



amazon business

**Planergy
Punchout
integration with
Amazon Business**

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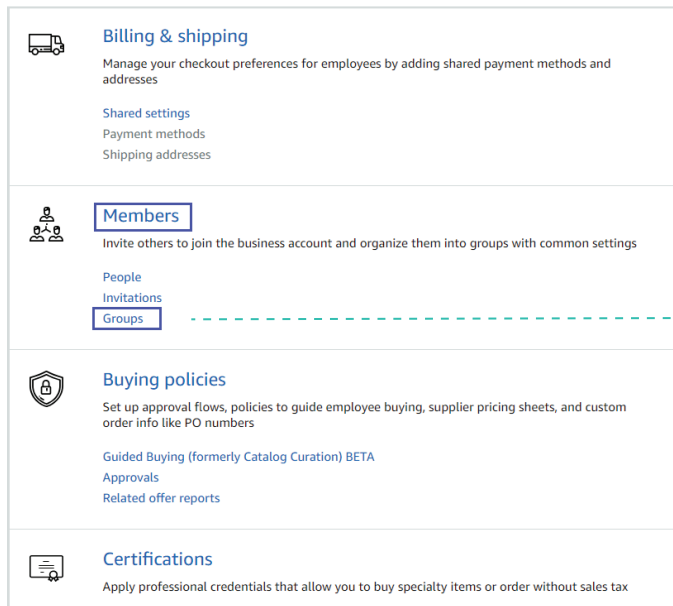
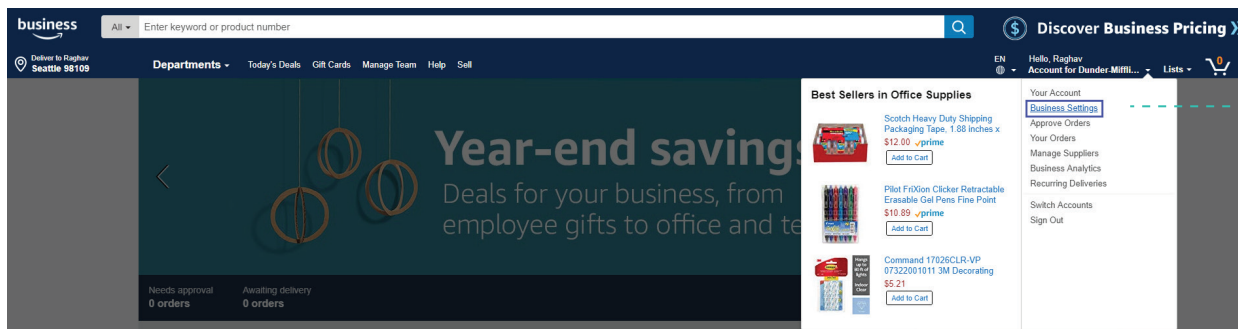


Overview

This document provides guidance and reference material to IT professionals to establish a Punchout integration to Amazon Business in Planergy.

Punchout setup on Amazon Business

If you don't already have an Amazon Business account, please register for one here: www.Amazon.com/Business

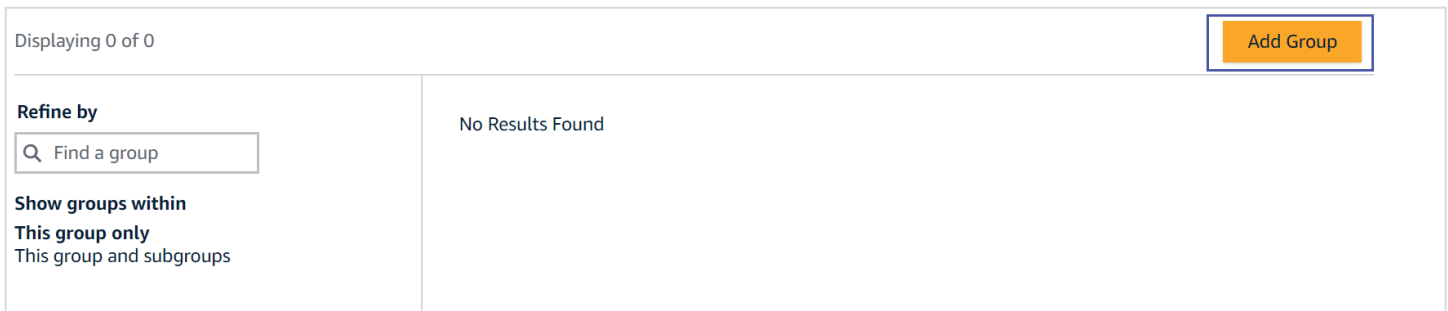


In Amazon Business, generate your credentials

- Open the **Your Account** dropdown menu
- Select **Business Settings**

- Click on **Groups** under the **Members** heading.

- Click on **Add Group** to create a new group. This group will be used as the Punchout group.



Create Group ✕

Group name

Turn off purchasing for this group

Payment methods
 Which payment methods should members of this group use to place orders?
 Individual Payment Methods – Employees provide their own
 Shared Payment Methods – Admin will provide ones for the group to use

Shipping addresses
 Which shipping addresses can members of this group ship orders to?
 Individual Addresses – Employees provide their own
 Shared Addresses – Admin will provide ones for the group to use

PunchOut (optional)
 Assign PunchOut orders to:

Add Group Cancel

- Select **Individual or Shared payment methods and Individual or Shared addresses** depending on how your users pay for purchases. If you are using a single payment method for the entire group, you can select Shared Payment Methods and if you want to give each user the option to add their own payment method you can select the Individual Payment Methods
- Please note that Ship to address from electronic PO is the final address we ship it to.

Displaying 1 of 1

Refine by

Show groups within

This group only

This group and subgroups

Punchout Group

/ Punchout Group

- Click on the newly created group. **Note: If it does not show up immediately, please refresh the web page.**

Billing & shipping
 Manage your checkout preferences for employees by adding shared payment methods and addresses

Shared settings
 Payment methods
 Shipping addresses

Members
 Invite others to join the business account and organize them into groups with common settings

People
 Invitations
 Groups

Buying policies
 Set up approval flows, policies to guide employee buying, supplier pricing sheets, and custom order info like PO numbers

Guided Buying (formerly Catalog Curation) BETA
 Approvals
 Related offer reports

Certifications
 Apply professional credentials that allow you to buy specialty items or order without sales tax

Tax exemption
 Add licenses

System integrations
 Connect Amazon Business with other purchasing, tracking, and financial programs you use

Configure purchasing system

 Transaction data

- Under **System Integrations**, click on **Configure Purchasing System**.
- Select **Planergy** from the drop-down and click on **Save**.

Set up your purchasing system

Amazon supports cXML and OCI based punchout systems and cXML and OAG based ordering systems.

Need help:

[Learn more about configuring your purchasing system to connect to Amazon.](#)

For questions, contact [Business Customer Service](#).

- During this step you will receive your **system login (from identity)**, **password (shared secret)**, Punchout URL and purchase order URL.

Purchasing System

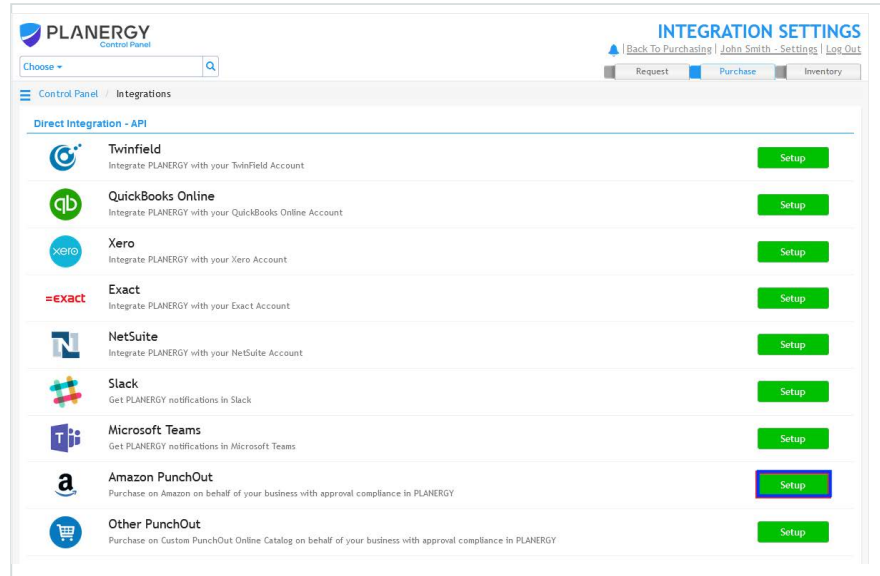
Use the settings below to configure Planergy to connect with Amazon. Additionally, you can also [email these settings](#)

Planergy punchout connection to Amazon "From Identity" in cXML PunchoutGroup6540549993 "Shared Secret" in cXML avv7mQBIDnX3UHGIDGBaUpkrwAz5 Punchout URL https://www.amazon.com/eprocurement/punchout Purchase order request URL https://https-ats.amazonaws.com/4a4f681c-18c4-48c2-bd69-e8ff04a736b5	Status : Test Purchase orders placed in Test mode are only used to verify connectivity. We will not charge or ship these orders. Start testing punchout setup Switch to Active mode Search for purchase orders
Advance settings Use these setting to configure additional information about your order Share Punchout connection Share Punchout connection with other legal entities Configure	
Purchase order confirmation email Punchout User All items, accepted and rejected, are included in the email sent by Amazon after the order has been placed Administrator No emails are sent	
Payment Method No payment method available Add a payment method	
Order safeguards Prices and stock levels can change. Tell us how to handle order requests if they do. Edit	

Punchout setup in Planergy

The account owner of your Planergy account will need to enable the Amazon Integration by following the below steps:

- Login to Planergy
- Access the **Control Panel**
- Select **Integrations** in the **Advanced Controls** section
- Press the **Setup** button

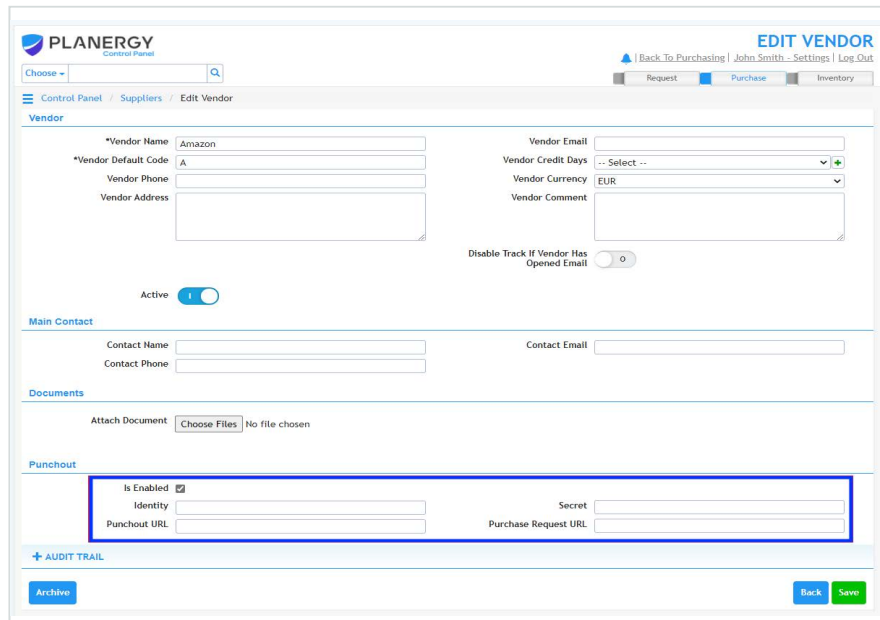


Configure Amazon Supplier's Punchout Settings:

Enter the credentials generated in the previous step in the Punchout section as following:

- **System login** should be entered in **Identity**
- **Shared secret** should be entered in **Secret**
- **Punchout URL** should be entered in **Punchout URL**
- **Purchase Order Request URL** should be entered in **Purchase Request URL**

Press the **Save** button on the bottom right of the page once done



Email address in Punchout setup request is mandatory for Amazon. We currently look at four locations for the email address in this order, and whatever we find first is what we use:

- Extrinsic field with name "UserEmail"
- ShipTo address email
- Contact email
- Extrinsic with name "Email"


Please note other values that are mandatory for Amazon:

- Payload ID in cXML Punchout setup request and order request should be always unique.
- Amazon supports only new order type. Update and delete are not supported as part of Punchout integration.
- Users must contact customer support to make changes or to cancel an existing purchase order.

Payment method setup

Amazon Business offers several payment methods, such as credit card or Amazon's [Pay by Invoice](#) line. The payment method lives on Amazon Business and must be added by an administrator, prior to going live.

- Add your payment method by going to **Business Settings > Groups**
- Click on **Newly created Punchout group**
- Click on **Payment methods** under **Billing & shipping**



Billing & shipping

Manage your checkout preferences for employees by adding shared payment methods and addresses

- Shared settings
- Payment methods**
- Shipping addresses


Add Payment Method

Punchout Group - **Payment methods** ▼

Members of this group will only be able to place orders with the payment methods listed below. A few [product exceptions](#) may require group members to enter their own payment method and will not be documented in the business' order history.

Add a New Payment Method

Credit or Debit Cards
Amazon accepts all major credit and debit cards.



Testing

You are now ready to test the Punchout and submit some test orders. While in test mode, place variety of orders (suggestions below) and ensure you receive an order confirmation email to the email address used for Punchout to Amazon Business. Please note that the orders placed during test mode will be considered as Test Order and will not be charged or shipped. This will be highlighted in the order confirmation email as well.

Here are some suggested test scenarios using product and quantity variations:

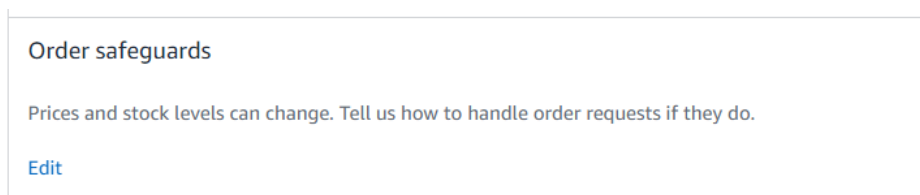
- One type of product, quantity one
- One type of product, quantity three
- Two different products, quantity one
- Two different products, quantities three & five

Review Order Safeguards

Order Safeguards protect customers from unexpected or undesired changes in fulfillment conditions between the time you construct your shopping cart at Amazon Business and the time the order is received by Amazon Business. These include changes to price, delivery lead time, whether the order is fulfilled by Amazon, limits on shipping charges, and inventory fulfillment conditions.

Setup Instructions:

1. Order Safeguards can be setup by the admin under **Business Settings** -> **Groups** -> **Newly created Punchout group** -> **System Integrations – Purchasing System** -> 'Order Safeguards' section of business settings page.
2. Turn on / off the safeguard settings for each of the safeguards, as required
3. Provide absolute or % value limits in the safeguards. We recommend that you use Amazon recommended settings to avoid order rejections.
4. Once you have set the safeguards, please save your settings
5. The order can be fulfilled only if all conditions as laid out by the tolerance settings have been met, otherwise the user will be notified of the order rejection.
6. You can edit the order safeguards settings as and when needed, following the steps as above.



Please reach out to your Amazon Business Customer Support at [+1 \(888\) 281-3847](tel:+18882813847) to understand various order safeguard settings.

First time Punchout user experience

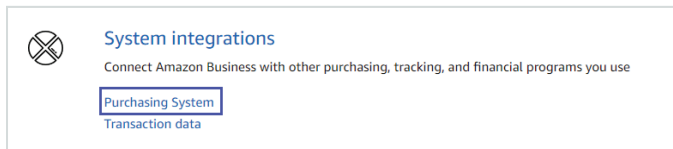
Please reach out to your Amazon Business representative or Customer Support at [+1 \(888\) 281-3847](tel:+18882813847), if you have any questions or concerns as you navigate Punchout for the first time.

Move to production

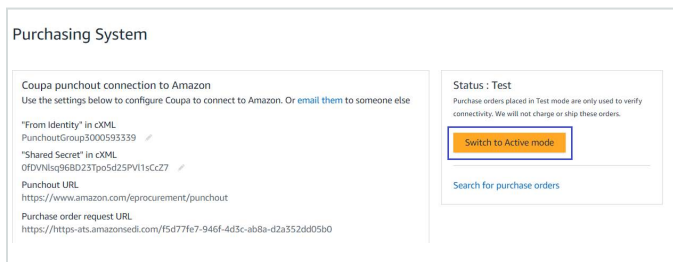
After an administrator has tested system connectivity, they can change the group status to active mode. Your Punchout credentials will be the same. If you would like to have different credentials for production, you should create a new group and generate new credentials as shown in this document.

When the status is in active mode, purchase orders will ship and the selected payment method will be charged.

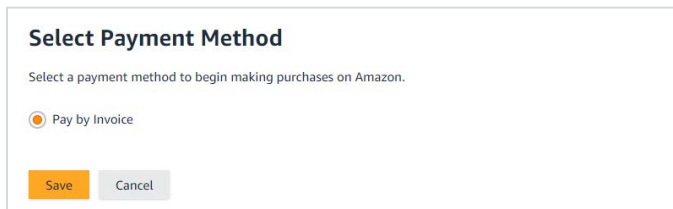
Note: After an administrator changes from test to active mode, the business account can be edited back to test mode.



- To update from test to active mode, navigate to **Business Settings > Groups**.



- Click on **Newly created Group > Purchasing System > Switch to Active Mode**.



- Select your payment method and save your settings. If you selected an individual payment method while creating a group, then you will not be asked to select a payment method.


Electronic invoice setup (if needed)

Please contact your Amazon Business Customer Advisor to know whether electronic invoicing is supported for your eProcurement platform.

Single sign on (SSO)

Single sign on can be setup via self-service.

- Please navigate to **Business Settings >System Integrations >Single Sign-On (SSO)** and follow the steps on the page.
- Please contact your Amazon Business Customer Advisor, if you experience any issues.



System integrations

Connect Amazon Business with other purchasing, tracking, and financial programs you use

[Configure purchasing system](#)
[Transaction data](#)
[Single Sign-On \(SSO\)](#)

Appendix

Amazon Business customer service/post-production support

Contact the Amazon Business customer service team for any transactional questions related to an order, including: ordering, quantity availability, shipment speed, delivery tracking, returns, and refunds. This team can also provide administrator support, including feature configuration and system integration support.

Phone: (888) 281-3847 | [Chat](#) | Email: corporate-punchout@amazon.com

Please note that we keep adding new features to Amazon Business and the website. You may see slight differences in terminology and/or layout compared to this document. If you have any questions, then please contact Amazon Business customer service.

Learn more about Amazon Business Punchout at [Amazon Punchout](#).