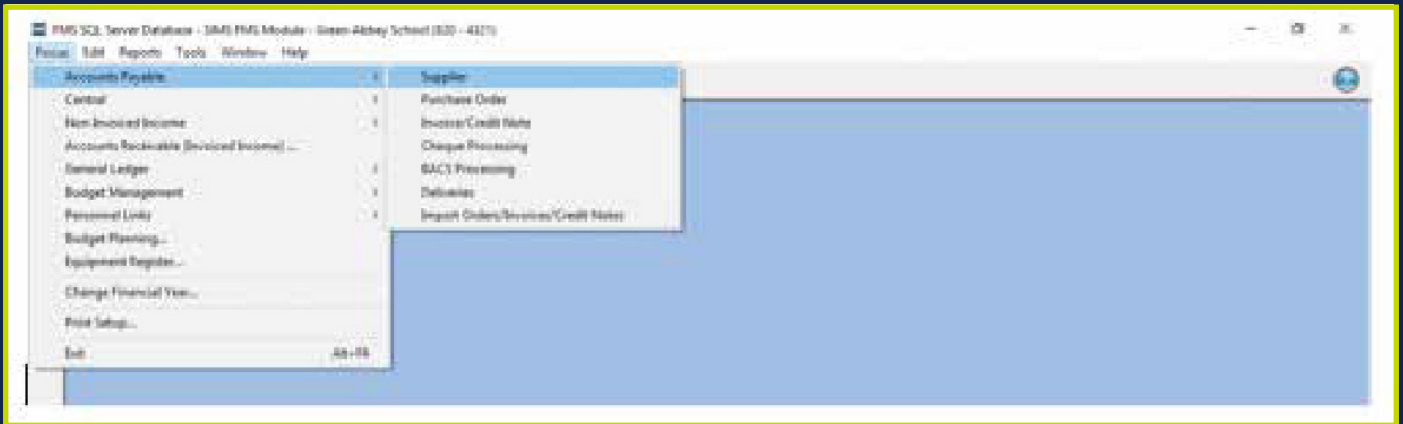
5.2 Find Hope Education and double click on the name.

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

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'.

Select (W)
for Web Services

5.5 In the unique identifier section select DUNS and enter Hope DUNS Number which is 212786214.

Select DUNS and enter 212786214

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

5.7 Save and close.

You are now ready to start ordering online via SIMS.

Section D: Ordering online

5. Shopping on www.hope-education.co.uk

5.1 Simply visit www.hope-education.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.
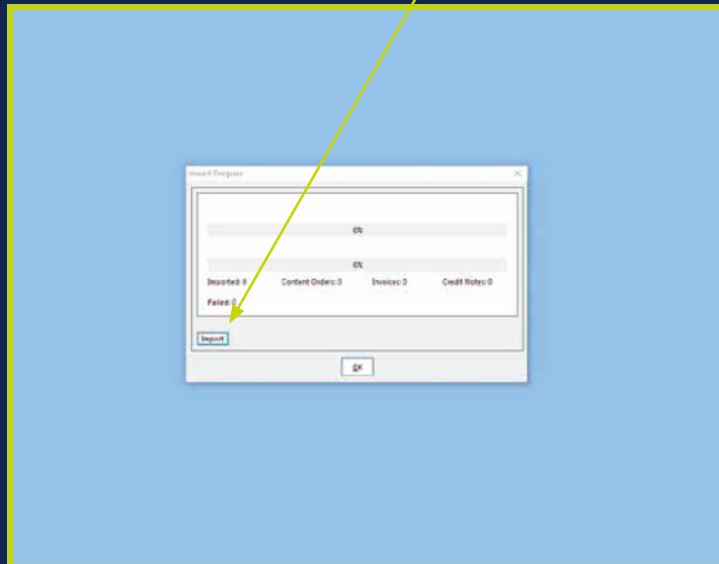
6. Import your order to SIMS

To Import Orders
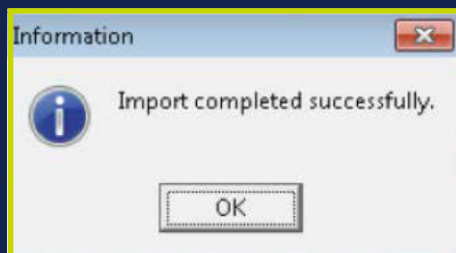6.1 Focus > Accounts Payable > Import Orders / Invoices / Credit Notes
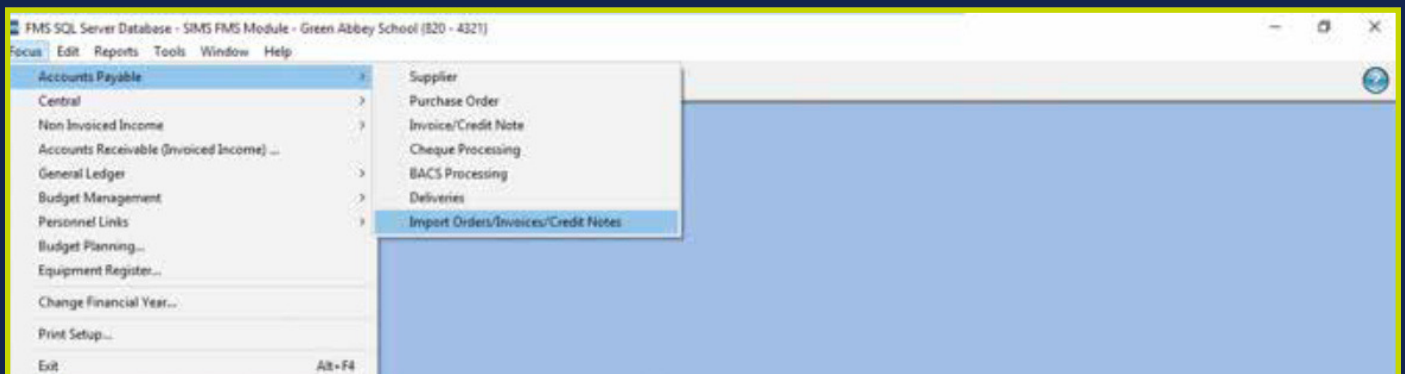
This will import any outstanding Orders / Invoices / Credit Notes.

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 20 20 55.

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.

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.

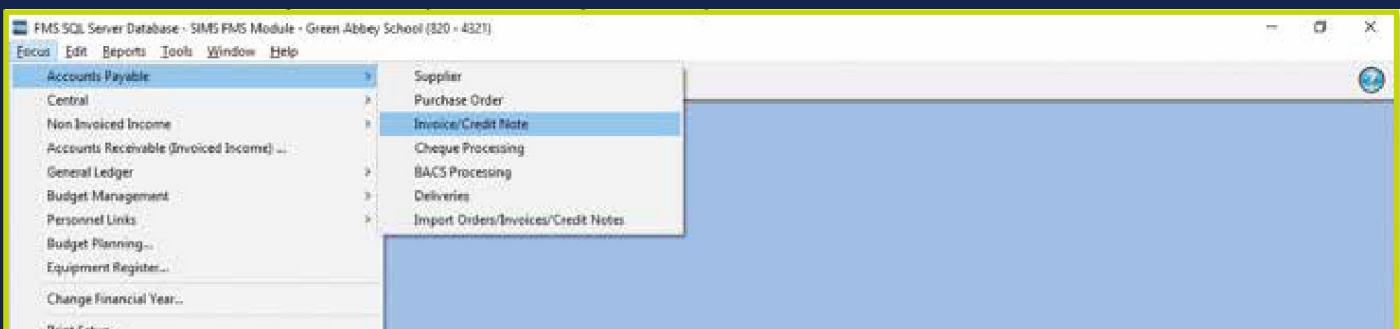The order method will be web service.

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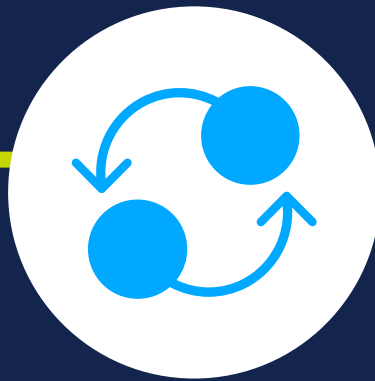Focus > Accounts Payable > Invoice / Credit Note and your invoice will be in the list.

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For help setting up call us on **03451 20 20 55**
or email **smartconnect@hope-education.co.uk**