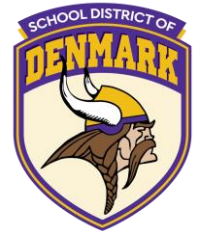


Amazon / Skyward e- Commerce Purchasing and Business Analytics

Janelle Marotz
Mike Koltes



business prime



Amazon Business Online Solutions

Overview

- Integration with Skyward Q (E-Commerce) overview
- Skyward Q vendor set-up
- Amazon site set-up
- How to process a purchase order from Skyward to Amazon

Amazon Business Online Solutions



Overview

- Imported partial invoices
- Reconciliation with the help of Amazon
- Questions

Amazon Business Online Solutions

Definitions

- Punchout / E-Commerce
 - A financial system connected electronically with a vendor to do purchasing from the vendor's website
 - Example: Skyward and Amazon purchasing
- Imported partial invoices
 - Example: Amazon connects to Skyward and
- Electronic receiving
 - Receiving items electronically through Skyward

System Integration Advantages

Can integrate Amazon easily with Skyward

- Connect your systems to simplify purchasing and move towards paperless options
- Direct purchases from Amazon Business through purchasing system to comply with organization's buying policies
- Manage end-to-end reconciliation electronically using e-Invoice



Amazon Business Online Solutions



Amazon Business Settings

- Login to Amazon business
 - Must be an admin security level
- Go to business settings

Amazon Business Online Solutions

Amazon



System integrations

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

Purchasing System

E-Invoicing

Single Sign-On (SSO)

Amazon WorkDocs

Domain verification

UNSPSC product classification

Identity management (SCIM)

App Center

Amazon Business Online Solutions

Amazon Business Settings Purchasing System

Use the settings below to configure Skyward to connect with Amazon Business.

Skyward punchout connection to Amazon Business

Download [Skyward](#) integration guide.

"From Identity" in cXML

[REDACTED]

"Shared Secret" in cXML

[REDACTED]

Punchout URL

<https://www.amazon.com/eprocurement/punchout>

Purchase order request URL

[REDACTED]

Amazon Business Online Solutions



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](#)

Skyward Punchout with Amazon



Skyward Purchasing Demo

- Login to Skyward
- Purchasing
 - My purchase order
 - Add purchase order
- Check the box for “shop online”

Skyward Punchout with Amazon



Add Purchase Order

Enter Purchase Order Details

[Save & Add Detail](#) [Save](#) [Cancel](#)

PURCHASE ORDER DETAILS

Attachments [Add Attachments](#)

*Purchasing Group

*Fiscal Year

Shop Online

*Vendor

*Description

*Batch

*Invoice To

*Ship To

Delivery Instruction

Attention To

Commodity


Due Date

Contract

Ship Date

Skyward Punchout with Amazon



Hello, MICHAEL
Account for CESA 5 ▾ Lists ▾ Try Business Prime ▾ 

Price

I time deal
\$7.99
ce: ~~\$10.99~~

Subtotal (1 item): \$7.99

This order contains a gift

[Proceed to checkout](#)

i Add \$27.01 of eligible items to your order to qualify for FREE Shipping. [See details](#)

Skyward Punchout with Amazon



amazon
Checkout (1 item)

1 Group CESA 5 E-Commerce Change
Group under CESA 5

2 Business order information Disabled

3 Shipping address MICHAEL A KOLTES, CESA 5 Change
626 E SLIFER ST
PORTAGE, WI 53901

4 Choose a payment method

Did you know your organization is setup to use Pay by Invoice?
Select Pay by Invoice at checkout to buy now and pay later with no interest or fees.

Net terms

Pay By Invoice
 Provided by your organization

Your credit and debit cards

+ Add a credit or debit card > Amazon accepts all major credit cards.

Your available balance

Available balances can only be used with your individual payment methods. [Learn more](#)

Enter a gift card, voucher or promotional code

+

Other payment methods

Use this payment method

Choose a payment method to continue checking out. You'll still have a chance to review and edit your order before it's final.

Order Summary

Items:	\$7.99
Shipping & handling:	--
Total before tax:	--
Estimated tax to be collected:	--
Order total:	--


How are shipping costs calculated?


Skyward Punchout with Amazon



1	Group	CESA 5 E-Commerce Group under CESA 5	Change
2	Business order information	Disabled	
3	Shipping address	MICHAEL A KOLTES, CESA 5 626 E SLIFER ST PORTAGE, WI 53901	Change
4	Payment method	Pay by Invoice ^ Add a promotional code <input type="text" value="Enter code"/> <input type="button" value="Apply"/>	Change

5 Review items and shipping

 This order requires approval.

 **Your order has been marked as restricted**

You can place the order but please note that it may not comply with your organization buying policies

[Submit order for approval](#)

By placing your order, you agree to the Amazon Business Accounts Terms and Conditions and Amazon's privacy notice.

Order Summary

Items:	\$6.99
Shipping & handling:	\$6.99
Total before tax:	\$13.98
Estimated tax to be collected:	\$0.00

Order total: **\$13.98**

[How are shipping costs calculated?](#)

[Why didn't I qualify for free shipping?](#)

Skyward Punchout with Amazon

Assign Purchase Order Accountings to this Purchase Order

Enter Account Distribution

 Save & Submit
  Save
  Cancel

PURCHASE ORDER ACCOUNTING DETAILS


PURCHASE ORDER ACCOUNT DISTRIBUTION

Account

Percent

100.00




 Add Account Distribution


Receivable



PURCHASE ORDER DETAILS

Search Display Order



 View: Skyward Default









 Filter: Skyward Default

	↑ Display Order	⚙️ Catalog Item	⚙️ Quantity	⚙️ Unit Cost	⚙️ Amount	⚙️ Description	⚙️ Previously Invoiced Qty
	1	B088R4BKRR	1.00000	6.99000	6.99	8 Pads Pop Up Sticky Notes 3x3 R...	0.00
	2		1.00000	6.99000	6.99	Cost of shipping, not including shi...	0.00

Skyward Punchout with Amazon





[+ Add Purchase Order](#) [Purchase Order Batch Update](#)

 Fiscal Year 	 Attention 	 Purchasing Group Code 	 Ship Date 
2023-2024	MICHAEL A KOL..	000	03/15/2024

Skyward Punchout with Amazon



Order Ecommerce Purchase Orders	
 Fiscal Year	 Purchasing Group

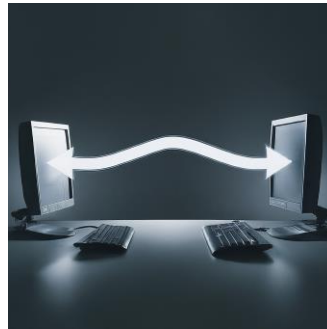


Skyward Punchout with Amazon



Turn and Talk

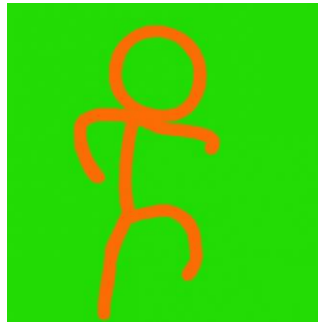
After seeing this demo, what advantages do you see in using the Punchout process?



e-Invoices



- System Integrations
- Making reconciliation and data entry easy!
- E-commerce pay by invoice-available in Qmlativ only
 - Building imported partial Accounts Payable Invoices enables you to generate invoices from the partial invoices created by the E-Commerce vendor in the Skyward system based on the Purchase Order details. The system uses the imported partial invoice and your receiving records to determine whether to mark the imported partial invoice detail as Is Fully Received and whether this imported partial invoice makes the Purchase Order Fully Received.



System Integrations

Contact Amazon to get started

Wisconsin Amazon contact to “turn on” imported partial invoices

Mahesh Reddi

rrmahesh@amazon.com



e-Invoices

This feature enables you to generate invoices from the partial invoices created by the e-Commerce vendor in the Skyward system based on the Purchase Order details. The invoices from the e-Commerce Vendors automatically display in the **Imported Partial Invoices List**.

Ex: if the vendor generated two invoices because they could not ship the brooms and cleaning spray you requested in your e-commerce purchase order in one order, you could use this feature to build an invoice for each invoice in the Skyward system to ensure the vendors receive payment for the purchased items.

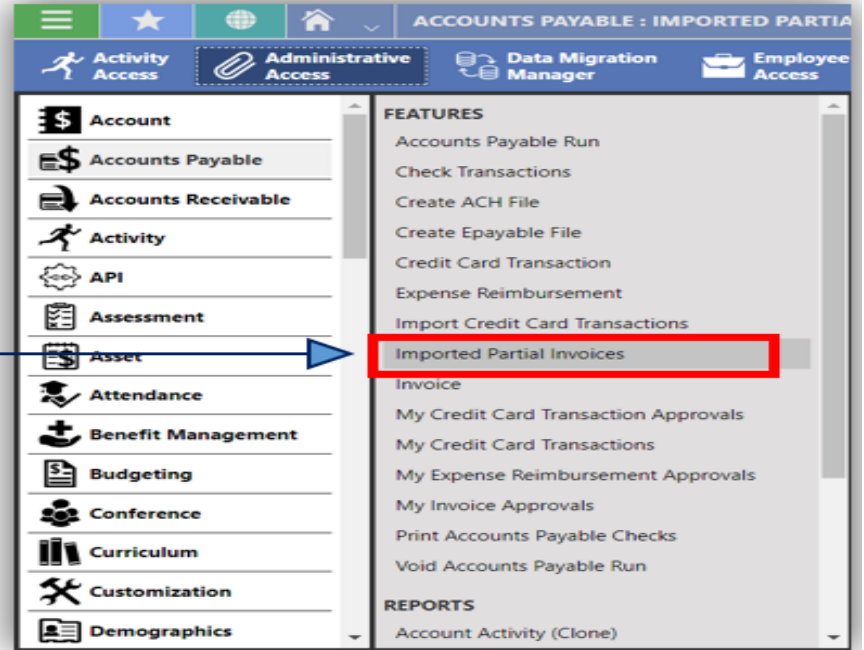
e-Invoices

Preparations:

- 1: Make sure you have the **pay by invoice** options set up in your e-Commerce code.
- 2: In order to start, you must have purchase orders that have been sent to your e-Commerce vendor.

Steps:

1: Navigate to the Accounts Payable Module and select Imported Partial Invoices under Features.



ACCOUNTS PAYABLE : IMPORTED PARTIA

Activity Access Administrative Access Data Migration Manager Employee Access

Account

Accounts Payable

Accounts Receivable

Activity

API

Assessment

Asset

Attendance

Benefit Management

Budgeting

Conference

Curriculum

Customization

Demographics

FEATURES

- Accounts Payable Run
- Check Transactions
- Create ACH File
- Create Epayable File
- Credit Card Transaction
- Expense Reimbursement
- Import Credit Card Transactions
- Imported Partial Invoices**
- Invoice
- My Credit Card Transaction Approvals
- My Credit Card Transactions
- My Expense Reimbursement Approvals
- My Invoice Approvals
- Print Accounts Payable Checks
- Void Accounts Payable Run

REPORTS

- Account Activity (Clone)

e-Invoices



Imported Partial Invoice List

IMPORTED PARTIAL INVOICES

Search Purchase Order Number View: Skyward Default Filter: Waiting Quick Filter

Purchase Order Number	Vendor	Supplier Invoice Number	Invoice Time	Payment Term
<i>No records to display</i>				

IMPORTED PARTIAL INVOICE DETAILS

Search Description View: Skyward Default Filter: Skyward Default

Description	Quantity	Unit Cost	Shipping Amount	Tax Amount	Unit of Measure
<i>No records to display</i>					

2: The next screen should show the Imported Partial Invoice list. If you completed all the preparations, you should see a list of invoices you have made here!

e-Invoices

You must build an invoice in the system for each invoice created by the e-commerce vendor. Detailed information on the charges of each imported partial invoice displays in the **Imported Partial Invoice** Details screen while the associated purchase order information displays in the Purchase Order Details screen.

Imported Partial Invoice List

IMPORTED PARTIAL INVOICES

Search Purchase Order Number 🔍 View: Skyward Default (Modified) Filter: Waiting (Modified) Quick Filter

Purchase Order Number	Vendor	Supplier Invoice Number	Invoice Time	Payment Term	Purchase Order Fully Received	Fiscal Year	Payment Term	Amount	Amount by Account
0002400...	AMAZON CAPITAL...	2HL7AZJCB4...	2/25/2024 2:45...	30	☑		30	0.00	0.00
Totals								0.00	

Record Options

🔧 Build Invoice

e-Invoices

Once you build the invoice; you return to the **Imported Partial Invoice List**.
 The invoice is created in the **Accounts Payable Invoice** feature.

Detailed information on the charges of each imported partial invoice displays in the Imported Partial Invoice Details screen while the associated purchase order information displays in the Purchase Order Details screen.

Imported Partial Invoice List

IMPORTED PARTIAL INVOICES

Search Purchase Order Number View: Skyward Default (Modified) Filter: Waiting (Modified)

Purchase Order	Vendor	Supplier Invoice Number	Invoice Time	Payment Term	Purchase Order Fully Received	Fiscal Year	Payment Term	Amount	Amount by Account
0002400...	AMAZON CAPITAL...	2HL7AZJCB4...	2/25/2024 2						

Record Options

- Build Invoice

Totals

Navigation: < < > > 50 Total Records

Tip: Write the PO number down on the statement next to the line item
 This will help you reconcile to the paper copies once your invoices are all built

e-Invoices

Once you build the invoice; you return to the **Imported Partial Invoice List**.
The invoice is created in the **Accounts Payable Invoice** feature.

Build Invoice from Imported Partial Invoices
School District of Denmark WA - DM - Build 11/7/2024

Enter Invoice Details

→ Next ⓧ Cancel

INVOICE DETAILS

*Invoice Group: AMAZON AMAZON STATEMENT

Purchase Order: 0002400070 Recess supplies for students

*Vendor: AMAZON CAPITAL SERVICES INC PO Box 035184 SEATTLE, WA 98124-5184

*Fiscal Year: 2023-2024

*Invoice Number: 5R7YN518PKM

*Description: Recess supplies for students

*Batch: JLM

Payment Type: W - Wire Transfer

Payment Terms: 30 0% discount if paid within 30 days

*Invoice Date: 03/13/2024 Wednesday

*Due Date: 04/12/2024 Friday

*Bank Account: []

Tip: Use a different invoice Group code to help you group the invoices on your list or for easy reporting!

e-Invoices




Once you build the invoice; you return to the **Imported Partial Invoice List**.

The invoice is created in the **Accounts Payable Invoice** feature.

The invoice is being built using the imported partial invoice and your receiving records.

Build Invoice from Imported Partial Invoices

Review Invoice Details to be Added

← Previous  Edit  Save  Cancel

INVOICE DETAILS

Search Display Order











View: Skyward Default (Modified)



Filter: Skyward Default

Tip: Use a different charge account for Amazon vs other credit charges to help you reconcile!

	↑  Display Order	 Catalog Item	 Quantity	 Unit Cost	 Amount	Description		 On Purchase Order	 Is Fully Received	Accountings
	1	B00L...	2.00000	19.60000	39.20	S&S Worldwide Giant Box of Jumbo Sid...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10 E 050 411 110000 000 (100.00%)	
	2	B07...	1.00000	9.98000	9.98	Kleenex 16 Pocket Packs (10 per pack), ...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10 E 050 411 110000 000 (100.00%)	
	3	B089...	2.00000	17.99000	35.98	JOYIN 2 Bottles Bubbles Refill 64 oz (up ...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	10 E 050 411 110000 000 (100.00%)	

e-Invoices

Once all Imported Partial Invoices are built, go to the **Accounts Payable invoice List**. This total should now match your statement.



- If it does not, then likely a late credit was applied that is not reflected on your statement.

Invoice List

INVOICES

Search Full Name View: Skyward Default (Modified) Filter: Batch (Modified) Quick Filter
 Add Invoice Invoice Batch Update Invoice Mass Submit More <<

Purchase Order Number	Attachments	Vendor	Status	Due Date	Description	Invoice Number	Invoice Date	Amount	Batch	Invoice Group Code	Fiscal Year	Payment Type	Check Payment Type	Accounts Payable Run Description	Invoice
8022400...	(0)	AMAZON CAPITAL SERVICES...	B - Batch	02/25/20...	District Library Books / Requ...	3Y1Z4CRVR5...	01/26/2024	9.98	Amazon	Def	2023-2...	W - Wire ...			Def
8022400...	(0)	AMAZON CAPITAL SERVICES...	B - Batch	02/25/20...	District Library Books / Requ...	19X35P9FE13	01/26/2024	21.95	Amazon	Def	2023-2	W - Wire			Def
8022400...	(0)	AMAZON CAPITAL SERVICES...	B - Batch	02/27/20...	District Library Books / Requ...										
8022400...	(0)	AMAZON CAPITAL SERVICES...	B - Batch	02/28/20...	District Library Books / Requ...										

- **Tip:** If you are in the invoices screen and delete a transaction, it will bump it back to imported partial invoices screen. If you intend to keep this transaction in invoices change to \$0.00.

Resources

Need help setting up Amazon Business?

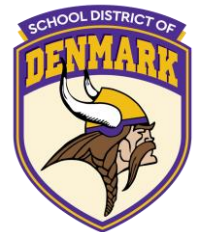
Contact skywardamazonintegrations@amazon.com

<https://go.skyward.com/wasboresources>

The Amazon team can also provide administrator support, including feature configuration and system integration support.

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

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



Questions



QUESTIONS?



Contact Information:



Mike Koltes

Director of Business Services

CESA #5

koltesm@cesa5.org

608-745-5416

Janelle Marotz, CPA, SFO, CSRSM

School District of Denmark

marotzj@denmark.k12.wi.us

920-863-4006

