Thank you for attending this Boston University & Amazon Business hosted webinar. 

*We will begin shortly.*

If you have not already, please take a minute to register your Amazon Business account. *You can do this by selecting ‘Set Up Your Account’ within the Welcome to Amazon Business email*
Boston University Agenda

- Key Features and Benefits
- Amazon Prime Reimbursement
- Rollout Schedule
- Contracted Suppliers
- Curation Functionality
- User Roles and Permissions
- Who Do I Contact?
- Amazon Business FAQs
- Questions
Key Features and Benefits

**Streamlined P-Card Reconciliation:**
- Receipts will not be required in Bank of America Works when reconciling Amazon Business purchases

**Business Prime Shipping**
- Free two-day shipping on eligible items

**Tax benefit savings**
- University tax-exemption will be automatically applied to purchases from Amazon Business when an item is sold by Amazon.com or a third party seller participating in Amazon’s Tax Exemption Program

**Customer Support**
- Access to a specialized, business-only, customer service team at 888-281-3847

**Amazon Business Analytics Reporting**
- Customized spend and detailed product data for all transactions

**Price Protection**
- All purchases in Amazon Business require pre-approval and pricing is held in the shopping cart for seven (7) days
The university has purchased an institutional Prime account at no cost to your department

• For users who previously purchased a Prime membership for BU purchases, please make sure to cancel your prime membership to receive a pro-rated refund. Reference our FAQ for cancellation instructions

• For more information about transferring student Prime memberships to a personal email address, please visit the Amazon Student Prime page
Administrative Department- Phase 1
• 165 P-Card holders
• Program Launch Date: September 24th
• Training Sessions- October 3rd, 4th, and 9th
• Requisitioner Launch- Week of October 8th

Academic Departments- Phase 2
• 618 P-Card Holders
• Program Launch Date- October/November
Contracted Suppliers

Contracted suppliers should always be considered for purchases before utilizing Amazon Business. If more competitive prices are found on Amazon Business or the product is unavailable through contracted suppliers, Amazon Business is a recommended method of ordering eligible products.

<table>
<thead>
<tr>
<th>Category of Spend</th>
<th>Contracted Vendor</th>
<th>Ordering Method</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Vendor Marketplace</td>
</tr>
<tr>
<td>Office Supplies</td>
<td>W.B. Mason</td>
<td>□</td>
</tr>
<tr>
<td>Lab Supplies</td>
<td>Fisher Scientific</td>
<td>□</td>
</tr>
<tr>
<td>IT: Computers</td>
<td>Lenovo, Apple</td>
<td>□</td>
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<tr>
<td>IT: Accessories &amp; Peripherals</td>
<td>Lenovo, Apple, SHL Gov. Connection</td>
<td>□</td>
</tr>
<tr>
<td>Books and Media</td>
<td>Barnes &amp; Nobles</td>
<td>□</td>
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<tr>
<td>Promotional Items</td>
<td>Promoversity</td>
<td>□</td>
</tr>
<tr>
<td>Breakroom Food &amp; Supplies</td>
<td>W.B. Mason</td>
<td>□</td>
</tr>
<tr>
<td>Printer Toner</td>
<td>W.B. Mason*</td>
<td>□</td>
</tr>
<tr>
<td>Gift Cards</td>
<td>National Gift Card</td>
<td>□</td>
</tr>
</tbody>
</table>

* Toner for Ricoh machines provided by Ricoh free of charge under current service contract
Curation Functionality

• Product curation will be implemented to ensure purchases are aligned with University guidelines.

• Categories that will be curated include, but are not limited to, High-Hazard Chemicals, Furniture, Medication/Drugs, Radioactive Compounds, Laptop/Desktop computers, Printers, Cellular Services, Amazon Coins, and Gift Cards.

• Restricted products will require approval workflow within Amazon by a designated approver. All restricted category purchases will require an explanation to confirm why the purchase was approved.
Company restricted
This item may not comply with the purchasing standards for your organization.
Barnes & Noble should be used for all course materials and supplies. Please refer to www.bu.bncollege.com

Paperback – May 3, 2011
by Roger Fisher  (Author), William L. Ury (Author), Bruce Patton  (Author)
★★★★★  1,050 customer reviews

The key text on problem-solving negotiation–updated and revised
Since its original publication nearly thirty years ago, Getting to Yes has helped millions of people learn a

11/26/2018
Amazon.com Confidential
When an administrator invites a participant to Amazon Business, they assign permissions for that person. Each user can have one of two roles—administrator and/or requisitioner. 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

<table>
<thead>
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<th>Role</th>
<th>Permissions &amp; Functionality</th>
<th>Visibility</th>
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| Administrator: | • Manage business 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  
• Add Certifications such as Tax Exemptions to the business account | • Administrators can view orders and order history for all purchases in their group(s) 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 by users in their group(s) |
| Requisitioner: | • Place orders on behalf of the organization  
• Add payment methods and shipping addresses at checkout *if individual pay is configured  
• Utilize Business Analytics for their own purchases  
• Can be configured as an Approver | • 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 |
Who do I contact?

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 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.
Amazon Business FAQs can be found on the Sourcing and Procurement website at

[www.bu.edu/sourcing/h2po/#amazonbusiness](http://www.bu.edu/sourcing/h2po/#amazonbusiness)

- Acceptable usage
- Activate your Business Account
- Ordering on Amazon Business
- Amazon Business Account Administration
Amazon Business Agenda

- Account Activation
- Shopping on Amazon Business
- Business Account Navigation
  - User Roles & Permissions
  - Business Settings
  - Payment and Shipping Address
  - Members
    - Inviting Users to the Account
    - Removing a User
    - Groups
- Curation

- Approvals
  - Adding approvals
  - Approving Orders
  - Approval Delegation
- Amazon Business Analytics
- Your Orders
- Business Customer Support
How do Invitations Work?

- When a user is added to the business account, an invitation to join is immediately emailed.
- Invitations are tied to an end user’s email address. The recipient cannot change the email address they use to register for the account.
- End users must take action after being invited to an account in order to become an active user.
- User permissions are assigned when a user is invited.
- Account invitations are valid for 21 days from send date. After 21 days, they will expire and need to be resent.
Scenario 1
Create a new business user account

- If you don’t have an existing Amazon account tied to your work email address, you will be provided step-by-step instructions to create your new account login for your organization’s Amazon Business account.

- Please be sure to use your full name when completing this form (First Last).

- Once your account has been created, you can start shopping.

Scenario 2
Separate Business & Personal Shopping

- If you have an existing Amazon account tied to your work email and utilize this account for business & personal purchases, please follow the prompts to separate your personal order history from your work email.

  Sign in to get started

  If you cannot remember your password, you can click Forgot your password? to reset it.

- After signing into your existing account, choose a new email for your existing personal order history to be associated with. The new email address cannot be associated with an existing Amazon.com account.

- This will free up your work email to be used strictly for business purchases moving forward.

- Confirm your name and new business password by complete the set up for your business log in following steps in Scenario 1.

Scenario 3
Migrate your existing Amazon Account

- If you already have an Amazon account tied to your work email address and utilize this account solely for business purchases, you can migrate this existing account to your organization’s Amazon Business account.

- Sign in to the existing account that you used for business purchases on Amazon.com.

- To migrate this account, click on the blue hyperlink on the right: “I want to convert…”

- Confirm that you have not made personal purchases on this account. If you change your mind you can still separate your accounts.

- Click next step to confirm your account conversion and start shopping on the central account with your same existing credentials.
Shopping on Amazon Business
Business Pricing & Quantity Discounts
• Business pricing and quantity discounts are only available to registered business account customers on Amazon.

Business Prime Shipping
• Business Prime Shipping has been purchased, providing you with Free Two-Day Shipping on eligible items. Please make sure to cancel your prime membership to receive a pro-rated refund

Buying Policies
• Boston University has customized Amazon Business to their buying standards and procedures. Features that will be enabled include approval workflows and catalog curation

Business-Only Selection
• Business-only selection refers to items and offers that are only available for purchase by Amazon Business customers.

Amazon Business Analytics
• Use Amazon Business Analytics to view data about your orders, create and filter reports based on your business needs, and view both charts and tables.
Take Advantage of Amazon Prime Shipping Benefits

• An easy way to ensure that your products arrive on time and as expected, is to order products fulfilled directly from Amazon. All products clearly mark who the seller is on the product detail page.

Prime Eligibility – Fulfilled by Amazon

• Prime eligible items are fulfilled by Amazon. We recommend searching for prime eligible items.

What’s not Included?

• Business Prime Shipping does not include additional Prime benefits such as Amazon Fresh, Pantry, Video, or Music.
• Amazon is the “everything store.” With such a large selection, we do our best to make it easy for you and your end users to find what you’re looking for.

• Recommended filters:
  • Business Sellers
  • Prime Eligible
  • Brand
  • Average Customer Review/Rating
  • Diversity Credentials
Business Order Information Field

Custom order fields at checkout make it easier to track and manage orders

- Information entered here will appear in Order History Reports in the Business Analytics tool
- This field is optional
- The information field below have been configured on your account
- This field can be entered by the original requisitioner or changed in the approval process if you have set up approval workflow within Amazon Business
Business Account Navigation
Welcome to Amazon Business. You will notice a few changes to the look and feel of your Amazon experience, which are designed to streamline your purchasing process.

<table>
<thead>
<tr>
<th>Your Account</th>
<th>Standard Amazon account information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Settings</td>
<td>Business Management pages. Add users, set up groups, configure approvals, etc.</td>
</tr>
<tr>
<td>Approve Orders</td>
<td>If workflow approvals are enabled for you, approvers can view and take action on pending orders</td>
</tr>
<tr>
<td>Your Orders</td>
<td>View and your track orders. Administrations can view orders others have placed on behalf of the organization.</td>
</tr>
<tr>
<td>Business Analytics</td>
<td>Create and filter custom reports based on your business needs to view your organization’s orders</td>
</tr>
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Group Administrators have the ability to add payment methods and shipping addresses, add and remove users, and designate a backup approver in the event you are out of the office and unable to approve orders. All of these changes are made under “Business Settings.”
Payment & Shipping

As the cardholder, you will need to manage your checkout preferences for your users by adding payment and shipping information.

- Enabling **Payment methods & Address sharing** lets administrators pre-configure the shipping addresses and payment methods requisitioners have access to during checkout.
- Once shared settings are enabled, Requisitioners cannot add their own payment methods or shipping addresses for a purchase during checkout – they can only choose from the options configured.
- Click into the **Payment Methods & Shipping Addresses** section to designate which addresses & payment options are available.
Members

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

- 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 **Invitations** section tracks all *pending and expired* invitations to users. Once a user has accepted their invitation, that person will move to the **People** section.

- To help keep your users organized, people can be added to specific **Groups**. Settings such as approvals, shared payment methods, and catalog curation messages can be configured at the group level.
Administrators can add users to the account one by one or all at once by uploading a spreadsheet.

Add Users from Business Settings
- Under the “Add people” button at the account or group level, select “Add people” again. Enter the user’s email address and select the appropriate user permissions. You can select one role or both. Up to 12 people can be invited in this window at once.

Add Users from any Group
- If you navigate directly to a subgroup within an account, you can also add users. Once at the group, click Members>People>Add People
# User Roles & Permissions

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                  • Utilize Business Analytics for their own purchases  
                  • Can be configured as an Approver | • 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 |
Administrators can add users to the account one by one or all at once by uploading a spreadsheet.

**Bulk User Invites**
- Under the “Add people” button at the account level, select “Upload list of people”. Using the provided template, invite multiple users to separate groups and designate their roles.

**Bulk Upload Results**
- After a spreadsheet has been uploaded, the admin will receive an automated report indicating any emails that were not able to be processed or invited. These failed invites usually indicate that an end user has an existing Amazon Business account.
Remove a User – using “People”

To remove a user, navigate to “Business Settings” from the top right drop down navigation menu. There are two ways you can navigate to the user you want to remove:

1. Click on “People” under the Members section
2. Hover over the “Actions” drop down at the right of the user’s name & email
3. Select “Remove from Group”

4. If the User is only in one group, a warning message will pop up prior to removing them from the business account.

Once a user is removed from the account, they will need to accept a new invitation if they are ever need to be re-added.
Remove a User – using Search

To remove a user, navigate to “Business Settings” from the top right drop down navigation menu. There are two ways you can navigate to the user you want to remove:

1. Use the search bar at the top right of the page to search for a specific user. You can search by name or email.

2. Select the user’s profile when it populates under the search bar.

3. Click “Remove from Group” at the right or “Remove from Business”.

4. If the User is only in one group, a warning message will pop up prior to removing them from the business account.
You can use groups to organize users and purchase settings based on your business needs. Many customers create groups based on business units, departments, locations, or payment method.

Groups may have one or more administrators, and one or more requisitioners. You can have an administrator for the business who manages all individual groups, or an individual administrator can be created for each group.

To create a new group:
1. Click the button from the top right of the Groups page.
2. Enter the desired group name
3. Select shared settings for the group
4. Click again to complete

The following settings can be configured at the group level:
- Shared payment methods and shipping addresses
- Approval workflows
- Catalog curation settings
Catalog Curation - Requisitioner View

- Catalog curation is enabled to ensure purchases are aligned with University guidelines.
- Certain product categories are flagged as company restricted. Please view the custom messaging for these products as they may not comply with your company’s purchasing policies.
- Categories that will be curated include, but are not limited to, High-Hazard Chemicals, Furniture, Medication/Drugs, Radioactive Compounds, Laptop/Desktop computers, Printers, Cellular Services, Amazon Coins, and Gift Cards.
As an approver, you will have visibility into what items are requested that have been flagged as restricted.

You can take action to approve or reject this item while still approving the other items in the order.
Approvals
Approvals

Approval workflows provide visibility and control over purchasing

- Approvers are notified of pending orders through email as well as when they log into their Amazon Business account.
- Requisitioners or Administrators can be designated as approvers.
- Only active account users can be configured as approvers.
- Approvals can be set up at individual group levels by navigating to **Buying policies>Approvals** and then further customized for individual users.
Approval Delegation

If you are out of the office for an extended period of time, you can delegate the approvals.

- Route to your Approve Order Queue
- Select ‘Assign a temporary delegate’
- Enter the delegate’s email and the date range in which you will be delegating approvals
- Please note, the approver MUST have activated their BU Business account

![Approval delegation screenshot](attachment:image.png)
Any time an order is routed to you for approval, you will get an email notifying you of the request. Purchase requests can be approved directly from the email or by navigating to “Approve Orders” in the top right drop down of your account.

• Once a purchase is submitted for approval, the order is held for 7 days. Approval requests that take longer than 7 days will be rejected
• If you have multiple orders awaiting approval, you have the option to approve or reject them in bulk
• Any time you reject an order, you can send comments back to the requisitioner explaining why the order was rejected

• When an order is approved, an order confirmation email is sent to the requisitioner letting them know that their order was approved and is now being processed by 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
- Customize and save report templates to meet business needs
- Download CSV files to analyze your data in excel

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: **Reconciliation, Orders, Returns, Refunds** and **Related offers**
- **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, Ordering Users** or **Transaction Type**.
Bar Chart View

- In the Bar Chart view, the Organized by option 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.
Use the Reconciliation Report to view data including transaction info, customer info, and order info.

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
Your Orders
Administrators can view a comprehensive “Your Orders” view for all orders placed across your department.

To view the full list rather than only those placed by yourself, use the drop down to toggle to View All Orders: Boston University.

From this view, Administrators can take a variety of actions regarding each specific order.
Business Customer Support

- Dedicated U.S. based Business Customer Support can be reached a number of ways including email, chat and phone.
- Not sure what you’re looking for? Learn more about the features and benefits on Amazon Business HERE.
Contact Business Customer Support: Provides end users the option to call, email, or live chat. Please use this method of contact for anything relating to an order, transaction, charge, or shipment.

Cancel an Individual Prime Membership:
- Your Account > Manage My Prime Membership > End Membership
- The end user must follow the steps to receive a pro-rated refund

Request a Tax Exemption Refund:
- Your Orders > Locate Order > Contact Seller > Request refund through email
- Additional tax queries can be emailed to tax-exempt@amazon.com

Your Customer Advisor – James Herbert – jhherber@amazon.com
- This person is your point of contact for anything related to the Amazon Business account structure, new features and functionality, and questions that do not fall into the above categories
Complete and return user list to Elyse Ryan on or before Thursday, November 1st

Requisitioner Launch - Week of November 5th

Enable your group as Shared Pay, add your payment method and shipping address
  • Without completing this step, the requisitioners will NOT be able to place orders

Add additional administrators or approvers
  • If there are others in your department that should have visibility over the account and/or plan to approve orders now or in the future, please go ahead and add them to your departmental group