

**MONTCLAIR**  
STATE UNIVERSITY

# Amazon Business Requisitioner Training



# Table of Contents

- What's Changing
- Joining and Accessing the Amazon Business Account
- Account Navigation & Shopping Experience
- Placing an Order
- Things to Know
- Additional Resources



# Montclair University Process Change

- Why we set up Amazon Business? To streamline the purchasing process between Montclair University and Amazon and setting buying policies that are in-line with our policies to enable the community to quickly shop for a wide range of products, excluding blocked items such as office supplies, computers, tablets, and telecommunications equipment.
- Why a punchout catalog? Punchout streamlines the process by enabling seamless transfer of data by leveraging the University's Workday system to "punchout" to Amazon's website and completing orders within Workday. To name a few benefits, this saves time and improves efficiency, minimizes errors, enables automatic electronic invoicing, enhances the shopping experience, and improves spend visibility and reporting.
- The punchout includes free shipping on Prime-eligible items and single-sign integration with your Montclair State University login information. All Amazon purchases should be made through the punchout.

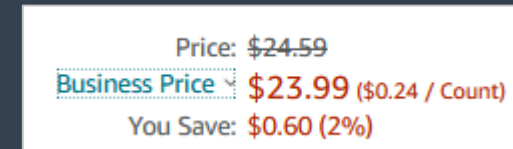


# Amazon Business Benefits

There are a variety of discounts available on Amazon Business that your organization can take advantage of to unlock savings.

## Business Pricing

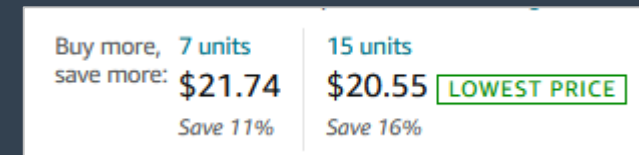
- Cheaper pricing available only for registered Amazon Business customers.



Price: ~~\$24.59~~  
Business Price: **\$23.99** (\$0.24 / Count)  
You Save: **\$0.60 (2%)**

## Business-Only Selection

- Business-only selection refers to items and offers that are only available for purchase by Amazon Business customers.



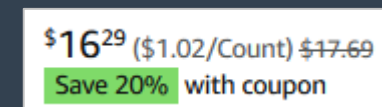
Buy more, <b>7 units</b> save more: <b>\$21.74</b> Save 11%	<b>15 units</b> <b>\$20.55</b> <b>LOWEST PRICE</b> Save 16%
---	---

## Quantity Discounts and Limited Time Deals/Coupons

- Volume-tiered discounts

## Amazon Business Analytics

- Use Amazon Business Analytics to view data about your orders, create and filter reports based on your business needs, and view both charts and tables. [Click](#) to learn more.



**\$16<sup>29</sup>** (\$1.02/Count) ~~\$17.69~~  
**Save 20%** with coupon







### Take Advantage of Amazon Business Prime

- Business Prime provides Free Two-Day Shipping on eligible items for all users utilizing the business account.

### Prime Eligibility – Fulfilled by Amazon

- Search results can be filtered based on Business Prime eligibility to ensure that your products arrive on time and as expected. All products clearly mark who the seller is on the product detail page.

### What's not Included?

- Business Prime does not include additional Prime benefits such as Amazon Fresh, Pantry, Video, or Music.



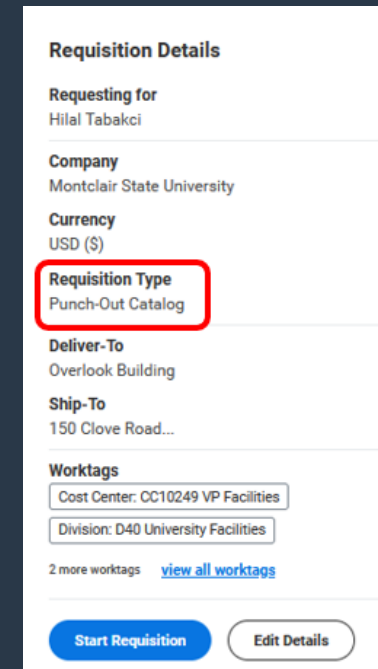
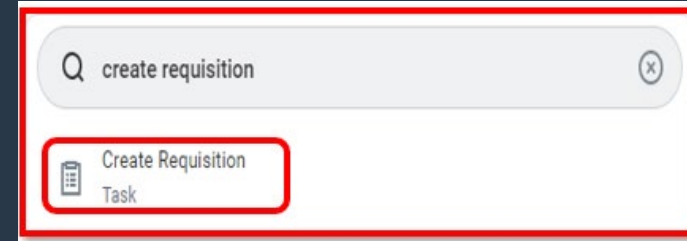
# Placing an Order



# Begin Checkout Flow in WorkDay

## Instructions:

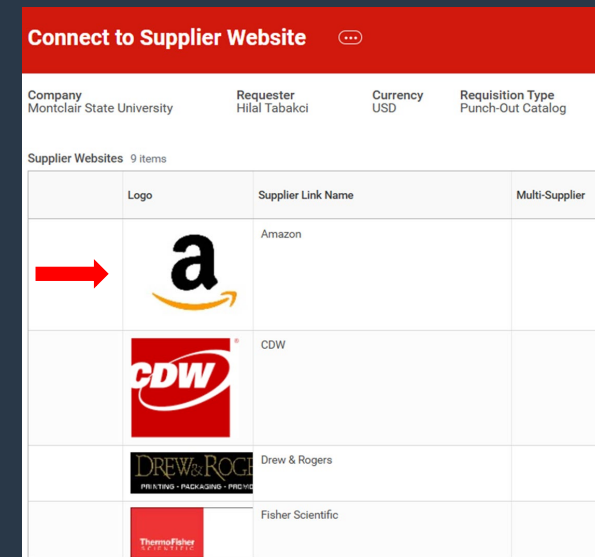
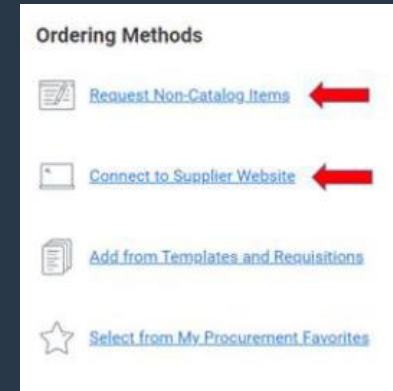
1. In Workday, go to the search bar and type in “Create Requisition”. Results will appear for you to select “Create Requisition”.
2. The requisition screen will appear for you to create a requisition. Enter Punch-Out Catalog in the Requisition Type area. Confirm that your Cost Center, Division, and Additional Work Tags are correct or need to be changed. If so, make the change and select “OK”. Choosing any other “Requisition Type” will create an error in Workday.



# Begin Checkout Flow in WorkDay

Instructions:

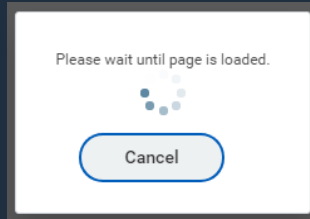
3. In the “Ordering Methods” section, choose “Connect to Supplier Website,” and the system will immediately connect you to the Punch-Out screen with which you are familiar.
4. Select the Punch-Out where you would like to make your purchase, then press Connect to direct you to the website's homepage.



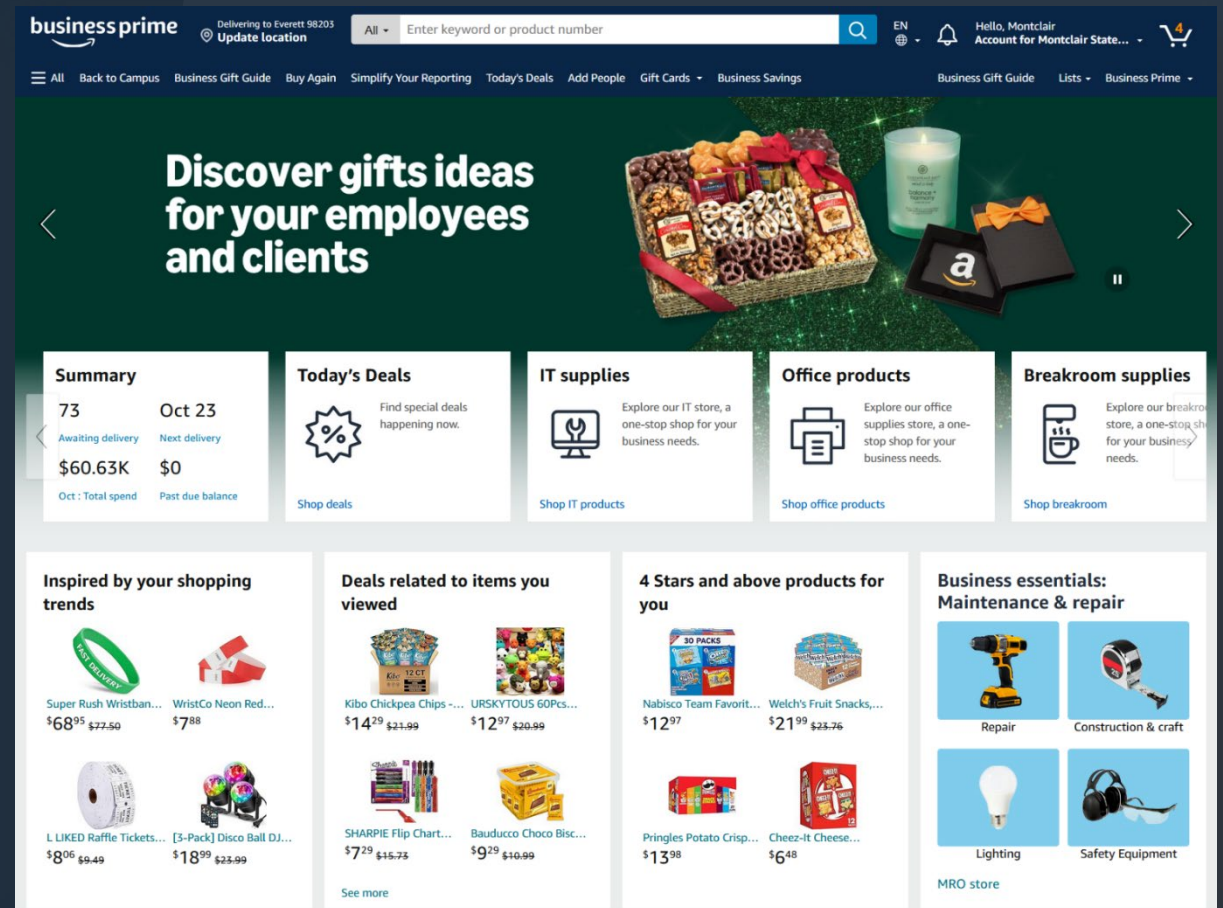


# Begin Shopping on Amazon Business

While the page is loading you will see this message:



Then, you'll be redirected to the centralized Amazon Business account homepage.

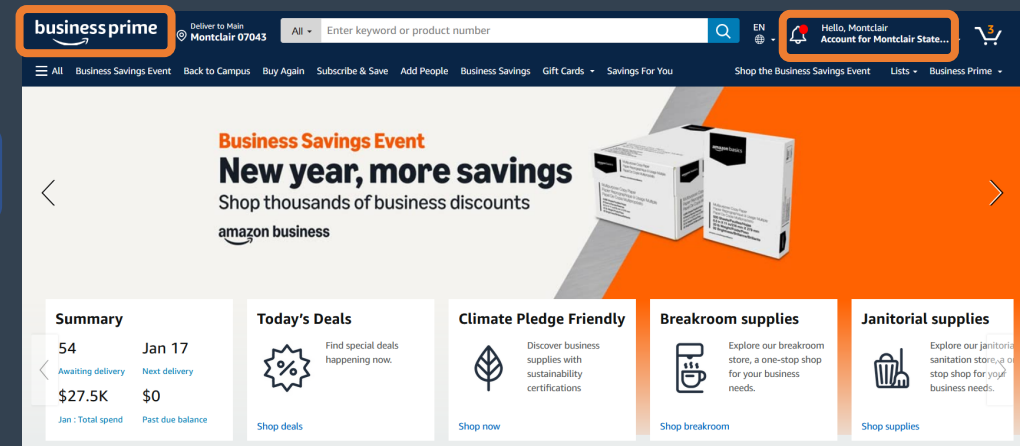
A screenshot of the Amazon Business account homepage. The top navigation bar is dark blue and includes the "business prime" logo, a delivery location of "Everett 98203", a search bar with "All" and "Enter keyword or product number", and user information for "Montclair State...". Below the navigation bar is a green banner with the text "Discover gifts ideas for your employees and clients" and an image of a gift basket. Underneath the banner are four category tiles: "Summary" (showing 73 items, \$60.63K total spend), "Today's Deals" (with a percentage icon), "IT supplies" (with a computer icon), "Office products" (with a printer icon), and "Breakroom supplies" (with a coffee cup icon). The main content area features four columns of product recommendations: "Inspired by your shopping trends", "Deals related to items you viewed", "4 Stars and above products for you", and "Business essentials: Maintenance & repair". Each column contains several product cards with images and prices.

# Your Business & Personal Account Display

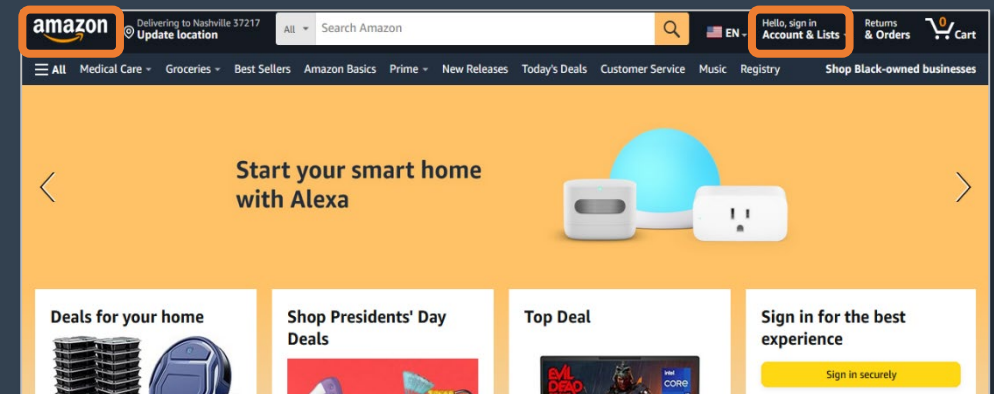
Make sure you are in the right account when shopping for Montclair University purchases

- The Amazon Business account will have the **Business Prime** logo in the top left corner.
- **Montclair State University** will be visible under “Hello, Your Name”
- **Business-Centric** rotating Homepage tiles

Business

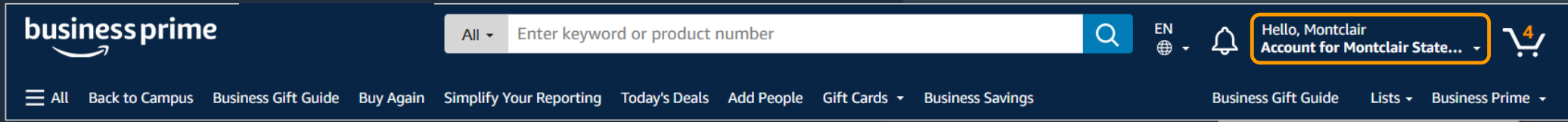


Personal



# Account Navigation

Hover over your name in the top right hand corner to access additional tools in your account



The screenshot shows the Amazon Business Prime header. On the left is the 'business prime' logo. In the center is a search bar with a dropdown menu set to 'All' and the placeholder text 'Enter keyword or product number'. To the right of the search bar are icons for language (EN), a globe, a notification bell, and a shopping cart with a '4' in a red circle. Below the search bar is a navigation bar with links: All, Back to Campus, Business Gift Guide, Buy Again, Simplify Your Reporting, Today's Deals, Add People, Gift Cards, Business Savings, Business Gift Guide, Lists, and Business Prime. On the far right, a user profile dropdown menu is open, showing 'Hello, Montclair Account for Montclair State...' and a list of account tools: Your Account, Your Orders, Business Analytics, Manage your delivery, Manage Recurring Deliveries, Bulk Ordering, Your Interactions, and Receiving. The 'Your Account', 'Your Orders', and 'Business Analytics' items are highlighted with orange boxes.

Page	Functionality
<b>Your Account</b>	Standard Amazon account information including name, & email address
<b>Your Orders</b>	View and track your orders. Administrators can view orders others have placed on behalf of the organization
<b>Business Analytics</b>	Create/filter reports to view & export your own order history

**Account Details**

- Your Account
- Your Orders
- Business Analytics
- Manage your delivery
- Manage Recurring Deliveries
- Bulk Ordering
- Your Interactions
- Receiving



# Search & Order From Within Your Lists

Lists make it easy to keep track of the things you need and are easy to share with others. Any User on Amazon Business can create a shopping list

- Review lists that have been shared with you
  - Shared with you
  - Shared with your groups
  - Public Lists
- Add items from your lists directly to your cart
- Utilize Search functionality to find specific items within the list

The screenshot displays the Amazon Business interface for managing shopping lists. At the top right, the user is logged in as 'Hello, User' with an 'Account for Business' dropdown and a 'Lists' dropdown menu. The main content area is titled 'Lists' and includes a 'Learn more' link and a 'Create a list' button. Below this, there are sections for 'Your reorder lists' (containing 'Preferred Item List'), 'Your shopping lists' (currently empty), 'Shared with you' (empty), 'Shared with your groups' (listing 'Events' and 'Josh Inc'), and 'Public Lists' (listing various categories like 'Best sellers for you by Amazon Business', 'Recurring Delivery by Amazon', etc.). The 'Preferred Item List' section shows an estimated subtotal of \$8.29 and an 'Add all to Cart (1 items)' button. A search bar with a 'Filter & Sort' dropdown is visible. The main item displayed is 'Amazon Basics 20 Pack AAA High-Performance Alkaline Batteries, 10-Year Shelf Life, Easy to Open Value Pack', which is a 'Best Seller' with a price of \$8.29 and 'FREE Shipping'. A 'Quantity' input field is set to '1', and a yellow 'Add to Cart' button is highlighted. Below the item are options to 'Delete item', 'Comment Add', and 'Priority Add'. On the right side, a 'Your lists' sidebar shows 'Preferred Item List' as the active list, followed by 'Amazon recommended lists' such as 'Best sellers for you by Amazon Business', 'Recurring Delivery by Amazon', etc., and a 'Create a list' button at the bottom.



# Choose a Shipping Address

Select the placeholder shipping address.

Note: You can change the shipping address *after sending the cart back to WorkDay*

**Group Main Punchout Group Prod ad...**

---

Main Campus 1 Normal Ave, Montclair, NJ, 07043, United States, Phone: 973 655-5000

**Use this address**





# Choose Payment & Shipping Options

Select the appropriate payment method.

Choose your shipping options.


*Note: Do **not** select next-day delivery because the requisition will need to be approved in WorkDay*

Review your order and click “Submit order for approval.” You will then be redirected to WorkDay to complete the process.

*Note: After you return the cart to WorkDay finalize the requisition per your internal approval process to send the PO to Amazon and start the fulfillment process.*

**4 Choose a payment method**

pay invoices how you want.  
Make payments through wire, check, or ACH online.

 **Pay By Invoice**  
Provided by your organization

Use this payment method

**5 Review items and shipping**

Submit order for approval


by placing your order, you agree to the Amazon Business Accounts Terms & Conditions.

**Order Summary**

Items:	\$5.07
Shipping & handling:	\$0.00
Total before tax:	\$5.07
Estimated tax to be collected:	\$0.00
<b>Order total:</b>	<b>\$5.07</b>


How are shipping costs calculated?  
Prime shipping benefits have been applied to your order.

**Estimated Delivery: Depends on Approval** For example, if approved now: Tomorrow, Nov. 14  
Items shipped from Amazon.com

 **WristCo Neon Red Tyvek Wristbands for Events – 300 Count – Tamper-Proof Design & Fluorescent Color Prevent Reuse – Premium-Grade Bracelets for Hospital & Medical ID, Party & VIP Identification**

**Choose your Prime delivery option:**

- Tomorrow, Nov 14**  
FREE One-Day Delivery
- Monday, Nov 18**  
FREE Amazon Day Delivery  
Get your orders together in fewer boxes and

**\$5.07**  Prime

Amazon Private Brands Discount

Qty: 1

Sold by: Amazon.com Services LLC

Add a gift receipt and see other gift options

Tax Exemption Applied. Remove



# Complete Checkout Flow in WorkDay

After clicking “Submit order for approval” the website will re-direct you to Workday to finish processing the transaction.

**Note:** Shipping Charges and discounts will not come into workday as a separate line but will be reflected in the invoice.

\*\*Refer to the [Procurement Lifecycle](#) Job Aid for further directions on how to complete the requisition process.\*\*

<https://www.montclair.edu/procurement/procurement-training-presentations/>



# Blocked Policies



Your organization may have blocked certain product categories based on its internal buying policies

**Organization blocked**

- Admin note: Please contact IT for laptop acquisition.
- See more admin notes (1)

HP Chrom  
GB RAM, 3  
Silver)  
Visit the HP Store  
★★★★★  
Climate Pled  
List Price:  
Business Price

Qty: 1

Add to Cart

1-Click ordering is not available for this item.

Select delivery location

**Organization blocked**

Samsung Galaxy Tab Active  
T540NZKAXAR  
★★★★★ ~ 137  
\$515<sup>63</sup> \$749.99  
\$512.87 with quantity discounts  
✓prime FREE Delivery Mon, Mar 8  
More Buying Choices  
\$489.90 (7 used & new offers)

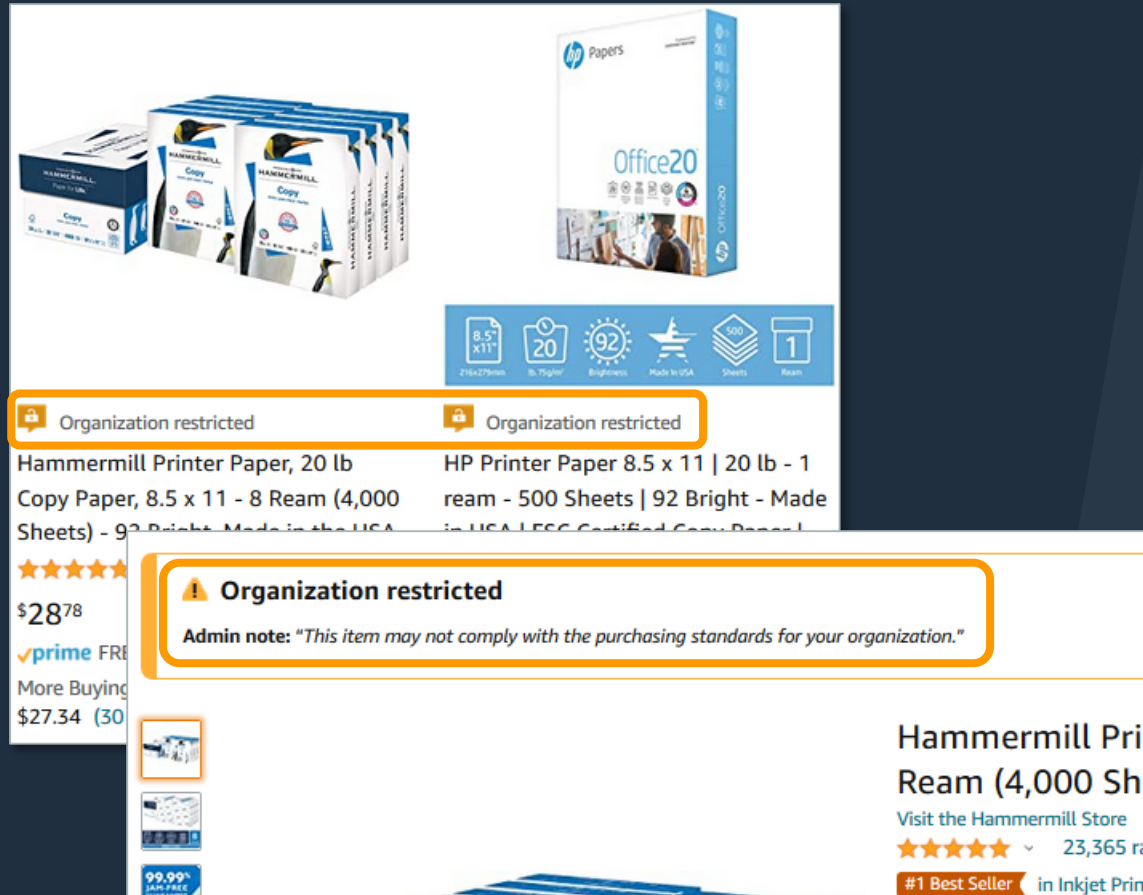
- Blocked products will be clearly marked throughout the buying process
- Blocked products cannot be added to cart, the cart will be grayed out
- If you have questions on a blocked item, reach out to the Montclair Procurement team.



# Restricted Policies



Your Account Administrator may have restricted categories for purchase within Amazon Business based on your organization's buying policies



- Restricted products will be clearly marked throughout the buying process
- Purchases with Restricted items may require additional approval
- Administrators have direct visibility into any restricted purchases via Business Analytics



# Montclair State University's Purchasing Policies

1. All items in the punchout catalog are not open for purchase. Some are blocked and others restricted. Restricted items will require additional buyer approval.
2. Water and snacks are permitted to be purchased for student activities only. Any snack orders will require an additional buyer review and approval. Be sure to note the purpose of the purchase is related to student activities in Workday's internal memo field.
3. Discounts, special handling, and shipping charges do not come into Workday from the Amazon punchout. This is a limitation within Workday and cannot be avoided. Once the shopping cart comes back into Workday, do not try to add these items as a separate lines. E-invoicing will reflect all discounts and other charges.
4. Employees should only access the centralized Amazon Business Account through WorkDay and should not have Amazon accounts (personal or work-related) tied to their work email outside of the centralized Amazon Business Account.





# Montclair State University's Purchasing Policies Cont'd

**Digital Books** - The University will permit the use of Amazon Business to purchase digital books through the Amazon Business Unit, with the exception of the following two conditions below:

1. The digital textbooks will be used for the classroom. Due to contractual obligations, these must be purchased through the University Bookstore;
2. Digital book orders of more than 20 copies to be used for any activity outside of the classroom. However, should the Bookstore be unable to provide the material, it is permitted to purchase them from the Amazon Business Unit as long as a written confirmation from the Bookstore's Manager is attached to the purchase in Workday.



# Purchase Order Changes

- Amazon Business does not support electronic Change Orders or Order Cancellations
- Only “new” PO type is accepted
- Punchout User will receive a rejection email if they send a Change PO Type or Delete PO Type
- Punchout User or Amazon Account Admin can make order updates in Amazon Business for cancellations prior to order shipment or returns once item received.

Like our other University punch-out catalogs, Amazon Business does not support change orders or cancellations. If you need to return an item, a credit memo will be issued.

If change needed after order has shipped

- Item may be returned and credit memo issued



# Halted Orders

There are three instances in which orders can be halted/cancelled

- **Safeguards** – All items procured through this punchout have a seven (7) day cart lock (prices and quantities guaranteed for seven [7] calendar days) to allow for routing of any required approvals. If the approval is not completed within the seven (7) day cart lock, and the order falls outside of the safeguards (tolerances set to ensure prices do not go too high or quantities cannot be fulfilled) at the time of approval, the item or order will be halted.
  - **Lightning/Today's deals** – these may expire before the punchout process is completed causing the order to cancel due to change in price.
- **Multiple PunchOut Sessions** – Multiple PunchOut sessions can result in a cancelled order. When shopping on Amazon Business through PunchOut, make sure to use one PunchOut Session per order.
- **Changing or Modifying Cart** – If PO is sent with deleted line items or modified quantities, the order will be rejected.

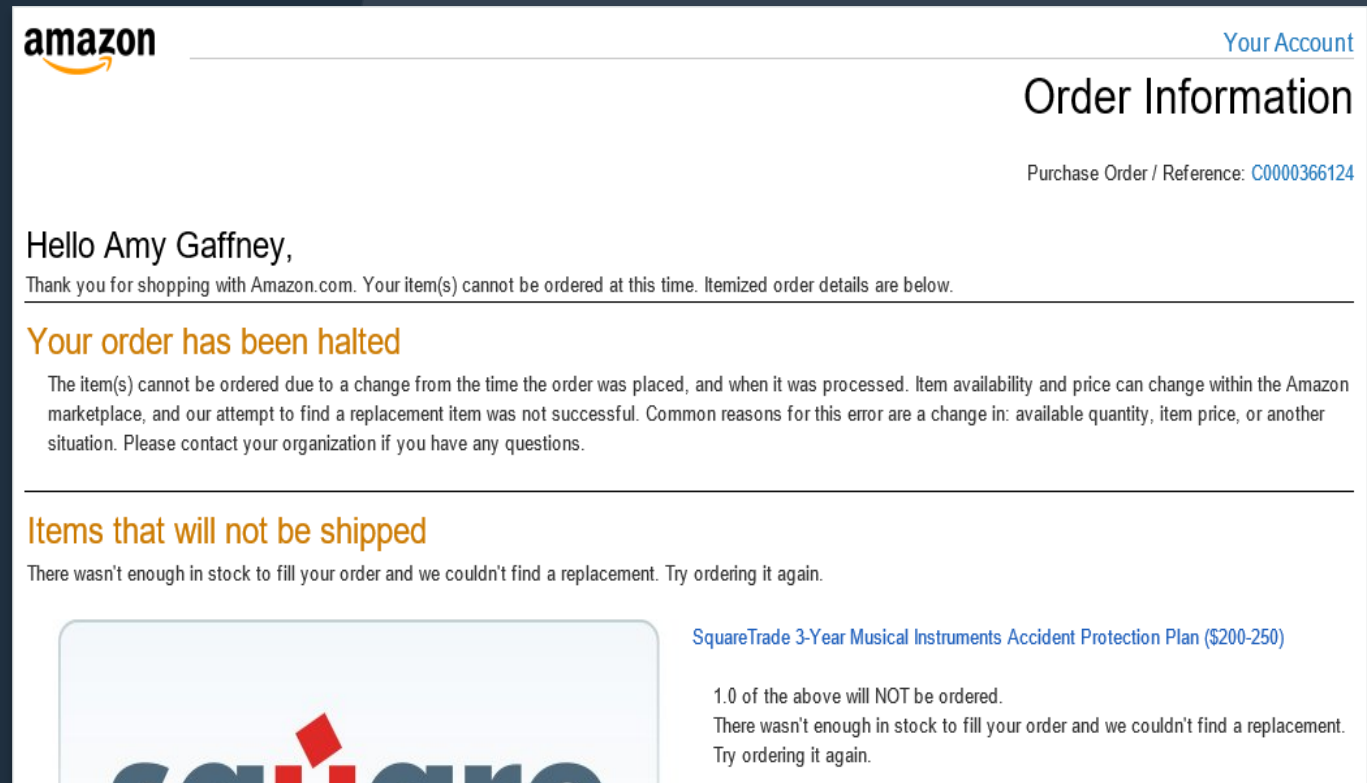


# Halted Orders

Amazon Business will send this email if an order triggers one of the business rules (called “Safeguards”) set by your organization.

## Things to note:

- Refer to details provided in the email. Or, contact Customer Service for more information.
- If an Amazon Business order has been halted, the end user will need to start over and place a new order.



The screenshot shows an email from Amazon Business. At the top left is the Amazon logo, and at the top right is a link for "Your Account". The main heading is "Order Information" with a sub-heading "Purchase Order / Reference: C0000366124". The email is addressed to "Hello Amy Gaffney," and includes a thank you message: "Thank you for shopping with Amazon.com. Your item(s) cannot be ordered at this time. Itemized order details are below." The primary message is "Your order has been halted" in orange text, followed by an explanation: "The item(s) cannot be ordered due to a change from the time the order was placed, and when it was processed. Item availability and price can change within the Amazon marketplace, and our attempt to find a replacement item was not successful. Common reasons for this error are a change in: available quantity, item price, or another situation. Please contact your organization if you have any questions." Below this is a section titled "Items that will not be shipped" with the text: "There wasn't enough in stock to fill your order and we couldn't find a replacement. Try ordering it again." A specific item is listed: "SquareTrade 3-Year Musical Instruments Accident Protection Plan (\$200-250)". To the left of the item name is a placeholder image showing a red diamond shape. To the right of the item name, it states: "1.0 of the above will NOT be ordered. There wasn't enough in stock to fill your order and we couldn't find a replacement. Try ordering it again."



# Error Messages





# Error Messages

This section of the account provides additional detail regarding the status of all orders placed

## Application Error

- End User will need to contact Workday Customer Care at ext. 5000 to assist with their user's profile

**Application Error**

 You are not authorized to access the action you selected. Contact your application administrator if you believe you have received this message in error.

Please reference the following information if you contact support

*Request Id: neo 1516726659063564*  
*Error Code: 403*  
*Error Message: Unauthorized*

[Click here](#) to return to the application.

## Amazon Error

- End User is receiving this message because they are attached to a separate Amazon Business account and need to de-register, and/or have the Administrator of that Amazon Business account remove them

**There was an error starting your buying session**


There are multiple accounts associated with your e-mail address. Please contact Amazon Support.

[Call Amazon Support](#)

[Conditions of Use](#) | [Privacy Notice](#) © 1996-2021, Amazon.com, Inc.

## Amazon Error

- End User is trying to place an order directly in Amazon and did not go through WorkDay

**amazon.com**  [SIGN IN](#) [SHIPPING & PAYMENT](#) [GIFT OPTIONS](#) [PLACE ORDER](#)

Your organization is set up to place orders on Amazon using a procurement system.  
To place orders on the website, please ask your administrator to log into their business account, and set requisitioner permissions for you. Thank you.

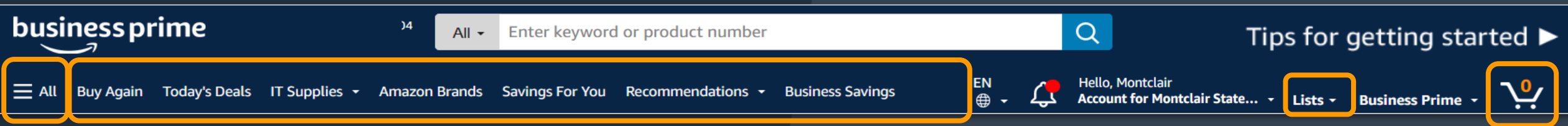


# Things to Know



# Start Your Shopping Experience

Utilize the Search bar or your Lists to search for specific items



Click here to shop by department and/or category

## LINKS TO EXPLORE:

- [PPE Workplace Essentials](#)
- [Best Sellers](#): Shop best-selling items across all departments, updated hourly
- [Today's Deals](#): Discover all current deals, including coupons
- [Wholesale](#): Save by purchasing items in bulk, case packs, and large packs
- [Private Brands](#): Discover Amazon Business brands, including Amazon Commercial, Amazon Basics and more

Click here to create and manage lists. You can also access lists shared with you.

Access your Shopping Cart Here



# Your Orders

This section of the account provides additional detail regarding the status of all orders you have placed within the Business Account

Take a variety of actions on Your Orders:

- Track Packages
- Initiate a Return

Use **Contact Us** or our **Chat** feature for assistance with Returns

Your Account > Your Orders

To view orders placed by users in your business account, select View All Orders below or go to Business Analytics.

### Your Orders

Search all orders Search Orders


View All Orders: Ravenna Garden

16 orders placed in past 6 months

ORDER PLACED	SHIP TO	PLACED BY	TOTAL
May 15, 2018	Third Floor	Katherine Approval Demo 2	\$0.00

This order was approved. [View details](#)

#### Cancelled

 AmazonBasics 92 Bright Multipurpose Copy Paper - 8.5 x 11 Inches, 10 Ream Ca Sheets)  
Sold by: Amazon.com Services, Inc.  
\$0.00

### Arriving August 16 - August 20

- ✓ Ordered Sunday, August 12
- ✓ Shipped today  
See all updates
- Out for delivery

Track package

Return or replace items

Write a product review

### Amazon Business Help

Recommended Topics

- Where's My Stuff?
- Manage Your Orders
- Getting Started
- Manage Your Account
- Payments
- Business-only Features
- Punchout

Contact Us

- Contact Us
- Website Feedback
- Amazon Co-pilot
- Ayuda en español



# Additional Resources



# Your Interactions

Built in Amazon Business tool to track the issues that remain unresolved after the initial contact with Amazon Business Customer Support

Hello, AB  
Account for AB Demo Acco...

- Account Details
- Your Account
- Your Orders
- Business Settings
- Business Analytics
- Try Business Prime
- Manage Recurring Delive
- Bulk Ordering
- Category Savings Evalua
- Your Interactions**

Your Account / Your Interactions

## Your Cases

Active Cases ▾

**8 Cases**

<b>Delivery date was changed</b> Last update: 0 minutes ago	<b>Active:Your Action Required</b> Case ID: 10613543421
<b>Heavy Bulky item - Carrier refused to deliver</b> Last update: 6 hours 49 minutes ago	<b>Active</b> Case ID: 10613305991
<b>Shipment not delivered, past delivery date</b> Last update: 6 hours 51 minutes ago	<b>Active</b> Case ID: 10589847591

One-stop location to track progress of open support issues. Allows users to monitor progress and re-open cases on their account without requiring follow-up.

## How it works?

When a customer reaches out to a support team or selling partner with an issue, a ticket is created that customers can directly reference from their account at any time.





# Common Amazon Business Support Questions

*Quick resolutions to frequently asked questions and contact information for a variety of support resources*



## **Contact Business Customer Support: [CLICK HERE](#) or call 866-486-2360**

- Provides end users the option to call, email, or live chat. Please use this method of contact for anything relating to an order, transaction, charge, or shipment



## **Support when Joining the Account: [CLICK HERE](#) or call (844) 428-3060**

- Provides end users the option to contact a dedicated support team for assistance with end user issues when joining your account.



amazon business

Thank You

