



amazon business

**Microsoft Dynamics 365  
Punchout  
Integration with  
Amazon Business**

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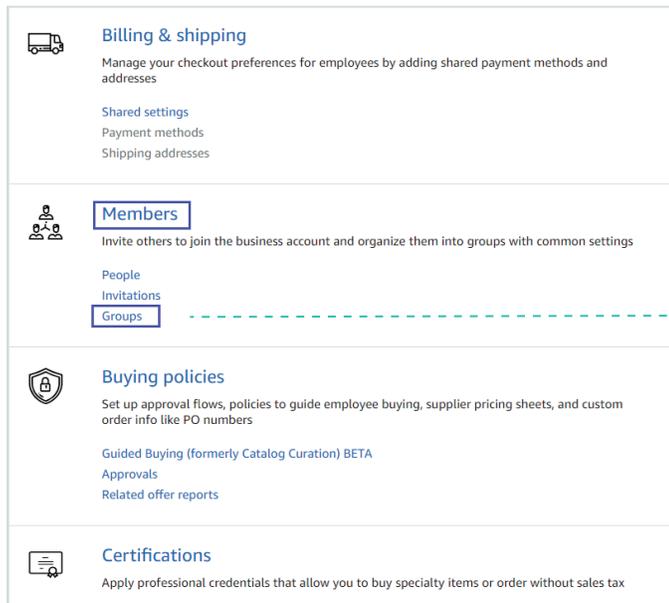
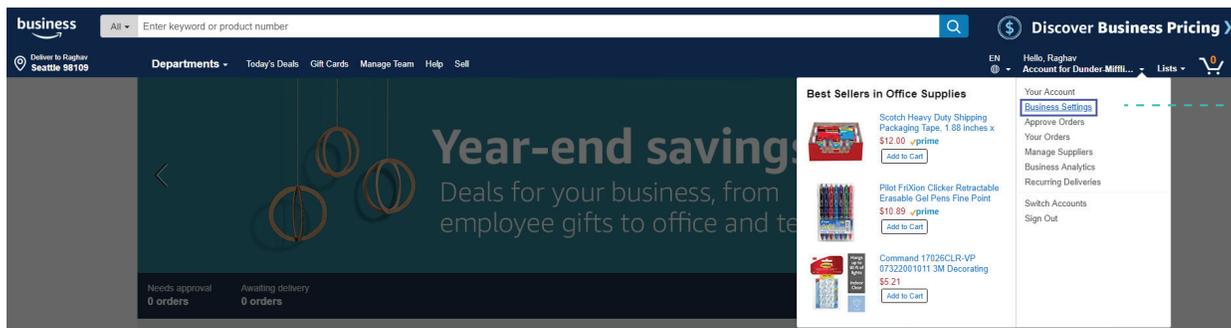


# Overview

This document provides guidance and reference material to IT professionals to establish a Punchout integration from MicrosoftDynamics365 to Amazon Business.

## Punchout setup on Amazon Business

If you don't already have an Amazon Business account, register for one here: [www.Amazon.com/Business](http://www.Amazon.com/Business).

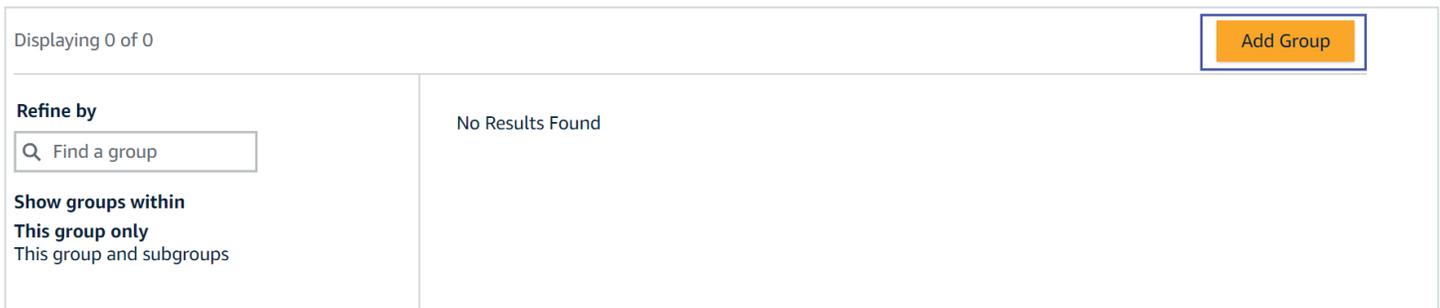


In Amazon Business, generate your credentials.

- Open the **Your Account** drop-down menu.
- Select **Business Settings**.

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

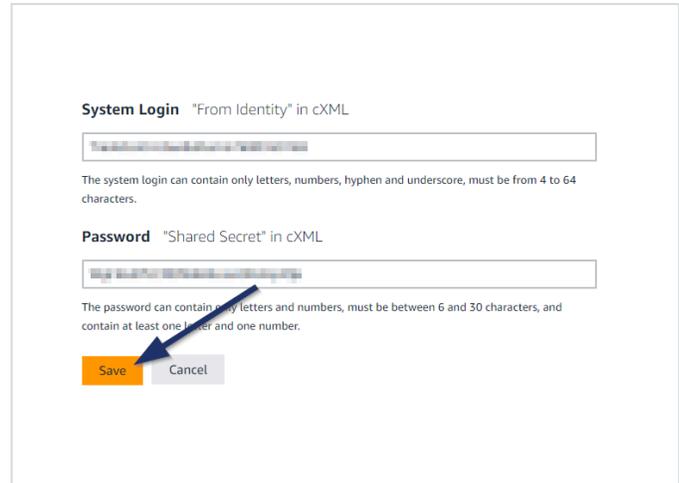
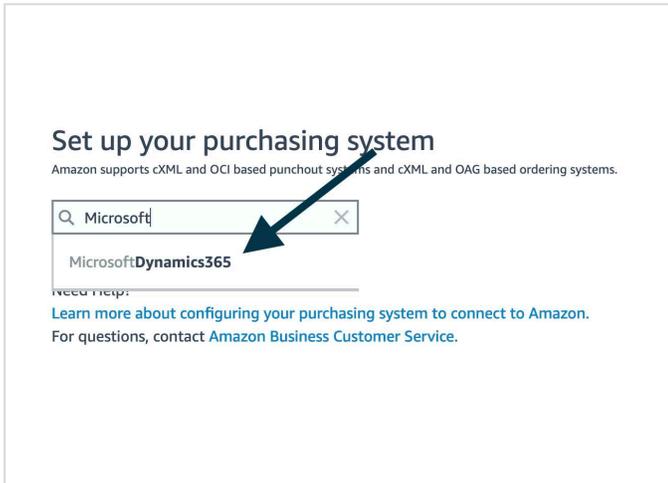
- Click **Add Group** to create a new group. This group will be used as the Punchout group.



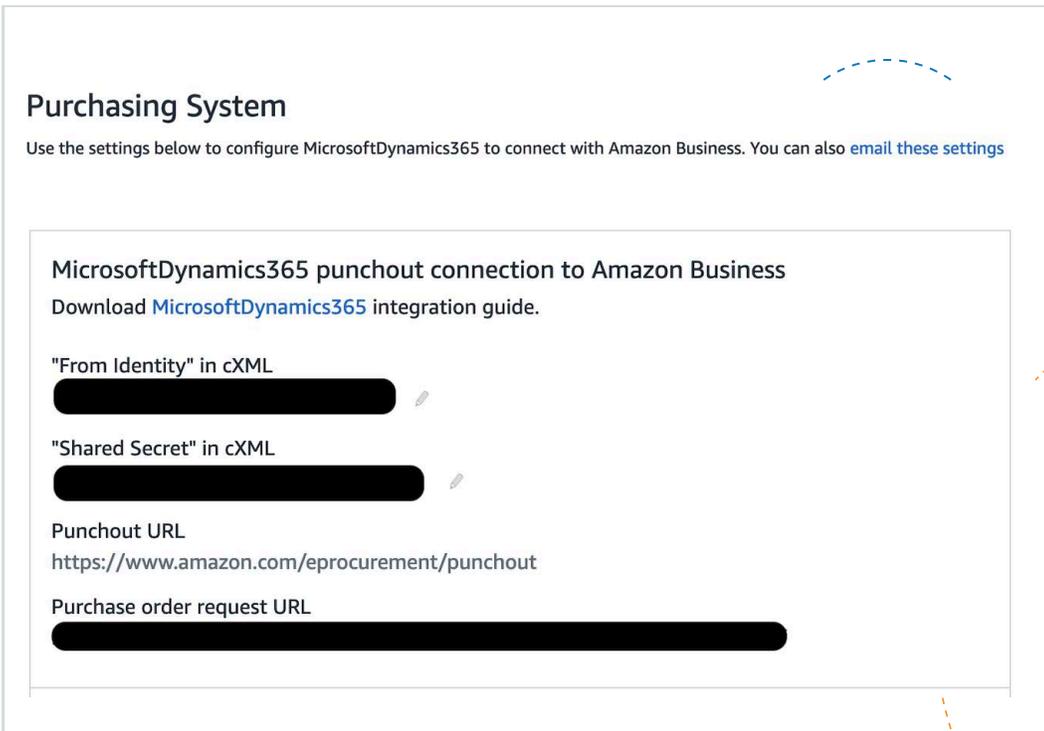
- Select **Individual or Shared payment methods** and **Individual or Shared addresses** depending on how your users pay for purchases. Please note that the Ship to address from an electronic purchase order (PO) is the final address we ship the order to.

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

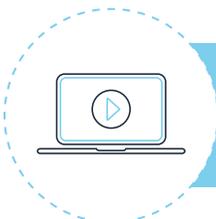
- Under **System Integrations**, click **Configure Purchasing System**.
- Select your purchasing system from the drop-down and click on **Save**.



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



- **Create and configure Production Punchout Group:** Repeat the steps under the section "Punchout setup on Amazon Business" from page 3 to create a Production Punchout group.



You can also watch our [Integration Instructions Tutorial Video](#) for a walkthrough.

## Payment method and Address/Delivery preference 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 before 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**.
- Add your default shared address by going to **Business Settings > Groups**.
- Click on **Newly created Punchout group**.
- Click on **Addresses and delivery preferences > Actions > Add an address**. This address will only be used to estimate the taxes. Items will be shipped to the actual address sent on the purchase order.
- Payload ID in cXML Punchout setup request and order request should always be unique.
- Amazon only supports "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.



### Billing & shipping

Manage your checkout preferences for employees by adding payment and shipping info.

<p>Shared settings</p> <p><b>Payment methods</b></p> <p>Addresses and delivery preferences</p> <p>Business order info</p>	<p>Budgets (Blanket POs)</p> <p>Receiving (3-Way Match)</p> <p>Checkout defaults</p>
---	--

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.

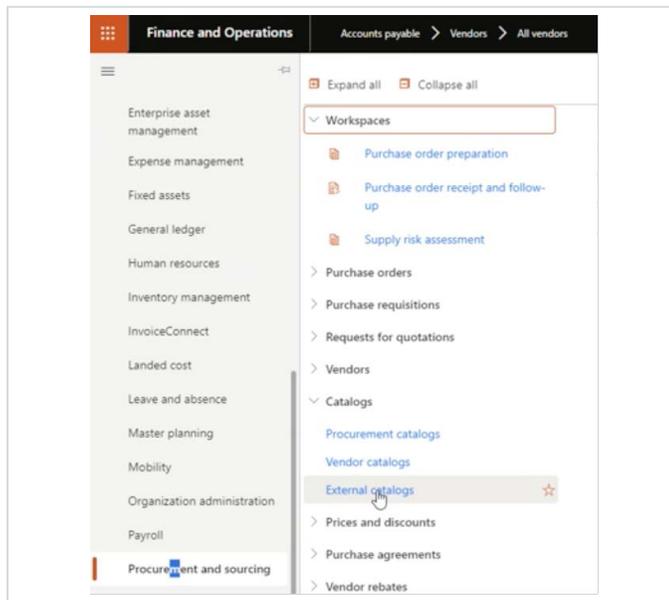
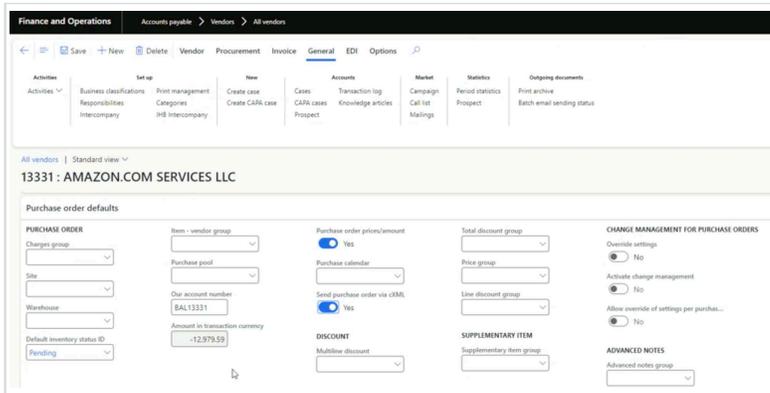
▾ Add a card



## Punchout setup on MicrosoftDynamics365

**Prerequisites:** Before setting up Punchout on MicrosoftDynamics365, the Purchasing Manager must set up a procurement category hierarchy to determine which products the organization wants the employees to purchase.

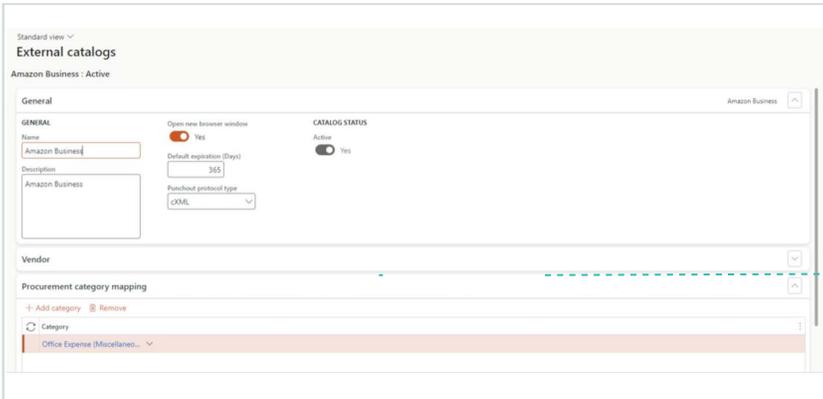
- Navigate to Accounts Payable > Vendors > All vendors > General > Categories.
- Under procurement > **Add Category**.
- Create the vendor > Accounts payable > Vendors > All vendors.
- **Note:** Make sure to enable send purchase order via cXML.



### Step 1. Set up external catalog.

- Navigate to Finance and Operations > Procurement and sourcing > Catalogs > External catalogs.



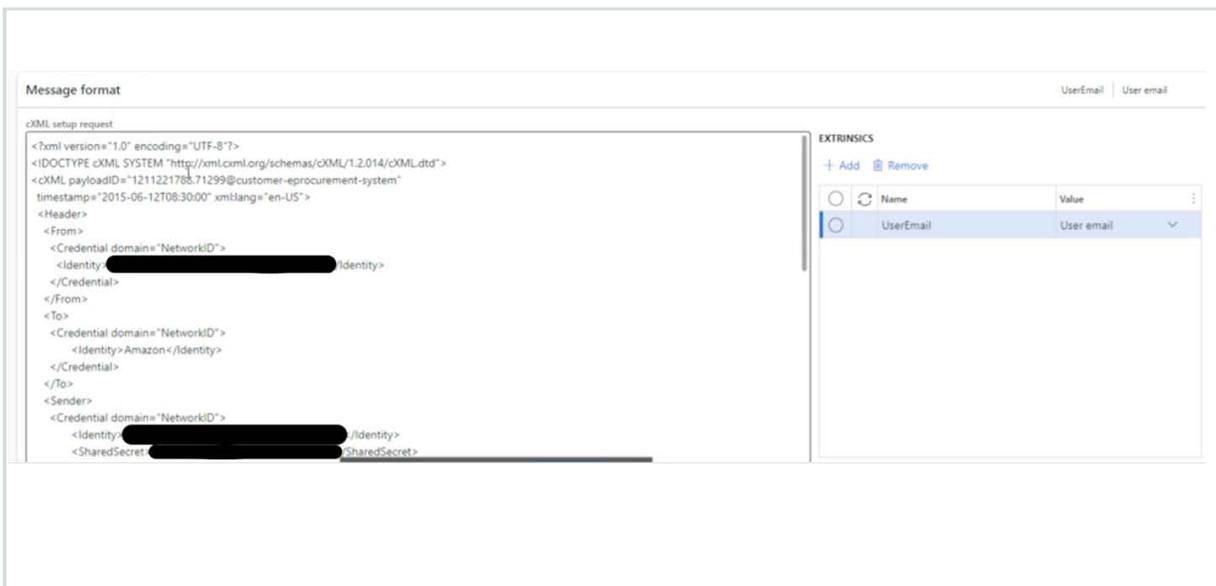


- Add a category under **Procurement category mapping**.

## Step 2. Punchout cXML setup request

Update the Punchout cXML message format using the following template.

- Update `<Header> <From> <Credential domain="NetworkID"> <Identity>` with the *FromIdentity* generated in Amazon Business.
- Update `<Header> <To> <Credential domain="NetworkID"> <Identity>` to *Amazon*.
- Update `<Header> <Sender> <Credential domain="NetworkID"> <Identity>` with the *FromIdentity* generated in Amazon Business.
- Update `<Header> <Sender> <Credential domain="NetworkID"> <SharedSecret>` with the *SharedSecret* generated in Amazon Business.
- Leave `<Request><BrowserFormPost><URL>` blank. This field will be automatically updated based on the user's environment.
- Add Extrinsic - Name - *UserEmail* and Value - *User email*.



## Punchout request template

```

<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE cXML SYSTEM "http://xml.cxml.org/schemas/cXML/1.2.014/cXML.dtd">
<cXML payloadID="1211221788.71299@customer-eprocurement-system"
timestamp="2015-06-12T08:30:00" xml:lang="en-US">
  <Header>
    <From>
      <Credential domain="NetworkID">
        <Identity>PunchoutIdGeneratedInAmazon</Identity>
      </Credential>
    </From>
    <To>
      <Credential domain="NetworkID">
        <Identity>Amazon</Identity>
      </Credential>
    </To>
    <Sender>
      <Credential domain="NetworkID">
        <Identity>PunchoutIdGeneratedInAmazon </Identity>
        <SharedSecret>SharedSecretGeneratedInAmazon</SharedSecret>
      </Credential>
      <UserAgent>eProcurement-System 1.0</UserAgent>
    </Sender>
  </Header>
  <Request deploymentMode="test">
    <PunchOutSetupRequest operation="create">
      <BuyerCookie>[Unique-Generated-Identifier-from-eProcurement-System]</
BuyerCookie>
      <Extrinsic name="FirstName">John</Extrinsic>
      <Extrinsic name="LastName">Smith</Extrinsic>
      <Extrinsic name="UniqueName">john</Extrinsic>
      <Extrinsic name="UserEmail" />
      <Extrinsic name="User">john</Extrinsic>
      <Extrinsic name="BusinessUnit">Buyer Department</Extrinsic>
      <Contact role="endUser">
        <Name xml:lang="en-US">john</Name>
        <Email>smith+john@greenwingtechnology.com</Email>
      </Contact>
      <BrowserFormPost>
        <URL></URL>
      </BrowserFormPost>
      <SupplierSetup>
        <URL>https://www.amazon.com/eprocurement/punchout</URL>
      </SupplierSetup>
    </PunchOutSetupRequest>
  </Request>
</cXML>

```

### Step 3. Add order properties.

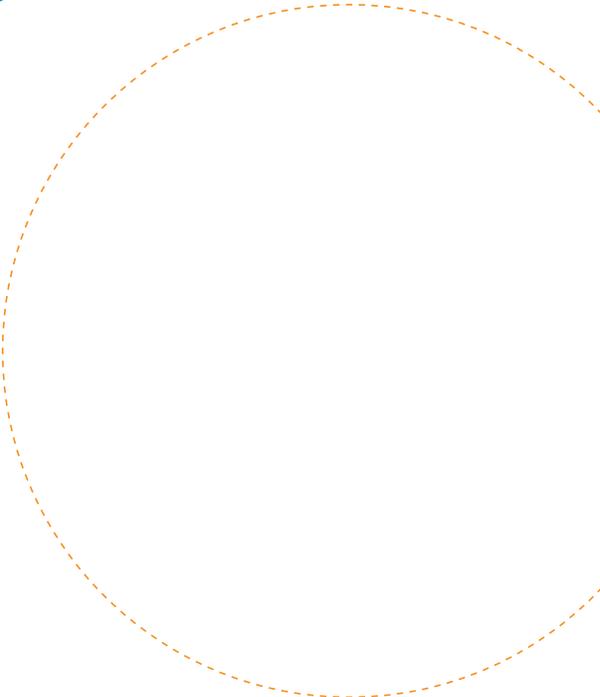
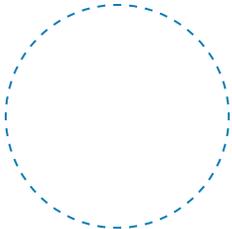
Under **Order properties**, click **Default properties** and provide the following values:

Key Name	Key Value
DEPLOYMENTMODE	TEST or PRODUCTION
FROM_DOMAIN	NetworkId
FROM_IDENTITY	(From Identity generated in Amazon)
ORDERCHECKURL	(Purchase Order Request URL generated in Amazon)
PUNCHOUTSHIPTO	TRUE
SENDER_DOMAIN	NetworkId
SHARED_SECRET	(Shared Secret generated in Amazon)
STREETLENGTH	30 (if more than 30, split into multiple lines)
TO_DOMAIN	NetworkId

For more information about order properties, see [Purchasing cXML Enhancements](#).

The screenshot shows the 'External catalogs' configuration page. Under the 'Amazon : Active' catalog, the 'Order properties' section is expanded. It contains a table with the following data:

Key name	Value
DELIVERTO	
DEPLOYMENTMODE	production
ENABLEHEADERS	
ENABLEMANUALPO	
FIXEDBILLADDRESSID	
FIXEDSHIPADDRESSID	



## Step 4. Validate settings.

Ensure Punchout configuration is configured correctly and connection is established successfully.

On clicking OK, you will be taken to the supplier website. Please close the browser window, as this website is just for validation and is not the actual requisition.

To validate settings, navigate to Finance and Operations > Procurement and sourcing > Catalogs > External catalogs – Validate Settings.

## Step 5. Activate catalog.

- Navigate to Finance and Operations > Procurement and sourcing > Catalogs > External catalogs > Catalog status.
- Click **Yes**.

The screenshot shows the 'External catalogs' configuration page. The breadcrumb navigation is 'Finance and Operations > Procurement and sourcing > Catalogs > External catalogs'. The page title is 'External catalogs' and the sub-header is 'Amazon Business : Inactive'. The 'GENERAL' section contains the following fields:

- Name: Amazon Business
- Description: Amazon Business
- Default expiration (Days): 365
- Punchout protocol type: cXML

The 'CATALOG STATUS' section has a toggle switch for 'Active' which is currently turned off.

## Step 6. Other configurations.

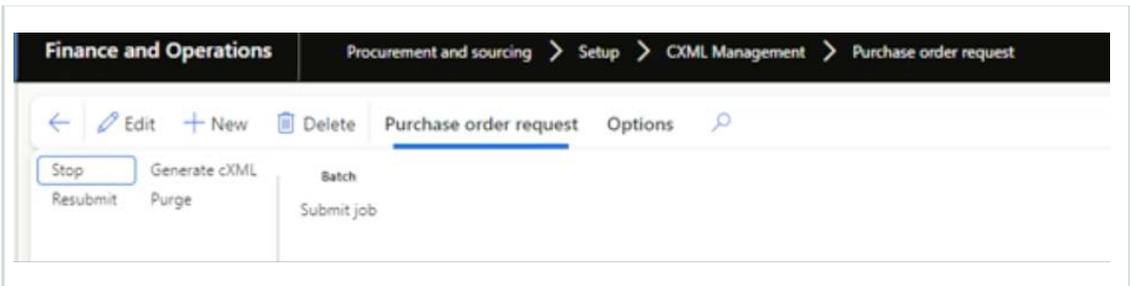
Configure CXMLADDRESSFORMAT to 50.

- Navigate to Finance and Operations > Procurement and sourcing > CXML Management > CSML parameters.

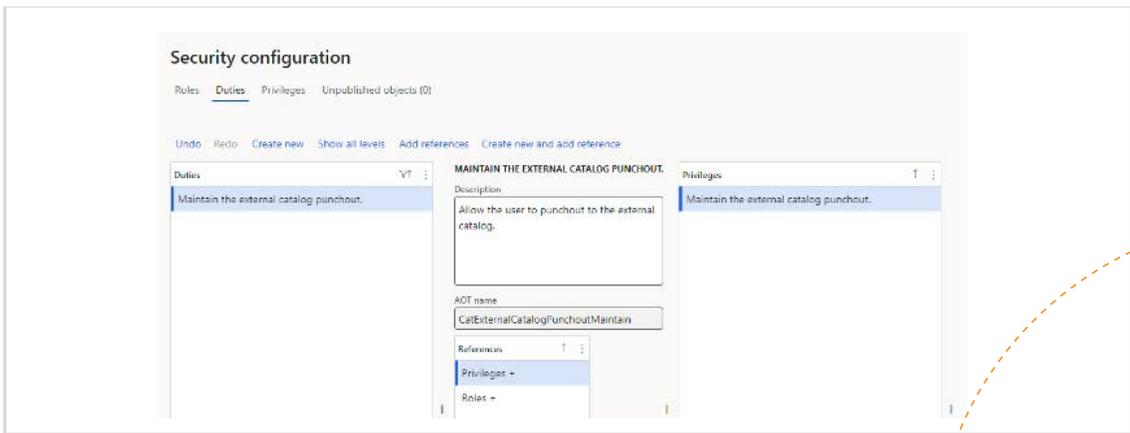
The screenshot shows the 'CXML parameters' configuration page. The breadcrumb navigation is 'Finance and Operations > Procurement and sourcing > Setup > CXML Management > CXML parameters'. The page title is 'CXML parameters' and the sub-header is 'Setup parameters to control generation and transmission of purchase orders with cXML'. The 'CXMLADDRESS FORMAT' section has a text input field for 'Max characters for street line' set to 50.

Schedule batch jobs to automatically send purchase orders to the supplier (Amazon Business):

- Navigate to Finance and Operations > Procurement and sourcing > CXML Management > Purchase order request > Purchase order request > Submit job.

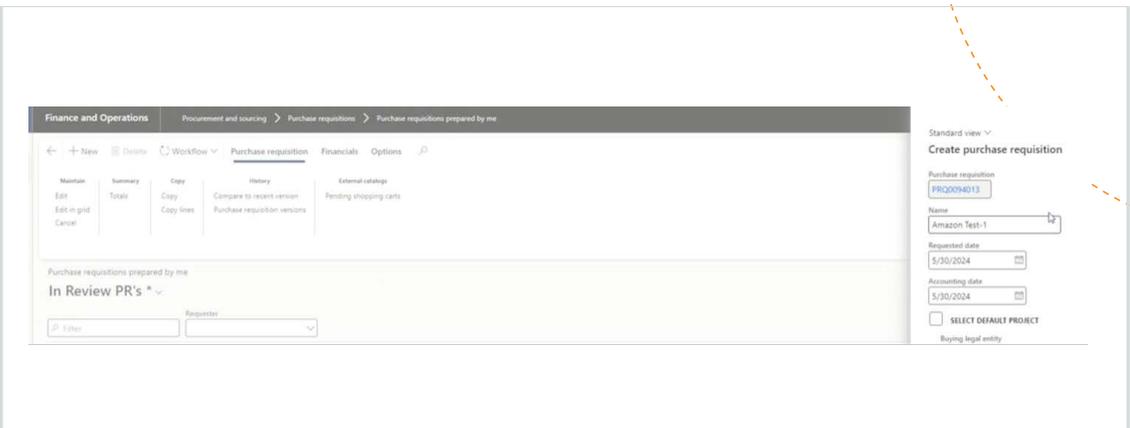


Security duty: Maintain the external catalog Punchout.



## Step 7. Create purchase requisition.

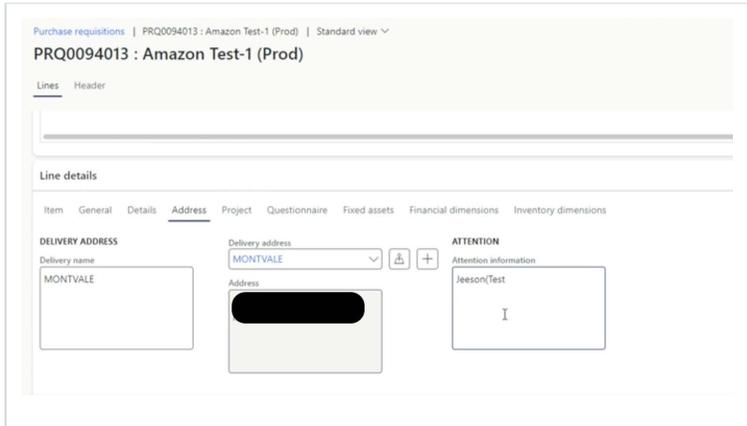
Navigate to Finance and Operations > Procurement and sourcing > Purchase requisitions > New.



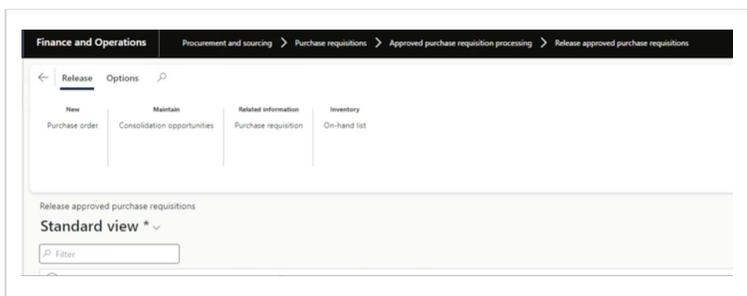
If you do not see 'External Catalog' option, please refer to 'Security Duty: Maintain the external catalog Punchout.'

Click **External Catalog** > Click on AmazonBusiness catalog > The user will be routed to Amazon Business website to create the cart.

Once the cart is submitted for approval, select the 'Procurement Category' > click **Add to requisition**.



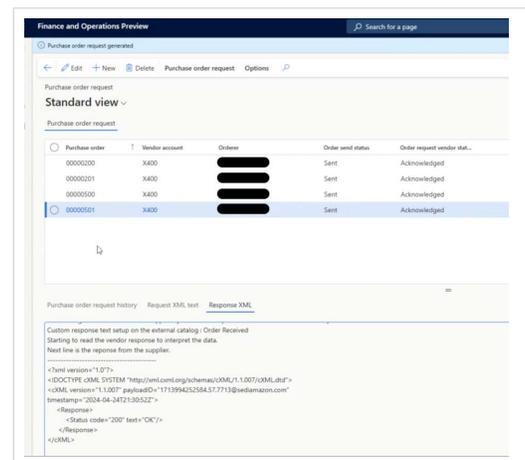
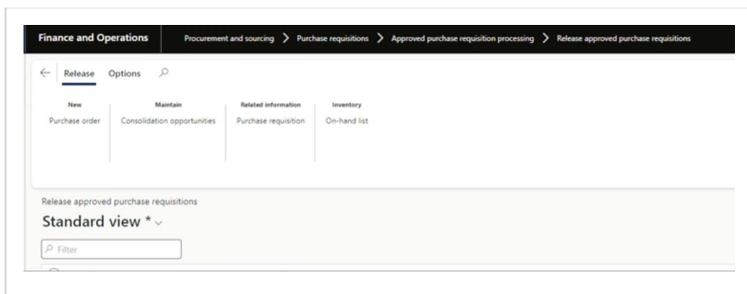
- Enter financial dimensions.
- Select shipTo address.
- Please also enter the end user name in Attention field. It will be printed on the shipping label.
- Click **Workflow > Submit**.



- Once the requisition is approved, navigate to Finance and Operations > Procurement and sourcing > Purchase requisitions > Approved purchase requisition processing > Release approved purchase requisitions.
- Select the purchase requisitions and click **Purchase order** to create a purchase order.

## Step 8. Send purchase order to the supplier (Amazon Business).

- Navigate to Finance and Operations > Procurement and sourcing > Purchase orders > All purchase orders > Select the purchase order > Purchase > Confirm.
- This will send the purchase order to the supplier for fulfillment.
- Check the status of the purchase order and the response received from Amazon Business on the 'Purchase order request' screen.



## Testing

You are now ready to test the Punchout and submit some test orders. While in test mode, place a 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 orders placed during test mode will be considered test orders 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:**

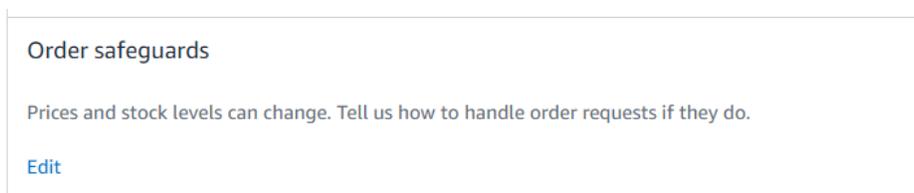
- One type of product, quantity one
- One type of product, quantity three
- Two different products, quantity one
- Two different products, quantities three & five

## 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. The admin can set up order safeguards 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 by following the steps above.



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

## First-time Punchout user experience

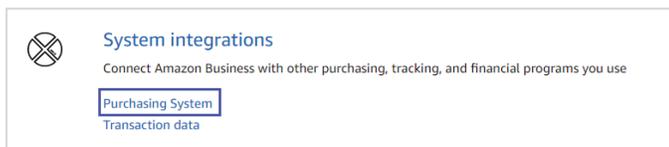
Please reach out to your Amazon Business representative if you have any questions or concerns as you navigate Punchout for the first time.

## Move to production

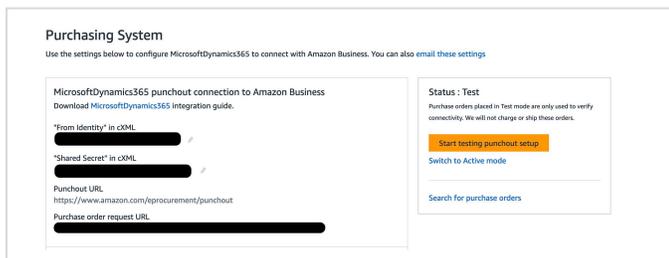
After an administrator has tested system connectivity, they can change the group status to active mode. Your Punchout credentials will be the same. If you would like to have different credentials for production, you should create a new group and generate new credentials as shown in this document.

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

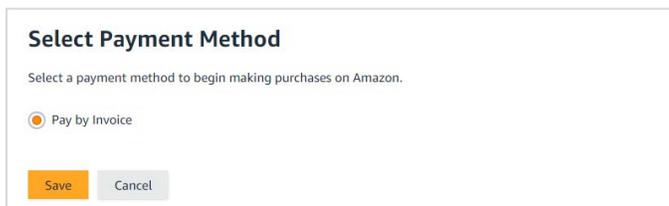
**Note: After an administrator changes from test to active mode, the business account can be edited back to test mode.**



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



- Click **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.

## Single sign-on (SSO)

Single sign-on can be set up via self-service.

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



**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.

Call/chat: <https://www.amazon.com/hz/contact-us/foresight/hubgateway> | Email: [corporate-punchout@amazon.com](mailto: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](#).