

WebFMS

User Guide

Simple steps to save time and
improve your financial efficiency

- ✓ Link our website directly to your SIMS FMS
- ✓ No re-keying or duplicate entry
- ✓ Instant approval and ordering from inside SIMS FMS
- ✓ Eliminate manual errors
- ✓ Save time and money



Davies
SPORTS

Davies Sports 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 re-keying 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 4515, or email, webfms@daviessports.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 Davies Sports**
- 2. Your Davies Sports Account Number**
- 3. Your Davies Sports 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.

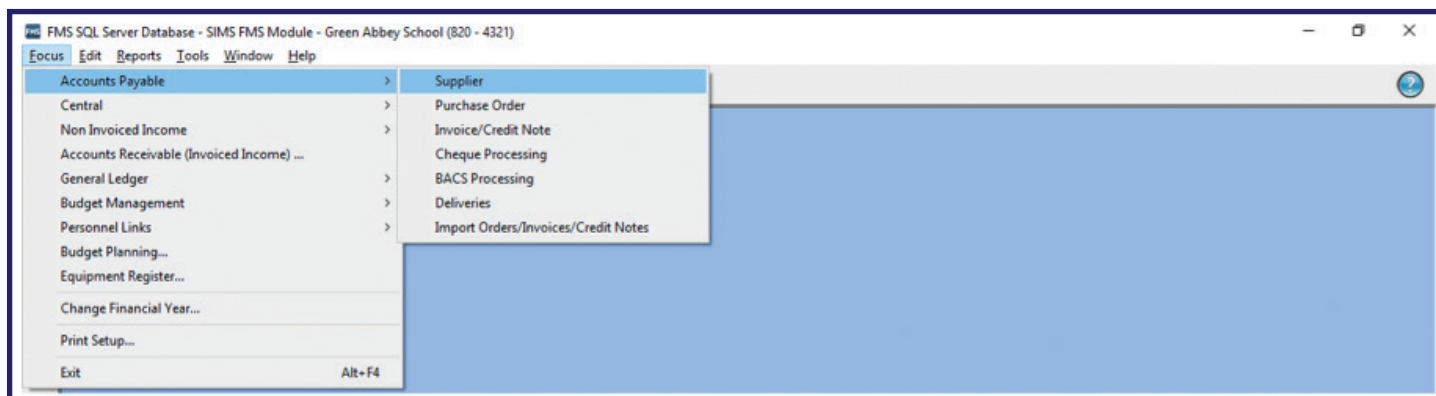
You can also find your DUNS number if you know your company registration number, by using the tool adjacent to Company Name search.

SETTING UP YOUR FMS

SECTION A: BASIC SET-UP

1. Add Davies Sports as a Supplier

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



1.2 Select the  and enter the below details:

Davies Sports

Leigh Fold,

Hyde,

Cheshire, SK14 4TH

VAT Number – GB125688644

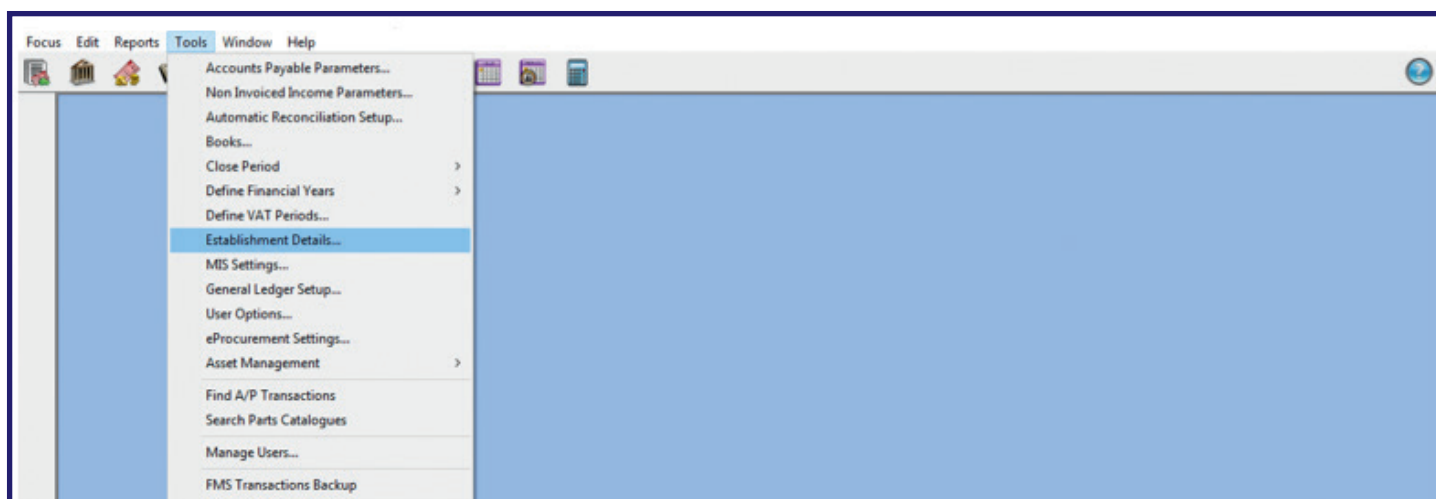
DUNS - 238521327

Telephone – 03451 120 4515

Email Address – orders@daviessports.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.

Establishment Details

5: Email Setup 6: Interfaces 7: Scanned Documents

1: Basic Details 2: Logo 3: System Parameters 4: eProcurement

Name:

Code: Companies House No.:

LA Code: VAT Registration No.:

Borough:

Payable to:

Address:

 Postcode:

Telephone: Fax:

e-mail:

Unique Identifier: ☐ n/a ☐ GLN ☒ DUNS DeMinimis Value:

Save **Cancel** **Help**

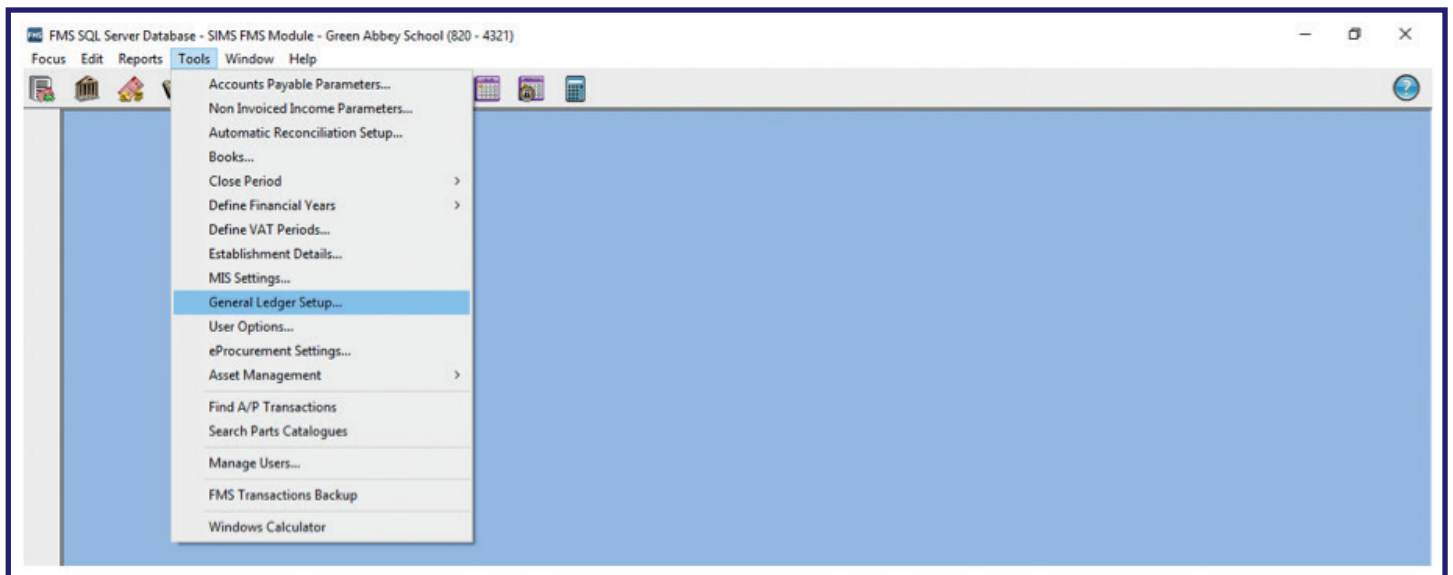
Select DUNS

Enter your DUNS Number

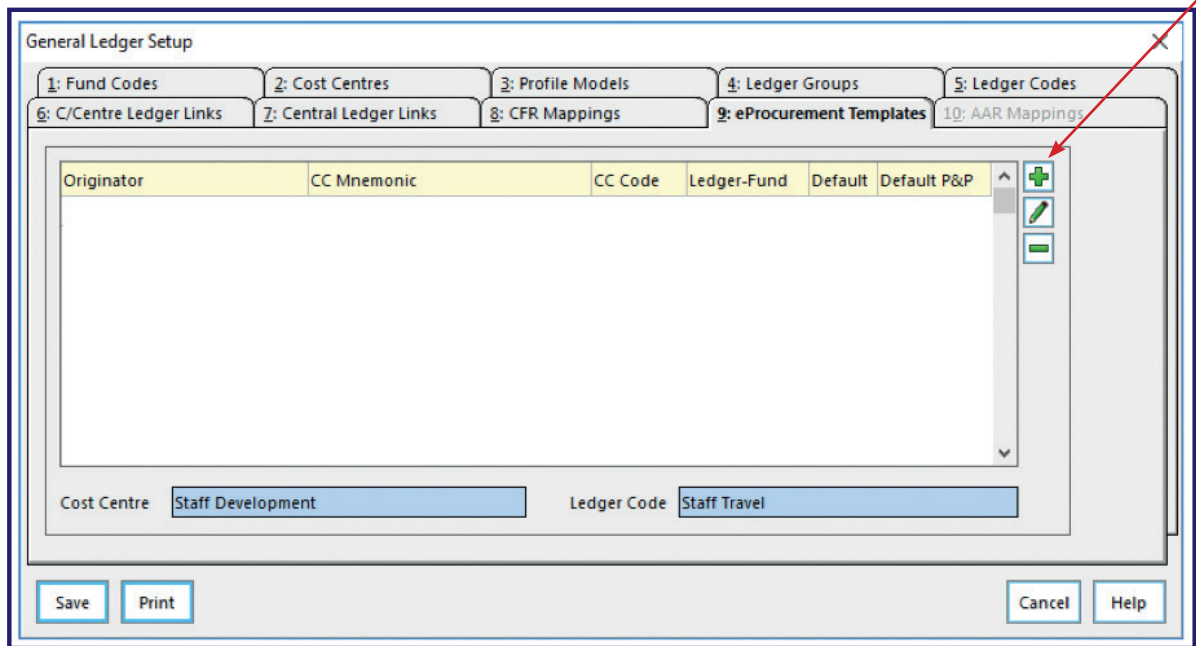
Save

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 

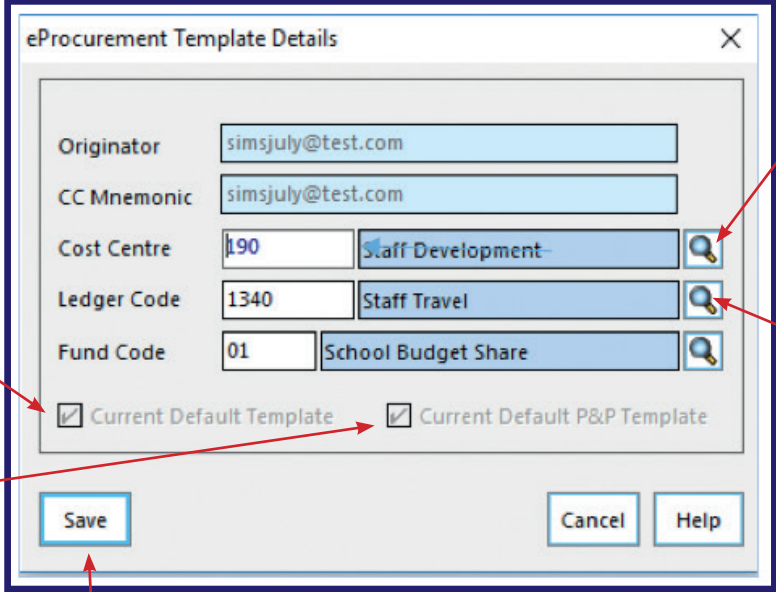


The 'General Ledger Setup' window shows a tabbed interface with tabs for Fund Codes, Cost Centres, Profile Models, Ledger Groups, Ledger Codes, C/Centre Ledger Links, Central Ledger Links, CFR Mappings, eProcurement Templates, and AAR Mappings. The 'eProcurement Templates' tab is active, displaying a table with columns: Originator, CC Mnemonic, CC Code, Ledger-Fund, Default, and Default P&P. A red arrow points to a plus icon in the top right corner of the table, with the label '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 Davies Sports 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.





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

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	

Below the fields are two checkboxes: ☒ Current Default Template and ☒ Current Default P&P Template. At the bottom are buttons for Save, Cancel, and Help.

Annotations with red arrows:

- 'Click  and enter your most frequently used Cost Centre' points to the magnifying glass icon next to the Cost Centre field.
- 'Click  and enter your most frequently used Ledger Code' points to the magnifying glass icon next to the Ledger Code field.
- 'Tick Current Default Template' points to the 'Current Default Template' checkbox.
- 'Tick Current Default P&P Template' points to the 'Current Default P&P Template' checkbox.
- 'Save' points to the 'Save' button.

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	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Cost Centre

Staff Development

Ledger Code

Staff Travel

Save

Print

Cancel

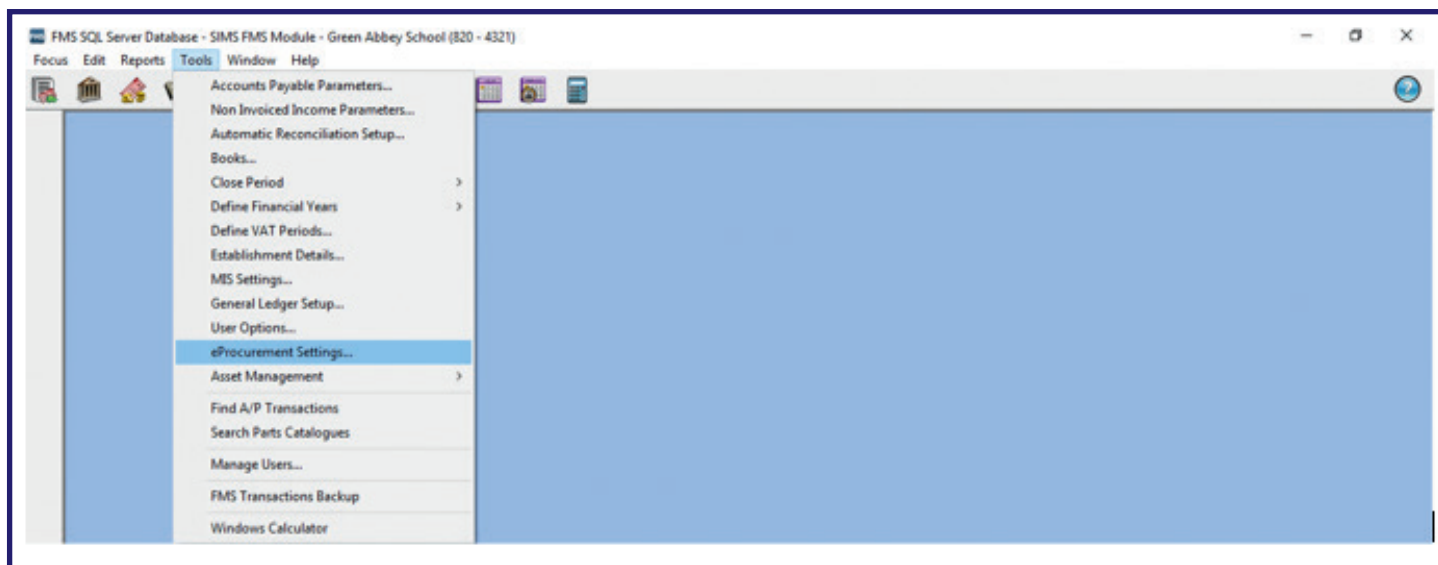
Help

3.6 Press save to complete.

SECTION B: EPROCUREMENT SET-UP

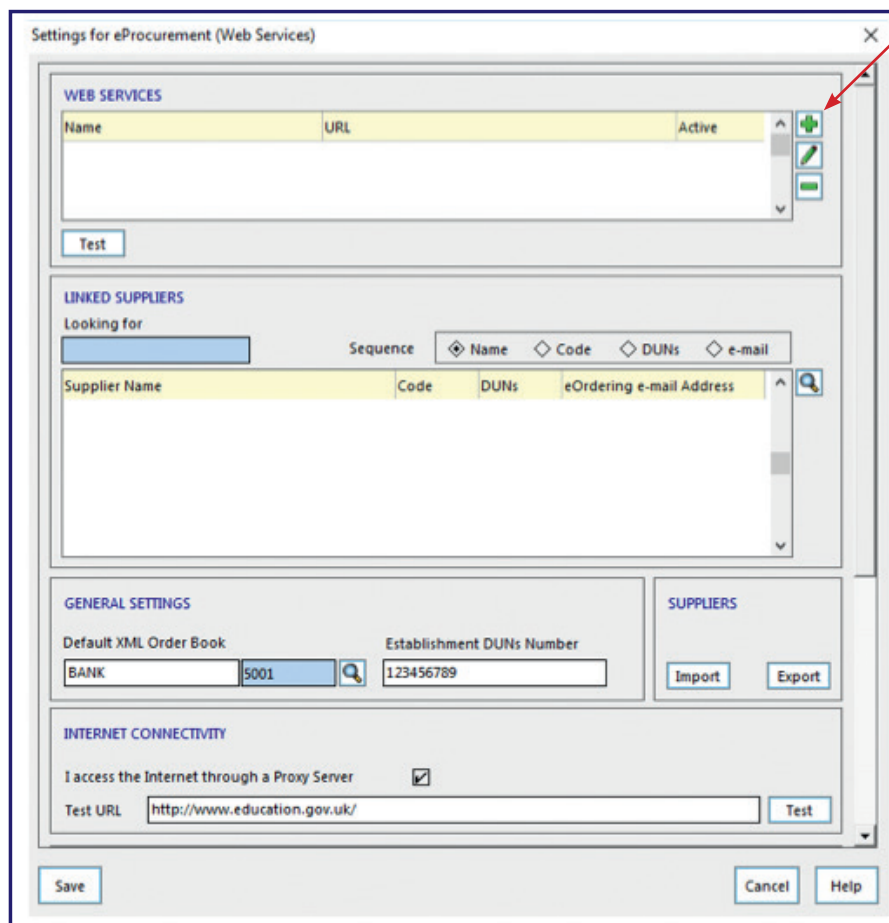
4.1 The next step is to enter the details to connect your SIMS FMS to our Davies Sports website.

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:

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 'Davies Sports'.
- URL:** Text field containing 'https://webfms.digital/davies.asmx'.
- Priority:** Text field containing '1'.
- User ID:** Text field containing 'username@example.co.uk'.
- Password:** Text field containing '*****'.
- Password duration (in days):** Text field containing '9999'.
- Active:** Check box with the label 'Active', which is checked.
- Buttons:** 'Save', 'Cancel', and 'Help'.

Annotations with red arrows point to the following elements:

- 'Enter 1' points to the Priority field.
- 'Enter your Davies Sports website email address' points to the User ID field.
- 'Enter your Davies Sports password' points to the Password field.
- 'Click Save' points to the Save button.
- 'Enter: https://webfms.digital/davies.asmx' points to the URL field.
- 'Enter 999 days' points to the Password duration field.
- 'Tick active' points to the Active check box.
- 'Select Supplier' points to the Supplier radio button.
- 'Select Davies Sports' points to the Name field.

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

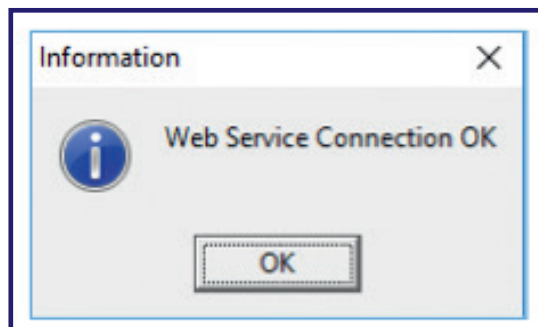
The 'WEB SERVICES' section displays a table with the following data:

Name	URL	Active
Davies Sports	https://webfms.digital/davies.asmx	<input checked="" type="checkbox"/>

Below the table is a 'Test' button. To the right of the table are three icons: a green plus sign, a green pencil, and a green minus sign.

Click Test

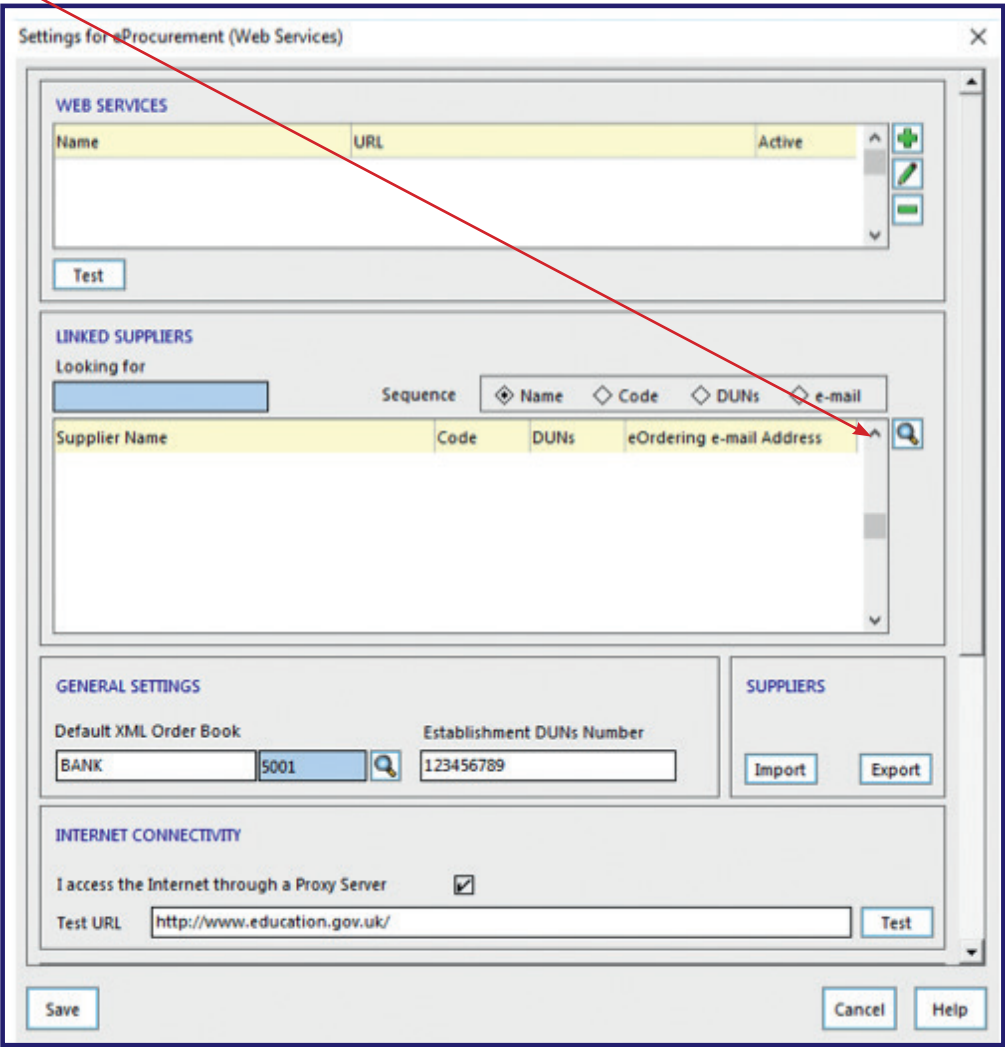
4.5 If the settings are correct the pop-up below will appear:



In the unlikely event of this showing a failed message, please contact our Support Team on 03451 120 4515.

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
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Test

LINKED SUPPLIERS

Looking for:

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

Supplier Name	Code	DUNs	eOrdering e-mail Address
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GENERAL SETTINGS

Default XML Order Book: Establishment DUNs Number:

SUPPLIERS

Import Export

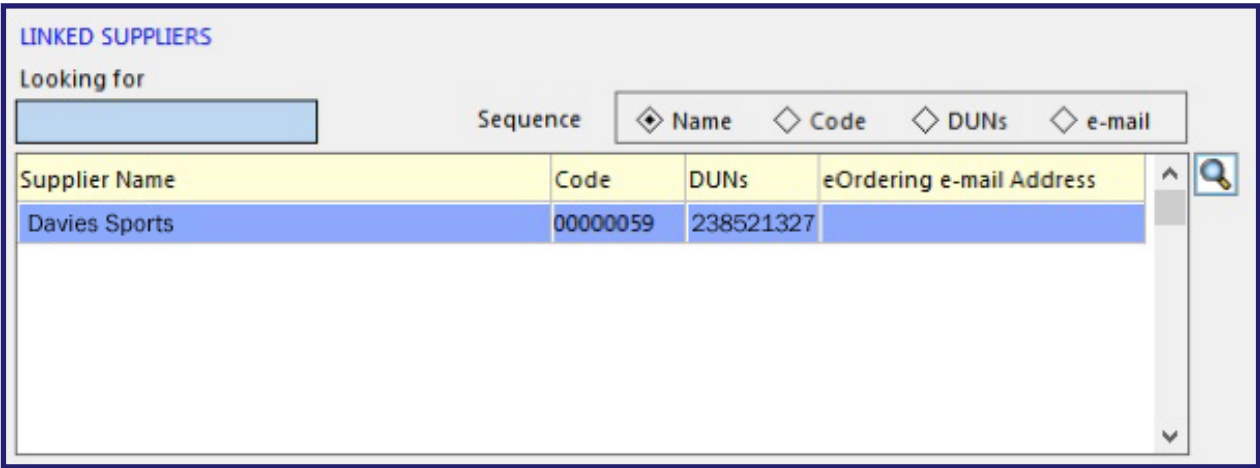
INTERNET CONNECTIVITY

I access the Internet through a Proxy Server ☒

Test URL: Test

Save Cancel Help

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



LINKED SUPPLIERS

Looking for:

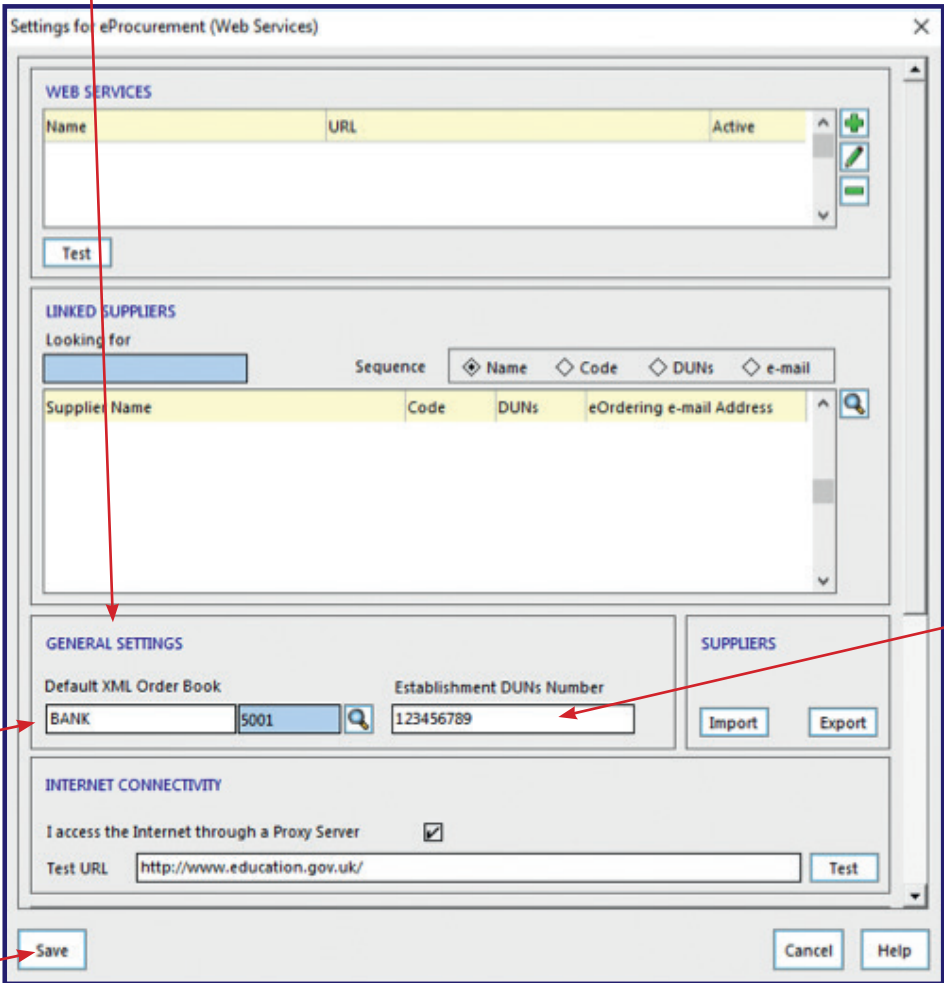
Sequence: ☒ Name ☐ Code ☐ DUNs ☐ e-mail

Supplier Name	Code	DUNs	eOrdering e-mail Address
Davies Sports	00000059	238521327	

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 page of 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

SUPPLIERS

Default XML Order Book

Establishment DUNS Number

BANK 5001 123456789

Import Export

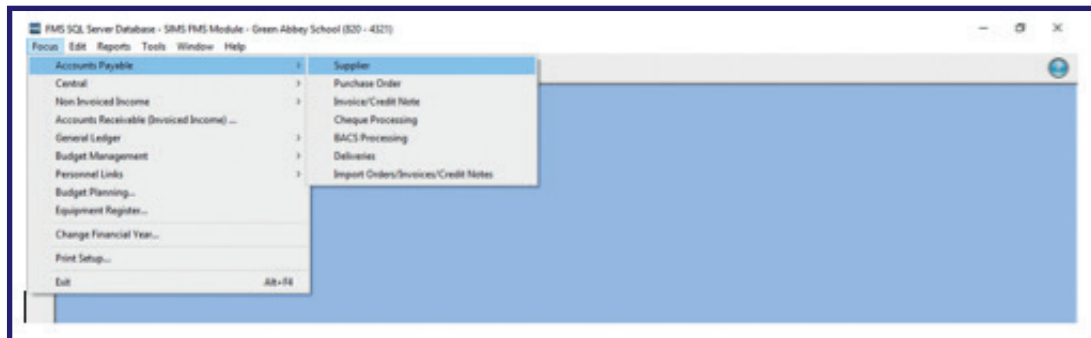
4.10 Check that your DUNS Number is in the 'Establishment DUNS Number' field too, if this information is missing, please add it.

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 Davies Sports to process Web Service Orders.
Go to Focus > Accounts Payable > Supplier



5.2 Find Davies Sports 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 'PHS Supplier Details' form, specifically the '1: Basic' tab. The form contains various fields for supplier information. A red arrow points from the text 'Enter your Account Number here' to the 'Account Number' field, which contains the value '3280000001'. Another red arrow points from the text 'Click the button' to a magnifying glass icon next to the 'Web Services' option in the 'Order Method' section.

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 features a table with two columns: 'Code' and 'Description'. The table lists five options: 'E' for 'EDI transfer', 'M' for 'Email PDF File', 'P' for 'Print', 'W' for 'Web Services', and 'X' for 'XML File'. The 'W' row is highlighted in blue. A red arrow points from the text 'Select (W) for Web Services' to the 'W' row in the table.

Select (W)
for Web
Services

5.5 In the unique identifier section select DUNS and enter the Davies Sports DUNS Number which is **238521327**.

Supplier Details

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

Name: Davies Sports Date Opened: 18/04/2017

LA Reference: VAT Registration No.: Balance: 0.00

Address: 2 Gregory Street
Hyde
Cheshire

Postcode: SK14 4GR

Contact: Telephone: Fax: e-mail: eOrdering e-mail:

Delivery Code: 3280000001 Delivery Terms: Account Number: 3280000001 Contract Number: Credit Terms: 0 days Credit Limit: 0.00 Min. Order: 0.00

Order Method: W Web Services Linked Web Service: In Use On Hold Service: Unique Identifier: n/a GLN DUNS 238521327

Select DUNS and enter 238521327

5.6 Then proceed to tab '5: eProcurement' and enter daviessports (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: daviessports

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.daviessports.co.uk




5.1 Simply visit www.daviessports.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

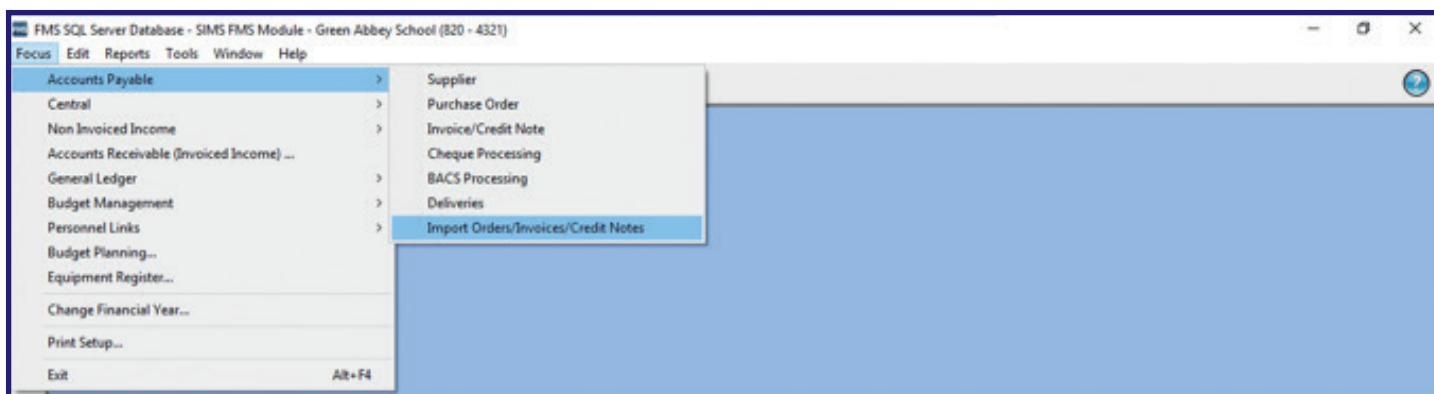
How to complete your order...

-  **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

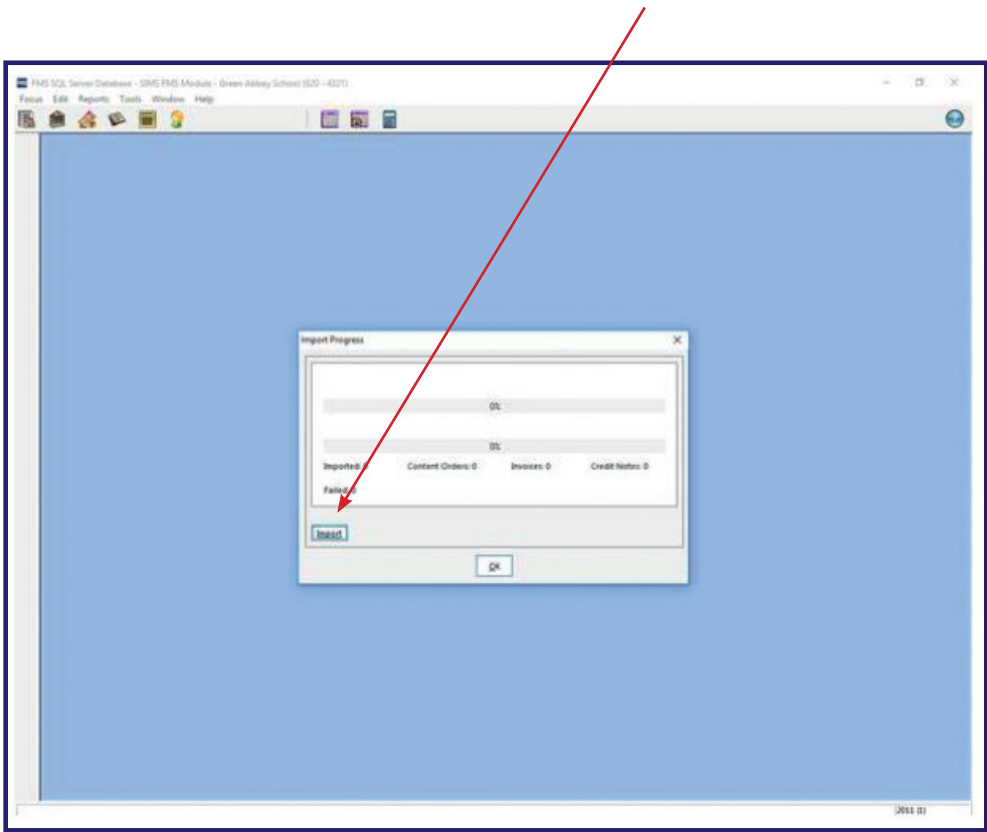
To Import Orders

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

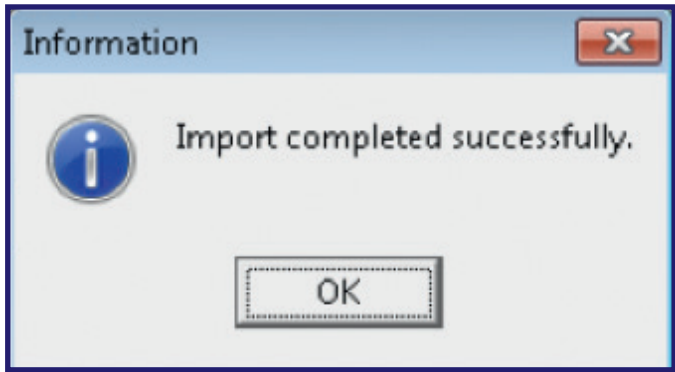


This will import any outstanding Orders / Invoices / Credit Notes

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 4515.

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.

FMS Purchase Order Processing

Book: Number: Pay From: Date:

Supplier:
 2 Gregory Street
 Hyde
 Cheshire
 SK14 4GR

Delivery Address:
 Monkmoor Road
 East Town
 Eastshire
 S12 5AP

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

Email: Order Method:

Contact Name: Special Instructions:

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

Supplier:
2 Gregory Street
Hyde
Cheshire
SK14 4GR

Delivery Address:

Status:

Source: First Output Method:

Delivery Instruction: ☐ On Hold

Email: Order Method:

Contact Name: Special Instructions:

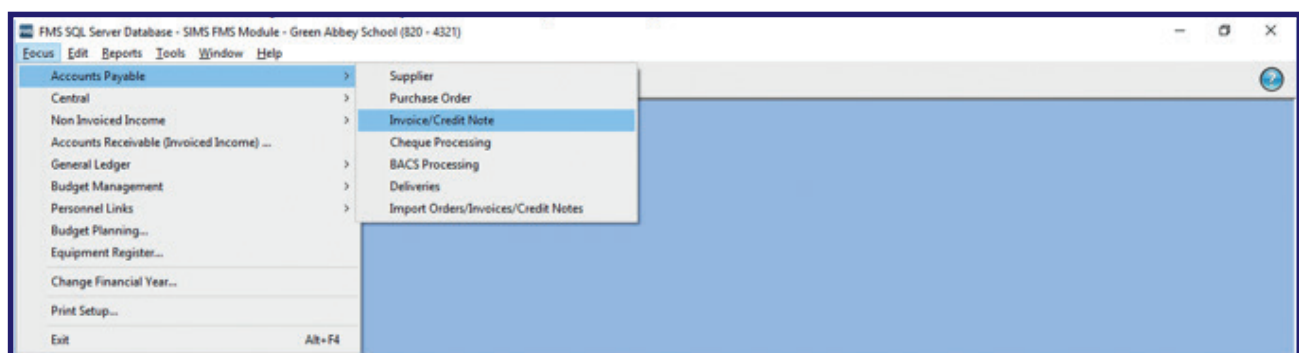
9. Invoices

Your invoice will be available for import into FMS via the eProcurement hub once you have received your order.

You will also be able to receive 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.

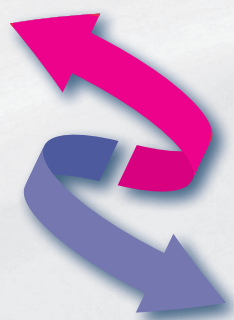


FMS Invoice/Credit Note Processing

Looking for: Status: Type:

Sequence:

Invoice/Credit Note No.	Invoice Date	Trans ID	Amount	Status	Order Number	Gross Year	Supplier	SRC
0094282538	16/11/2016	00010206	17.12	Unauthorised	BANK005204		Davies Sports	XML
0094282539	16/11/2016	00010207	45.73	Unauthorised	BANK005206		Davies Sports	XML
0094282540	17/11/2016	00010208	521.99	Unauthorised	BANK005226		Davies Sports	XML
0094282561	08/12/2016	00010209	45.72	Unauthorised	BANK005227		Davies Sports	XML
0094442024	19/01/2017	00010211	104.74	Unauthorised	BANK005270		Davies Sports	XML
0094442035	23/01/2017	00010212	16.79	Unauthorised	BANK005274		Davies Sports	XML
0094442070	26/01/2017	00010214	11.98	Unauthorised	BANK005278		Davies Sports	XML



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Simple steps
to save time
and **improve**
your financial
efficiency



Davies
SPORTS

visit **daviesports.co.uk** | call **0345 120 4515**