

Administrators Set-up Guide Amazon Business



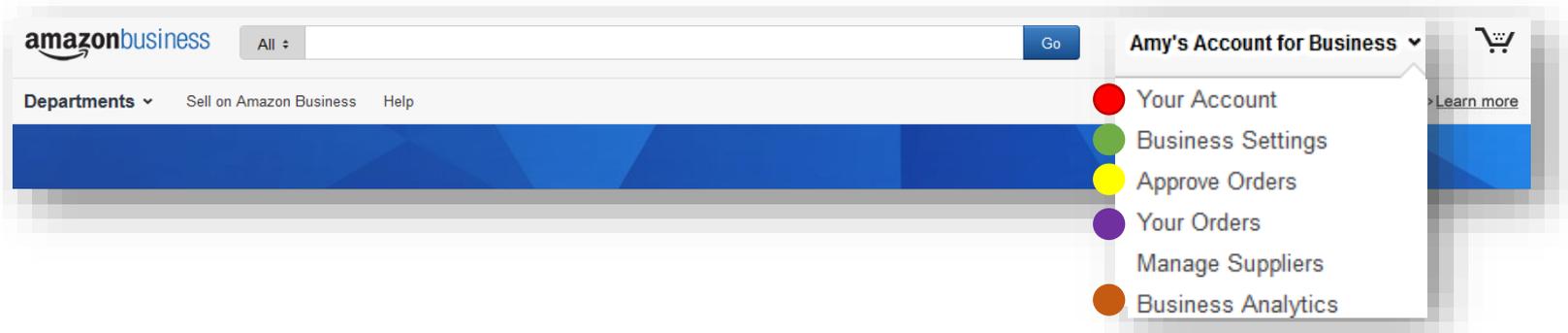
Sourcing & Procurement

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Business Account Navigation

Welcome to Amazon Business. You will notice a few changes to the look and feel of AmazonBusiness.com compared to Amazon.com, which is designed to streamline your purchasing process.



 Your Account	Standard Amazon account information order tracking and account settings.
 Business Settings	Access your management tools such as adding users, payment methods, and shipping addresses.
 Approve Orders	View and take action on pending orders.
 Your Orders	View and track orders. Administrators can view orders others have placed on behalf of the organization.
 Business Analytics	Create and filter custom templates based on your business needs to view your orders as well as the orders others have placed on behalf of your Department.

Business Settings

The 'Business Settings' area will be crucial to setting up and managing your account.

- Hover the area **Hello, NAME**, and click **Business Settings**
- **Payment Methods:** Add P-Card information
- **Shipping Addresses:** Add BU delivery addresses
- **People:** Add and remove Requisitioner users
- **Invitations:** Review the status of pending invitations
- **Groups:** Create sub-groups of users
- **Approvals:** Add an individuals to approve orders
- **Tax Exemption:** Find pre-loaded University tax exemption certifications

The screenshot displays the Amazon Business account management interface. At the top right, there is a search bar and a 'Discover Business' button. Below this, a user profile dropdown shows 'Hello, Elyse' and 'Account for Boston Univ...'. A secondary dropdown menu is open, listing options: 'Your Account', 'Business Settings' (circled in red), 'Approve Orders', 'Your Orders', 'Manage Suppliers', 'Business Analytics', 'Recurring Deliveries', 'Switch Accounts', and 'Sign Out'. The main 'Business settings' panel is open, showing four sections: 'Billing & shipping' (with sub-links for Shared settings, Payment methods, Addresses, Business order info, and Pay by Invoice), 'Members' (with sub-links for People, Invitations, Groups), 'Buying policies' (with sub-links for Catalog curation, Debarment policies, Approvals, Negotiated pricing, and Related offer reports), and 'Certifications' (with sub-links for Tax exemption and Add licenses).

Enabling Shared Payment Methods

Administrators can configure **shared** or **individual** settings for payment methods and shipping addresses at each group level.

Shared Payment

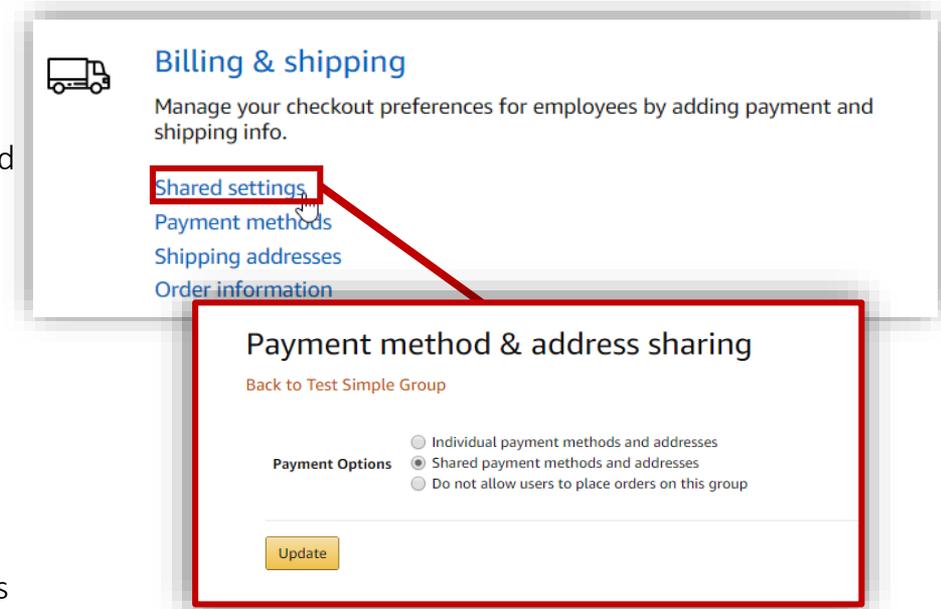
- Administrators **must** choose Shared Payment methods and Addresses when configuring payment methods for your group

Individual Payment

- Administrators will add P-Card information for their individual purchases as well as the purchases made by Requisitioners in your group

Do not allow users to place orders on this group

- Requisitioners (shopper) will only have “Read only” access to Amazon Business and are unable to checkout



Billing & shipping

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

Shared settings

[Payment methods](#)

[Shipping addresses](#)

[Order information](#)

Payment method & address sharing

[Back to Test Simple Group](#)

Payment Options

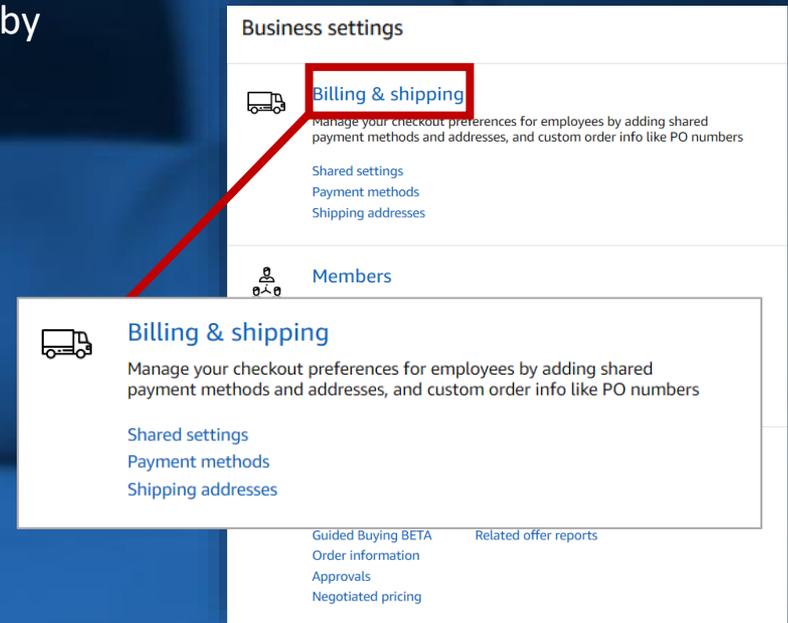
- Individual payment methods and addresses
- Shared payment methods and addresses
- Do not allow users to place orders on this group

[Update](#)

Payment Method & Address Sharing

Manage your checkout preferences for Faculty and Staff by adding payment and shipping information.

- Pre-configure the **Payment method & Address sharing** Faculty and Staff have access to during checkout
- Click into the **Payment Methods & Shipping Addresses*** section under **Manage your Business** to designate which addresses & payment options are available



The screenshot displays the 'Business settings' page. A red box highlights the 'Billing & shipping' section, which includes a truck icon and the text: 'Manage your checkout preferences for employees by adding shared payment methods and addresses, and custom order info like PO numbers'. Below this are links for 'Shared settings', 'Payment methods', and 'Shipping addresses'. A red arrow points from this section to a larger, detailed view of the 'Billing & shipping' settings, which also includes a truck icon and the same descriptive text. Below the detailed view are links for 'Guided Buying BETA', 'Order information', 'Approvals', 'Negotiated pricing', and 'Related offer reports'. A 'Members' section with a person icon is also visible below the 'Billing & shipping' section in the main screenshot.

*Products can only be shipped to BU delivery addresses.

Approval Workflows

Approval workflow provides visibility and control over purchasing between many users.

- **Who Can Approve:** Add your group's designated approvers (up to 10) and click save
- **Approval Delegation:** Set alternate delegated temporary approvers when you are out of office to ensure no orders are left waiting

The screenshot displays the Amazon Business user interface. On the left, a navigation menu for 'Elyse' is shown with 'Approve Orders' highlighted in a red box. The main content area is titled 'Purchase Requests' and states 'There are no purchases pending your approval.' Below this, an 'Approval delegation' section features a button labeled 'Assign a temporary delegate', which is also highlighted in a red box. A modal window titled 'Approval delegation' is open, showing a form to set up a delegate. The 'Approver' field contains 'enryan@bu.edu'. The 'Delegate' field is empty with the placeholder 'Enter email'. The 'Start date' is set to '09/11/2018', and the 'End date' field is empty. 'Cancel' and 'Save' buttons are at the bottom right of the modal.

Approval Workflows Continued

Administrators will need to set the dollar amount for order approvals for their group.

- **Orders over \$0.00:** Check this box and leave the dollar amount at \$0.00 to review all orders

Manage your business

Billing & shipping
Manage your checkout preferences for employees by adding shared payment methods and addresses, and custom order info like PO numbers

Shared settings
Payment methods
Shipping addresses

Members
Invite others to join the business account and organize them into groups with common settings

People
Invitations
Groups

Buying policies
Set up approval flows, policies to guide employee buying, and supplier pricing sheets

Guided Buying BETA
Order information
Approvals
Negotiated pricing

Related offer reports

Approval settings for Boston University

Approval settings will not apply to services, digital products, or punchout accounts. [Learn More](#) ▾

Which orders require approval?

Orders over \$

Orders with restricted items. [Learn More](#) ▾

Who can approve?

You can enter up to 5 approvers for each level.

Level 1 approvers

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User Roles & Permissions

When an administrator invites a participant to Amazon Business, they assign permissions for that person. Each user can have multiple roles– administrator, approver, requisitioner or multiple. Administrators can change user permissions at any time.

Assign administrator permissions on a per-group basis. One administrator can manage multiple groups. Group level administrators only have admin authority over the group they are assigned.

Role	Permissions & Functionality	Visibility
Administrator:	<ul style="list-style-type: none"> • Manage account settings & Business features • Invite people to join the business account • Remove users from the business account • Assign a role to a user • Set up approval workflows and spending limits • Configure shared payment methods and shipping addresses • Review pre-loaded certifications such as Tax Exemptions 	<ul style="list-style-type: none"> • Administrators can view orders and order history for all purchases on behalf of the business • Last 4 digits of any payment methods used by Requisitioners • Billing & Ship to addresses • All Amazon Business Analytics fields for orders placed
Approver:	<ul style="list-style-type: none"> • Approve P-Card reconciliations* • Monitor P-Card activity for the department* • Approve or reject purchase requests 	<ul style="list-style-type: none"> • Approvers can view orders and order history for all purchases within the designated group • Approvers can review orders submitted to them for approval from designated Requisitioners
Requisitioner:	<ul style="list-style-type: none"> • Place orders on behalf of the organization • Select payment methods and shipping addresses at checkout • Utilize Business Analytics to create reports and review their own purchases (not for entire group) • Can be configured as an Approver as needed 	<ul style="list-style-type: none"> • Order history for all orders that they placed for their organization with their business user account • Shipping addresses & payment methods (last 4 digits visible), as established by the administrator

*If Approver is P-Card holder.

Inviting Participants

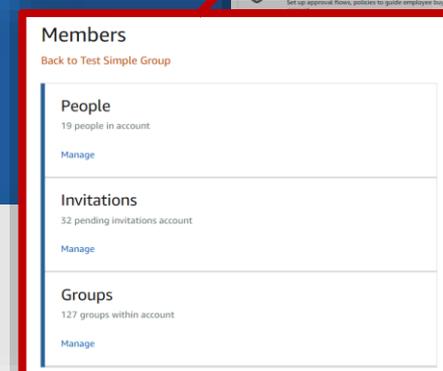
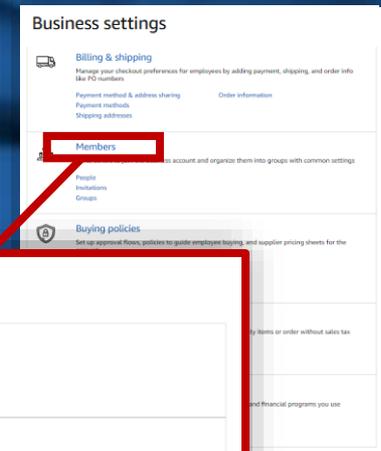
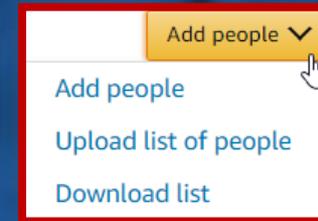
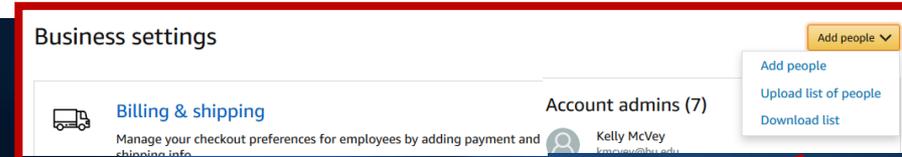
Invite faculty and staff to join your departmental group

Business Settings > Members

- The **People** section of your account enables you to manage all active users on the business account. You can add and remove users, edit user roles, and download a complete list of account users from this section of your account.
- The **Invitation** section tracks all *pending* invitations to users. Once a user has accepted their invitation, they will move to the **People** section.

Business Settings > Add People

- To invite a user, route to the **Business Settings** section of your account. Select the **Add People** drop down menu.
- Select **Add People**, to add people individually enter the **email address**, select their role, and click **Add**.
 - To add 10 users or more, select **Upload list of people** to upload a spreadsheet of users.

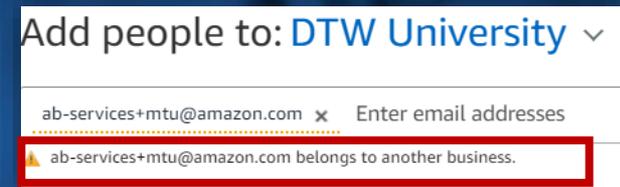


Deregistration Error Message

If you receive an error message saying a user belongs to another business when inviting a user to the account, this means the user already belongs to an existing Business account. Provide the user with the following instructions:

1. Log into your Business account and download an order history report for the past 6-12 months (recommended best practice)
2. Click the following link to deregister your existing account (it will not remove any information on the account, simply the Amazon Business account tag) <https://amazon.com/gp/b2b/manage/deregister>
3. Notify you once this process is complete

Once the end user deregisters their account, you can follow the instructions to invite them to the account.



Amazon Business Analytics

Amazon Business Analytics provides users the ability to:

- Aggregate purchases to compare and track spend over time
- Monitor and track 60+ data fields including customer info, shipment info, payment info, and seller info
- Organize data by applying filters such as “Group” or “Category”
- Customize and save report templates to meet business needs
- Download CSV files to analyze your Order History in excel

Show **Time Period** **Organized by**

Orders ▾ Month to date ▾ Account Groups ▾

Table Bar chart

- Order Info Customer Info Invoice Info Paym

Manage columns

Edit displayed columns

1. <input checked="" type="checkbox"/> Order Date	21. <input checked="" type="checkbox"/> Payment Date	41. <input checked="" type="checkbox"/> Company Compliance
2. <input checked="" type="checkbox"/> Order ID	22. <input checked="" type="checkbox"/> Payment Amount	42. <input checked="" type="checkbox"/> Listed PPU
3. <input checked="" type="checkbox"/> Account Group	23. <input checked="" type="checkbox"/> Payment Instrument Type	43. <input checked="" type="checkbox"/> Purchase PPU
4. <input checked="" type="checkbox"/> PO Number	24. <input checked="" type="checkbox"/> Payment Identifier	44. <input checked="" type="checkbox"/> Item Quantity
5. <input checked="" type="checkbox"/> Order Quantity	25. <input checked="" type="checkbox"/> Shipment Date	45. <input checked="" type="checkbox"/> Item Subtotal
6. <input checked="" type="checkbox"/> Order Subtotal	26. <input checked="" type="checkbox"/> Shipment Status	46. <input checked="" type="checkbox"/> Item Shipping & Handling
7. <input checked="" type="checkbox"/> Order Shipping & Handling	27. <input checked="" type="checkbox"/> Carrier Tracking #	47. <input checked="" type="checkbox"/> Item Promotion
8. <input checked="" type="checkbox"/> Order Promotion	28. <input checked="" type="checkbox"/> Shipment Quantity	48. <input checked="" type="checkbox"/> Item Tax
9. <input checked="" type="checkbox"/> Order Tax	29. <input checked="" type="checkbox"/> Shipping Address	49. <input checked="" type="checkbox"/> Item Net Total
10. <input checked="" type="checkbox"/> Order Net Total	30. <input checked="" type="checkbox"/> Shipment Subtotal	50. <input checked="" type="checkbox"/> PO Line Item Id
11. <input checked="" type="checkbox"/> Order Status	31. <input checked="" type="checkbox"/> Shipment Shipping & Handling	51. <input checked="" type="checkbox"/> Tax Exemption Applied
12. <input checked="" type="checkbox"/> Approver	32. <input checked="" type="checkbox"/> Shipment Promotion	52. <input checked="" type="checkbox"/> Tax Exemption Type
13. <input checked="" type="checkbox"/> Account User	33. <input checked="" type="checkbox"/> Shipment Tax	53. <input checked="" type="checkbox"/> Tax Exemption Opt Out
14. <input checked="" type="checkbox"/> Account User Email	34. <input checked="" type="checkbox"/> Shipment Net Total	54. <input checked="" type="checkbox"/> Discount Program
15. <input checked="" type="checkbox"/> Invoice Status	35. <input checked="" type="checkbox"/> Carrier Name	55. <input checked="" type="checkbox"/> Pricing Discount applied (\$ off)
16. <input checked="" type="checkbox"/> Total Amount	36. <input checked="" type="checkbox"/> Product Category	56. <input checked="" type="checkbox"/> Pricing Discount applied (% off)
17. <input checked="" type="checkbox"/> Invoice Due Amount	37. <input checked="" type="checkbox"/> ASIN	57. <input checked="" type="checkbox"/> Seller Name
18. <input checked="" type="checkbox"/> Invoice Issue Date	38. <input checked="" type="checkbox"/> Title	58. <input checked="" type="checkbox"/> Seller Credentials
19. <input checked="" type="checkbox"/> Invoice Due Date	39. <input checked="" type="checkbox"/> UNSPSC	
20. <input checked="" type="checkbox"/> Payment Reference ID	40. <input checked="" type="checkbox"/> Product Condition	

Cancel Apply

Hello, Elyse

Account for Boston Univ... ▾

Your Account

Business Settings

Approve Orders

Your Orders

Manage Suppliers

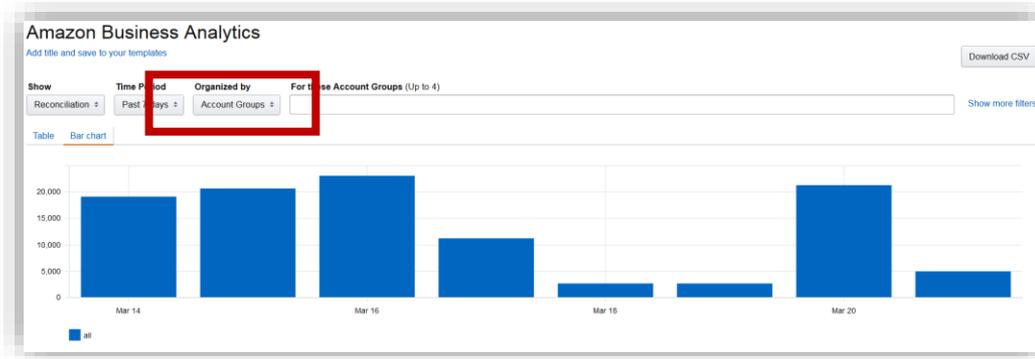
Business Analytics

Recurring Deliveries

High level filters allow you to customize both the table and bar charts.

- The **Show** option allows you to select the data view you are interested in: **Orders, Returns, Refunds** and **Reconciliation**
- **Manage Columns** allows you to select all possible data points to view.
- **Time Period** supports a range of default settings (month to date, quarter to date, etc.) as well as a custom range option
- **Organized by** allows you to drill down into spend from specific **Account Groups** or **Account Users** or spend towards specific **Product Categories** or **Seller Credentials**. The text box allows you to select from a menu of options or enter text with smart search support.

Bar Chart vs. Table View



Bar Chart View

- **Organized by:** determines how the data is aggregated so you can compare and track spending over time
- You can also compare how you are spending towards certain product categories on Amazon Business

Amazon Business Analytics

Download CSV

Show: Returns: Past 7 days: Organized by: Account Groups: For these Account Groups (Up to 4): Show more filters

Table Bar chart

Order Info Customer Info Product Info Seller Info Show more table filters

Manage columns Results per page 15

Order Date	Order Id	Account Group	PO Number	Account User	Return Date	Return Reason	Return Quantity	Product Category	ASIN	Title
03/06/2017	116-5528884-9809636	70322 - SBA		Dawn Boyd	03/17/2017	Ordered the wrong item	1	Wireless	B01N0BLZRP	👤 sophie jace
03/03/2017	104-0889722-4801055	65109 ERO SDG		Ima Ramirez	03/14/2017	Undeliverable	12	Personal Computer	B007ABJJK4	📄 Case Log: 1
03/01/2017	103-4159773-1861007	78138		Manuel David Rojas	03/15/2017	Exchanged	5	Personal Computer	B003F1UAMY	📄 Gear: 20-Pa
02/28/2017	109-8900963-5547419	78235		rick johnston	03/15/2017	Exchanged	2	Personal Computer	B000XBEJY4	📄 Gear: 16-Pa
02/28/2017	103-8995858-6381062	65297 HSI SDG		Elizabeth Kiley	03/17/2017	Ordered the wrong item	2	Sports	B001G5CAS	📄 5.11 Tactical
02/28/2017	103-8995858-6381062	65297 HSI SDG		Elizabeth Kiley	03/14/2017	Missed estimated delivery	3	Office Product	B004WJUYOG	📄 Georgia-Pac

Table View

- In the table view, you can customize to include only the attributes that are relevant to you by clicking **Manage Columns**.
- You can also **Download a CSV** of the table view if you prefer to do spend analysis in excel.

Reporting & Reconciliation

Use the Reconciliation Report to view data including transaction, customer, and order information.

Simplify the reconciliation process by matching corporate credit card charges to each item in a shipment.

- Match the **Payment Reference ID** in the Reconciliation Report against your credit card statement
- Improved formatting & roll-up support streamlines reporting and reconciliation for orders containing multiple shipments and/or multiple charges

Order Date	Order ID	Payment Reference ID	Payment Date	Payment Amount	Payment Instrument Type	Payment Identifier	Product Category	ASIN	Title
02/08/2016	108-XXXXXXXX-XXXXXXXX	12345678901112	02/08/2016	\$199.98	Line of Credit	123 4	Personal Computer	B00D78QCYK	ViewSonic VA2
02/08/2016	108-XXXXXXXX-XXXXXXXX	12345678901112	02/08/2016	\$199.98	Line of Credit	123 4	Personal Computer	B00D78QCYK	ViewSonic VA2
02/08/2016	108-XXXXXXXX-XXXXXXXX	12345678901112	02/08/2016	\$17.99	Line of Credit	123 4	CE	B001F42MKG	Logitech Track
02/07/2016	108-XXXXXXXX-XXXXXXXX	N/A	N/A	N/A	N/A	123 4	Health and Beauty	B000VEDK66	Renew Life Dic
02/04/2016	106-XXXXXXXX-XXXXXXXX	12345678901112	02/07/2016	\$221.87	Line of Credit	123 4	CE	B0007WDIW8	Tripp Lite HDM
		12345678901112	02/08/2016	\$17.95	Line of Credit	123 4	CE	B0000AZK6H	StarTech.com
		12345678901112	02/04/2016	\$34.02	Line of Credit	123 4	CE	B001D5RPEK	StarTech.com
		12345678901112	02/04/2016	\$34.02	Line of Credit	123 4	CE	B001D5RPEK	StarTech.com
		12345678901112	02/04/2016	\$34.02	Line of Credit	123 4	CE	B0007WDIW8	Tripp Lite HDM
		12345678901112	02/04/2016	\$34.02	Line of Credit	123 4	CE	B0000AZK6H	StarTech.com
		12345678901112	02/06/2016	\$83.07	Line of Credit	123 4	CE	B0007WDIW8	Tripp Lite HDM
		12345678901112	02/06/2016	\$83.07	Line of Credit	123 4	CE	B0000AZK6H	StarTech.com

Business Customer Support

- Dedicated U.S. based [Business Customer Support](#) can be reached a number of ways including email, chat and phone.
- The best way to contact Amazon Business Customer Service is to follow the steps below:
 - Click **Contact Us** page from your business account
 - Select **Prime or Something Else**
 - Select an issue **Amazon Business**
 - Select **Phone or Chat**
- Not sure what you're looking for? Learn more about the features and benefits on Amazon Business [HERE](#).

Need Help?

Contact Business Customer Service
Talk with us by email, phone, or chat.

Available M-F 8am-10pm EST,
Sat. & Sun. 8am-5pm EST

The screenshot shows the Amazon Business 'Contact Us' page. A red box highlights the 'Help' link in the top navigation bar. An orange box labeled '1' highlights the 'What can we help you with?' section, which includes buttons for 'An order I placed', 'Devices', 'Digital Content and Services', and 'Prime or Something else'. Another orange box labeled '2' highlights the 'Prime or Something else' button. A third orange box labeled '3' highlights the 'Tell us more about your issue' section, specifically the 'Amazon Business Question' dropdown menu. A fourth orange box labeled '4' highlights the 'How would you like to contact us?' section, showing buttons for 'E-mail', 'Phone' (marked as 'Recommended'), and 'Chat'.

Who Do I Contact?

Below are some general guidelines as to when you should contact Amazon Business customer support and when you should contact the Boston University Sourcing and Procurement team.

Following these guidelines will ensure you the fastest solution to any issue you may be having!

- **Question/Issue:** Orders, returns, tracking, Prime, or general Amazon inquiries
 - **Recommendation:** [Contact Customer Service](#) or explore online videos and [Amazon Business Tutorials](#)
- **Question/Issue:** Tax Queries
 - **Recommendation:** If you have any queries regarding tax charges, please email tax-exempt@amazon.com- this includes questions regarding tax rate and refunds.
- **Question/Issue:** You are a PCard Admin and do not have an Amazon account
 - **Recommendation:** BU Sourcing and Procurement sourcing@bu.edu
- **Question/Issue:** You have questions regarding your PCard
 - **Recommendation:** BU Card Services Pcard@bu.edu
- **Question/Issue:** A buyer needs to be set up under your Departmental group so they can submit orders for approval
 - **Recommendation:** You are enabled to add, remove, or resend invites to buyers in your group at any time

The screenshot displays the Amazon Business website interface. At the top, there is a search bar with the text "amazonbusiness" and a dropdown menu set to "All". Below the search bar, there are navigation links for "Departments", "Browsing History", "Today's Deals", "Gift Cards", "Help", "Contact Us", and "Sell". The main content area is titled "Help & Customer Service" and includes a "Search Help" box with a "Go" button. A list of help topics is provided, such as "Amazon Business Help", "About Amazon Business", "Manage Your Business Account Settings", "Free Shipping for Business Accounts", "Your Business Order Information", "Terms & Conditions", "Other Topics", "Amazon PunchOut", "Trademark Guidelines", "Amazon Banking and Tax Information", "Tax Exemption", "Amazon Business Video Tutorials", "Archives", and "Selected Policies". A "Quick solutions" section lists "Your Orders", "Returns & Refunds", and "Business Prime Shipping". On the right side, there is a section for "Amazon Business Video Tutorials" and "For New Users" with a large image of an invitation email from Amazon Business. The email text includes: "Amy | [redacted]@amazon.com has invited you to purchase on behalf of Amy's Business", "Amazon Business allows you to shop on Amazon using your organization's multi-user business account among the millions of business products on Amazon and get business pricing on select items", and a prominent yellow "Accept the invitation" button with a blue arrow pointing to it. Below the email, there are four small thumbnail images for video tutorials: "Amazon Business - Create Your New Business User Account", "Amazon Business - Separate Business from Personal Shopping and Shoopino and Experience", "Amazon Business - Optimize Your Business Shopping Experience", and "Amazon Business - Migrate an Existing Amazon Account and Create Your".



Sourcing & Procurement Additional Resources

Amazon Business Help:

Amazon Customer Service Center: amazon.com/gp/help/customer/FAQs
page: bu.edu/sourcing/h2po/#amazonbusiness