

The Bull Marketplace and Amazon Business



Topics

- What is changing with orders for Amazon?
- What Roles are available in BMP and what do they do?
- Assigning, Approving and Rejecting Carts in BMP
- Submitting a Cart to workflow
- Approving a Cart in workflow
- Setting Cart defaults for more efficient ordering
- Transitioning your business process to BMP

What is changing with Amazon orders?

Changes

- PO vs. PCard
 - Encumbrances
 - PCard limit impacts
- Preapproval vs. Receipts/Reconciliation
- Some discounts aren't allowed (e.g. subscribe and save)

Staying the Same

- Prime Benefits/free shipping
- No order minimums
- Order History visible inside Amazon
- Returns
- Most discounts (coupons, volume discounts)

Roles – What are they, and what do they do?

- Shopper
 - The default BMP role for USF users
 - Shoppers can fill up carts using Punch Out suppliers
 - Shoppers cannot submit a cart into requisition workflow – they must assign it to another user with the Requestor or Approver role
- Requestor
 - The role designed to fill out forms and requisitions and submit them into workflow
 - Requestors can also create change requests on existing POs (though NOT on Punch Out POs)
 - Requestors can create receipts against non-Punch Out POs
 - Requires completion of the CANVAS course Procurement 101 (course code FSTPCM)
- Approver
 - The role designed to review and approve forms and requisitions in workflow
 - Like Requestor, can submit forms and requisitions; but can also approve them
 - An Approver cannot create receipts to get POs paid
 - An Approver cannot approve their own orders!



Shop

Carts and what to do with them

- A user fills a “shopping cart” with items from a Punch Out site
- The user then “punches back in” to the Bull Marketplace
- The user can then...
 - Rename the cart if they wish to make it easier to keep track of
 - Reassign the cart to another user
 - Click the **Proceed To Checkout** button to go to the requisition page to input more information such as the chartfield string or Ship To address
 - Note that only Requestors and Approvers can submit the requisition after the information is filled; Shoppers will still need to reassign the cart
 - Empty or Delete the Cart if the order will not proceed
 - Return or Reject the Cart if it was assigned to them by another users



Shopping Cart • 3890731



Return Cart

Assign Cart

Proceed To Checkout

Simple

Advanced



Search for products, suppliers, forms, part number, etc.





1 Item



AMAZON CAPITAL SERVICES INC • 1 Item • 14.55 USD



SUPPLIER DETAILS Catalog : 701 5TH AVE, SEATTLE, Washington 9810...

	Item	Catalog No.	Size/Packaging	Unit Price	Quantity	Ext. Price	
1	 The Big Book of HR, 10th Anniversary Edition	B08XB6XGL S	Each	14.55	Qty: 1 Each	14.55	... 

ITEM DETAILS

Commodity Code

1912100000



Electronic media books & texts

Summary



Details



For

Paul Cleveland

Name

Kindle book link test

Total (14.55 USD)



Shipping, Handling, and Tax charges are calculated and charged by each supplier. The values shown here are for estimation purposes, budget checking, and workflow approvals.

Total: 14.55

Common cart questions


- Who can access my cart?
 - Only you, unless you assign your cart to another user. While you can search for other carts with some roles, only the owner of the cart or the assignee can actually review the cart and its requisition page
- If I assign my cart to the wrong person, can I get it back?
 - Yes! From the green bar on the left, select Shop → My Carts and Orders → View Carts, and then select “Assigned Carts.” You can select from a drop-down menu to “Unassign Cart” to get it back
- How many carts can I have at a time?
 - As many as you want, but only one is “Active” at any given time. It is not advised to add multiple carts from different suppliers together into one large cart, as the requisition can get confusing and will create multiple POs
- If I assign my cart to someone, can they then reassign it to someone else?
 - Yes; a cart can be reassigned multiple times before a Requestor or Approver submits it as a requisition. If the cart gets returned, it will go back to the original cart creator, not the last assignee
- Can I alter quantities or remove items from my cart after I punch back into the BMP?
 - No; changes to quantities or items can only be done in the Punch Out. If changes are needed, the users should empty their cart and go back to the Punch Out site to start a new cart.

Submitting a Cart – How to Place an Order

- After selecting “Proceed to Checkout” a cart creates a draft requisition
- All required fields must be filled out for the “Place Order” button to be selectable (green)
 - Only Requestors or Approvers will see this button. Shoppers can access the requisition page, but will only see the option to Assign Cart.
- Required fields will be displayed on the right-hand side of the page in **Red**, alerting the user to what fields are missing information
- Once all missing fields are filled in, the Place Order button lets the requisition be submitted into workflow

Summary →


Draft

 **Correct these issues.** ∨

You are unable to proceed until addressed.

Required: Location

Required: Fund (Line 1)

 **Be aware of these issues.** ∨

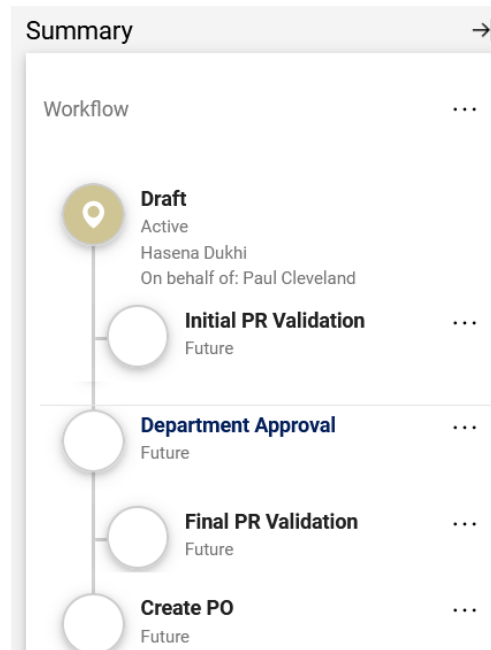
You may review and proceed.

Empty: PC Bus Unit

Empty: Project / Activity

Workflow – The Approval Route of a requisition

- A Requestor or Approver submits a requisition into workflow
- Initial PR Validation
 - Checking to make sure the chartfield string is valid
 - Funds are NOT pre-encumbered
- Approver review/approval
 - The Approver is selected based on the chartfield used
 - The Approver can approve, return, or reject the requisition
 - An Approver cannot approve their own requisition
 - An Approver cannot reassign their approval step to another Approver unless both are Approvers for the same chartfield string. It is best practice to have at least two Approvers assigned to each chartfield string, in case someone is unavailable
- Final PR Validation
- PO is created



Common workflow approval questions

- I submitted my requisition into workflow, but it immediately returned to a draft status. What happened?
 - Most likely your requisition failed PR Validation. This is usually the case when the chartfield you're using would not pass a budget check in FAST.
 - If you check the History tab of the requisition, the notes will tell you what chartfield string was checked and why it failed, such as "No budget exists."
 - Update the chartfield and try to resubmit it.
- My Approver is out of the office! Can anyone else approve my requisition?
 - Unless you have multiple Approvers for the same chartfield, no.
 - You can Withdraw the requisition to cancel it, and create a new requisition using a different chartfield string with a different Approver instead.
- Can a shared email be used for an entire group of Approvers?
 - No – the Bull Marketplace requires a single email per user, and workflow is assigned based on those emails.
- I'm an Approver but I don't see the option to return or reject the requisition?
 - You must assign the requisition to yourself first, then the options will show up under the "...” icon

Saving Time— setting up defaults and favorites in your Profile

- In your Profile, you can set up defaults and favorites to save time
 - Defaults will automatically show up on every requisition created by your cart. Unless you only use one single chartfield string or Ship To address, you probably don't want to use lots of defaults
 - Favorites are available from a drop-down menu, saving you the time of having to manually input all the fields each time
- Recommended areas to set up include:
 - Custom Field and Accounting Code Defaults
 - Header (int.): Probably best to only set PO Business Unit to your area (e.g. TAMPA)
 - Delivery: Your Location Code default
 - Codes: Default chartfields. Unless you have only one you ever use, only set GL Unit to USF01, which is used for all chartfield strings at USF
 - Code Favorites: A great place to put in commonly used chartfield strings. Leave the Account field blank; it will vary based on the type of commodity you're buying
 - Default Addresses: Lets you add a default and/or favorite Ship To Addresses
 - Cart Assignees: If you always assign your cart to the same people, you can set them here so you don't need to search for them each time

Paul Cleveland

User Name

User Profile and Preferences ▶

Default User Settings ◀

Custom Field and Accounting Code Defaults

Default Addresses

Cart Assignees

Checkout Settings

User Roles and Access ▶

Ordering and Approval Settings ▶

Permission Settings ▶

Notification Preferences ▶

User History ▶

Administrative Tasks ▶

Custom Field and Accounting Code Defaults

Header (int.) | Header (ext.) | Delivery | Codes | **Code Favorites** | Internal Information | Cart

Business Units: ▼

Use Code Favorites for quick access to accounting code combinations saved to your profile during checkout. You may create a new Code Favorite by clicking the "Add" button and entering a commonly used combination of accounting codes with or without splits. Code Favorites are accessed during checkout by editing the codes section or by selecting it as your default accounting codes in your profile.

Add

Accounting Codes ?

ASBC General

Edit

Delete

GL Unit	Oper Unit	Fund	Account	Dept	Product	Initiative	PC Bus Unit	Project / Activity	Budget Reference
USF01 USF	TPA USF TAMPA	90021 AGEN Fin Statement Control	<i>no value</i>	000001 FINANCIAL STATEMENT CONTROL	000000 DEFAULT PRODUCT	0000000 DEFAULT INITIATIVE	<i>no value</i>	<i>no value</i>	<i>no value</i>

Transitioning your business process to BMP

Example 1:

- A field technician needs an item. They usually tell their manager, who puts in a request to a shared business services area to create the order.
 - Technician (Shopper role): Goes into Amazon, finds the item they need, assigns their cart to the Manager.
 - Manager (Shopper role): Is assigned the cart, reviews the order, then reassigns the cart again to a user in the shared business services area, with a note indicating what chartfield should be used and where it should be shipped.
 - SBS user (Requestor): Is assigned the cart, and Proceeds to Checkout to the requisition page, filling in the chartfield and Ship To information (if not defaulted by the original Shopper). The requisition is placed into workflow.
 - Department financial head (Approver): Reviews the requisition and approves it. A PO is created and the order is placed to Amazon.

Transitioning your business process to BMP

Example 2:

- A small department has a principal investigator who needs to buy from Amazon using their own grant project chartfield. All orders usually go through a single business specialist.
 - Principal Investigator (Approver) goes to the Amazon Punch Out, fills up a cart, and punches back into the BMP. They assign their cart to the business specialist.
 - Business specialist (Requestor) proceeds to checkout to the requisition page. They change the “Prepared For” field to their own name, so that the PI is no longer the owner (and can thus approve the requisition). They use the PI’s chartfield and Ship To address, which are saved as favorites to save time. The requisition is submitted into workflow.
 - The Principal Investigator (Approver) approves the requisition, which becomes a PO and sends the order to Amazon.

Reminders:

The Amazon Punch Out is set to go live November 20th

Access to Amazon Business outside of the BMP will be turned off December 18th

If you need the Requestor or Approver roles, please complete the Procurement 101 training (for Requestors) and submit your forms ASAP!



A photograph of a modern, multi-story building with a curved facade and large glass windows. The building has "MARSHALL UNIVERSITY" written on it. In the foreground, there is a large, dark-colored bull sculpture running through a shallow pool of water. Another smaller bull sculpture is visible in the background near the building's entrance. The scene is set outdoors with some greenery and a clear sky.

Questions?