

Amazon Ordering

Amazon does not offer EDI ordering or MARC downloads. You have a couple of options for working with Amazon orders.



If you are purchasing items from Amazon that are not to be cataloged, please see [here](#).

Ordering Options

1. Create no purchase order at all. You would create your cart on Amazon and order it. Then when the items arrive, create invoices for each charge.

Considerations:

- You will not have your funds encumbered if you go this route. Your funds will not be debited until you create, save and close your invoices.
- You will not have acq copies in the catalog. Copies will need to be created manually whenever they arrive.
- You will not have line items to mark received. So there will be a hole in your receiving history, since Amazon orders will not be included.

To do this workflow, follow these instructions: [Invoices Only](#).

2. Create a purchase order, add brief line items, activate PO, and order cart on Amazon.

Considerations:

- You will have line items that you can mark received when they come in.
- Your funds will be encumbered at the time of ordering, so your fund balances will more accurately represent your available balances.
- You will not have acq copies in the catalog. Copies will need to be created manually when they arrive.

To do this workflow, follow these instructions: [PO with Brief Records](#).

3. Use MARCEdit and Excel to manually create MARC records that can be uploaded through Load MARC Order Records.

Considerations:

- You will have line items that you can mark received when they come in.
- Your funds will be encumbered at the time of ordering, so your fund balances will more accurately represent your available balances.
- You will have acq copies in the catalog, as normal.

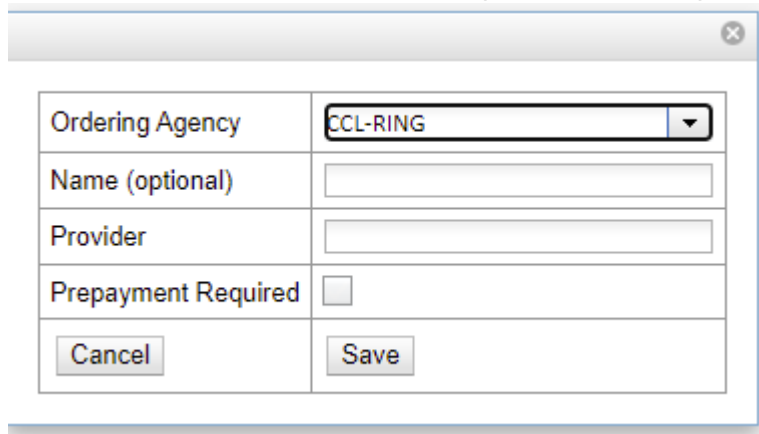
- The process is difficult, time consuming, and not fully tested. Proceed at your own discretion.

To do this workflow, follow these instructions: **PO with Full MARC Records**.

Invoices Only

PO with Brief Records

1. Go to **Acquisitions→Create Purchase Order**.
2. You'll get a pop-up box to set some information. Make sure to set your **Ordering Agency** and **Provider**. You can set the name of your PO here, if you'd like, but it's not required.



A screenshot of a web-based pop-up form for creating a purchase order. The form has a title bar with a close button (X). It contains several input fields and buttons. The 'Ordering Agency' field is a dropdown menu with 'CCL-RING' selected. The 'Name (optional)' field is a text input. The 'Provider' field is a text input. The 'Prepayment Required' field is a checkbox. At the bottom, there are two buttons: 'Cancel' and 'Save'.

Ordering Agency	CCL-RING
Name (optional)	
Provider	
Prepayment Required	<input type="checkbox"/>
Cancel	Save

Once done with that, hit Save. This will open up your purchase order.

3. From the Actions menu, select **Add Brief Record**. This will open a new pop-up with some information to fill out.

New Brief Record

Adding to Purchase Order	<input type="text" value="9445"/>
Identifier	<input type="text"/>
Publisher Number	<input type="text"/>
UPC	<input type="text"/>
Edition	<input type="text"/>
Publication Date	<input type="text"/>
Publisher	<input type="text"/>
ISSN	<input type="text"/>
ISBN	<input type="text"/>
Pagination	<input type="text"/>
Language of work	<input type="text"/>
Author of work	<input type="text"/>
Title of work	<input type="text"/>
Estimated Price	<input type="text"/>

The only two fields you need to fill out in this form are **Title** (required) and **Author**. Do not fill in Estimated Price yet.



Title is always required, but Author is not. I would recommend it for something like a book/audiobook, but if you're entering DVDs then it's not necessary.





If your normal receiving method is to scan in the item's ISBN/UPC in the legacy Search, you **do** need to enter a value in the ISBN or UPC fields.



Once you've entered that information, hit **Save Record** and your purchase order will reload.

4. You can now see that you have a bare-bones sort of line item available. You'll notice that you're missing an ISBN and it says "link to catalog". These are both okay in this workflow. This is only highlighted here so that you don't feel you need to fix those things.

✓ **Line Items**

 **Milo and Monty**

Order Identifier ISBN 

382892 | 0 |  [link to catalog](#) |  [worksheet](#) | [requests](#) | [view invoice\(s\)](#)

5. Add your discount price to your line item.

6. The line item is automatically created with 1 copy. If you need to adjust the quantity, you can click **Copies (1)** and add more copies. You can also add branch and fund information for this title at this time if you would like.

7. If you need to add more titles to the purchase order, repeat the steps of going to the Actions menu and choosing **Brief Record**. Repeat until all titles that you're ordering have been added to the purchase order and have prices.

8. Once you've added all titles, make sure that all copies have branch and fund information. If you didn't already add it through the **Copies** link, you can also use the batch updater if all information is the same for your line items.



This step should be the same as working with a normal purchase order. So however you would normally add branch and fund information is fine.

9. Once all line items have prices, quantities, branch and fund information, you're ready to activate the order.

At the top of the purchase order, choose **Activate Without Loading Items**.

10. Your purchase order will reload, and you'll see that it's now on-order. Your funds are now encumbered. You can now submit the cart on Amazon's website.



Remember that you will not have any acq copies on this purchase order.

When your items arrive

When your items arrive, you will mark them received using your normal receiving method.

When your items are invoiced

When you receive the invoice from Amazon and your items are received, you will need to create the

invoice. The easiest way to do this would be to follow the instructions here: [Create invoice with items on a PO](#).

Especially with Amazon, make sure that the price on the invoice is correct. Amazon often changes the price between the time that you order it and when they bill you; it's often off by a couple of cents. Make sure that your invoice reflects what they're billing you.

If there are any fees, like shipping or tax, you can [create direct charges](#) on your invoice to account for those.

PO with full MARC records

However, there is a workaround to get MARC downloads so you can populate your purchase orders for Amazon purchases.

Requirements

- You will need a program called MarcEdit, which can be downloaded from [here](#).
- You will need Excel on your computer.
- **(Optional)** You will need to download the PINES-created MARCedit template from here. If you do not download the template, you will need to define the MARC fields and subfields yourself.

Downloading Data

Amazon offers an option to download your order history via Order History Reports. You can access this area [here](#).



You can only download your order data **AFTER** you've completed your order. The best workflow would be to create your Amazon cart, order, and then proceed with the steps below.

Your search should be set to search for Items, with Start Date and End Date both as today's date. Name the report something explanatory (like 9.5.2019-Adult) and then click **Request Report**. This will download a CSV file with your order date.

Request Order History Report

Report Type
Items

Start Date
September
5
2019

End Date
September
5
2019
Use today

Report Name
Optional-for Identification

Request Report
Clear

Creating Minimal MARCs

With this method, you do get very brief MARC records, particularly with DVD purchases since there's not much info to include other than the title. However, if you're just trying to populate your lineitems with price, quantity and title then this is the fastest method to do so.

As an example, your MARC records will end up looking something similar to this:

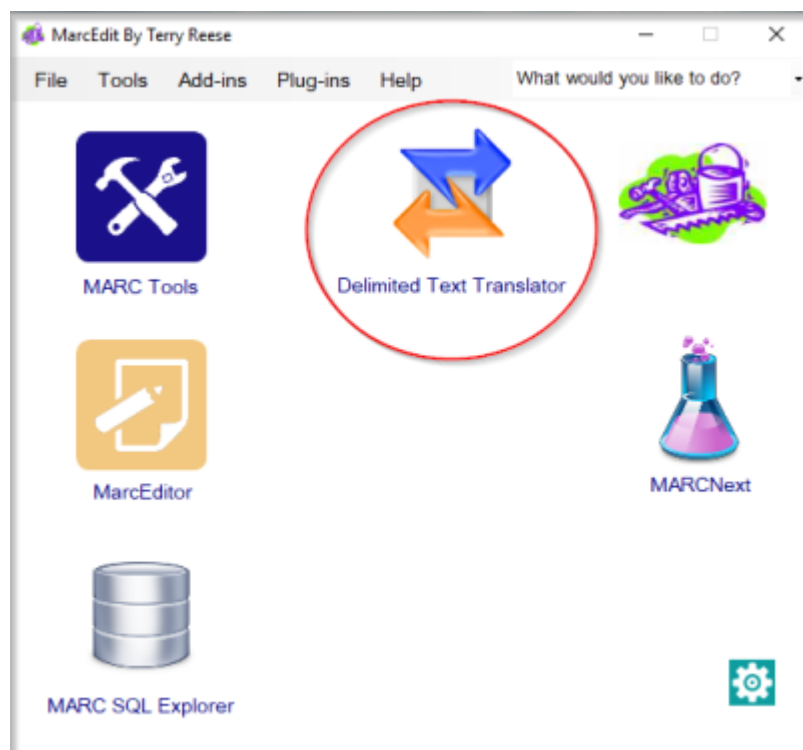
```

=LDR 00000nam 2200000la 45e0
=008 190906s9999|||||xx|||||||000\0\und\c
=020 \a6317653291
=245 \0$aSecond Act
=260 \c3/26/2019
=500 \aDVD
=962 \p$19.99
=962 \q1

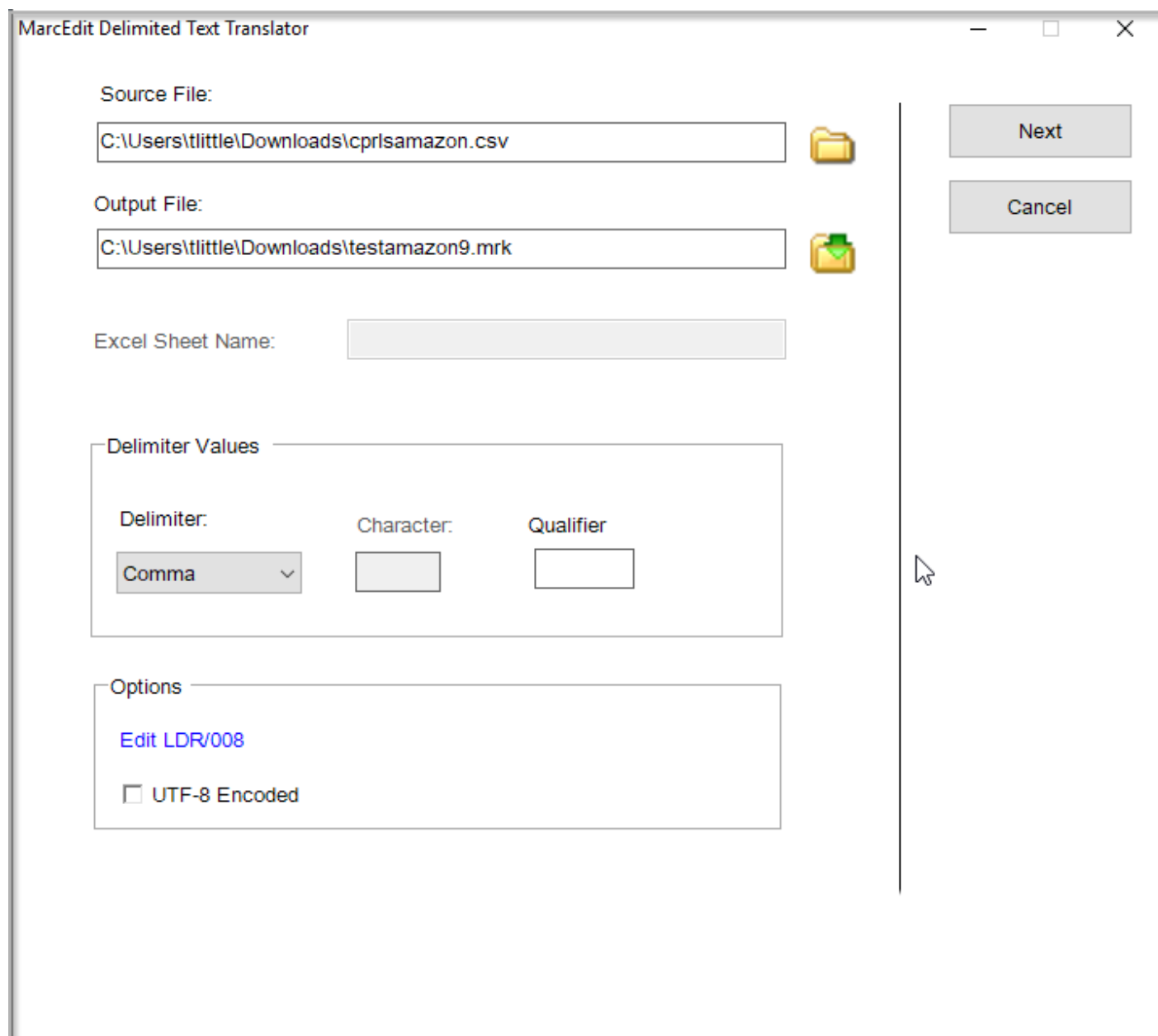
=LDR 00000nam 2200000la 45e0
=008 190906s9999|||||xx|||||||000\0\und\c
=020 \aB07MQGGCHV
=245 \0$aMARY POPPINS RETURNS
=260 \c3/19/2019
=500 \aDVD
=962 \p$19.99
=962 \q1

```

1. Open MARCedit.
2. From the main screen, choose **Delimited Text Translator**.



3. From the next screen, click the yellow folder icon next to **Source File** and find your CSV file you downloaded from Amazon.
4. In the Output File box, click the yellow folder icon and create a name for your output file. It should be file format .mrk or .mrc.
5. In the Delimiter Values area, select the Delimiter drop-down box and choose "Comma".



The screenshot shows the 'MarcEdit Delimited Text Translator' dialog box. It has a title bar with standard window controls. The main area contains several input fields and buttons. On the right side, there are 'Next' and 'Cancel' buttons. A vertical line separates the input fields from the buttons. A mouse cursor is visible near the bottom right of the dialog box.

Source File:
C:\Users\tlittle\Downloads\cprlsamazon.csv

Output File:
C:\Users\tlittle\Downloads\testamazon9.mrk

Excel Sheet Name:

Delimiter Values

Delimiter:	Character:	Qualifier
Comma		

Options

[Edit LDR/008](#)

☐ UTF-8 Encoded

6. Click Next.

7. Toward the bottom of the page, ensure that "Ignore Header Row" is checked.

MarcEdit Delimited Text Translator

Data Snapshot

Field 0	Field 1	Field 2	Field 3	Field 4	Field 5	Field 6	Field 7	Field 8
Order ...	Order ID	*@an...	Categ...	ASIN/...	UNSP...	Website	Relea...	Cor
4/1/2019	113-3...	*@an...	DVD	B07M...	55111...	Amaz...	3/19/2...	new

Finish

Cancel

Settings

Select: Map To: Indicators: Term. Punctuation:

☐ Constant Data

☐ Repeatable Subfield

Add Argument

Arguments

☐ Save Template

☒ Sort Fields

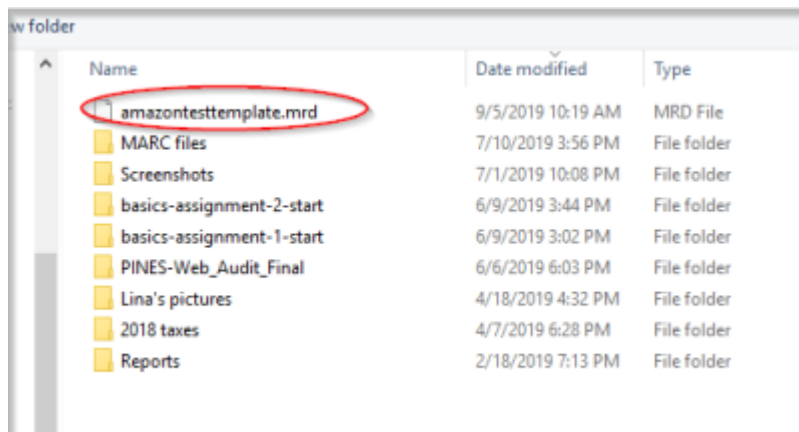
☒ Calculate common nonfiling data

☒ Ignore Header Row

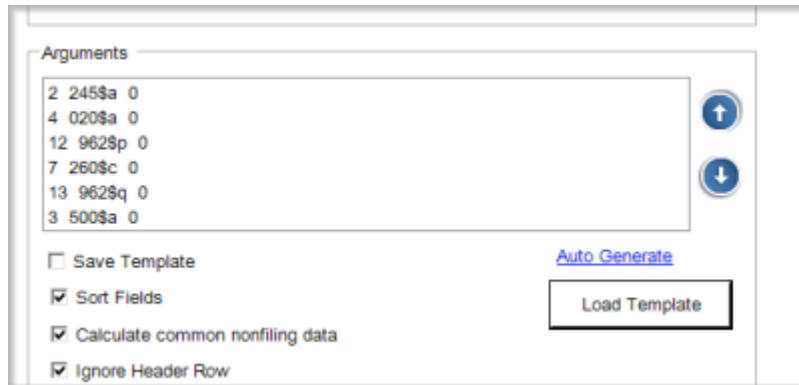
[Auto Generate](#)

Load Template

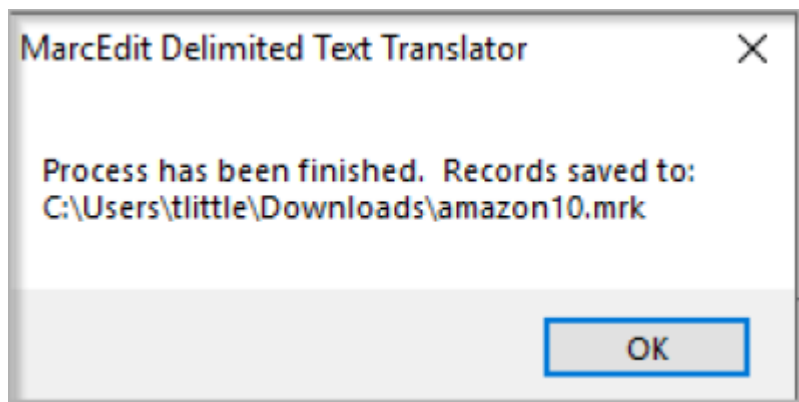
8. Click "Load Template". Locate the template file that you downloaded from PINES. Its file format will end in .mrd. Once you have selected it, click Open.



9. You will be returned to the translator page, and you'll notice that there are now arguments listed in the "Arguments" box.



10. You may now click the **Finish** button. After a moment, you will receive the notification popup to tell you that your records have been processed, and where the file is located.



11. From here, upload your new MARC file via **Load MARC Order Records** and proceed with your purchase order as normal.

You may view a screen recording of the MarcEdit process below:

Creating Fuller MARCs

From:

<https://pines.georgialibraries.org/dokuwiki/> - **PINES Documentation**

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