amazon business

Planergy Punchout/Punch-in integration with Amazon Business

Table of Contents

Punchout/Punch-in setup on Amazon Business 1

Punchout/Punch-in setup in Planergy software 9

Testing 11

Review order safeguards 11

First time Punchout user experience 13

Punch-in user management and user experience 13

Move to production 13

Potential reasons for rejected orders 15

Single Sign-on (SSO) 16

Appendix 17

- Appendix 1: Confirmation emails during testing 17
- Appendix 2: Configure Pay by Invoice 17
- Appendix 3: Amazon Business customer service/post-production support: 18
- Appendix 4: Extending punchout to multiple legal entities 18

Frequently encountered errors – Planergy 19

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

Punchout/Punch-in setup on Amazon Business

If you don't already have an Amazon Business account, please register for one in the Amazon Business store you are looking to integrate with Amazon Business:

https://www.amazon.com/business - For US Amazon Business store

https://www.amazon.ca/business - For CA Amazon Business store

https://www.amazon.co.uk/business - For UK Amazon Business store

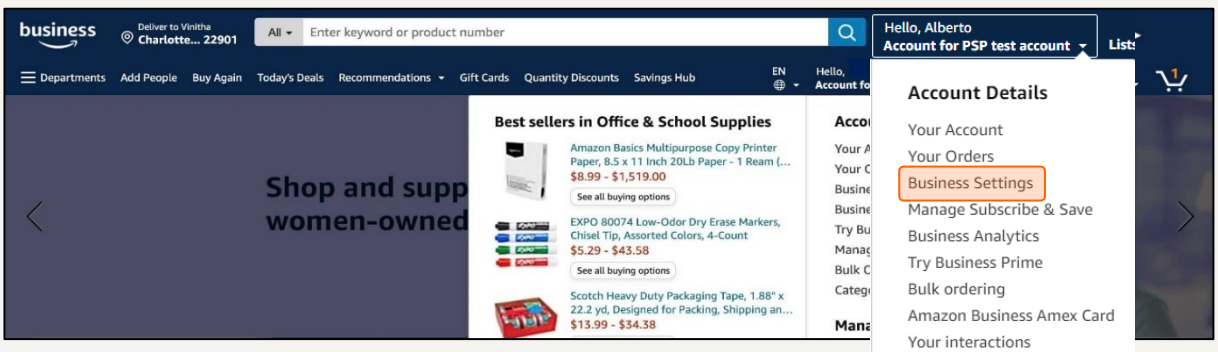
https://www.amazon.de/business - For DE Amazon Business store

https://www.amazon.fr/business - For FR Amazon Business store

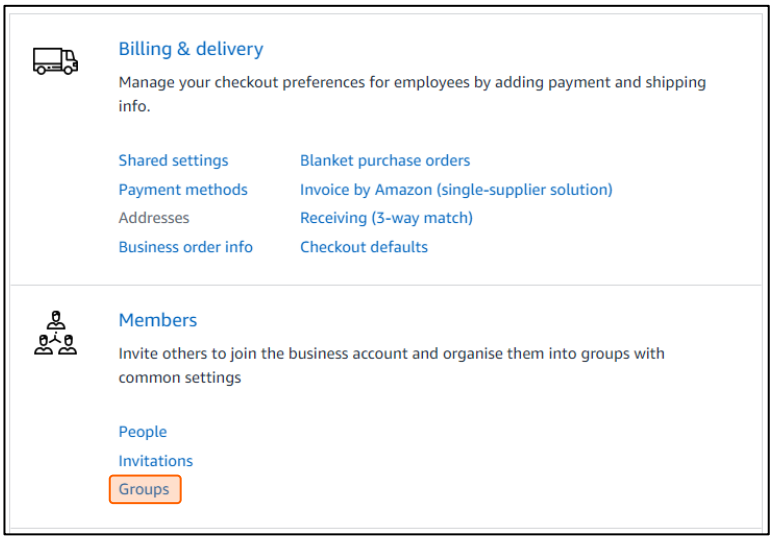
https://www.amazon.it/business - For IT Amazon Business store

https://www.amazon.es/business - For ES Amazon Business store

It may take up to 72 hours for the account to be verified and activated.
Once the account is activated, login to your Amazon Business account and navigate to Business Settings by hovering over your name as below:

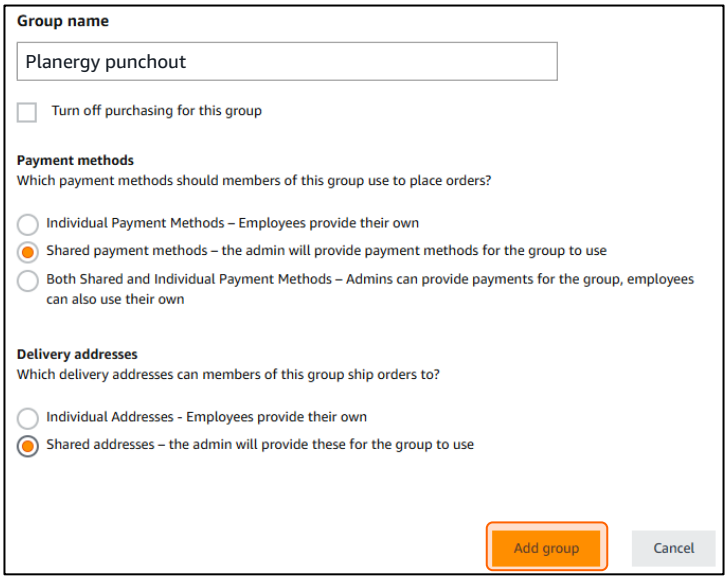


- Under ‘Members’ click on Group

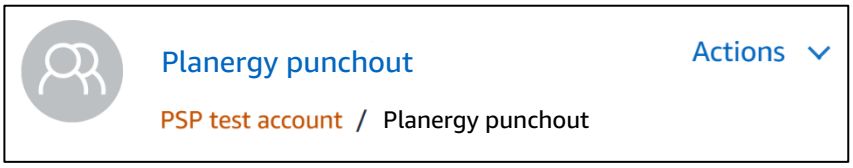


- Click on Add Group to create a new Group. This group will host both the Punchout and Punch-in connection.

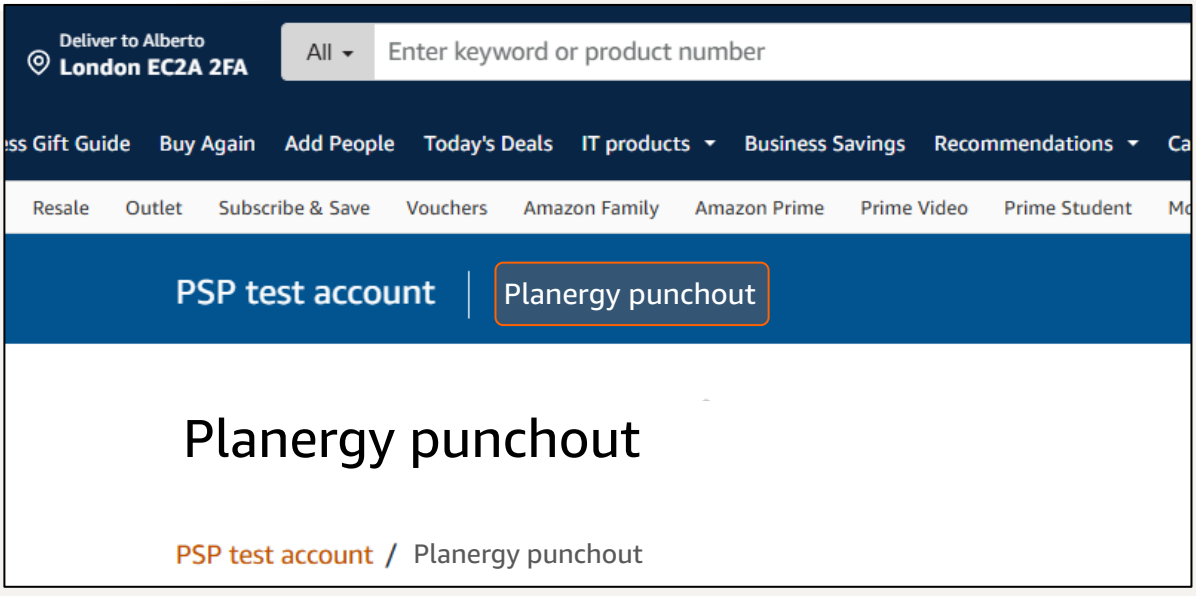
- Enter a group name of your choice (e.g. Planergy Punchout) and select Shared payment methods if a common payment instrument will be used for all the users (i.e. Pay By Invoice). Select Individual payment methods only if users will use their own payment instrument (users must add their payment instrument in their Amazon Business account if this option is selected). Select Shared addresses, as the shipping address will be taken from the purchase order sent from Planergy.



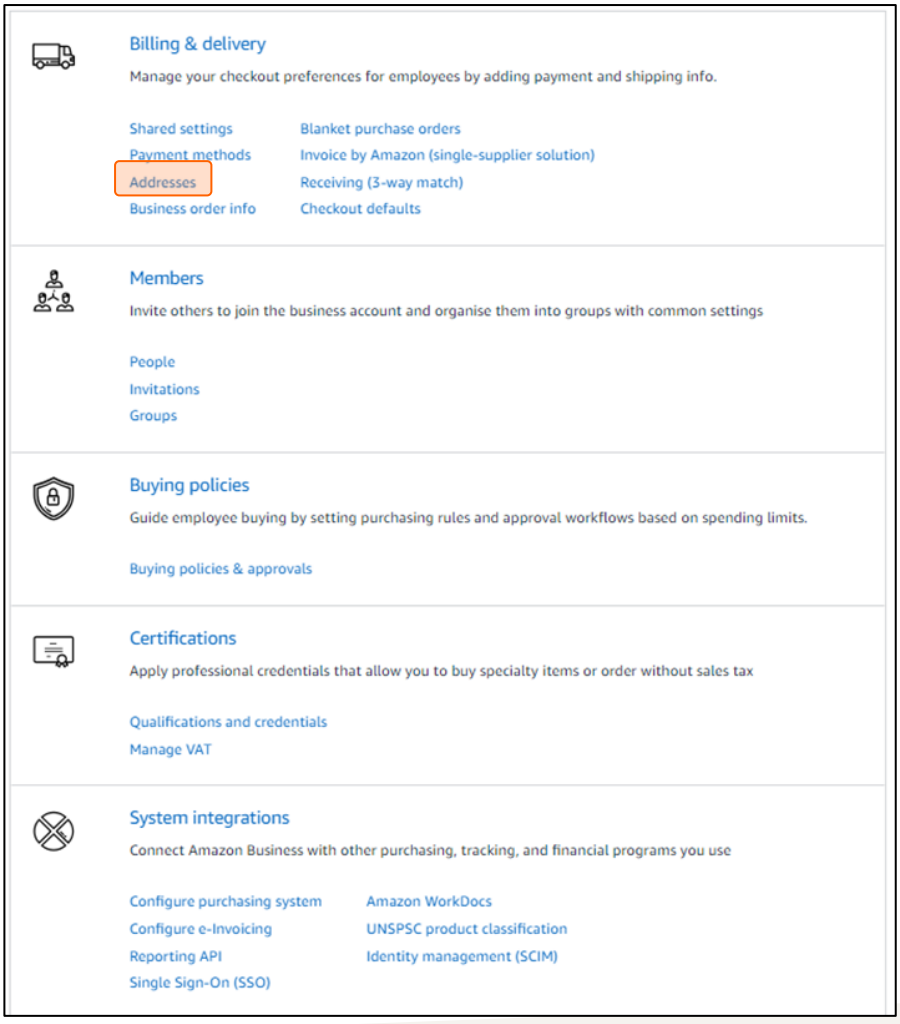
- Click on the newly created group. If it doesn't show up immediately, please refresh the web page.



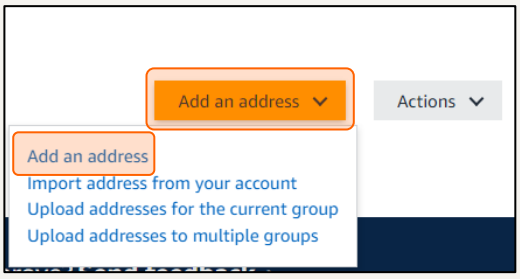
- To make sure you are on the newly created group, check you can see the name on the top blue banner. Otherwise, select it from the dropdown list highlighted below.



- Under 'Billing & delivery', click on Addresses

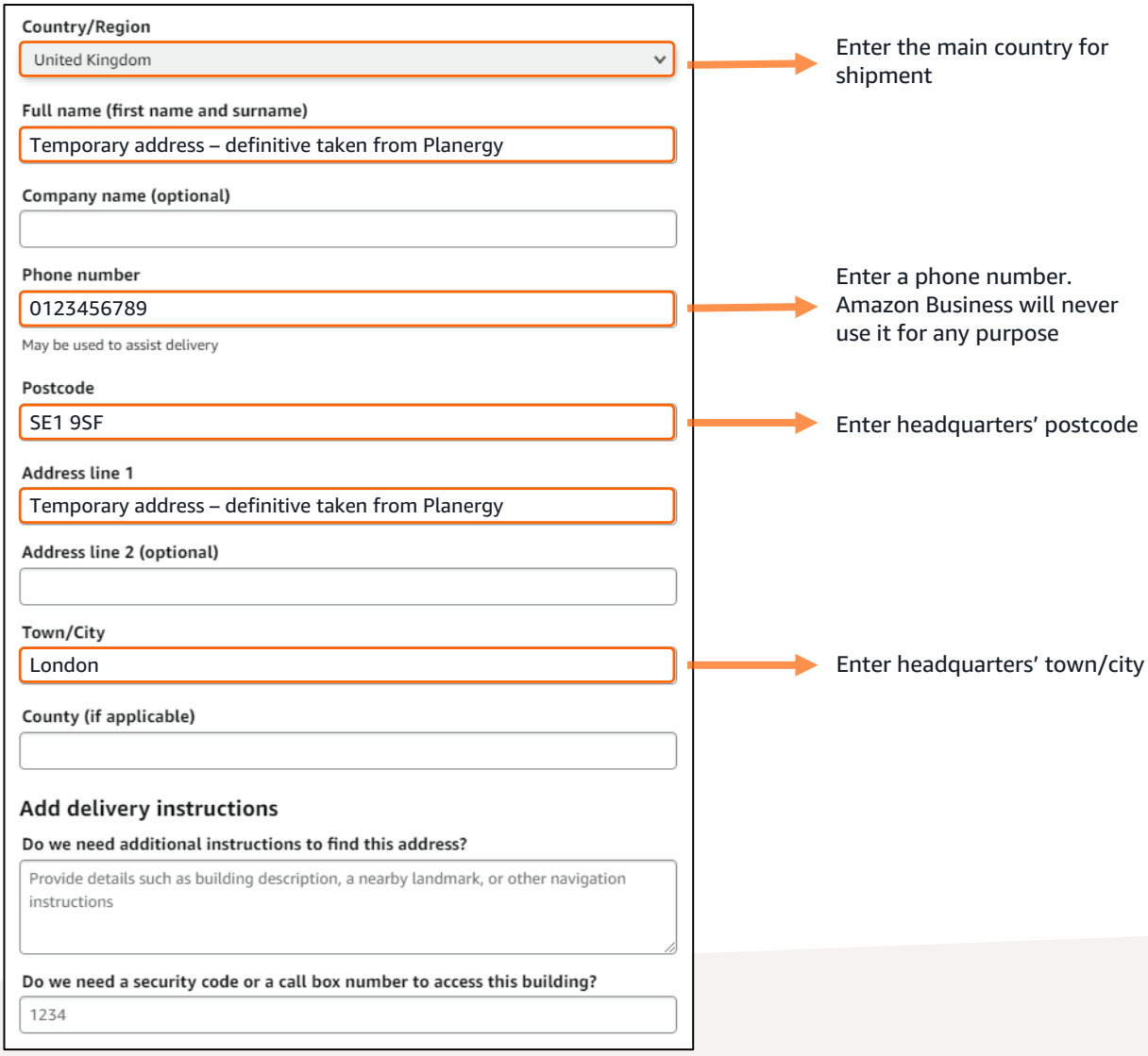


- On the right side, click on Add an address (twice)



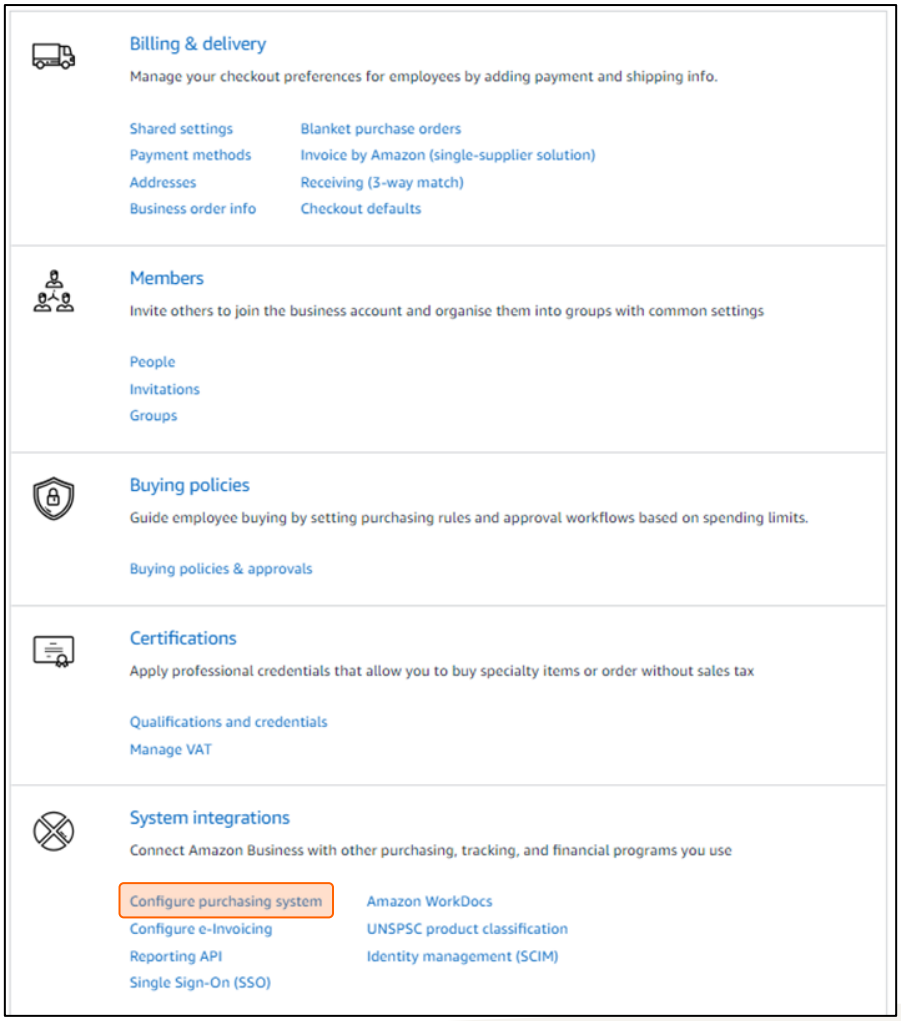
The address that you are adding is a dummy address, which all punchout users will be forced to select upon checkout. **This address will be ignored, the real shipping address will be taken from the purchase order generated from Planergy.**

- Complete the form as shown in the screenshot below

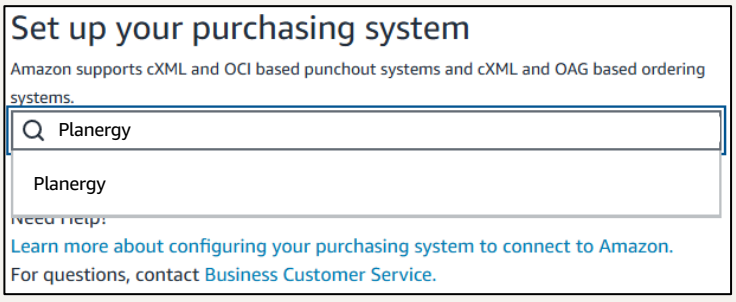


Fields that show empty, must be left empty.

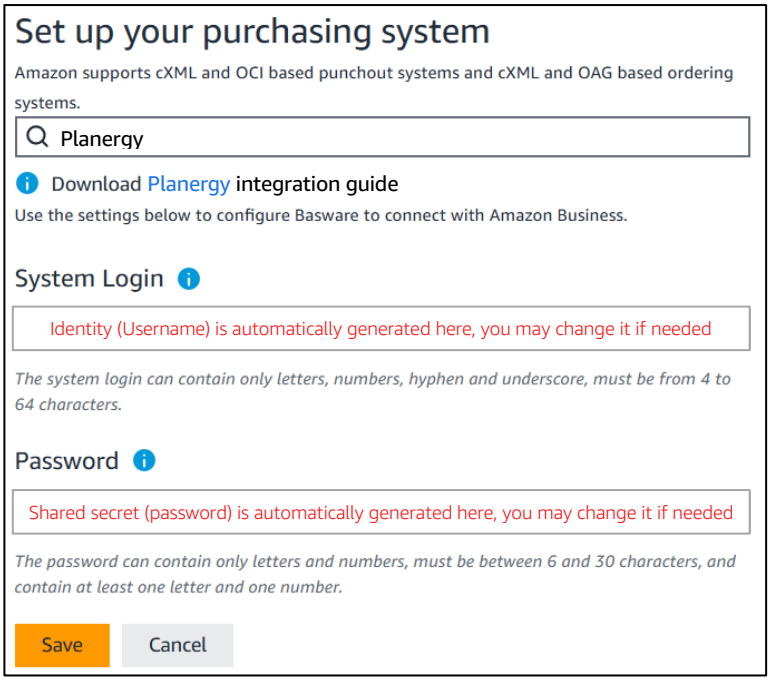
- Click on Add address at the end of the form. If a warning message pops up, ignore and click again on Add address.
- Under 'System Integrations', click on Configure purchasing system



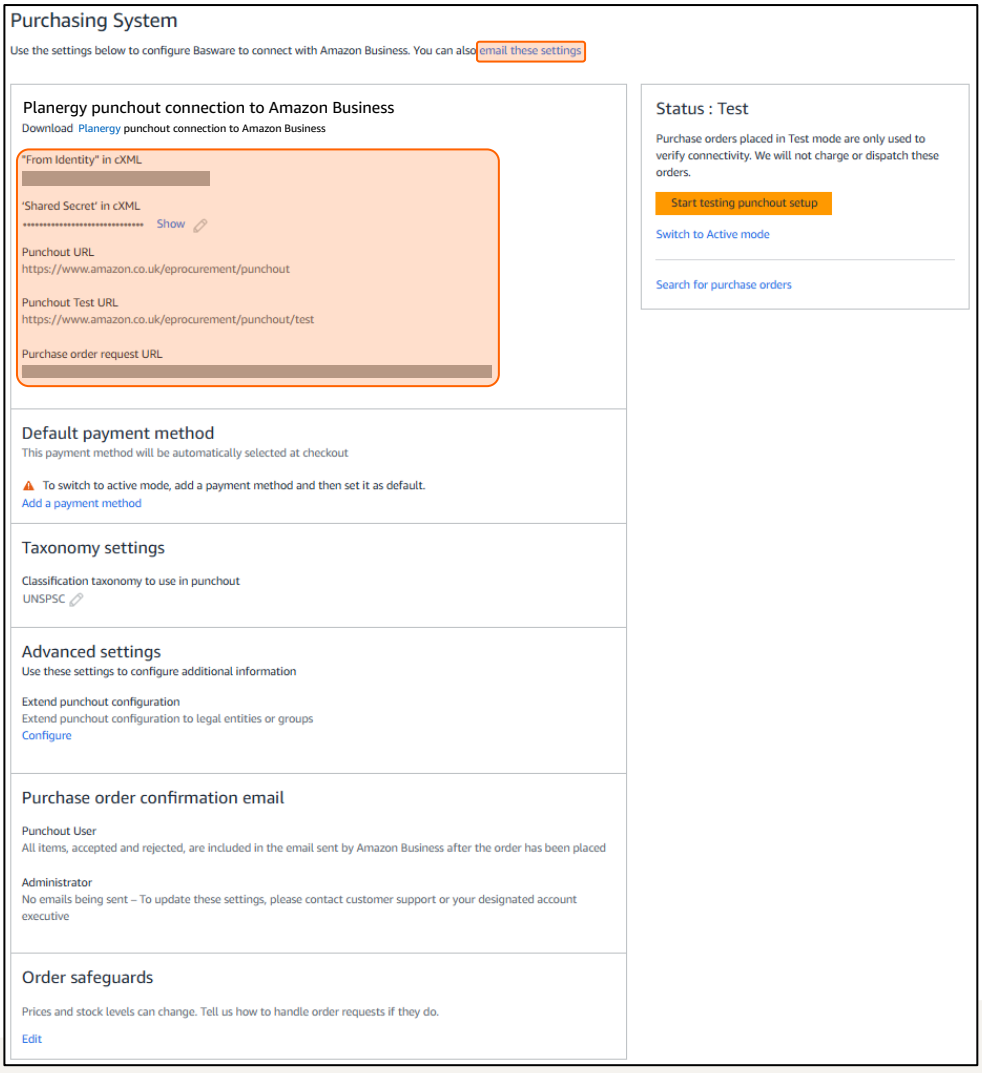
- Type Planergy in the search bar and select it.



- Credentials are autogenerated. Change the System login and Password per your choice if needed. Click on Save.

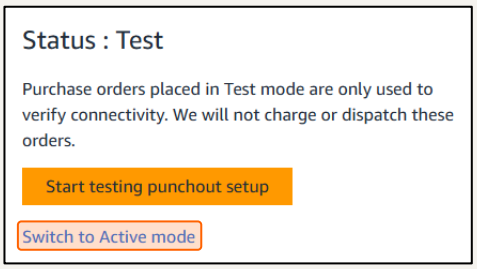


- During this step you will receive your user name (from/sender identity), password (shared secret), Punchout URL and purchase order URL. Please note, these details will also be emailed to you as well if you select the email these settings option (highlighted in the next screenshot).



- The purchasing system is set to Test mode by default in the Amazon Business account. As long as it is set to Test mode, **all the purchase orders transmitted to Amazon Business will not get shipped nor invoiced**. Users will receive confirmation emails informing whether test orders were successful or not, including reasons for rejected orders (see Potential reasons for rejected orders).

- Once the testing is successful, you will have to switch the mode from Test to Active to be able to place live orders (instructions in Move to production section).



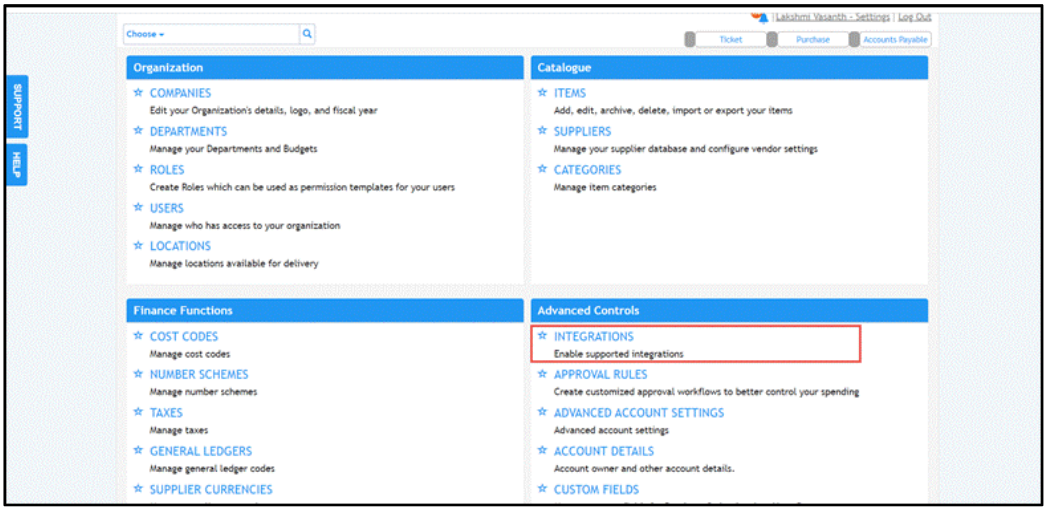
Punchout/Punch-in setup in Planergy software

Instructions for Planergy customers

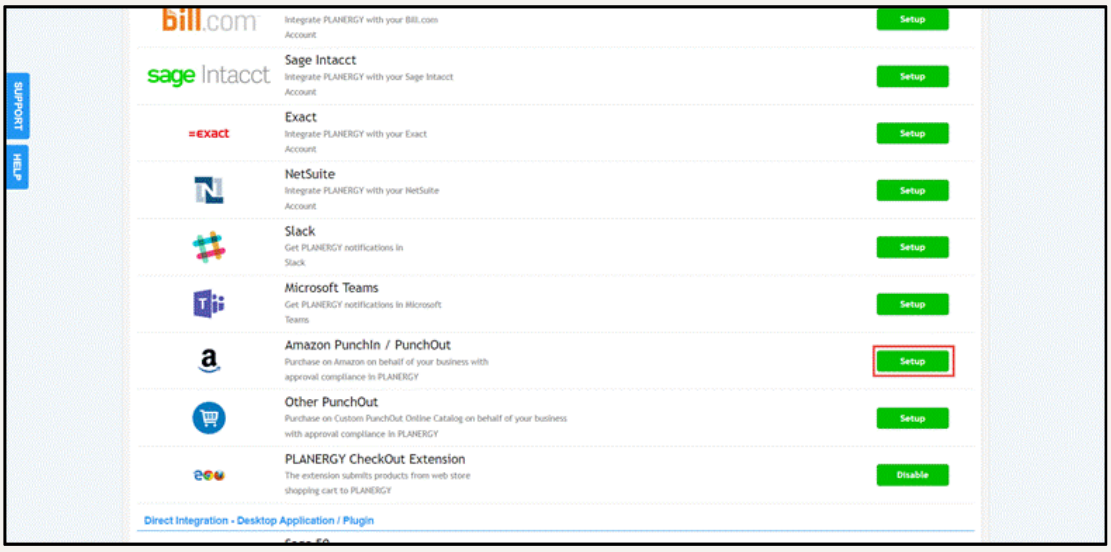
The account owner of your Planergy account will need to enable the Amazon Integration by following the below steps:

1 - Login to Planergy (see Planergy help page here)

- Access the **Control Panel**
- Select **Integrations** in the Advanced Controls section



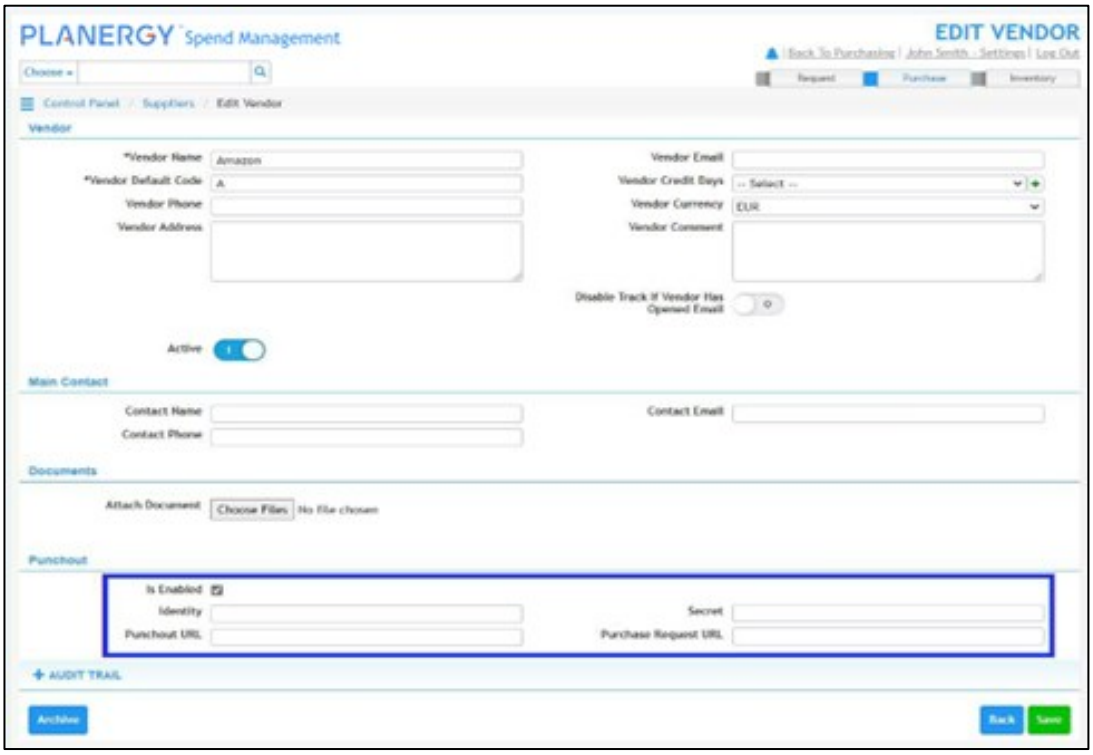
- Press the **Setup** button beside Amazon PunchIn / PunchOut



2 - Configure Amazon Supplier's Punchout Settings (see Planergy help page here)

Enter the credentials generated by Amazon Business 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

Testing

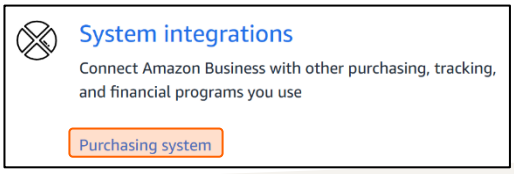
You are now ready to test the Punchout and submit some test orders. While in test mode, place several different orders (suggestions below) and make sure you receive an order confirmation for each (check Appendix 1 with example). Please note that test orders will not be shipped nor invoiced.

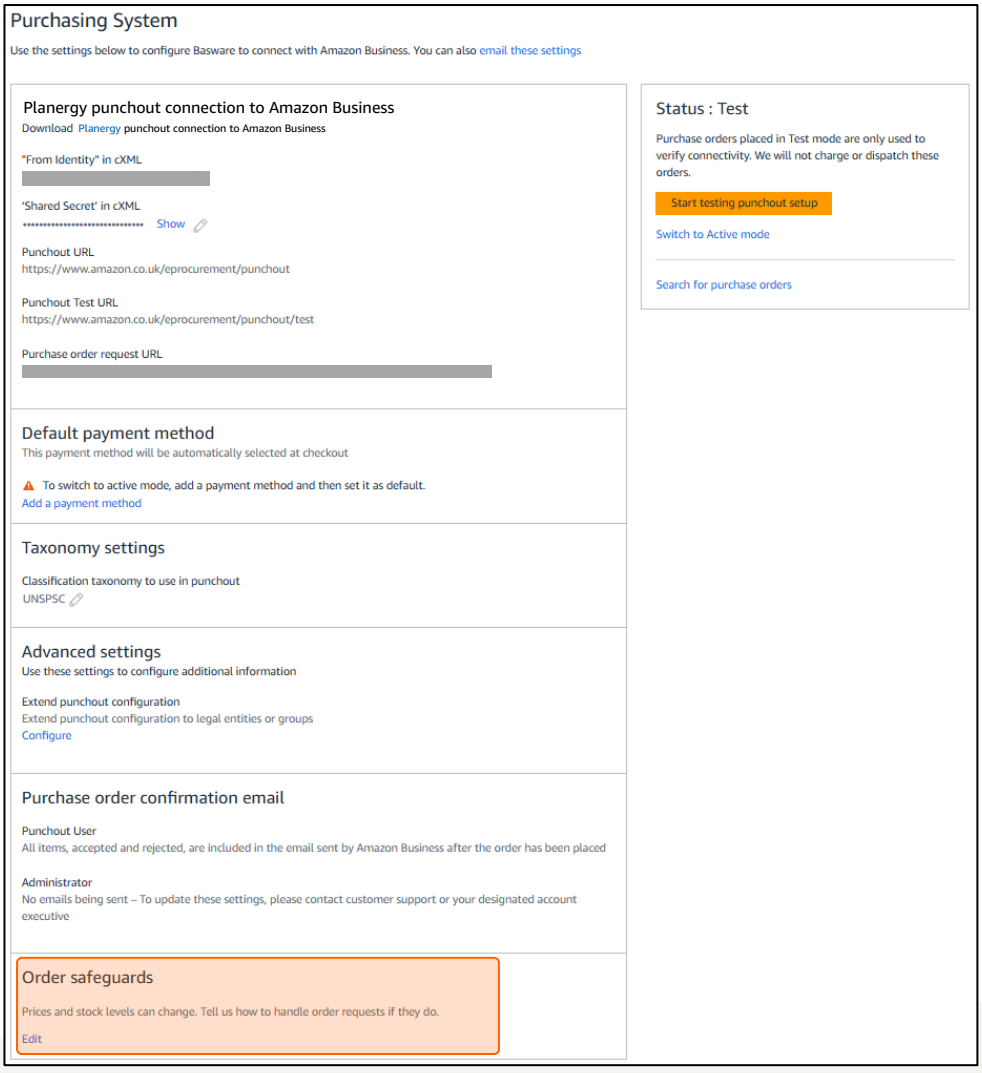
Here are some suggested test scenarios using product and quantity variations:
- One type of product, quantity one
- One type of product, quantity three
- Two different products, quantity one
- Two different products, quantities three & five

Review order safeguards

Amazon Business surfaces offers from multiple sellers and prices and inventory levels can change. We added some controls, so you can tailor how you interact with Amazon Business.

To change the default order safeguards, navigate to *Business Settings > Groups> Punchout Group > Purchasing System > Order Safeguards > Edit*





Purchasing System

Use the settings below to configure Basware to connect with Amazon Business. You can also email these settings

Planergy punchout connection to Amazon Business

Download Planergy punchout connection to Amazon Business

"From Identity" in cXML

'Shared Secret' in cXML

•••••••••••••••••••••••••••••• Show

Punchout URL
https://www.amazon.co.uk/eprocurement/punchout

Punchout Test URL
https://www.amazon.co.uk/eprocurement/punchout/test

Purchase order request URL

Status : Test

Purchase orders placed in Test mode are only used to verify connectivity. We will not charge or dispatch these orders.

Start testing punchout setup

Switch to Active mode

Search for purchase orders

Default payment method

This payment method will be automatically selected at checkout

To switch to active mode, add a payment method and then set it as default.
Add a payment method

Taxonomy settings

Classification taxonomy to use in punchout
UNSPSC

Advanced settings

Use these settings to configure additional information

Extend punchout configuration
Extend punchout configuration to legal entities or groups
Configure

Purchase order confirmation email

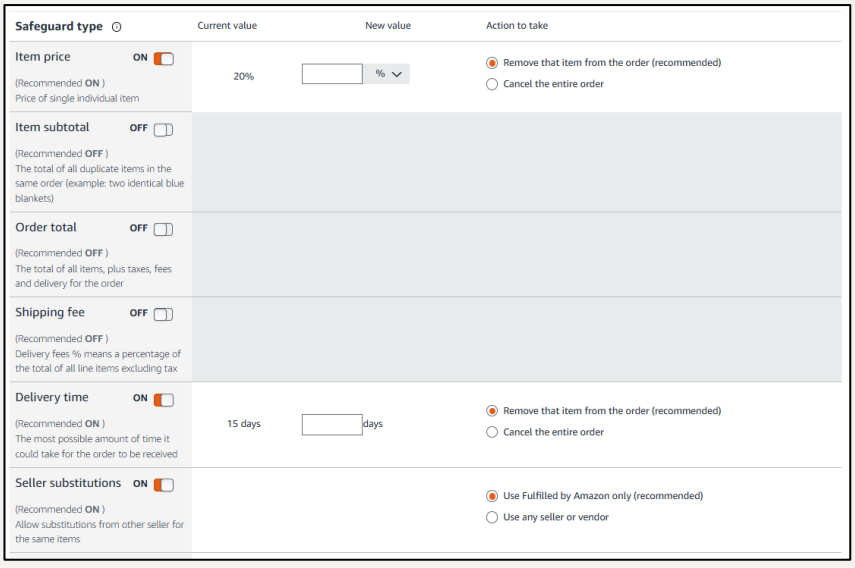
Punchout User
All items, accepted and rejected, are included in the email sent by Amazon Business after the order has been placed

Administrator
No emails being sent – To update these settings, please contact customer support or your designated account executive

Order safeguards

Prices and stock levels can change. Tell us how to handle order requests if they do.

Edit



Safeguard type	Current value	New value	Action to take
Item price ON (Recommended **ON**) Price of single individual item	20%	%	Remove that item from the order (recommended) Cancel the entire order
Item subtotal OFF (Recommended **OFF**) The total of all duplicate items in the same order (example: two identical blue blankets)			
Order total OFF (Recommended **OFF**) The total of all items, plus taxes, fees and delivery for the order			
Shipping fee OFF (Recommended **OFF**) Delivery fees % means a percentage of the total of all line items excluding tax			
Delivery time ON (Recommended **ON**) The most possible amount of time it could take for the order to be received	15 days	days	Remove that item from the order (recommended) Cancel the entire order
Seller substitutions ON (Recommended **ON**) Allow substitutions from other seller for the same items			Use Fulfilled by Amazon only (recommended) Use any seller or vendor

First time Punchout user experience

If the user does not have an Amazon Business account yet, user will be asked to create one when they Punchout for the first time; this is a one-time process. For the subsequent Punchout sessions, user will be taken to the Amazon Business home page directly without needing to login. User will be asked to enter the password only if they try to access Your Orders page on their account. Please reach out to your Amazon Business representative if you have any questions or concerns as you navigate Punchout for the first time.

Punch-in user management and user experience

To access Punch-in, users need to be invited to the Amazon Business account by the admin. Admin can add the users by navigating to the *Punch-in group > People > Add people > Enter the email address of the user that needs access to Punch-in > Select Punchout User role*. Once this is done, user can register themselves by following the steps on the invitation email. After registration, users can login using their email address and password and proceed with Punch-in. They can add items to their cart and transfer the cart back to Planergy for approvals.

Users should not have Requisitioner role for Punch-in to work. Requisitioner is only used for direct website purchases and not for Punch-in purchases.

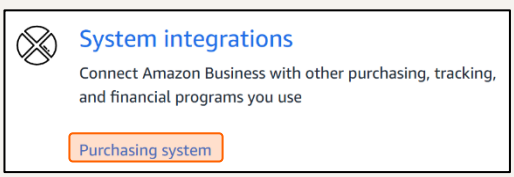
Move to production

After an administrator has tested system connectivity, they can change the group status to active mode and to be able to do this, a payment method must be setup in the account.

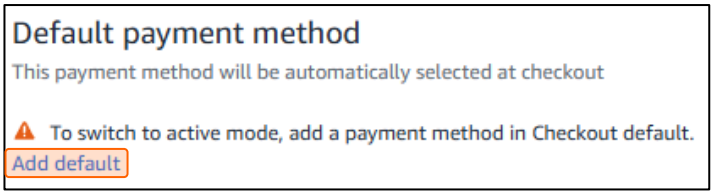
Payment method setup

Amazon Business offers several payment methods, such as credit card, Direct Debit or Amazon Business's Pay by Invoice line. The payment method lives on Amazon Business and must be added by an administrator prior to going live, following these steps:

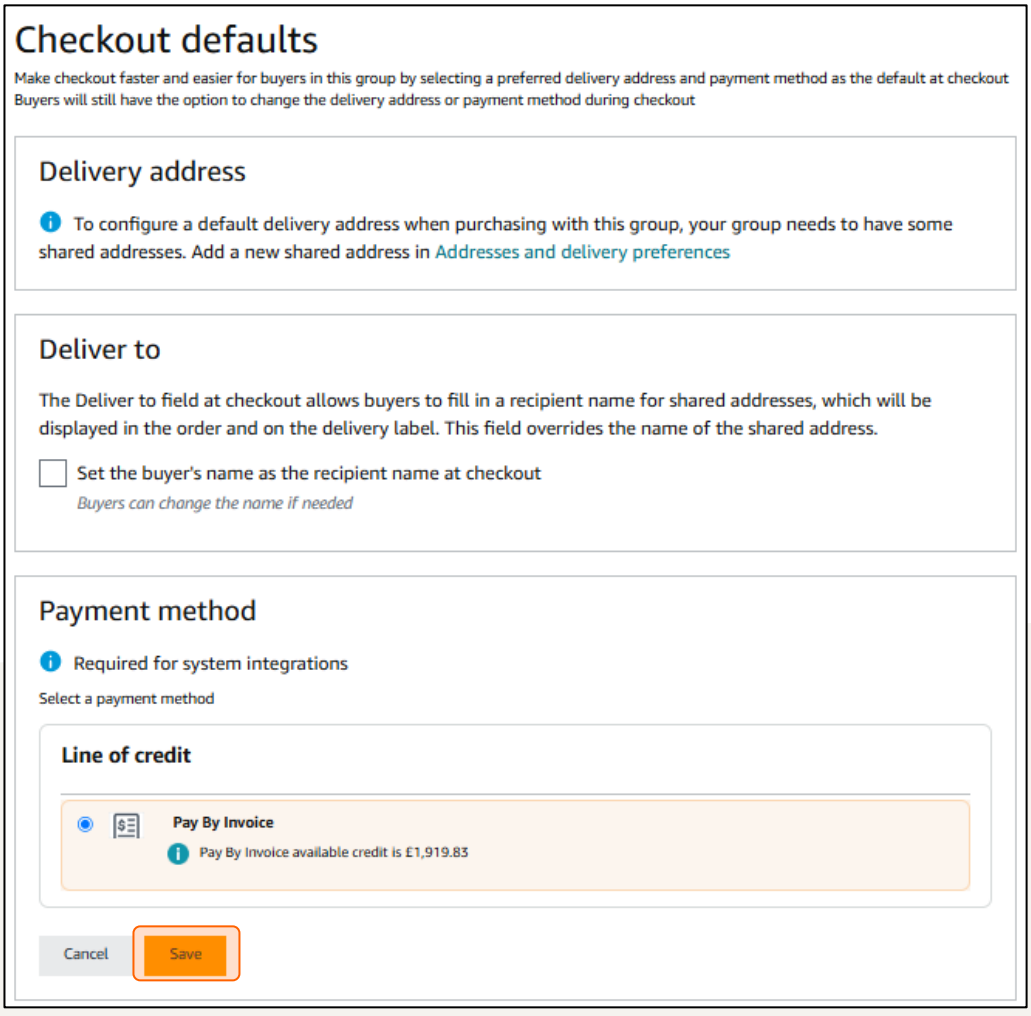
- Go to Business Settings > Groups
- Click on Newly created Punchout group
- Click on Purchasing System under System integrations



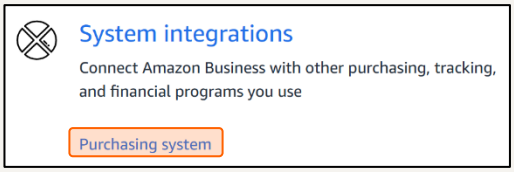
- Click on Add default under Default payment method

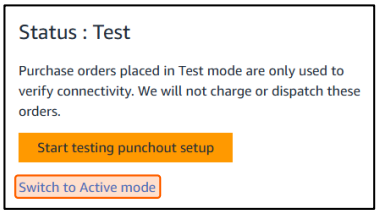


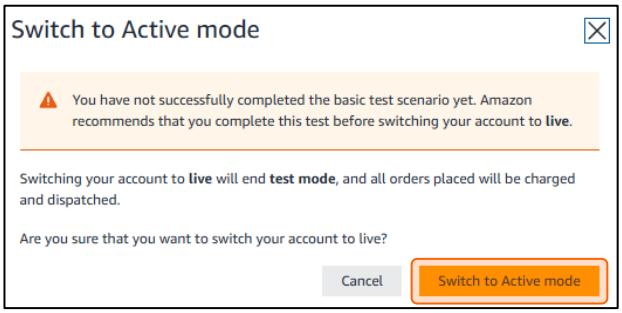
- Under Payment method section, click on Add and select the payment method desired (in this case, Pay by Invoice; check Appendix 2 if Pay by Invoice is not available) and click Save.



Once the above done, navigate to *Business Settings > Punchout Group > Purchasing system > Switch to Active mode*







When the status is in active mode, purchase orders will be shipped and the selected payment method will be charged. Contact customer service (check Appendix 3) for any delivery problem, payment or invoicing issues, etc.

If needed, punchout can be moved back to Test at any time and continue with testing.

In case your company has **several legal entities** (i.e. different VAT numbers and/or billing addresses), please reach out to your Amazon Business representative for support (see Appendix 4)

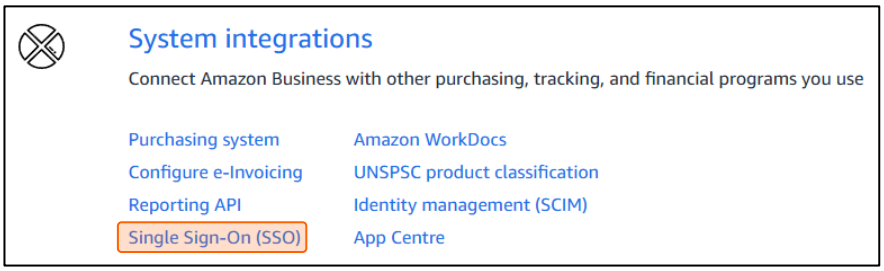
Potential reasons for rejected orders

- **Multiple punchout sessions:** several active punchout sessions in parallel can cause a rejection in order submission.
- **No approval within 7 days:** Amazon Business blocks the price and stock of items submitted in the cart to Planergy for 7 days (stock 12 hours). If a purchase order is not approved within the 7 days (stock 12 hours), the order may be cancelled due to price and/or stock fluctuations outside of the defined tolerances.
- **Modified shopping cart:** if the final PO submitted via Planergy contains a different quantity than the initial defined during cart checkout on Amazon Business, the order will be rejected. If you need to modify/cancel an order, cancel it both on Amazon Business and Planergy.

Single Sign-on (SSO)

If SSO is enabled, users don't have to create an account manually when they Punchout for the first time and they will also not be asked to enter password if they try to access Your Orders page on their account. 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.

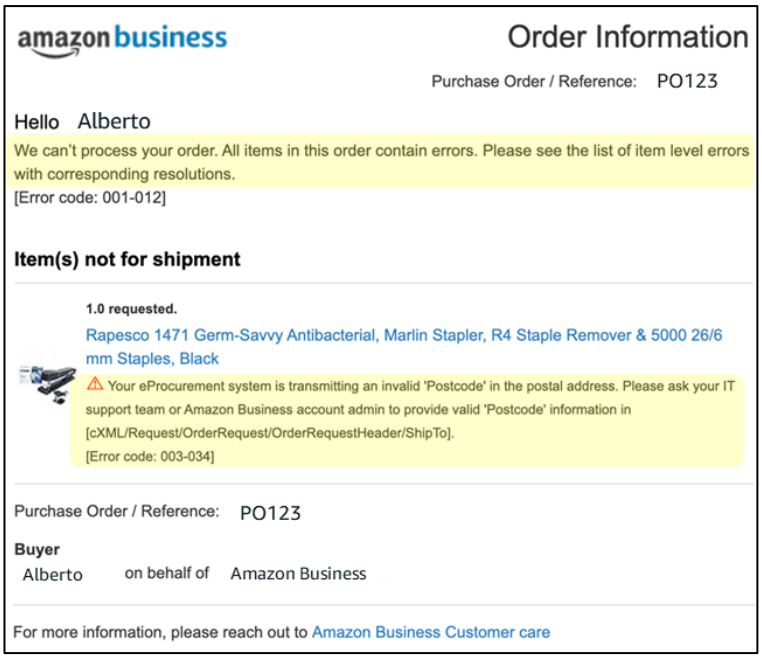


Please contact your Amazon Business representative, if you experience any issues.

Appendix

Appendix 1: Confirmation emails during testing

Punchout users will receive confirmation emails on whether test orders were successful or not, including reasons for rejected orders, as highlighted in the below image.



amazon business

Order Information

Purchase Order / Reference: PO123

Hello Alberto

We can't process your order. All items in this order contain errors. Please see the list of item level errors with corresponding resolutions.
[Error code: 001-012]

Item(s) not for shipment

1.0 requested.

Rapesco 1471 Germ-Savvy Antibacterial, Marlin Stapler, R4 Staple Remover & 5000 26/6 mm Staples, Black

⚠ Your eProcurement system is transmitting an invalid 'Postcode' in the postal address. Please ask your IT support team or Amazon Business account admin to provide valid 'Postcode' information in [cXML/Request/OrderRequest/OrderRequestHeader/ShipTo].
[Error code: 003-034]

Purchase Order / Reference: PO123

Buyer
Alberto on behalf of Amazon Business

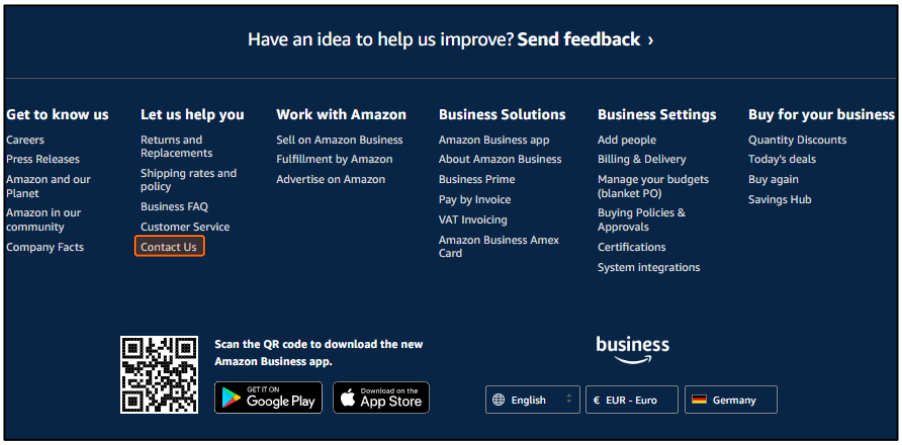
For more information, please reach out to Amazon Business Customer care

Appendix 2: Configure Pay by Invoice

Go to *Business Settings* > *Pay By Invoice* and define invoicing details following this guide. If Pay By Invoice is not visible in your account, reach out to your Amazon Business representative or customer service.

Appendix 3: 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. Find the link at the bottom of Amazon Business page.



If you have any issues regarding the Punchout integration or for any post production issues, please reach out to your Amazon Business account manager.

Appendix 4: Extending punchout to multiple legal entities

Contact your Amazon Business representative to request the creation of different legal entities. Once the legal entities created in your account, follow this guide to extend punchout to all entities.

Frequently encountered errors – Planergy

Multiple Amazon Business accounts

When having multiple Amazon Business accounts (e.g., one account per school), it is possible to merge all of them under the same central account.
To get support with this, contact your Amazon Business representative or Amazon Business Customer Service.

Approval workflows configured in Amazon Business account not applying to punchout and punchin users

When accessing Amazon Business through punchout/punchin, any previously existing approval workflow in the Amazon Business account will be disregarded. For punchout and punchin purchasing, approval workflows take place in Planergy.