



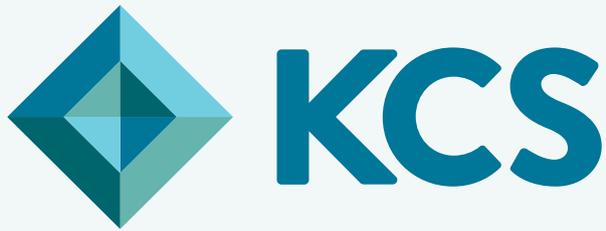
FMS EasyOrder Guide



2023

kcs.co.uk | 0808 281 9440

Welcome to



EasyOrder Guide

What Is EasyOrder?

If you want to make ordering quicker and easier, then we've got the answer. KCS EasyOrder lets you build orders on our website then import them straight into SIMS FMS for authorisation and processing. Easy!

Why choose EasyOrder?

- ▶ **No more order rekeying**
Orders are imported directly into SIMS FMS, which means no need for manual entry
- ▶ **Instant processing**
As soon as you approve and authorise an order, we process it
- ▶ **Live pricing and product information**
Our everyday low prices and up-to-date product details come straight from our website, meaning orders and invoices will always reconcile
- ▶ **No more catalogue updates**
Live pricing means no annual file uploads. Phew!
- ▶ **Access to all promotions and offers**
Special prices, limited time offers and any other discounts will be imported as part of your order, meaning you're always getting the best value
- ▶ **Manage the order process**
Keep track of your procurement process with managed order approval and tracking



How does **EasyOrder** work

Build and submit your
order online



Use the one-click
process to import your
order into SIMS FMS



Review and authorise
as normal...



...We'll do the rest!



Experience more
with **KCS**



Getting Started

If you're ready to take advantage of EasyOrder and want to integrate SIMS FMS with KCS, you'll just need to run through a few preliminary steps before we can start the setup process.

1

EasyOrder needs to use eProcurement Settings within SIMS FMS.

Check **Tools > eProcurement Settings** to see if it's greyed out. If it's active and you can click it, you're ok to move on.

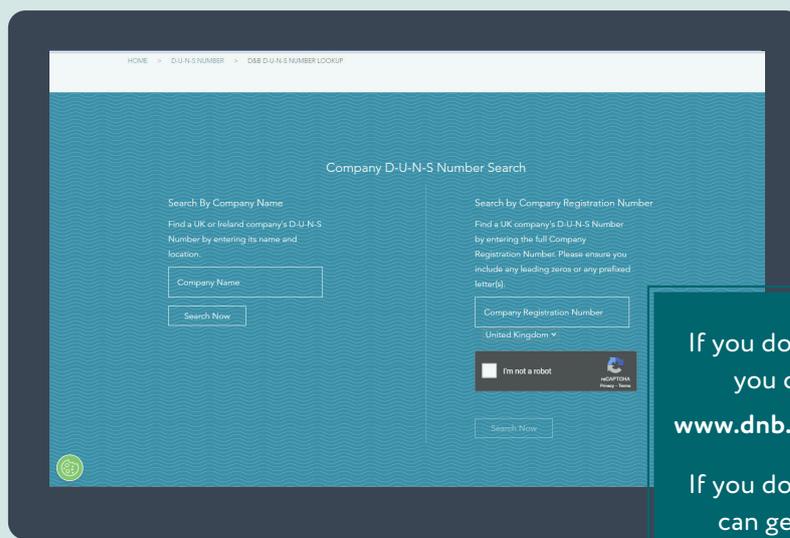
If it's greyed out then unfortunately it's disabled. Check you've got full (Administrator) access to make the required changes and change user if needed. If you think you should have access and it's still greyed out, you'll need to contact your SIMS representative or IT department who can enable it for you.

2

In order to create a unique connection between SIMS FMS and KCS you'll need to know your D-U-N-S number.

What's a D-U-N-S Number?

The **Data Universal Numbering System** or **D-U-N-S Number**, issued by Dun & Bradstreet, is a unique nine-digit code, issued to business entities or organisations to identify them on a location-specific basis



If you don't know your D-U-N-S number, you can find it quickly and easily:
www.dnb.co.uk/duns-number/lookup.html

If you don't have one, or can't find it, you can get one free. You'll just need to provide a few details about your location:
www.dnb.co.uk/duns-number/lookup-request-a-duns-number.html

3

Once you've established that eProcurement Settings are enabled and you've got your D-U-N-S Number to hand, you need to let us know you're ready to start using EasyOrder.

Fill out the online form with your details and we'll make the necessary changes to your account setup on our system: www.kcs.co.uk/fms-integration

We'll send you an email when you're ready to proceed and complete the setup process.

4

Finally, when you use EasyOrder you'll be using our website to build your orders, so will need your account set up for online ordering.

If you have your user details then move on, but if you're not registered yet, then don't panic! Simply visit our website and fill in the form:

www.kcs.co.uk/new-account-request

Once you've received your details (this could take 24 hours) and are logged in you can move on with the EasyOrder setup process

Experience more
with **KCS**

Setup: The basics

1

Check establishment details

First we need to make sure that your establishment details are correctly set up in SIMS FMS and include your D-U-N-S number:

1. Select **Tools > Establishment Details**
2. In the **Basic Details** tab check that your details are correct and that no information is missing
3. In the bottom left of the window is the **Unique Identifier** value. Make sure the '**DUNs**' option is selected and that your D-U-N-S number is present and correct. Click Save and close window

The screenshot shows the 'Establishment Details' window with the following data:

Name	Your Name		
Code	1234		
LA Code	123	VAT Registration No.	123-4567-89
Borough	Your Borough		
Payable to			
Address	123 Your Road		
	Your District		
	Your City		
	Your Borough	Postcode	TES 1ST
Telephone	01234 567890	Fax	09876 543210
e-mail	your_email@email.com		
Unique Identifier	n/a <input type="radio"/> GLN <input type="radio"/> DUNs <input checked="" type="radio"/> 123456789		
DeMinimis Value	1.00		

4. Click **Save** and close window

5. We also need to ensure your delivery address is set up correctly. Select **Tools > Accounts Payable Parameters**

6. Ensure you have the correct delivery address entered in the **Delivery Address** Text box

2

Set up a general ledger

Next we need to set up a general 'eProcurement' ledger template to allow EasyOrder to assign incoming orders a default cost centre and ledger code:

1. Select **Tools > General Ledger Setup**
2. In the **eProcurement Templates** tab click the + button in the top right hand corner to open the **eProcurement Template Details** window
3. Fill in the **Originator** field with your organisation's name
4. Enter **CC MN** into the **CC Mnemonic** field
5. Click the magnifying glass button alongside **Cost Centre** to open the **Cost Centres** window
6. Choose a cost centre from the list. This will simply act as a default, and the cost centre or ledger code applied to an order can be amended once it's been imported. Click on the code and then **Select**
7. Now we assign the default ledger code. Click the magnifying glass button alongside **Ledger Code** to open the **Ledger Codes** window
8. Choose a ledger code and click **Select**
9. Tick the **Set Default Template**
10. Tick the **Set Default P&P Template**

The screenshot shows the 'eProcurement Template Details' window. The fields are filled as follows:

Originator	Your Name
CC Mnemonic	CC MN
Cost Centre	300 Admin
Ledger Code	5009 Stationery - Admin
Fund Code	01 School Budget Share

Checkboxes: Set Default Template, Set Default P&P Template

Buttons: Save, Cancel, Help

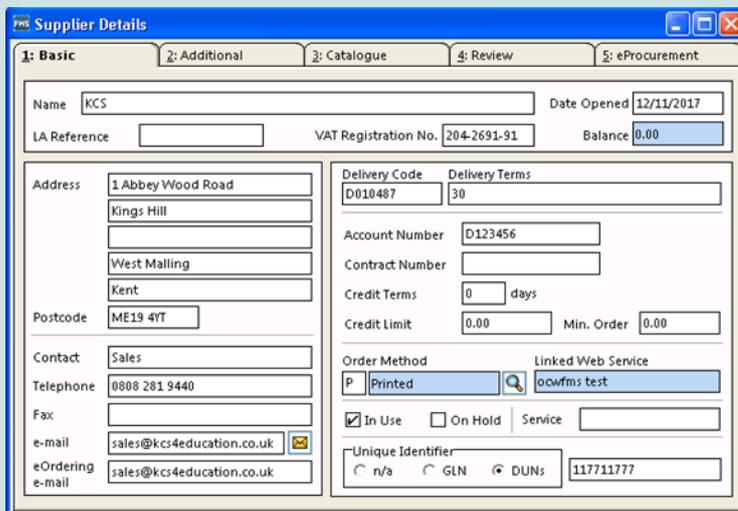
11. Click **Save** to save your **General Ledger** detail

3

Set up KCS as a supplier

Next we need to make sure KCS is set up as a supplier on your system. We may already exist, but you can still make sure that all details are correct:

1. In **Focus**, select **Accounts Payable > Supplier**
2. In the **Supplier Details** window check if there's a 'KCS' record listed. If so then double-click to open the **Supplier Details** window. We're often called Kent County Supplies...
(In rare cases, you may have multiple instances of KCS in your system. Choose one to act as your EasyOrder account and amend the name to make it easy to identify eg 'KCS Web') If there are no KCS records click the **+ (Add Record)** button at the top of the screen to open a blank record
3. If you're setting us up as new, enter the details as below, or if you're modifying an existing record, check that all fields are correct:
KCS,
CSG Global Education Ltd
Shepley Estate South
Audenshaw
Manchester
Greater Manchester
M34 5EX
VAT Registration No: 408 8459 25
DUNs: 117711777
Contact: Sales
Telephone: 0808 281 9440
Email: orders@kcs.co.uk
4. Enter your KCS account number/DPN (e.g. D123456) into the **Account Number** field



1: Basic		2: Additional		3: Catalogue		4: Review		5: eProcurement		
Name	KCS				Date Opened	12/11/2017				
LA Reference			VAT Registration No.	204-2691-91		Balance	0.00			
Address	1 Abbey Wood Road Kings Hill West Malling Kent				Delivery Code	D010487				
Postcode	ME19 4YT				Delivery Terms	30				
Contact	Sales				Account Number	D123456				
Telephone	0808 281 9440				Contract Number					
Fax					Credit Terms	0 days				
e-mail	sales@kcs4education.co.uk				Credit Limit	0.00		Min. Order	0.00	
eOrdering e-mail	sales@kcs4education.co.uk				Order Method	P Printed				
					Linked Web Service	powfms test				
					<input checked="" type="checkbox"/> In Use	<input type="checkbox"/> On Hold		Service		
					Unique Identifier	<input type="radio"/> n/a <input type="radio"/> GLN <input checked="" type="radio"/> DUNs: 117711777				

5. Click the Save Records button at the top of the screen

Setup eProcurement settings

1

Set up a Web Service

Now we need to create the settings which will link SIMS FMS and KCS EasyOrder:

1. Select Tools > eProcurement Settings to open Settings for eProcurement (Web Services)
2. Add a new entry to **Web Services** by clicking the + button in the top right hand side of the window

3. The Service Details window will open. Enter the details EXACTLY as below:

Provider Type: Portal

Name: KCS4Education

URL: <https://eapi.cs ltd.org.uk/EProcurementService.aspx>

Priority: 1

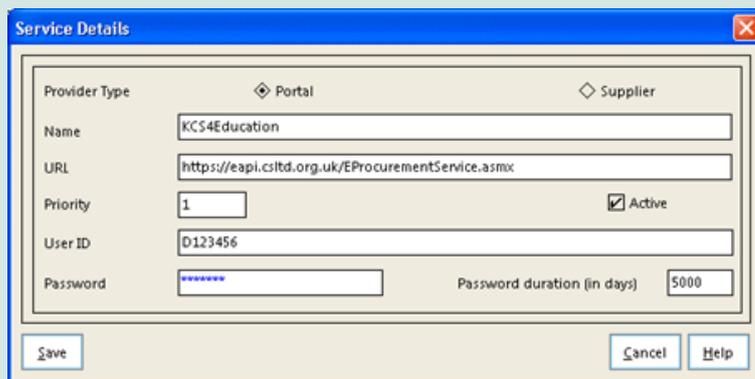
Active: (Tick)

Password duration (in days): 5000

User ID: your KCS account number/DPN (eg D123456)

Password: your KCS account number/DPN (eg D123456)

Ensure that these values have been entered correctly and that there are no blank spaces present eg at the end of the URL field. Any incorrect entries will cause your integration to fail



The screenshot shows a 'Service Details' dialog box with the following fields and values:

- Provider Type: Portal
- Name: KCS4Education
- URL: <https://eapi.cs ltd.org.uk/EProcurementService.aspx>
- Priority: 1
- Active:
- User ID: D123456
- Password: [masked]
- Password duration (in days): 5000

Buttons at the bottom: Save, Cancel, Help

4. Click **Save** and close the **Service Details** window. You'll see the new service under **Web Services**
5. Test the connection by clicking the Test button. If you're connecting ok you'll see a '**Web Service Connection OK**' message.

If you don't receive this message, enter the details again to make sure they're correct or contact customer support on **0808 281 9440**

2

Link Web Service And Supplier

Next we assign the new web service to the KCS supplier account:

1. On the right hand side of the window, alongside **Linked Suppliers**, click the magnifying glass button to open the **Choose Suppliers** window
2. Select the **KCS** record (the 'Web' record if there were multiple instances) and then click the **Choose** button to move KCS down into the **Linked Suppliers** display
3. Click **Update** and check that the account appears below **Linked Supplier**
4. In the **General Settings** section, alongside **Default XML Order Book**, click the magnifying glass button and select an Order Book. If you want to use your current **order book** to enable sequential numbering, select it here
5. In **Establishment DUNs Number**, enter your D-U-N-S number

See Notes/
Troubleshooting at the
end of this guide for help
setting up an Order Book
if you don't have one

The screenshot shows a software interface with three main sections:

- LINKED SUPPLIERS**: A search bar with 'Looking for' and a dropdown menu. Below it is a table with columns: Supplier Name, Code, DUNs, and eOrdering e-mail Address. The table contains one row: KCS, 00000057, 117711777.
- GENERAL SETTINGS**: Two input fields. 'Default XML Order Book' has 'KCSW' and '7001'. 'Establishment DUNs Number' has '123456789'. There are 'Import' and 'Export' buttons.
- INTERNET CONNECTIVITY**: A checkbox 'I access the Internet through a Proxy Server' is checked. Below it is a 'Test URL' field with 'http://www.education.gov.uk/' and a 'Test' button.

Under Internet
Connectivity, if your
establishment uses a
Proxy Server to connect
to the Internet, tick the
'I access the Internet
through a Proxy Server'
box and fill in the details.
If you don't use a Proxy
Server then leave this
unticked

6. Test the connection by clicking the **Test** button.
If you're connecting ok you'll see a '**Web Service Connection OK**' message.

If you don't receive
this message, enter the
details again to make sure
they're correct or contact
customer support on
0808 281 9440

3

Complete supplier setup

The final step is to enable KCS to process your orders through the EasyOrder system:

1. In Focus, select Accounts Payable > Supplier
2. In the Supplier Details window double-click the KCS (Web) record. We need to complete the remaining fields in the Basic tab
3. Click the magnifying glass next to Order Method and select W - Web Services
4. Make sure DUNS is selected with the KCS D-U-N-S number entered: 117711777
5. Next, select Tab 5: eProcurement and enter the details below:
Purchasing Web Address: <https://eapi.cs ltd.org.uk/EProcurementService.aspx>
e-mail Address Source 1: **test@test.com**
e-mail Address Destination: **test@test.com**
XML Supplier Reference: **ref1**

The screenshot shows a software window titled "Supplier Details" with five tabs: Basic, Additional, Catalogue, Review, and eProcurement. The eProcurement tab is active. Under the "BASIC" section, there are five input fields: "Purchasing Web Address" (containing "https://eapi.cs ltd.org.uk/EProcurementService.aspx"), "e-mail Address Source 1" (containing "test@test.com"), "e-mail Address Source 2" (empty), "e-mail Address Destination" (containing "test@test.com"), and "XML Supplier Reference" (containing "ref1"). Below this is an "OPTIONS" section with a checkbox "Copy XML File to e-mail Address" and an empty text field. At the bottom is an "ENCRYPTION" section with a checkbox "Use File Encryption for Sending and Receiving" and two buttons: "Import Public Key" and "View/Set Public Key".

Ensure that these values have been entered correctly and that there are no blank spaces present (eg at the end of the Web Address field). Any incorrect entries will cause your integration to fail

6. Click the **Save Records** button at the top of the screen and close the **Supplier Details** window

Experience more
with **KCS**

Setup: Placing a test order

1

Place your order on the KCS website

1. Open your default web browser and enter www.kcs.co.uk. The KCS homepage will load
2. Click '**Log In**' in the top right hand corner and enter your KCS user name and password
3. Once logged in simply search for the products you need and add them to your basket
4. Once you've completed your order go to the checkout page, review your order and click the '**Submit Your Order**' button
5. The order is now sent from the website into your SIMS FMS system and will then wait to be imported. **This process can take up to 5 minutes**

2

Import your order in SIMS FMS

1. To import the order, go into SIMS FMS. In Focus, select Accounts Payable > Import Orders/Invoices/Credit Note
2. The Import Progress window will open. Click the Import button
3. The order will be imported and a message box will appear to tell you that this has been successful

If you receive an error message and your order doesn't import as expected, please check the previous steps have been completed correctly or contact customer support on
0808 281 9440

3

Now imported, the order needs to be authorised

1. In Focus, select Accounts Payable > Purchase Order
2. In the Purchase Order Processing window, orders that have been authorised and sent to KCS will appear as Printed in the Order Status column.
Orders that have not been authorised appear as Not Yet Authorised
3. Double click the Not Yet Authorised order to open the Purchase Order Processing window
4. At this point, changes can be made: items can be deleted (but NOT added) and Cost Centre, Ledger, Fund and VAT codes can be changed
5. Double click a product and check that VAT code has defaulted to the correct value (tax code Y is correct for KCS in Kent)
6. Depending on the process set up by your establishment, you may require a pre-authorisation print of the order: click the Print button at the top of the screen. This printout will be labeled Not Yet Authorised. To authorise the order, click Authorise Current Order on the top bar
7. Finally, to send the order to KCS, press the Print Order button

Congratulations, you're connected!

Remember:

the next day delivery cut-off time of 12:00 applies only to orders that have entered the KCS ordering system. Until they have been authorised and Print has been pressed on your SIMS FMS system, they will not be received and processed

Notes/ Troubleshooting

1

Remember, to make changes to your system you will need to be running SIMS FMS as an administrator

2

Once you're integrated the '**Print**' button in SIMS FMS will send orders through to KCS, including all orders created directly within the system! To avoid sending orders through that you don't want us to process, please create orders via the website only

3

If your establishment use a **proxy server** to connect to the internet, you'll need to know the following settings to allow SIMS FMS and EasyOrder to connect:

Address of the Proxy e.g. http//ProxyServer:123

Username, Password and Domain

(Your IT department will be able to confirm these details)

4

If you're a **regular SIMS FMS user** then you should have Order Books set up already, but if you need to run through this process or want to check everything's set up ok, then follow these steps right at the start of the integration process:

1. Select **Tools > Books**

2. In the **Define Books** window you'll see existing the **Order Books** listed

3. Check that a book with the prefix **BANK**, a **Start** number of **4001** and an **End** number of **5000** has previously been set up. If not, you'll need to create one:

Click the + button in the **Define Books** window and enter the details as below:

Prefix: **BANK**

Start Number: **4001**

End Number: **5000**

Payment Source: **Bank Account**

5

Click **Save** to close the **Add Order Book** window and **Save** again on the **Define Books** window