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## HBS USER GUIDE FOR SIMS/FMS TRANSACTIONS

This guide is intended to show you how to set up FMS/SIMS and import orders created on the HBS website.

To proceed, you will need the following information:

- Your email address that you use to log onto the HBS website
- Your account password that you use to log onto the HBS website
- Your HBS account number that is associated to your account on the HBS website, eg ESANC001. If you are unsure of this, please contact your Account Manager or speak to Customer Services (0800 980 0192)
- Your school/company DUNS number

### FIND YOUR DUNS NUMBER

If you are unaware what your school's DUNS number is, then you can find it using this tool provided by DUN and Bradstreet.  
<https://www.dnb.co.uk/duns-number/lookup.html>

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-U-N-S Number by entering the full Company Registration Number. Please ensure you include any leading zeros or any prefixed letter(s).

Company Registration Number

United Kingdom

I'm not a robot

reCAPTCHA  
Privacy Terms

Search Now

Enter your school/company name into the **Search By Company Name** search box. A pop-up screen will then appear where you can add your postcode and town to help refine the search.

If you know your school/company registration number, you can enter this into the **Search By Company Registration Number** search box.

## SET UP WEBFLOW ACCOUNT

### Edit Account Information

Logon to the website and navigate to **My Account > Edit Account Info**

1. Enter your username (this will be the email address you use to log into the website).
2. Enter your School/Establishment's DUNS Number (*instructions on how to find this are above*).
3. Once details are entered – click SAVE.
4. Webflow is now set up to receive orders from FMS. The following sections now take you through how to set up FMS and connect to Webflow.

- My Dashboard
- My Online Orders
- My Invoices
- My Purchases by Product Category
- My Shopping Lists
- Favourites
- Address Book
- Edit Account Info**
- Stored Payment Methods
- My Product Reviews
- Subscriptions
- Shared Shopping Carts
- Form Submissions
- Manage Subaccounts
- Orders Waiting For Approval
- Logout

## Edit Account Information

### Edit Account Info

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**First Name \***

**Last Name \***

WebFlow Connect - **Inactive**

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**WebFlow Username (please use your HBS customer account email)**

**WebFlow DUNS No**

Change Email

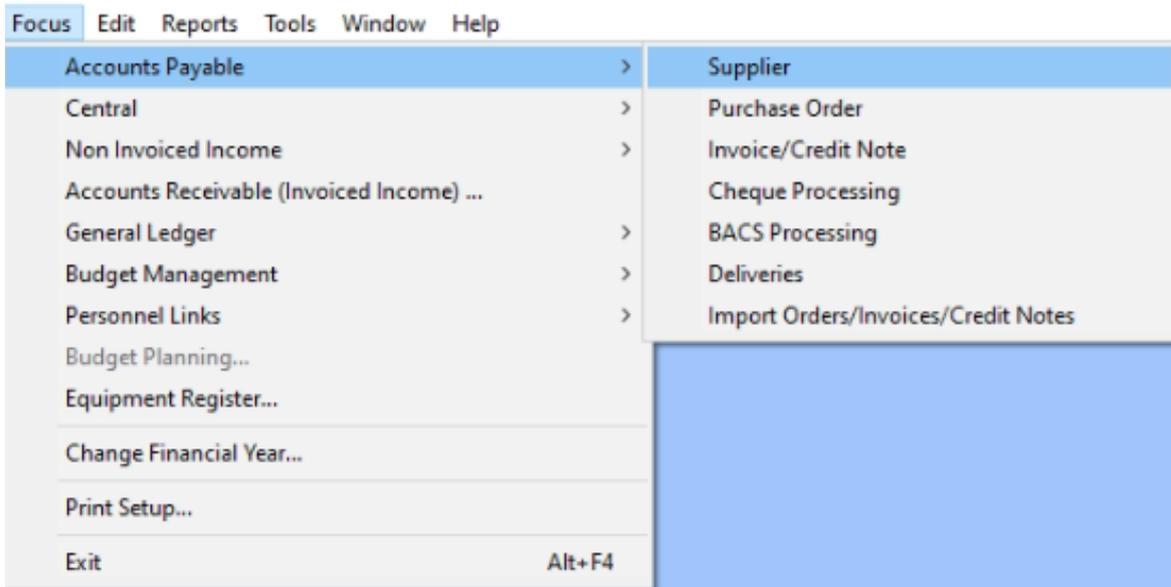
Change Password

## SET UP FMS

### Add HBS as a Supplier

If HBS is not already set as a supplier, please follow the instructions below:

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



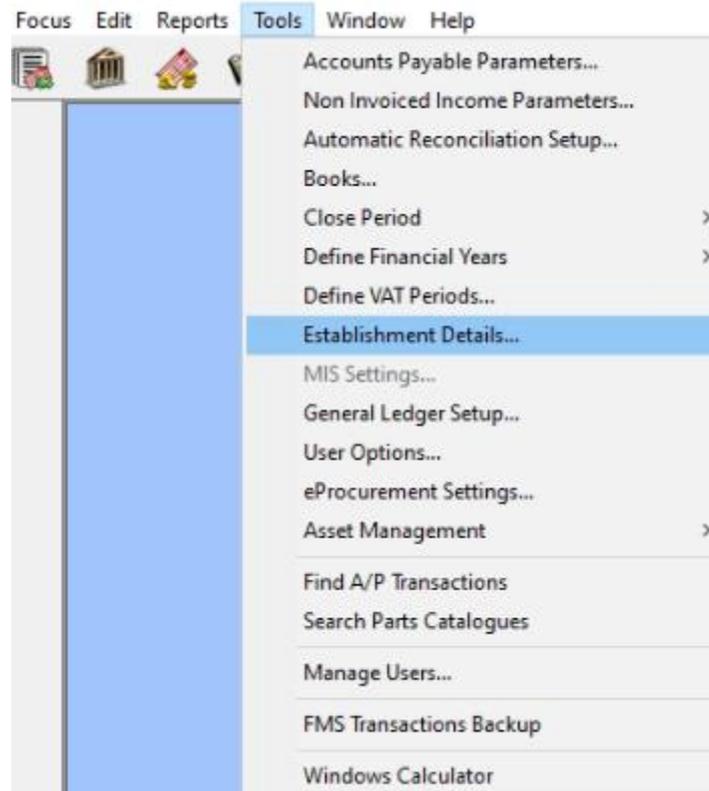
2. If you need to create HBS as a supplier, press the  on the top menu bar and enter the following details:

**HBS Ltd**  
**Unit 8 Easter Park**  
**Colchester**  
**Essex**  
**CO5 5WY**  
**VAT Number: 103 7162 52**  
**DUNS Number: 217024993**  
**Telephone: 0800 9800192**  
**Email@ [online@hbsgroup.net](mailto:online@hbsgroup.net)**

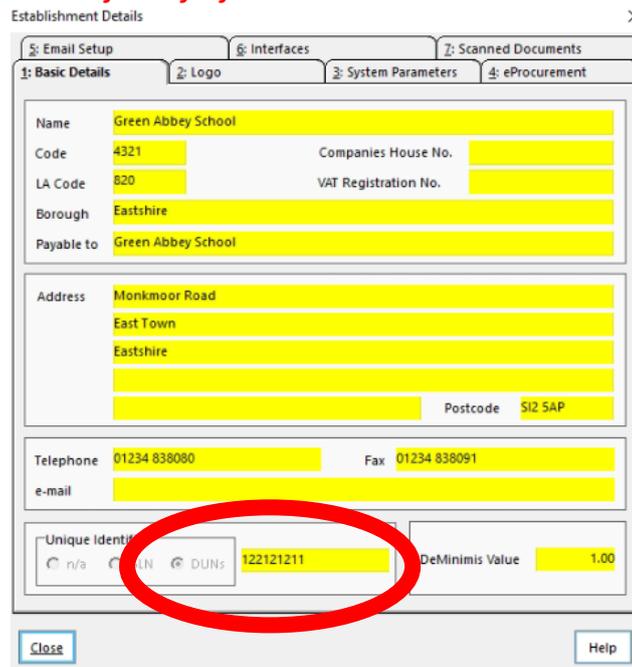
## Check your details

Make sure that your details are correct and that your DUNS number is entered correctly

1. Go to **Tools>Establishment Details**



2. Check the details recorded on **Tab 1 – Basic Details**. Double check that the unique identifier is set to DUNS and your DUNS number is correct. *The DUNS number is used to link between HBS and yourself, so it needs to be correct, otherwise the flow of information will not occur.*



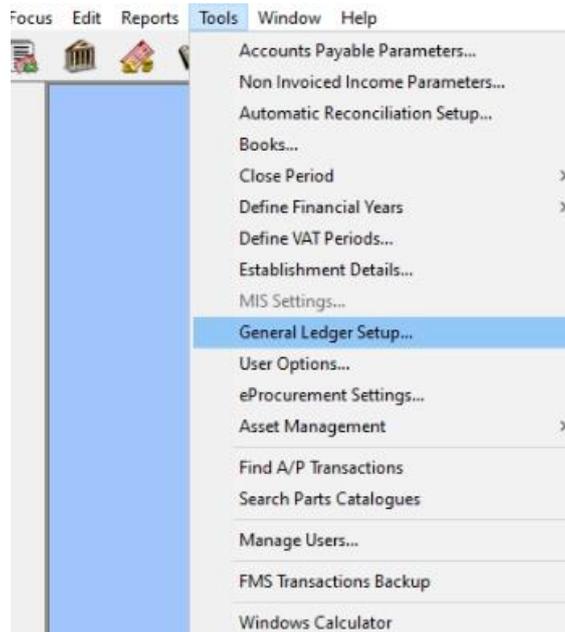
The screenshot shows the 'Establishment Details' form with the 'Basic Details' tab selected. The form contains the following information:

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	SI2 5AP
Telephone	01234 838080	Fax	01234 838091
e-mail			
Unique Identifier	<input type="radio"/> n/a <input type="radio"/> LN <input checked="" type="radio"/> DUNS <input type="text" value="122121211"/>		
DeMinimis Value	1.00		

The 'Unique Identifier' section is circled in red, highlighting the 'DUNS' radio button and the text input field containing the number '122121211'.

## General Ledger

To ensure that imported orders are assigned to a cost centre go to **Tools > General Ledger Setup**.



1. Select **Tab 9 – eProcurement Templates**, and add a new ledger by clicking the  button.

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: ESFA Mappings

Originator	CC Mnemonic	CC Code	Ledger-Fund	Default	Default P&P
abc		190	1365-01	✓	✓

Cost Centre:     Ledger Code:

Save    Print    Cancel    Help

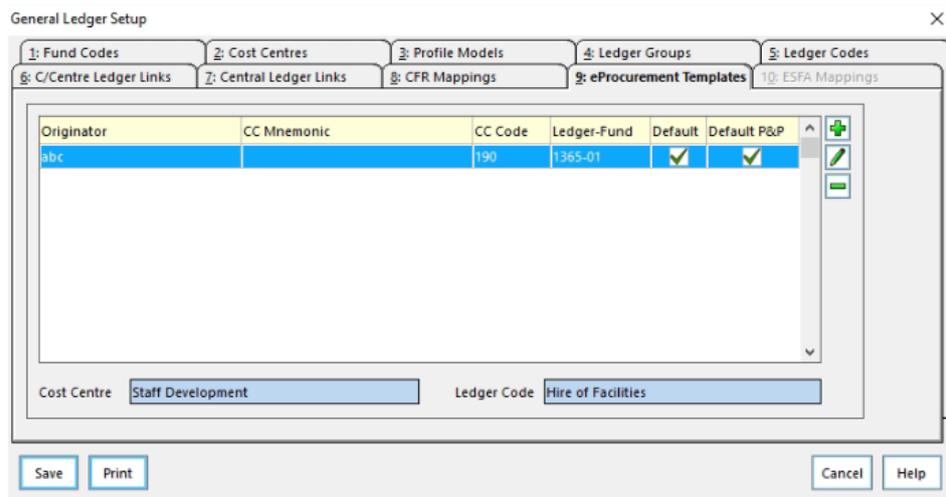
2. Complete the pop-up box. In the Originator Box and CC Mnemonic, use the email address that you use to log into the HBS website.

3. Click the  next to Cost Centre and select the default cost centre. The cost centre you use depends on your own school/company preferences. In general it will be the category you commonly use, but please seek advice from your financial department if you are unsure which one to select. Do the same for the Ledger code.

Any Cost Centre or Ledger code applied to an incoming order can be amended once the order has been imported.

4. Tick the Current Default Template and Current Default P&P Template Boxes and click Save.

You should now see the following screen. If this is correct, hit Save.



Originator	CC Mnemonic	CC Code	Ledger-Fund	Default	Default P&P
abc		190	1365-01	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

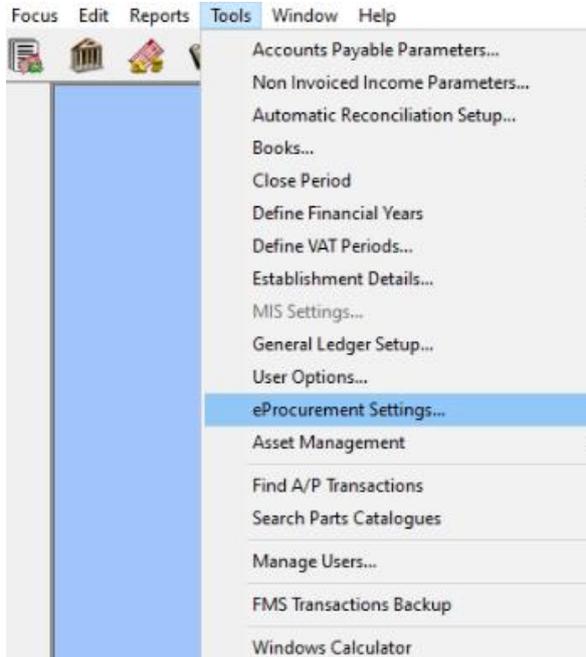
Cost Centre:  Ledger Code:

Buttons: Save, Print, Cancel, Help

**eProcurement Setup**

This will allow you to connect your SIMS FMS to the HBS website and start importing orders.

1. Go to Tools > eProcurement Settings. If this option is greyed out, you do not have the required account privileges. Please contact your SIMS representative to enable it, either at your School.



2. If you are able to edit, select  in the **WEB SERVICES** section.
3. In the pop-up screen, enter the following details:

**URL:** <https://hbsgroup.net/eprocurement/server.php>  
**Make sure this is entered in lowercase**

**Select Supplier**

**Enter 1**

Service Details ✕

Provider Type	◇ Portal	◇ Supplier
Name	<input style="width: 90%;" type="text" value="HBS"/>	
URL	<input style="width: 90%;" type="text" value="https://hbsgroup.net/eprocurement/server.php"/>	
Priority	<input style="width: 20%;" type="text" value="1"/>	<input checked="" type="checkbox"/> Active
User ID	<input style="width: 90%;" type="text" value="username@example.co.uk"/>	
Password	<input style="width: 20%;" type="password" value="*****"/>	Password duration (in days) <input style="width: 20%;" type="text" value="999"/>

**Tick Active**

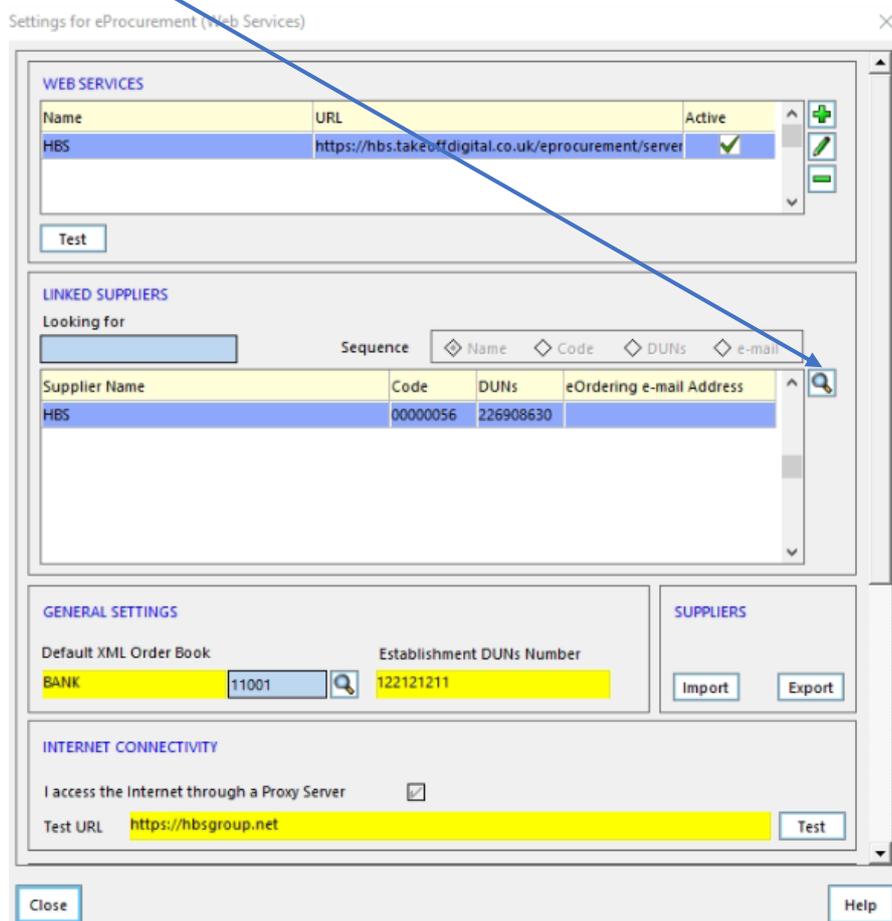
**Enter the user name and password you use to logon to the HBS Website**

**Enter 999 days**

4. Save the settings and click the **Test** button to check that the connection can be established. If the settings are correct, you will see the following message:



5. Now that the Web Services are set up, choose the one you have just created to link the supplier to the website. Select  within **Linked Suppliers**.



6. In the **Supplier Name** list, select **HBS** so that it is highlighted and then click the **Choose** button. Finally click **Update**. This then links HBS to the Web service.

**LINKED SUPPLIERS**

Looking for

Sequence  Name  Code  DUNs  e-mail

Supplier Name	Code	DUNs	eOrdering e-mail Address
HBS	00000058		

7. In the **General Settings** section, enter your **Default XML Order Book** by clicking on the  to the right of the text box. Then enter your **DUNS number** and click **Save**.

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:

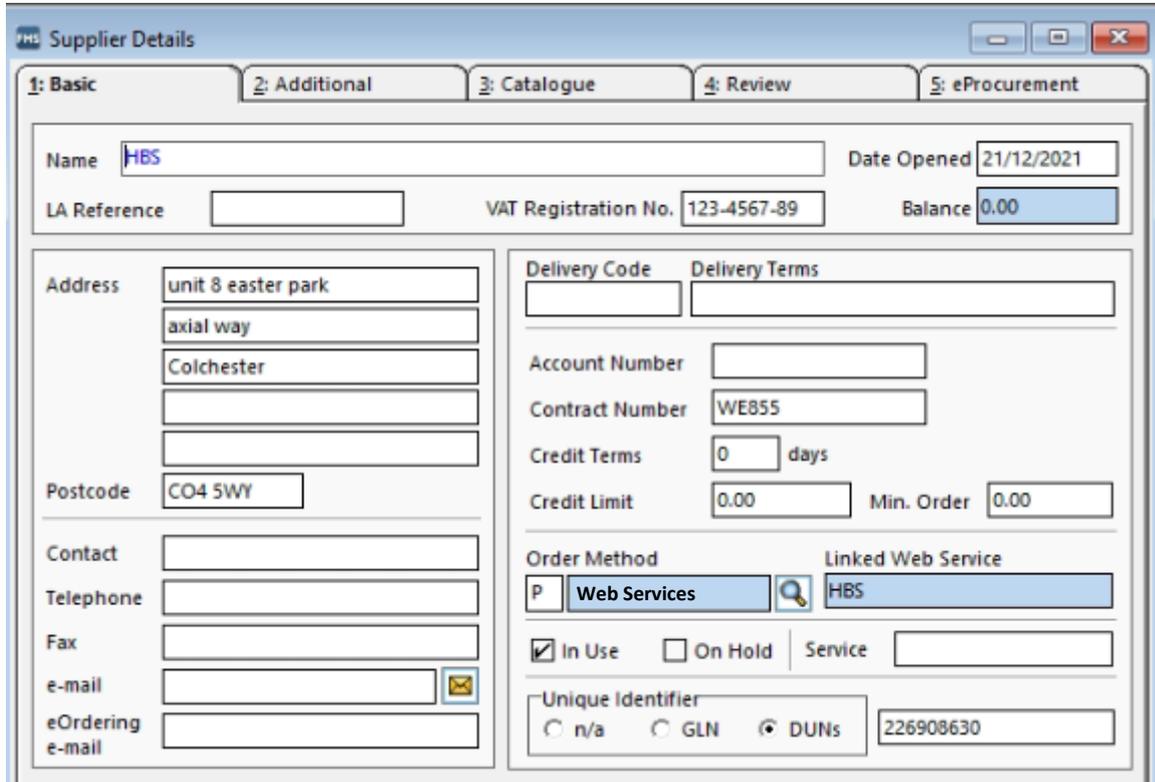
Test URL:  Test

Save Cancel Help

## Supplier Setup

This enables HBS to process the orders via Web Services.

1. Go to **Focus > Accounts Payable > Supplier**
2. Find **HBS** and **double click** on the name.
3. In **Tab 1: Basic**, enter your HBS account number eg **ESANC001**.



The screenshot shows the 'Supplier Details' window for 'HBS'. The 'Basic' tab is active. Fields include: Name (HBS), Date Opened (21/12/2021), LA Reference, VAT Registration No. (123-4567-89), Balance (0.00), Address (unit 8 easter park, axial way, Colchester), Postcode (CO4 5WY), Contact, Telephone, Fax, e-mail, eOrdering e-mail, Delivery Code, Delivery Terms, Account Number, Contract Number (WE855), Credit Terms (0 days), Credit Limit (0.00), Min. Order (0.00), Order Method (Web Services), Linked Web Service (HBS), In Use (checked), On Hold (unchecked), Service, Unique Identifier (DUNS, 226908630).

4. Click the  in the **Order Method** section and select **Web Services**.
5. In the **Unique Identifier** section, select **DUNS** and enter the HBS DUNS Number **217024993**
6. Select **Tab 5: eProcurement** and enter **HBS** in the **XML Supplier Reference Field**
7. **Save and close** and the setup is complete! **Orders can now start being imported into SMS.**

## Order Online

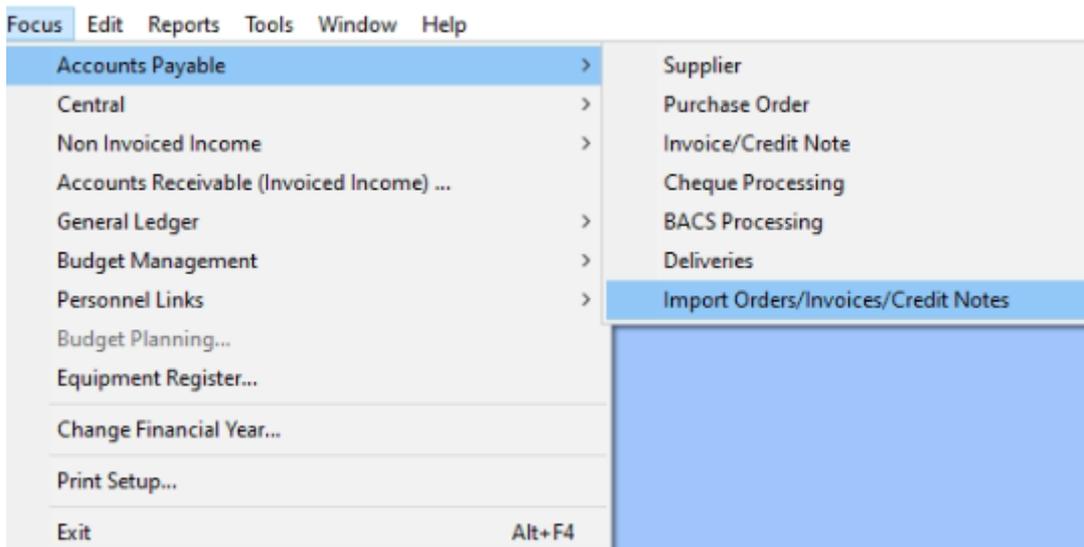
The details below show you how to create and order on the HBS website and import it into SIMS for authorisation.

1. Login to your account on the [HBS Website](#) and create an order as you normally would. In the checkout area, select the SIMS options and click **Place Order**. The order will now be given a status of '**SIMS**', and will remain at this status until authorised in SIMS and posted back.

## Import Orders into SIMS

This section details how you import the order(s) you created above into SIMS.

1. Go to **Focus> Accounts Payable > Import Orders/Invoices/Credit Notes**. This will now import any outstanding orders ready for approval.



2. When the Import Progress box appears, click on the **Import** button. A connection will be made to the HBS website and the orders will be imported. Once complete you will see the following message.



## Approve and Print Purchase Orders

Before the orders can be accepted back by HBS, they need to be approved. Any new orders will appear at the top of the list of **Not Yet Authorised** Purchase Orders.

Once the order has been reviewed and authorised, click on the **Print** button. This will then send the approved order back to the HBS website and the order will then be processed. You will then receive the order confirmation and invoices etc in the usual manner.

## Potential Issues

You may need to install a patch to the front end of FMS. This should have been communicated to you by your FMS representative or via a newsletter.

If you need to install an update, it can be found via the link below. Before installing the patch, please make sure of the following:

- Your current version is Autumn 21 for FMS – If you are not, please download and update from:  
<http://dl.sims.co.uk/CDImage/FMS-2021-Autumn-6202.zip>
- Password: !/ %[YBX74vf9& \$)d
- You are not running FMS during the updates!

The patch is available here:

[FMS WS Patch eProc | ESS Portal \(sims-partners.com\)](#)

If you experience any issues with installing the patch or updating FMS, please speak to your SIMS/FMS representative/support in the first instance.