

Summer Academy 2017 Getting Started with Amazon Business

Fiscal Coordination July 2017

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Getting Started with Amazon Business

Through your Amazon Business account you will have immediate access to:

- Free Two-Day Shipping on orders over \$49
- Pricing and quantity discounts on items that educators need
- Education-tailored search and browse functionality
- Receive invoices against your Purchase Orders
- Increased spend visibility and management
- Access to a specialized Customer Service team Amazon Business PunchOut Customer Service – 888-281-3847 or via email at Corporate-Punchout@amazon.com

You will need to first set up an Amazon Business account. Once you have your district's account set up, you can move forward with setting up Amazon ECommerce in Skyward by first requesting the Login information and Order/PunchOut Links from Amazon.

Amazon ECommerce Set Up

Menu path: Web Financial Management, Purchasing, Purchasing, Setup, Configuration, ECommerce

01										
, I	Home - Account Management Vendors Purchasing	Accounts Payable	Accounts Receivable	Fixed Assets	Inventory	Custom Reports	Federal/State Reporting	Bid Management	Administration	٩
	<u>q</u>	🖌 Fina	ancial Manage	ment Setu	р					
ſ	Purchasing - PU Setup	- Pu	rchase Orde	r Receivir	ng - PR		- Purchasing	g Order Proces	ssing	
	Codes - CO	Rec	eiving - RC			1	Email Purcha	se Orders - EP	Ŷ	5
	My Requisition Proces Configuration - CF	Rep	orts - RE				eCommerce	Drdering - EC	{	
	Requisitions - RQ Utilities - UT									
l	Approve Requisitions - AR	J								
	My Requisition Approval History - MR 👘 📍									
	User Preferences - UP 👇									

Select the Amazon vendor button

Use UNC Path UNC Path (\\s	ervername\directory\): \\esd171-prog-01\ecom\	
Click on an image to go into the setu amazonbusiness	p for the eCommerce Site	CDWG
	Baker Office Products	

Configure the Amazon Business Setup screen with your district's login information (provided by Amazon).

Tip: Each of these boxes are case sensitive and must be exactly correct in order to jump out to Amazon's website and get back into Skyward.

	Amazon Business Setup	
Login:		Edit
Password:		
PunchOut Link:		
Order Link:		
Vendor:		
Automatic Line Items:	Do not automatically create a line item for the shipping information passed back	
Order Confirmation: Order Phone Number:	 Do not automatically create a line item for the tax information passed back <i>*Automatically creating line items for shipping and tax information is recommended.</i> Do not send a confirmation email Send confirmation email to the person that submits the order* Send confirmation email to the person that created the order* Designate an email address to send all order confirmation emails: <i>*If the user does not have an email address set up then It will default to the designated email address.</i> Do not send a phone number with the order Send the phone number of the person that submits the order* Send the phone number of the person that created the order* Designate an email address to send all order confirmation emails: 	
	*If the user does not have a phone number set up then it will default to the designated phone number.	

Submitting Your Test Order

Menu path: Web Financial Management, Purchasing, My Requisition Processing, Requisitions

				Clone
2017	1	2		Notes
				Attac h
				Submit
2017	1	2		Add from Online Catalog
				Clone from Purchase Order

Create a new ECommerce requisition using "Add from Online Catalog" button

Select the "Amazon" button



Add a description to the requisition

Click the "Save and Add Detail" button –this button will send you out to the Amazon website

	1
 Requisition entry not allowed for current Fiscal Year. 	Save and Add Detail Back

Shop for your items on Amazon, and click on the "Check Out" button once you're finished, and you'll be linked back to Skyward

Note: When you first log in, the Amazon account will be set at test in account settings. Please make sure to change it to production, otherwise you won't be able to place orders.

S	Edit	sys	sten	n settings						
	Keep the requisitio	statu: ns on	s as Tes Amazo	t when you initially set up or edit and test the configuration. Set the status to Active to allow users to place purchase order n.						
	Status	۲	Test	Purchase orders placed in Test mode are only used to verify connectivity. We will not charge or ship these orders.						
		0	Active	Purchase orders placed in Active mode are shipped and charged to your business account						
				Save Cancel						

TIPS:

- When placing an ECommerce order, make sure you are not in RDS. Since RDS is a secured environment, the link out to Amazon, or any other ECommerce vendor site, won't work correctly.
- Once you check your cart out, and return to Skyward, you will not be able to go in and edit your cart.
- You can set up an approval system within the Amazon Business account. This would entail signing into Amazon, preparing your cart, placing it for approval, and the order being approved in Amazon. If you take advantage of this feature however, the requisition will skip the approval process in Skyward. Because Amazon's approval and Skyward's approval are going to be two different processes, you can only have one or the other.
- Amazon contact info:

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