Administrators Set-up Guide
Amazon Business

Sourcing & Procurement
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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.

### Business Account Navigation

<table>
<thead>
<tr>
<th>Feature</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your Account</td>
<td>Standard Amazon account information order tracking and account settings.</td>
</tr>
<tr>
<td>Business Settings</td>
<td>Access your management tools such as adding users, payment methods, and shipping addresses.</td>
</tr>
<tr>
<td>Approve Orders</td>
<td>View and take action on pending orders.</td>
</tr>
<tr>
<td>Your Orders</td>
<td>View and track orders. Administrators can view orders others have placed on behalf of the organization.</td>
</tr>
<tr>
<td>Business Analytics</td>
<td>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.</td>
</tr>
</tbody>
</table>
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
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.
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.

*Products can only be shipped to BU delivery addresses.*
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
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.
# 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.

<table>
<thead>
<tr>
<th>Role</th>
<th>Permissions &amp; Functionality</th>
<th>Visibility</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Administrator:</strong></td>
<td>• Manage account settings &amp; Business features&lt;br&gt;• Invite people to join the business account&lt;br&gt;• Remove users from the business account&lt;br&gt;• Assign a role to a user&lt;br&gt;• Set up approval workflows and spending limits&lt;br&gt;• Configure shared payment methods and shipping addresses&lt;br&gt;• Review pre-loaded certifications such as Tax Exemptions</td>
<td>• Administrators can view orders and order history for all purchases on behalf of the business&lt;br&gt;• Last 4 digits of any payment methods used by Requisitioners&lt;br&gt;• Billing &amp; Ship to addresses&lt;br&gt;• All Amazon Business Analytics fields for orders placed</td>
</tr>
<tr>
<td><strong>Approver:</strong></td>
<td>• Approve P-Card reconciliations*&lt;br&gt;• Monitor P-Card activity for the department*&lt;br&gt;• Approve or reject purchase requests</td>
<td>• Approvers can view orders and order history for all purchases within the designated group&lt;br&gt;• Approvers can review orders submitted to them for approval from designated Requisitioners</td>
</tr>
<tr>
<td><strong>Requisitioner:</strong></td>
<td>• Place orders on behalf of the organization&lt;br&gt;• Select payment methods and shipping addresses at checkout&lt;br&gt;• Utilize Business Analytics to create reports and review their own purchases (not for entire group)&lt;br&gt;• Can be configured as an Approver as needed</td>
<td>• Order history for all orders that they placed for their organization with their business user account&lt;br&gt;• Shipping addresses &amp; payment methods (last 4 digits visible), as established by the administrator</td>
</tr>
</tbody>
</table>

*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.
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](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

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.

**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

### Reporting & Reconciliation Table

<table>
<thead>
<tr>
<th>Order Date</th>
<th>Order ID</th>
<th>Payment Reference ID</th>
<th>Payment Date</th>
<th>Payment Amount</th>
<th>Payment Instrument Type</th>
<th>Payment Identifier</th>
<th>Product Category</th>
<th>ASIN</th>
<th>Title</th>
</tr>
</thead>
<tbody>
<tr>
<td>02/08/2016</td>
<td>108-xxxxxxxx-xxxxxxx</td>
<td>12345678901112</td>
<td>02/08/2016</td>
<td>$199.98</td>
<td>Line of Credit</td>
<td>123 4</td>
<td>Personal Computer</td>
<td>B900780CYYK</td>
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<tr>
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<td>ViewSonic V40</td>
</tr>
<tr>
<td>02/07/2016</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
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<td>N/A</td>
<td>123 4</td>
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<td>B900780CYYK</td>
<td>ViewSonic V40</td>
</tr>
<tr>
<td>03/04/2016</td>
<td>106-xxxxxxxx-xxxxxxx</td>
<td>12345678901112</td>
<td>02/07/2016</td>
<td>$211.87</td>
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<tr>
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<td>02/04/2016</td>
<td>$34.92</td>
<td>Line of Credit</td>
<td>123 4</td>
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<td>Tripp Lite HD</td>
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<tr>
<td>03/04/2016</td>
<td>106-xxxxxxxx-xxxxxxx</td>
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<td>02/05/2016</td>
<td>$83.07</td>
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<td>123 4</td>
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<td>B0000AZK6H</td>
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<tr>
<td>03/04/2016</td>
<td>106-xxxxxxxx-xxxxxxx</td>
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<td>02/06/2016</td>
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<td>Line of Credit</td>
<td>123 4</td>
<td>CE</td>
<td>B0000AZK6H</td>
<td>StarTech.com</td>
</tr>
</tbody>
</table>

*Note: The table contains a sample of data for demonstration purposes.*
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.
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
Sourcing & Procurement
Additional Resources

Amazon Business Help:

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