



Yale University Amazon Program

Quick Guide for End Users

Welcome to the Yale University Amazon program! This guide will help you get started with the system, make informed purchasing decisions, and troubleshoot common issues.

Follow these steps to ensure a smooth and efficient procurement process!

Note: Amazon purchasing is subject to Yale University's policies and requirements. Before using the Amazon Program, please check the Buying Guide for University Preferred Suppliers who are vetted, contracted, and approved for their respective purchase categories.

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Two Options for Accessing the Yale University Amazon Account

SciQuest/Jaggaer Punchout Catalog: <https://www.myworkday.com/yale>



Preferred method for Amazon purchases since no expense report is required and purchases are automatically invoiced similar to other catalogs. Any employees assigned a Workday role of Cost Center Requisitioner (CCR) are able to initiate purchases, which would then follow the typical approval routing workflows.

Yale Amazon Business Prime: <https://www.amazon.com/>



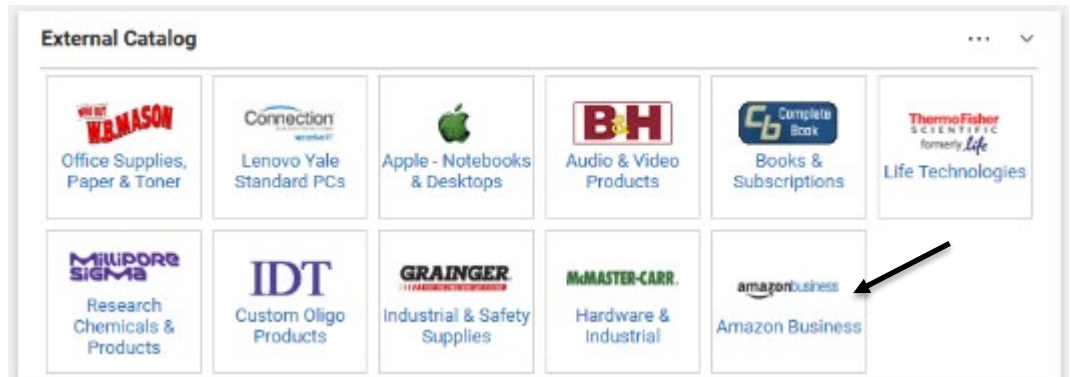
Employees without the CCR role can make Amazon purchases through the Yale Amazon Business Prime Account webpage. (See “Request Access” on page 2 on how to be setup). All purchases made will require a submittal of an Expense Report.

Note: All Amazon business purchases for Yale shall be made using only these two solutions.

The Amazon experience remains largely the same, with the primary changes being the new requirement for Single Sign On (SSO) and the addition of the Guided Buying experience, which includes rules for Preferred, Restricted and Blocked products.

Accessing Amazon Punchout via SciQuest/Jaggaer

“Create Requisition” in the Workday search bar to bring in your default information and give you the option to “Connect to Supplier Website” which will connect you to SciQuest/Jaggaer. Select the **Amazon Business** button from the list of External Catalogs.



Making Purchases in Amazon Punchout via SciQuest/Jaggaer

For additional information on creating a Requisition please use the following link:

<https://workday.training.yale.edu/training-materials/create-requisition>

Quick Tips: Amazon Punchout

1. If you need to change quantity ordered you must do so from the Amazon checkout screen. You will not be able to change quantity once the order goes back to SciQuest/Jaggaer. The price is locked at this point so changing the quantity on the PO may change pricing.
2. Shipping address on the Amazon Cart checkout is only a default address for the master Amazon account and the correct shipping address should be chosen in Workday.
3. If you do **not** add items to your cart to purchase, hover over “Hello [your name]” at the top of the Amazon page and select “Cancel Punchout” to return to the SciQuest/Jaggaer home page.

Accessing the Yale Amazon Business Prime Webpage

1. If you are an existing Pcard holder your Yale email has been loaded into the Yale Amazon Business account go to Amazon.com and sign in with your Yale email address using Single Sign On (SSO).
2. If you are not an existing Pcard holder, request access by contacting the Finance Support Center at askfinance@yale.edu to request access and receive an invitation email with a link.
3. **Account Setup:** Click the link in the invitation email and follow the prompts to create your account. **You must use your “@Yale.edu” email address.**

Login: Visit the Amazon Business website (<https://www.amazon.com/>) and log in with your **Yale** credentials (via SSO).

NOTE: Before making a purchase, confirm that you are logged into the Yale University account by locating this at the header.



Making Purchases in the Yale Amazon Business Prime Webpage

1. **Product Selection:** Choose products based on your business needs.

Note: *No Personal purchases should made in the Yale Amazon Business Prime Webpage.*

2. **Guided Buying Tags** may appear in your Amazon searches to indicate:



Preferred Products: Items marked as preferred by Yale Procurement.



Organization Restricted Items: Products that may require additional review to ensure adherence to policies – and may be purchased from the Amazon Business Prime account.

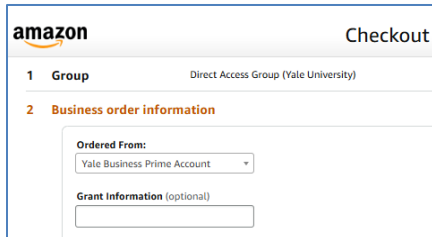


Organization Blocked Items:* Products that cannot be purchased from the Amazon Business Prime Account. These products pose a risk and do not align to our policies & requirements.

***NOTE:** *Blocked items are only shown if you have filtered the search results to “Include Blocked Items.”*

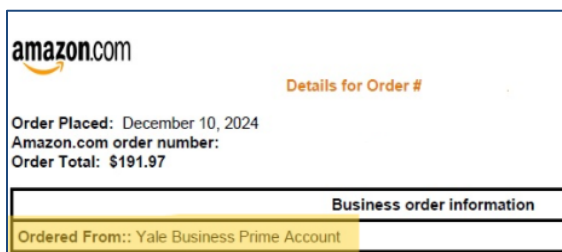
3. **Checkout:** The checkout screen defaults to Group = “Direct Access Group (Yale University)” and Ordered From: “Yale Business Prime Account”. Separate field is provided to specify the Grant Number (if applicable).

Note: *When purchasing any item for a grant, the grant name/id must be entered in this field.*



The screenshot shows the Amazon checkout interface. At the top, the Amazon logo is on the left and 'Checkout' is on the right. Below the logo, there are two main sections: '1 Group' with the value 'Direct Access Group (Yale University)' and '2 Business order information'. Under 'Business order information', there is a dropdown menu for 'Ordered From:' set to 'Yale Business Prime Account' and an optional text input field for 'Grant information (optional)'.

4. **Receipts:** Order confirmations (receipts) are sent to your Yale email and should be saved for Expense Report preparation. Order history can also be accessed (see “Account Navigation” on page 3). Purchases made through the Yale Amazon Business Prime Webpage will reference that “This order is placed on behalf of Yale University” in the confirmation email and “Ordered From: Yale Business Prime Account” on the order summary.



The screenshot shows the Amazon order confirmation page. At the top left is the 'amazon.com' logo. In the center, it says 'Details for Order #'. Below this, it lists 'Order Placed: December 10, 2024', 'Amazon.com order number:', and 'Order Total: \$191.97'. A section titled 'Business order information' is highlighted in yellow and contains the text 'Ordered From:: Yale Business Prime Account'.

How Preferred, Restricted and Blocked Items Are Defined

The Amazon program administrators in Procurement Operations have utilized Amazon’s guided buying tools to ensure adherence to policies. Here are some examples:

1. **Preferred Items:** These are items and/or vendors that meet certifications. Examples include:
 - Sustainability certifications
 - Diversity certifications
2. **Restricted Items:** These are products that require additional review before purchase. Examples include:
 - Electronic items: UL certification
 - Furniture (if shipped to some Yale locations)
3. **Blocked Items:** These are products that cannot be purchased. Examples include:
 - Computers
 - Controlled substance and chemicals
 - Hazardous, Radioactive, Biological and Safety Critical requiring approvals from EHS*

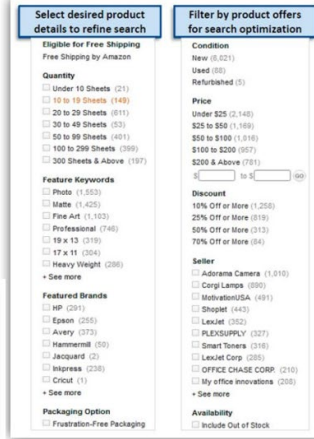
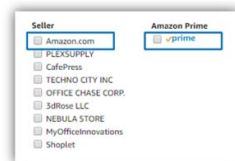
NOTE: *In some cases, items that are blocked in the Yale Amazon Business Prime webpage can be purchased in SciQuest/Jaggaer Amazon Punchout Catalog. These items require EHS approvals prior to finalizing the purchase.*

Quick Tips: Yale Amazon Business Prime Webpage

1. **Bookmark the Login Page:** Save the Amazon Business login page to your bookmarks for quick access.
2. **Filter:** Use filters in your search results to narrow by price, supplier, delivery time and more.
3. **Lists:** Create lists for frequent purchases; you can also share these lists with colleagues.

Search & Browse Optimization

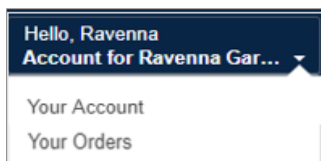
- Recommended Filters:
 - Sellers
 - Prime Eligible
 - Brand
 - Average Customer Review/ Rating
 - Diversity Credentials



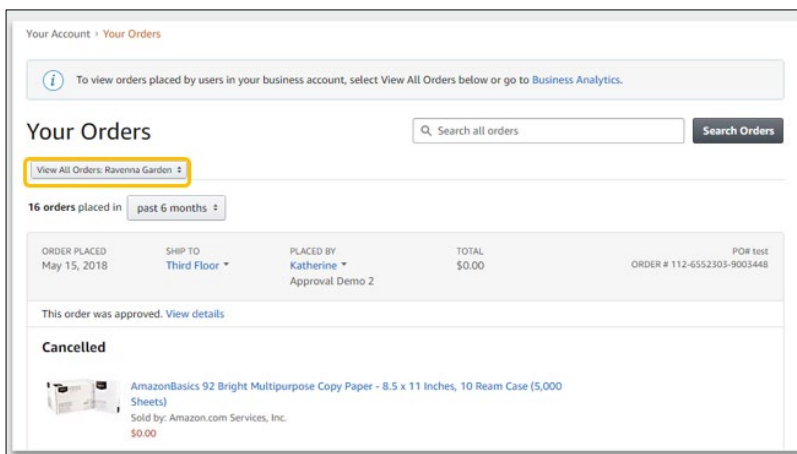
Account Navigation – To View/Track Orders and to Return an Item

Several helpful functions are located within the Account Navigation menu.

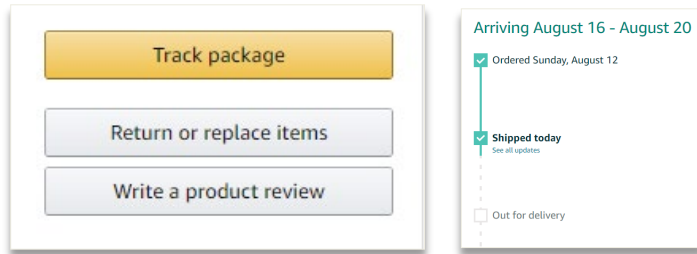
1. Hover over “Hello [your name]” at the top of the Amazon page and select “Your Orders” from the menu options.



2. The “Your Orders” screen is displayed. **Please note:** Depending on how you purchased on the Yale Amazon account, the View Orders dropdown (circled) will need to be changed:
 - **Purchases made through SciQuest/Jaggaer:** change to “View Your Orders: Paid by Yale University”
 - **Purchases made through the Yale Amazon Business Prime Webpage:** change to “View Your Orders: Paid by You”



3. You can take several actions -- such as viewing the order details, tracking the delivery of a package or initiating returns.



Troubleshooting: Halted Orders in SciQuest/Jaggaer

Orders can be halted or stopped from being completed due to several reasons. Here are five common instances:

- **Multiple Punchout Sessions:**— When shopping on Amazon Business through Punchout, make sure to use one Punchout Session per order.
- **Changing or Modifying Cart:**— If PO is sent with deleted line items or modified quantities, the order will be rejected and a new order will need to be created and submitted.
- **Safeguards:** If the approval is not completed within the 7 calendar day cart lock, and the order falls outside of the safeguards at the time of approval, the item or order will be halted and a new order will need to be created and submitted.

Note: If a business order has been halted, the end user will need to start over and place a new order.

Troubleshooting: Common Error Messages

1. **Access Denied:** Ensure you are using your Yale email address and that your account is properly set up.
2. **Payment Issues:** Verify that your payment information is correct and the transaction size is below your PCard transaction limit. If you receive a payment error, check for any restrictions on your purchasing card.
3. **Product Availability:** Check for alternative suppliers or contact the Procurement Office for assistance.

Support and Resources

For Amazon inquiries relating to an order, transaction, charge, or shipment, contact Amazon Business Customer Support online or by phone at (866) 486-2360.

For access to our Amazon Prime Business account or for business / policy questions, please email askfinance@yale.edu. Level two support is provided by the Procurement Operations Team.