Administrators Set-up Guide
Amazon Business

Sourcing & Procurement

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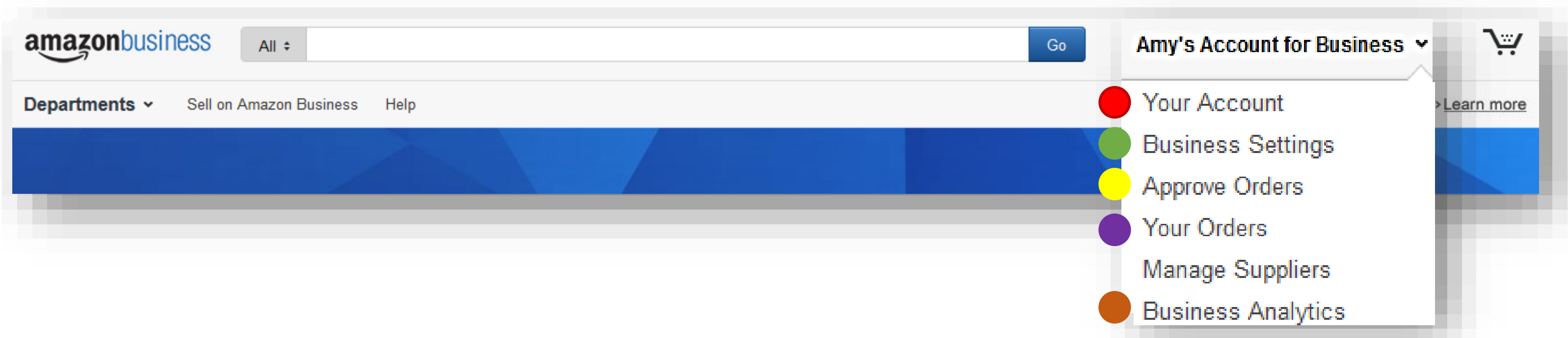
Business Account Navigation

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.

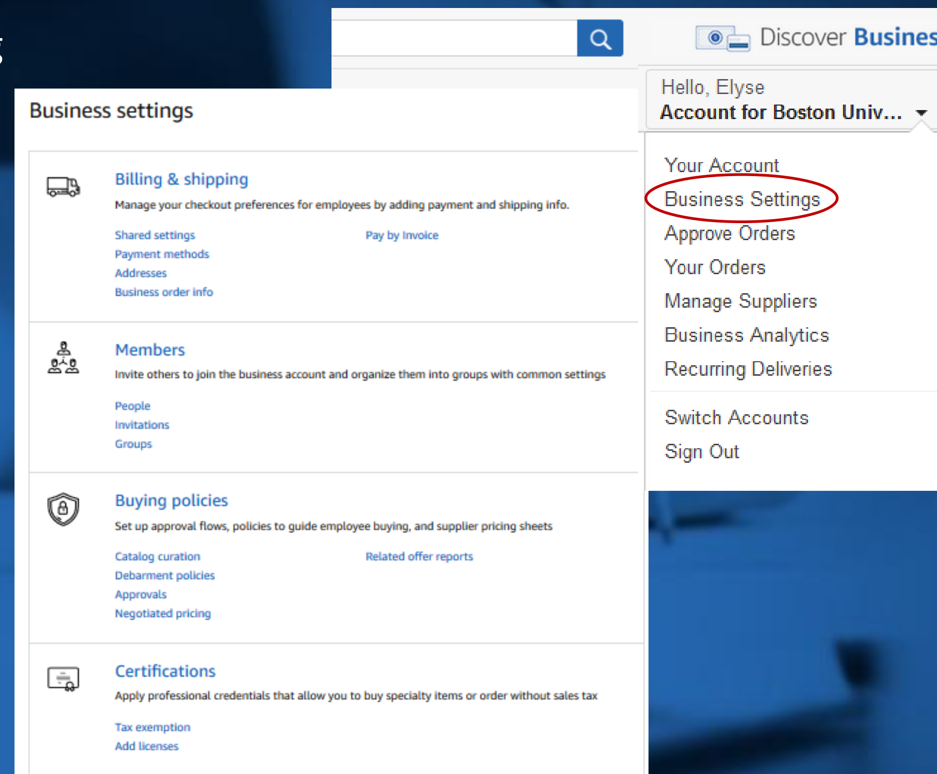


Your Account	Standard Amazon account information order tracking and account settings.
Business Settings	Access your management tools such as adding users, payment methods, and shipping addresses.
Approve Orders	View and take action on pending orders.
Your Orders	View and track orders. Administrators 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

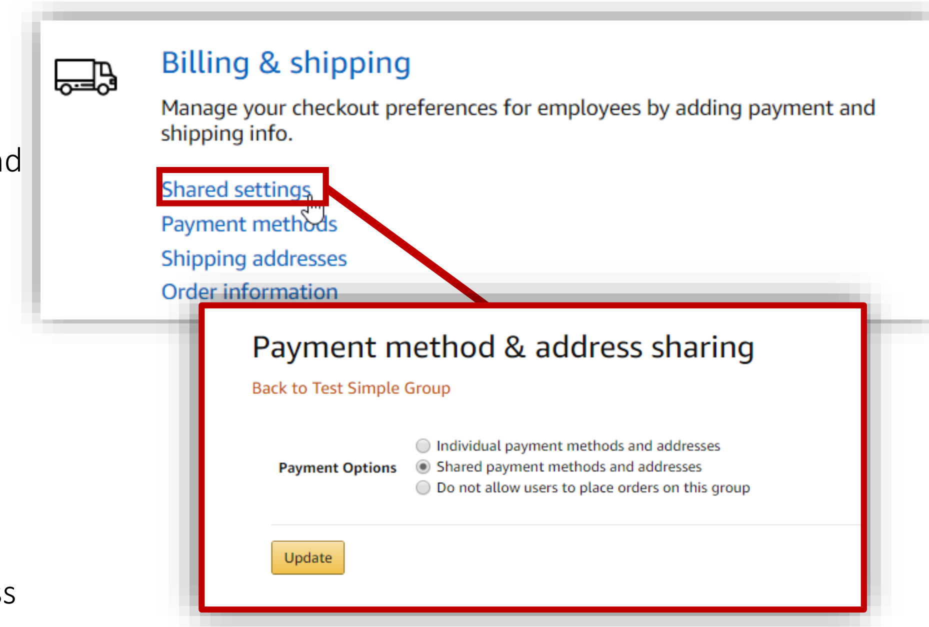
The 'Business Settings' area will be crucial to setting up and managing your account.

- 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



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

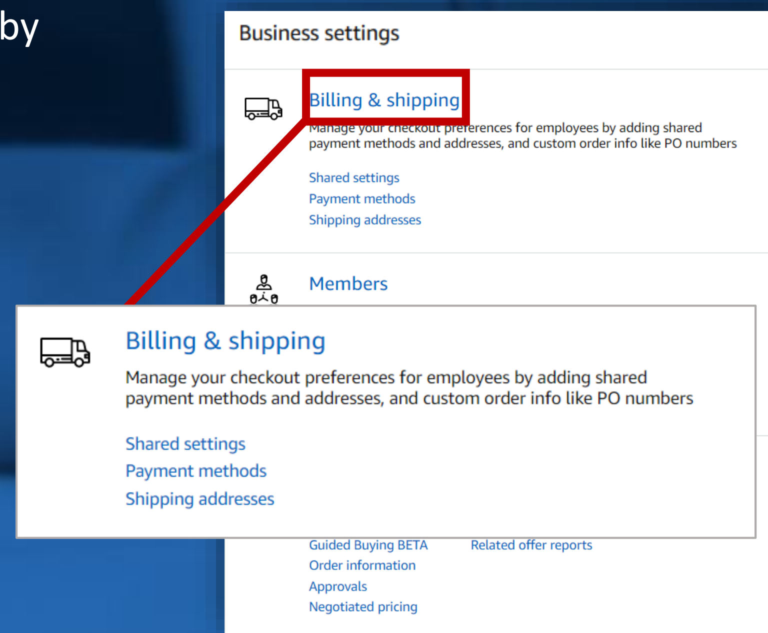
Do not allow users to place orders on this group

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

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

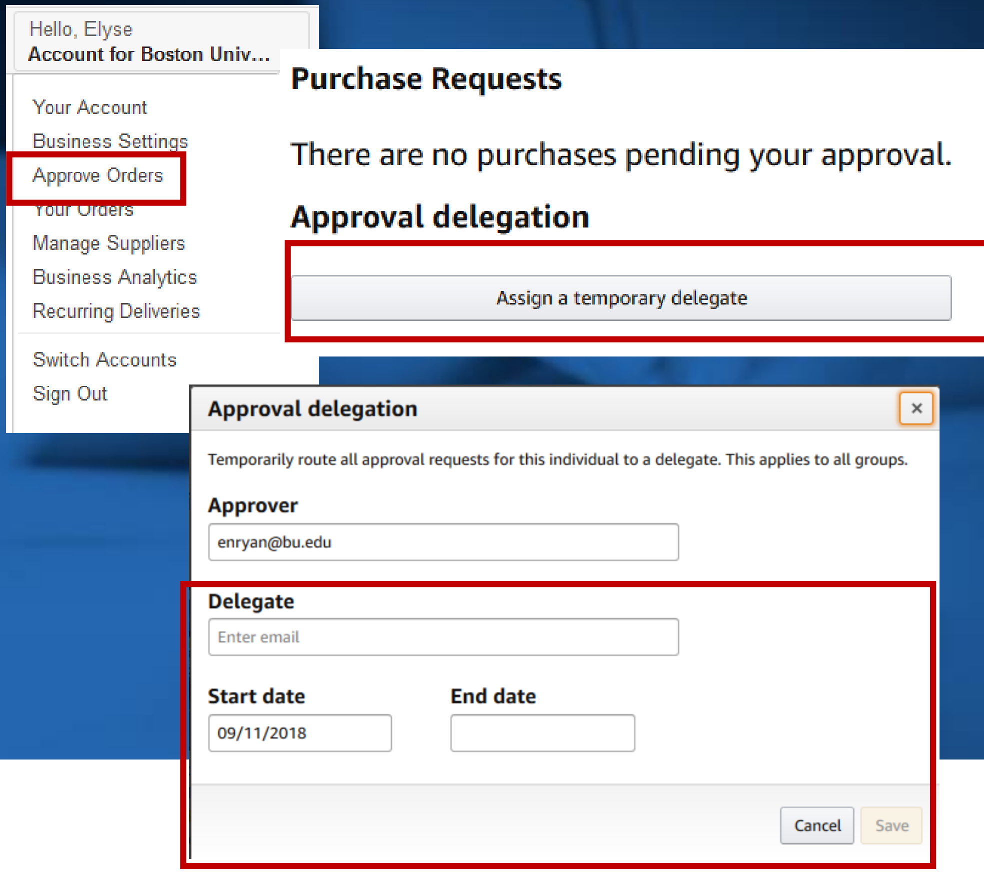


*Products can only be shipped to BU delivery addresses.

Approval Workflows

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

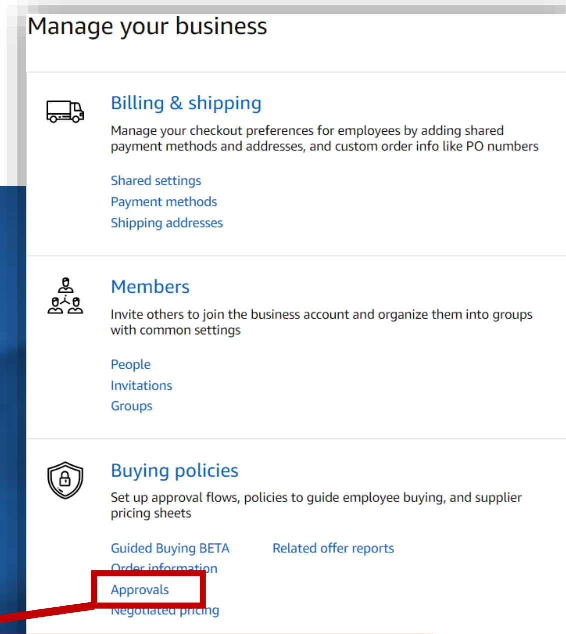
- **Who Can Approve:** Add your group's designated approvers (up to 10) and click save
- **Approval Delegation:** Set alternate delegated temporary approvers when you are out of office to ensure no orders are left waiting

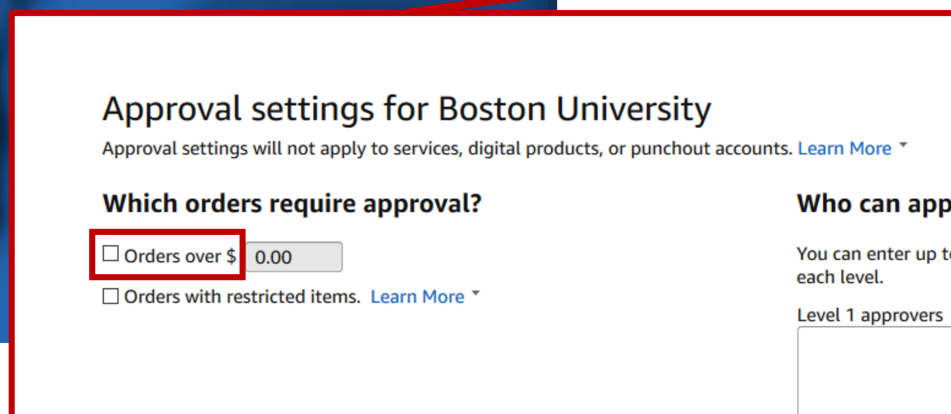


Approval Workflows Continued

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





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:	• 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	• 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:	• Approve P-Card reconciliations* • Monitor P-Card activity for the department* • Approve or reject purchase requests	• 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:	• 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	• 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

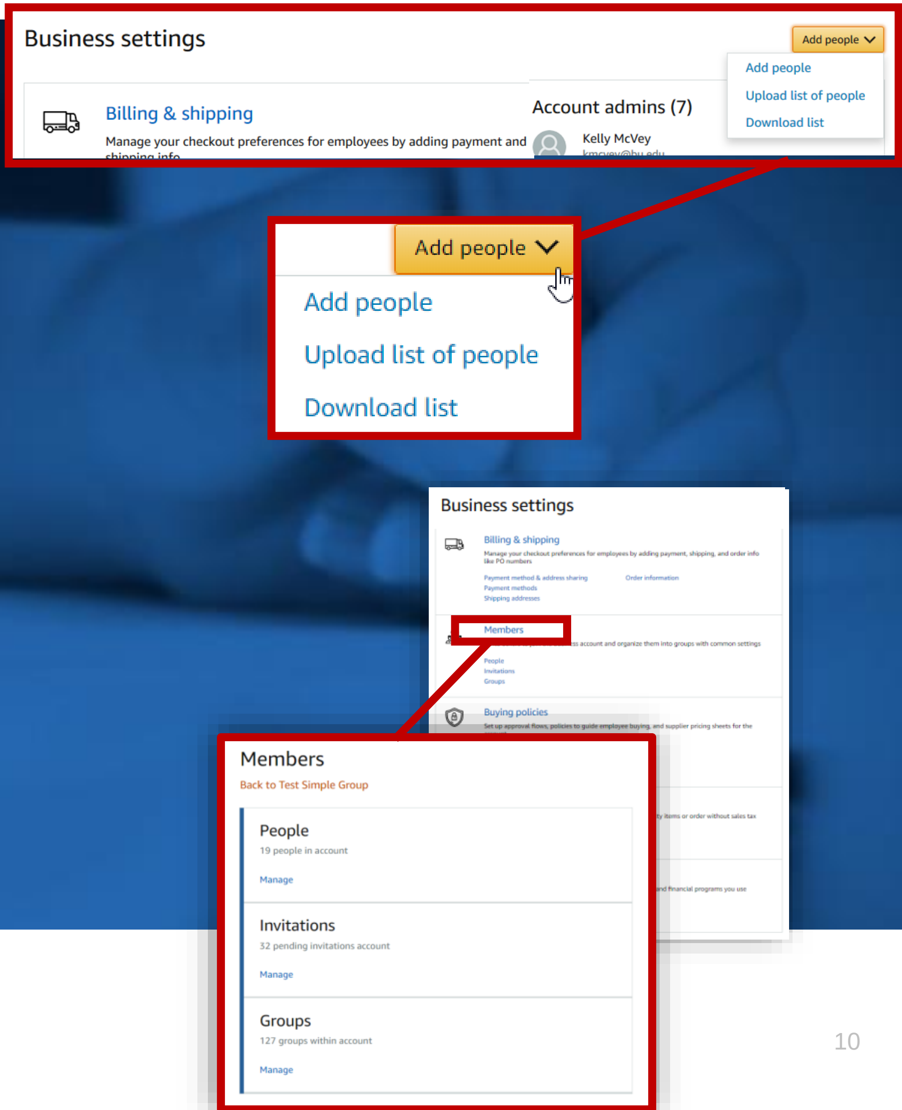
Invite faculty and staff to join your departmental group

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.



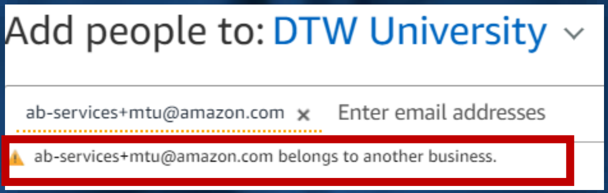
Deregistration Error Message

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

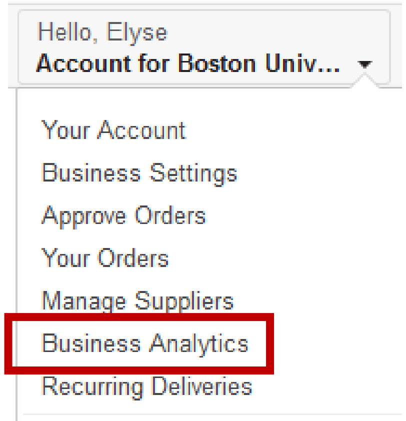


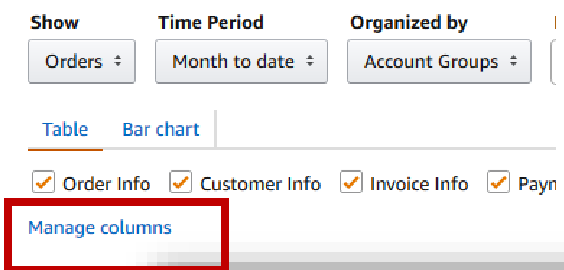
Once the end user deregisters their account, you can follow the instructions to invite them to the account.

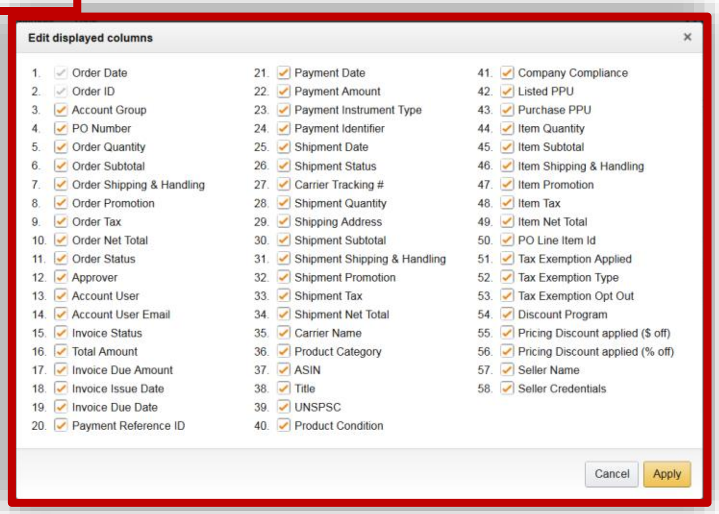
Amazon Business Analytics

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



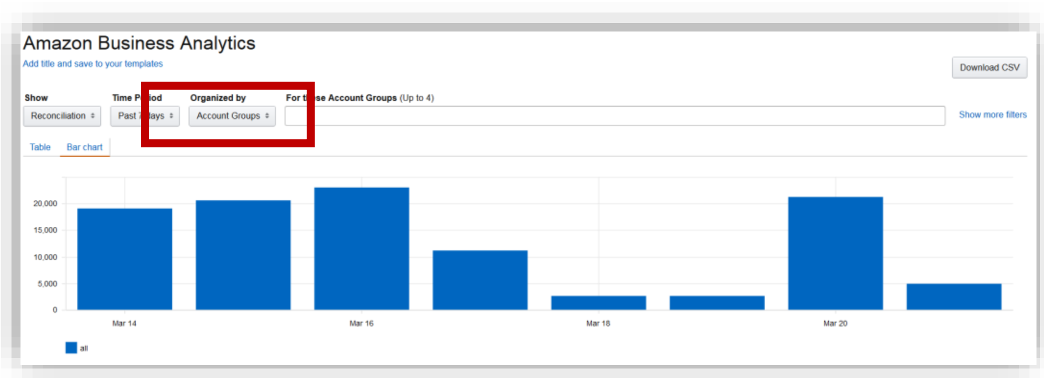




High level filters allow you to customize both the table and bar charts.

- 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

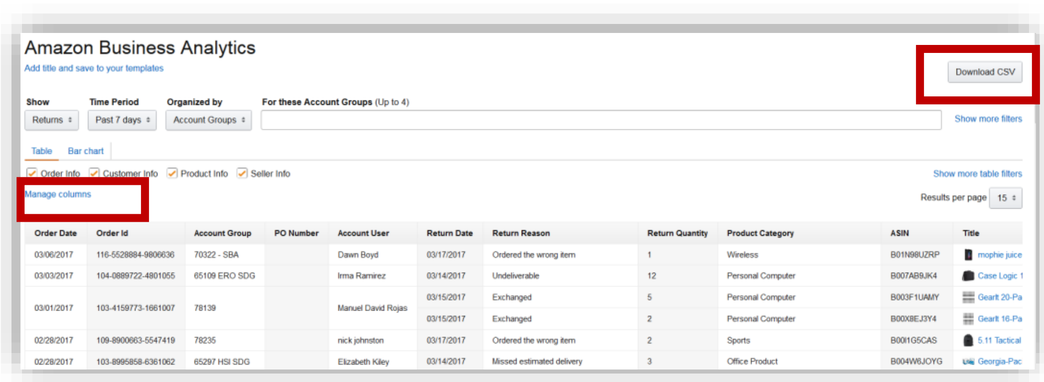


Table View

- 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

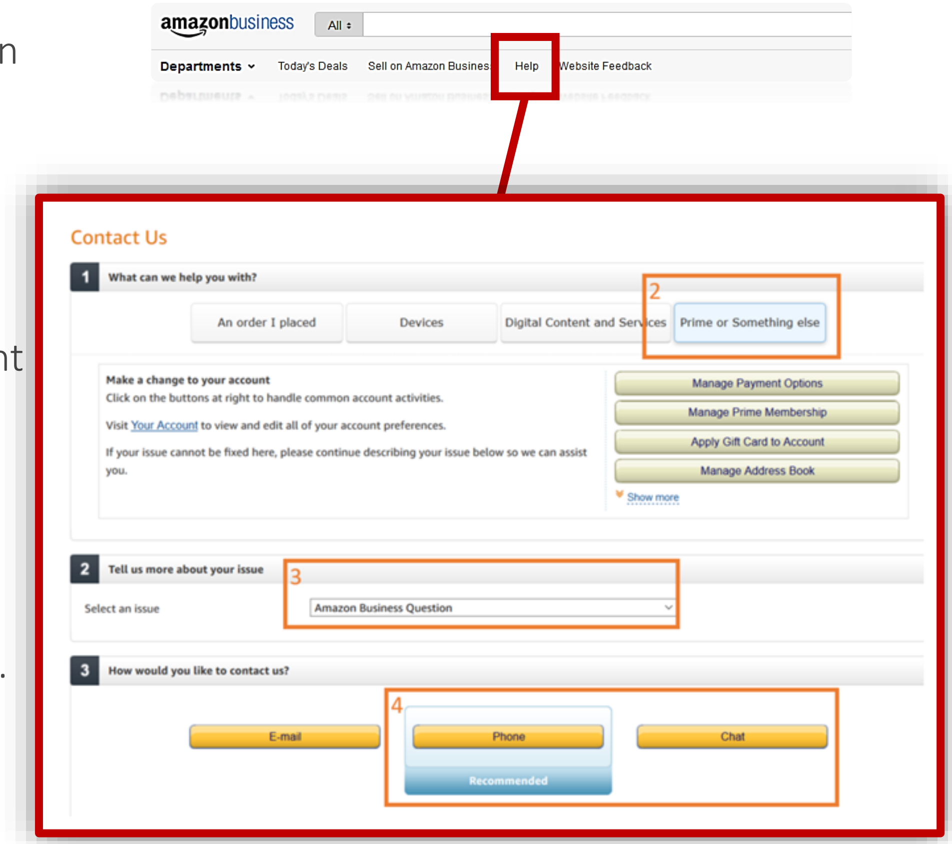
Order Date	Order ID	Payment Reference ID	Payment Date	Payment Amount	Payment Instrument Type	Payment Identifier	Product Category	ASIN	Title
02/08/2016	108-XXXXXXX-XXXXXXX	12345678901112	02/08/2016	$199.98	Line of Credit	1234	Personal Computer	B00D78QCYK	ViewSonic VA2
02/08/2016	108-XXXXXXX-XXXXXXX	12345678901112	02/08/2016	$199.98	Line of Credit	1234	Personal Computer	B00D78QCYK	ViewSonic VA2
02/08/2016	108-XXXXXXX-XXXXXXX	12345678901112	02/08/2016	$17.99	Line of Credit	1234	CE	B001F42MKG	Logitech Track
02/07/2016	108-XXXXXXX-XXXXXXX	N/A	N/A	N/A	N/A	1234	Health and Beauty	B000VEDK66	Renew Life Die
02/04/2016	106-XXXXXXX-XXXXXXX	12345678901112	02/07/2016	$221.87	Line of Credit	1234	CE	B0007WDIW8	Tripp Lite HDM
							CE	B0000AZK6H	StarTech.com
							CE	B001D5RPEK	StarTech.com
		12345678901112	02/08/2016	$17.95	Line of Credit	1234	CE	B001D5RPEK	StarTech.com
		12345678901112	02/04/2016	$34.02	Line of Credit	1234	CE	B0007WDIW8	Tripp Lite HDM
							CE	B0000AZK6H	StarTech.com
		12345678901112	02/06/2016	$83.07	Line of Credit	1234	CE	B0007WDIW8	Tripp Lite HDM
							CE	B0000AZK6H	StarTech.com

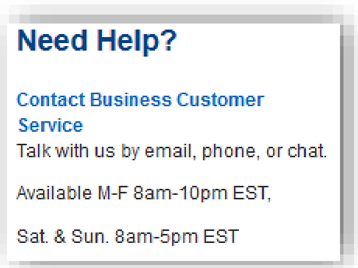
Business Customer Support

- 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](#).



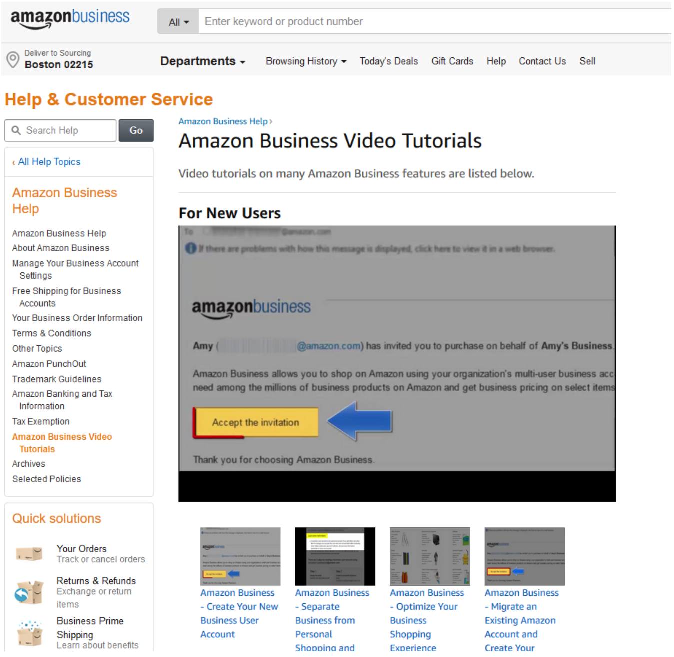


Who Do I Contact?

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



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Sourcing & Procurement Additional Resources

Amazon Business Help:

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