

CREATING A REQUISITION VIA AMAZON BUSINESS PUNCHOUT IN PS FINANCIALS

OVERVIEW

CREATE AND DEFINE REQUISITION
ADDING ITEMS AND SERVICES
REVIEW AND SUBMIT
RECEIVE ITEMS

OVERVIEW

Creating a requisition is done by Department Requestors or Service Delivery Teams to order goods from the NAU Amazon's Business Catalog. In PeopleSoft Financials, the requestor creates a requisition, adds items and submits for approval. The requisition then goes through approval processes based on amount and items ordered. After the requisition is approved it is sourced into a Purchase Order and dispatched to Amazon Business for fulfillment.

Special Instructions:

Change Orders: Do not process Change Orders on Amazon Business requisitions. Change Orders are not sent to Amazon. Process a new requisition for additional items.

Returns: Go out to Amazon.com, find your Order and select Return or Replace Items. Print your return label, place the return item back into the box and apply the shipping label. Contact Campus Supply at NAU-CampusSupply@nau.edu that your shipment is ready for pick up, provide the building, room number and contact person. Campus Supply will pick up your item/s from your department to send back to Amazon.

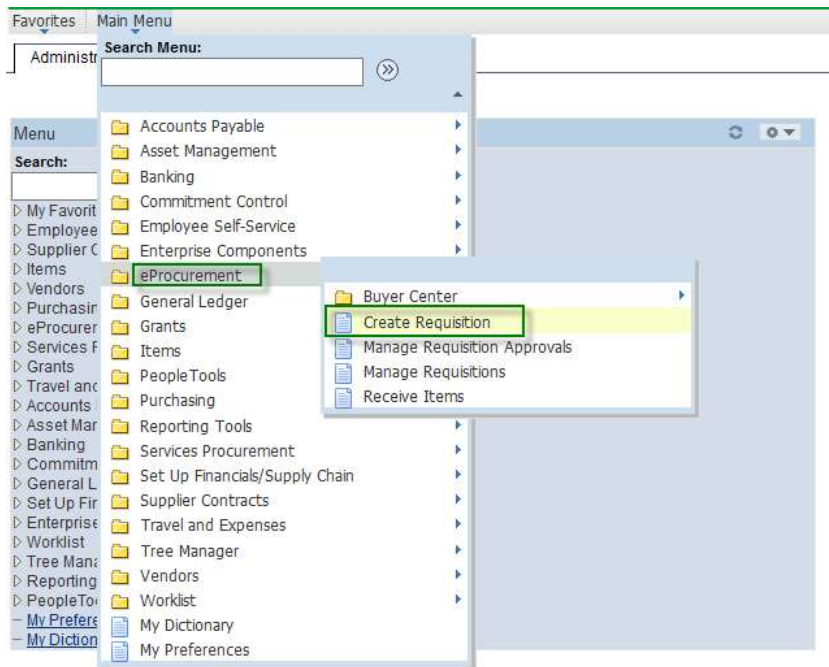


Requisition Origin: Requisitions are to be created with the origin “DPT” for order less than \$2,500. Orders greater than \$2,500 will require Purchasing Oversight and need to be processed as a “PUR”.

Grant Accounts: General-purpose office supplies are considered facilities and administrative costs, and are not allowed as direct costs. When office supplies are purchased for technical or scientific use on a project, charges may be allowable as direct costs if appropriately justified. Additional information can be obtained at <http://nau.edu/postaward/>.

CREATE and DEFINE REQUISITION (same process as the Staples PunchOut)

Navigate to “Create Requisition” screen: eProcurement > Create Requisition



Define Requisition Tab – Enter Basic Information

eProcurement > Create Requisition – Define Requisition

The Define Requisition page contains several default fields that flow through to the Requisition creation. Enter a meaningful Requisition Name and confirm default information.

1. Title Requisition. Use a description that that will aid in searching for the requisition.
2. Add Amazon’s vendor number which is V# 0000021804.
3. Confirm default Origin as “DPT” (orders under \$2,500) or “PUR” (orders over \$2,500).
4. Confirm Other Items:
 - **Accounting Date:** Defaults to current date. It is only necessary to change the date during Fiscal year end processing.
 - **Ship To:** Select the ‘Ship To’ address the merchandises is to be delivered. “Attention To” detail will be completed on the “Review and Submit” page. This field can be set to a certain default location, contact Ask-FAS@nau.edu to update user preferences.
 - **Accounting Defaults:** These will be confirmed on the “Review and Submit” page.

You are now ready to click the "CONTINUE" button to add your line items

ADDING ITEMS and SERVICES

eProcurement > Create Requisition - Add Items and Services

- Click 'Web' Tab, and Amazon Business catalog link

Favorites | Main Menu > eProcurement > Create Requisition

Help

Create Requisition

1. Define Requisition | 2. Add Items and Services | 3. Review and Submit

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search: Search

Catalog | Favorites | Templates | Forms | **Web** | Special Request

Logo	Merchant	Description
	Staples Office Supplies	Use Staples to browse and shop for office supplies
	Amazon Business	NAU's Amazon Business Prime catalog with preferred pricing, bulk discounts and subscription services.

[Review and Submit](#)

PeopleSoft will redirect to Amazon Business

Redirecting to Amazon Punchout

[Click here](#) if the session doesn't open in a new tab automatically.

[Conditions of Use](#) | [Privacy Notice](#) © 1996-2020, Amazon.com, Inc.

First Time Users – Amazon will prompt to create or consolidate accounts.



Welcome to Amazon Business!

Let's create your free business user account so you can join your Northern Arizona University coworkers and shop for work.

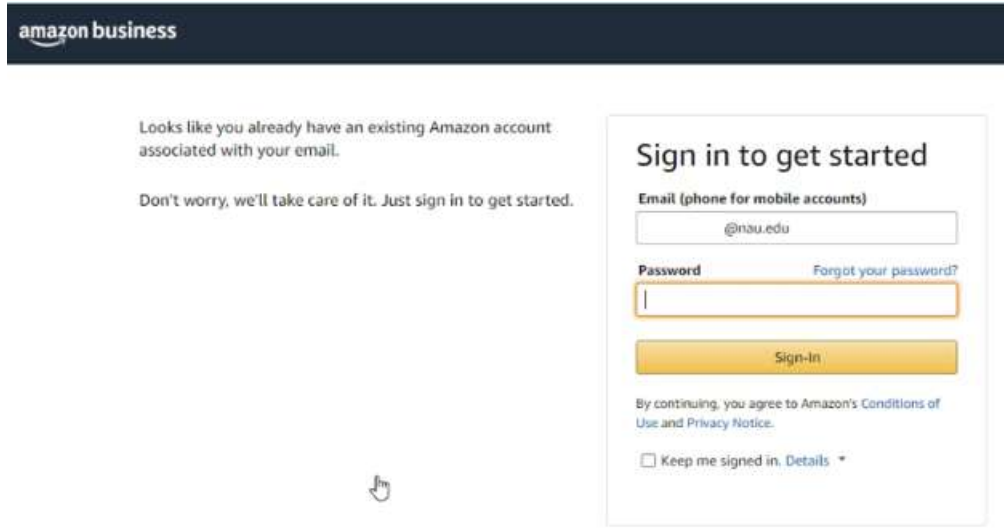
[Get started](#)

By clicking "Get Started", you agree to the [Amazon Business Acceptable Use Policy](#)

Your business user account information, including order history, addresses, payment methods and personal information will be visible to administrators of the business account. The administrator of the business account will have the ability to manage or close this account.



Amazon will determine if you have an account associated with your @nau.edu account. If so, sign in



amazon business

Looks like you already have an existing Amazon account associated with your email.

Don't worry, we'll take care of it. Just sign in to get started.

Sign in to get started

Email (phone for mobile accounts)
@nau.edu

Password [Forgot your password?](#)

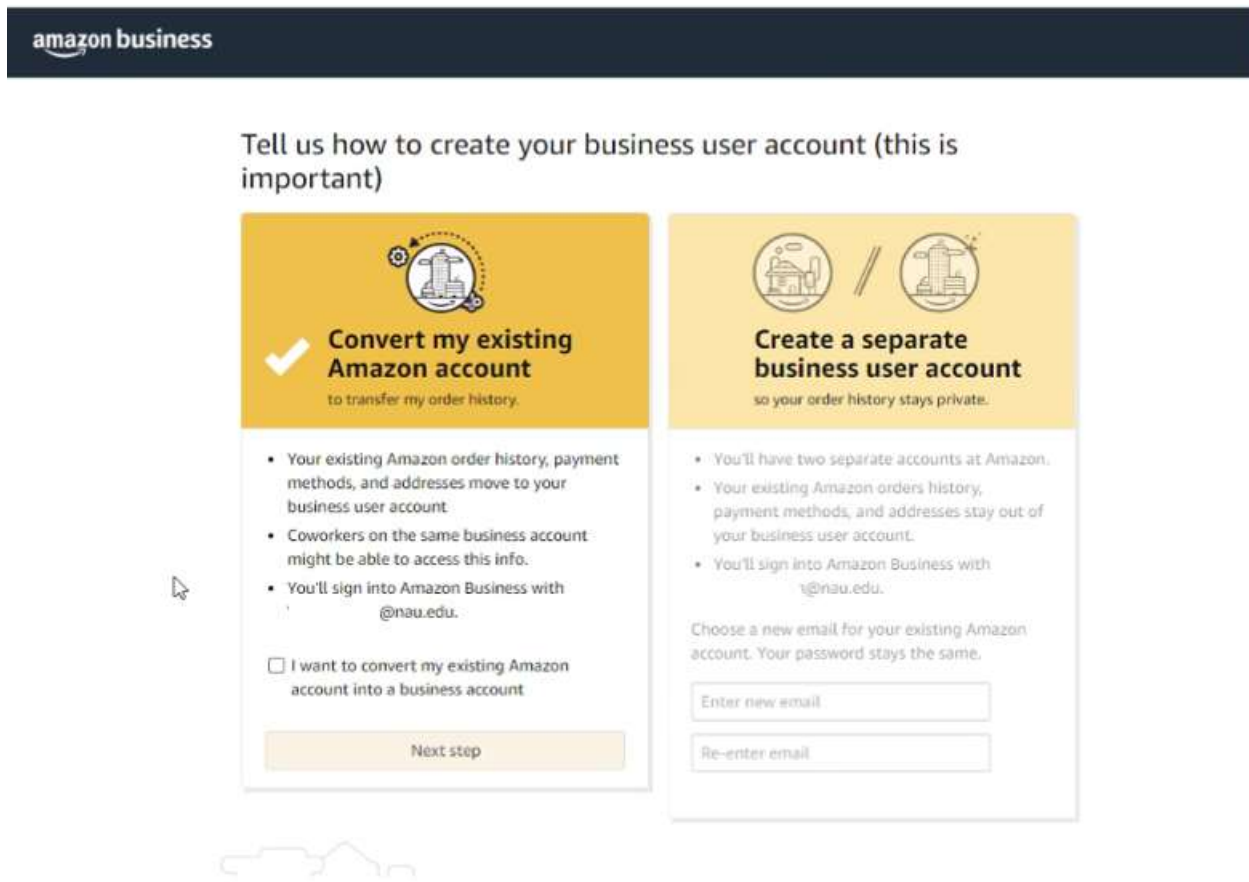
Sign-In

By continuing, you agree to Amazon's [Conditions of Use and Privacy Notice](#).

Keep me signed in. [Details](#)

It is recommended to “Convert my Existing Amazon Account”. (This is important)

- Historical order information is not viewable by NAU. Only orders “Paid for” by NAU are viewable by purchasing and others.
- If you create a “Create a separate business user account”, the personal email used may NOT be associated with an existing Amazon account. This is not the recommended approach.



amazon business

Tell us how to create your business user account (this is important)

Convert my existing Amazon account

to transfer my order history.

- Your existing Amazon order history, payment methods, and addresses move to your business user account.
- Coworkers on the same business account might be able to access this info.
- You'll sign into Amazon Business with @nau.edu.

I want to convert my existing Amazon account into a business account

Next step

Create a separate business user account

so your order history stays private.

- You'll have two separate accounts at Amazon.
- Your existing Amazon orders history, payment methods, and addresses stay out of your business user account.
- You'll sign into Amazon Business with @nau.edu.

Choose a new email for your existing Amazon account. Your password stays the same.

Enter new email

Re-enter email

Your account is ready to go!

You can start using it to shop for work.

Start shopping

amazon business

Email:

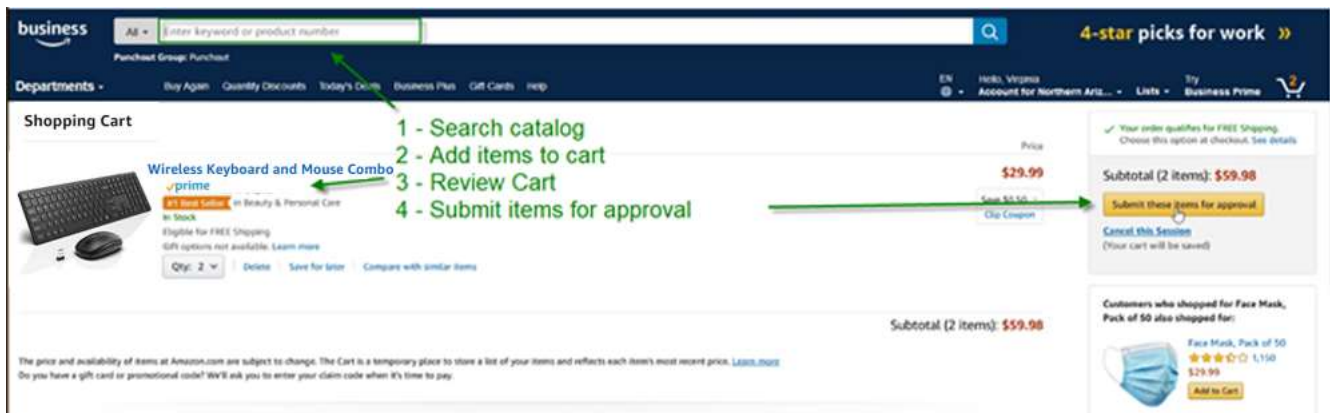
@nau.edu



Once you have created your Amazon Business account through Northern Arizona University, you will sign in directly through SSO in the future.

Amazon Business Catalog – Similar to Amazon consumer experience

1. Search items from the catalog and add items to the shopping cart.
2. Add additional items to your cart if desired.
3. Orders must be greater than \$25 for free 2-Day shipping.
4. Once items have been added selected, Review Cart and select “Submit these items for approval”



REVIEW and SUBMIT

eProcurement > Create Requisition – Review and Submit

Favorites Main Menu > eProcurement > Create Requisition

Edit Requisition

1. Define Requisition **2. Add Items and Services** **3. Review and Submit**

Add lines to the requisition, specifying the information necessary to procure each item or service.

Search:

[Catalog](#) [Favorites](#) [Templates](#) [Forms](#) [Web](#) [Special Request](#)

Direct Merchants Personalize | Find | First 1-2 of 2 Last

Logo	Merchant	Description
	Staples Office Supplies	Use Staples to browse and shop for office supplies
	Amazon Business	NAU's Amazon Business Prime catalog with preferred pricing, bulk discounts and subscription services.

[Review and Submit](#)

Must Click here to Review and Submit

This screen allows for final review of the order prior to submission. Please review and update by:

1. Expand each item to confirm items and quantities are correct
2. Confirm 'Ship To' location is accurate. Campus orders are to be shipped to WHSE-COC (Campus Supply).
3. Input "Attention To" with Building Number / Room Number for the first item. The first item text displays on order packing slip. It is preferred numbers are used. For example, Gammage (Building 1) Room 101B should be input as "001/101B"
4. Select SpeedCharts for each item. Multiple SpeedCharts can be used for one Requisition. This defines the accounting distribution for the order, by item.
5. Check Budget.
6. Save & Preview Approvals. This saves the order as an open Requisition.

Create Requisition

- 1. Define Requisition
- 2. Add Items and Services
- 3. Review and Submit

Review the details of your requisition, make any necessary changes, and submit it for approval.

Business Unit: Northern Arizona University Origin: Department Purchasing

Requester: Laird, Kristin *Currency:

Requisition Name: Priority:

Card Number: Expiration Date: Use Procurement Card

Requisition Lines

Line	Description	Vendor Name	Quantity	UOM	Price	Total
1	Face Mask, Pack of 50	Amazon.com Services, Inc.	1.0000	Each	28.91000	28.91

1 - Expand

Consolidate with other Reqs Amt Only Override Suggested Vendor

Shipping Line: 1 Due Date: Quantity: 1.0000 Price: 28.91000

Status: Active *Ship To: **2 - Confirm Ship To Location is Warehouse**

Attention To: **3 - Input Building and Room, to display on packing slip**

*Distribute By: Qty SpeedChart: *Liquidate by: Amt **4 - Select Speedchart for Accounting distribution**

Accounting Lines

Line	Status	Dist Type	*Location	Quantity	Percent	Merchandise Amt	GL Unit
1	Open		<input type="text" value="001"/>	1.0000	100.0000	28.91	NAUBU <input type="text"/> + or - for split funding

Select All / Deselect All Total Amount: 28.91 USD

Add to Favorites Add to Template(s) Modify Line / Shipping / Accounting Delete

Comments

Informational comments to be displayed on requisition

Send to Vendor Show at Receipt Shown at Voucher Approval Justification [More Comments](#)

 5 - Check Budget to confirm department accounting and save requisition as "Open"

 [Find more items](#)

Confirmation Page summarizes the order and previews approvers, the order is now ready to “Submit”

Confirmation

[Documentation](#)

Requested For:	Paddock,Charlotte	Number of Lines:	1
Requisition Name:	FY 17 Staples Office Supplies	Total Amount:	129.95 USD
Requisition ID:	1000082161	Pre-Encumbrance Balance:	<u>129.95</u> USD
Business Unit:	NAUBU		
Status:	Open		
Priority:	Medium		
Budget Status:	Valid		

Initial Fiscal Approval

Line 1:Initiated
Dell 24" Monitor SE2416HSC1

Department Approval

Not Routed

 [Multiple Approvers](#)
Department Approver

[Submit](#)

[Edit Requisition](#)

[Apply Approval Changes](#)

[Check Budget](#)

[View printable version](#)

[Manage Requisitions](#)

[Create New Requisition](#)

Once your order is submitted:

1. The Requisition will be saved and routed for approvals.
2. Once approved, the Requisition will be auto sourced to a Purchase Order.
3. The Purchase Order will be dispatched to Amazon Business for order fulfillment.

RECEIVE ITEMS

Receive Items navigation: eProcurement > Manage Requisitions

After a shipment of goods has been received by a Requester, a Receipt must be created before the Invoice can be paid. Once items have been received, they will be funneled to Accounts Payable for payment.

1. Navigate to the 'Manage Requisitions' page under eProcurement. This will show all recent order made by the requester.
2. Click the drop down on the right of the Amazon order and select "Receive Order"

1 - Navigate to Manage Requisitions

2 - Receive Order

3. Select the Box next to line item of items to be received
4. Click "Receive Selected"

3 - Select box next to line items of item to be received

4 - Click Receive Selected

Req BU	Requisition	Item Description	Tot Req Qty/Amt	Accepted to Date	UOM	Ship To	Attention To	Vendor	
<input checked="" type="checkbox"/>	NAUBU	FY 17 Staples Office Supplies	Dell S2415H 24" LED Monitor	1	0	EA	WHSE-COC	0011101B	STAPLESCON-001

5. Click Receipt Comments to add the Invoice number in Commentary. Then Click 'OK'

5 - Click Receipt Comments

5 - Add Invoice # from Accounts Payable email

6. Confirm Receipt Date. This defaults to current date. Change date if shipment was received earlier.
7. Confirm Received Quantity: Defaults to the entire quantity of the order. Change if receiving less or more. Save Receipt.
8. Save Receipt
9. Send your invoice with the receiver number to AccountsPayable@nau.edu.

Note: The “Details” icon will display more data about the item, the PO that you are receiving, and the previous and current receipts.

Favorites Main Menu > eProcurement > Manage Requisitions

Receive Items

New Receipt

*Business Unit: NAUBU

Receipt Status: Open

*Received Date: 04/24/2018

6 - Confirm Receipt Date

[Add Header Comments](#) [Reject Shipment](#)

Line	Item Id	Item Description	Received Quantity	*UOM	Accept Quantity	Details	Cancel Line	Receipt	PO
1		Dell S2415H 24" LED Mon	1.0000	EA	1.0000		X		

7 - Confirm Received Quantity

[Save Receipt](#) **8 - Save Receipt**

Favorites Main Menu > eProcurement > Manage Requisitions

Receipt Saved Successfully

You have saved receipt # 3000196517 containing the following items:

Line	Item Description	Received Quantity	Reject Quantity	Accept Quantity
1	Dell S2415H 24" LED Monitor	1.0000		1.0000

[Return to Manage Requisitions](#) [Return to Receiving](#)

A confirmation screen will be shown with a Receipt number.

WRITE THE RECEIVER NUMBER ON YOUR INVOICE, SCAN AND EMAIL TO AccountsPayable@nau.edu. ATTACH THE INVOICE TO YOUR EMAIL.