



**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

# Amazon Prime Reimbursement

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](#)



# Rollout Schedule

## Administrative Department- Phase 1

- 165 P-Card holders
- Program Launch Date: September 24<sup>th</sup>
- Training Sessions- October 3<sup>rd</sup>, 4<sup>th</sup>, and 9<sup>th</sup>
- Requisitioner Launch- Week of October 8<sup>th</sup>

## 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.

■ Primary Method ■ Secondary Method

| Type of Purchase/Vendor/Ordering Method |                                     |                     |                        |                       |             |
|---|-------------------------------------|---------------------|------------------------|-----------------------|-------------|
| Category of Spend                       | Contracted Vendor                   | Ordering Method     |                        |                       |             |
|   |                                     | Terrier Marketplace | Material Shopping Cart | PCard/Amazon Business | Travel Card |
| Office Supplies                         | W.B. Mason                          | ■                   | ■                      | ■                     |             |
| Lab Supplies                            | Fisher Scientific                   | ■                   | ■                      | ■                     |             |
| IT: Computers                           | Lenovo, Apple                       | ■                   | ■                      | ■                     |             |
| IT: Accessories & Peripherals           | Lenovo, Apple, SHI, Gov. Connection | ■                   | ■                      | ■                     |             |
| Books and Media                         | Barnes & Nobles                     | ■                   | ■                      | ■                     |             |
| Promotional Items                       | Promoversity                        | ■                   | ■                      |                       |             |
| Breakroom Food & Supplies               | W.B. Mason                          | ■                   | ■                      | ■                     |             |
| Printer Toner                           | W.B. Mason*                         | ■                   | ■                      | ■                     |             |
| Gift Cards                              | National Gift Card                  | ■                   |                        |                       |             |

\*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.

# Curation Example

Back to search results for "getting to yes negotiating agreement without givin..."

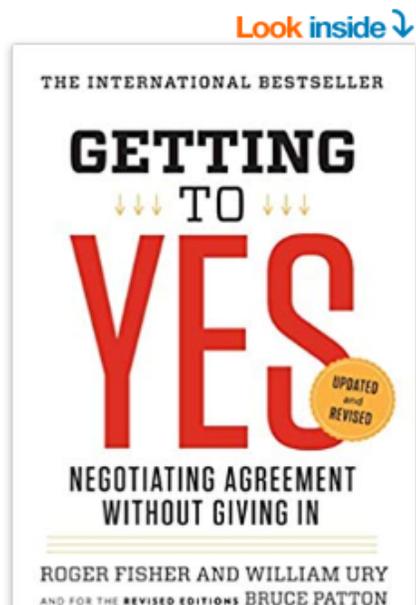
**Getting to Yes: Negotiating Agreement Without Giving In** and millions of other books are available for **Amazon Kindle**. L



## 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](http://www.bu.bncollege.com)*



Paperback – May 3, 2011

by Roger Fisher (Author), William L. Ury (Author), Bruce Patton (Author)

★★★★☆ 1,050 customer reviews

> See all 10 formats and editions

| Audiobook                    | Kindle                 | Hardcover                                  | Paperback  | Audio CD                                    |
|------------------------------|------------------------|--|--|---|
| \$0.00                       | \$12.99                | \$29.55                                    | <b>\$11.55</b>   | \$21.61                                     |
| Free with your Audible trial | Read with Our Free App | 32 Used from \$8.71<br>13 New from \$29.55 | 330 Used from \$3.99<br>131 New from \$5.16<br>4 Collectible from \$9.99 | 20 Used from \$14.21<br>23 New from \$18.38 |

**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

# User Roles & Permissions

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  | Visibility  |
|----------------|--|---|
| Administrator: | <ul style="list-style-type: none"><li>• Manage business settings &amp; business features</li><li>• Invite people to join the business account</li><li>• Remove users from the business account</li><li>• Assign a role to a user</li><li>• Set up approval workflows and spending limits</li><li>• Configure shared payment methods and shipping addresses</li><li>• Add Certifications such as Tax Exemptions to the business account</li></ul> | <ul style="list-style-type: none"><li>• Administrators can view orders and order history for all purchases in their group(s) on behalf of the business.</li><li>• Last 4 digits of any payment methods used by Requisitioners</li><li>• Billing &amp; Ship to addresses</li><li>• All Amazon Business Analytics fields for orders placed by users in their group(s)</li></ul> |
| Requisitioner: | <ul style="list-style-type: none"><li>• Place orders on behalf of the organization</li><li>• Add payment methods and shipping addresses at checkout *if individual pay is configured</li><li>• Utilize Business Analytics for their own purchases</li><li>• Can be configured as an Approver</li></ul>   | <ul style="list-style-type: none"><li>• Order history for all orders that they placed for their organization with their business user account</li><li>• Shipping addresses &amp; payment methods (last 4 digits visible), as established by the administrator</li></ul>   |

# 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](mailto: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](mailto: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



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

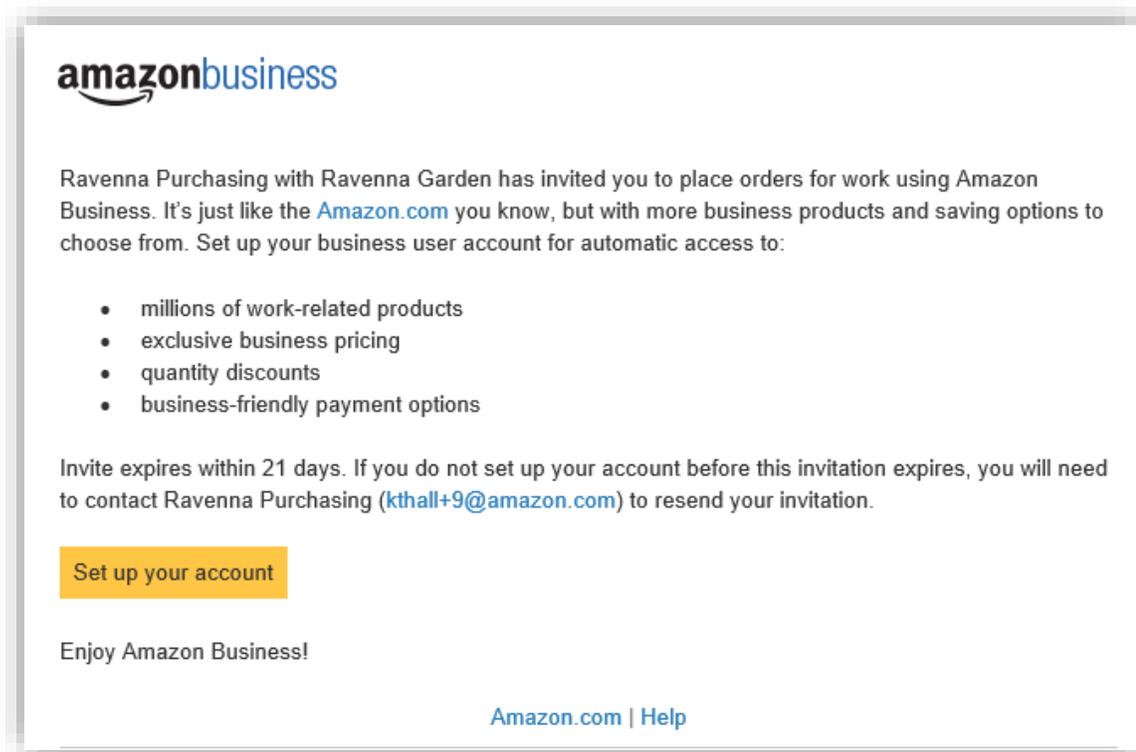
- Account Activation
- Shopping on Amazon Business
- Business Account Navigation
  - User Roles & Permissions
  - Business Settings
  - Payment and Shipping Address
  - Members
    - Inviting Users to the Account
    - Removing a User
    - Groups
- Curation
- Approvals
  - Adding approvals
  - Approving Orders
  - Approval Delegation
- Amazon Business Analytics
- Your Orders
- Business Customer Support



# Account Activation

## 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 users 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 log in for your organization's Amazon Business account.

The screenshot shows a registration form with the following fields and elements:

- Your name:** A text input field with a cursor.
- Email:** A text input field containing "user@company.com".
- Password:** A text input field containing "At least 6 characters". Below it is a blue information icon and the text "Passwords must be at least 6 characters."
- Re-enter password:** A text input field.
- Next step:** A yellow button at the bottom.

- Please be sure to use your full name when completing this form (First Last).
- Once your account has been created, you can start shopping.

Start shopping

11/26/2018

## 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 you 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.*

The screenshot shows the Amazon logo and the following text:

Now choose a new email for your existing account (this password stays the same).

- 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.

Amazon.com Confidential

## 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 for business purchases on Amazon.com
- To migrate this account, click on the blue hyperlink on the right: "I want to convert..."

The screenshot shows a form with the following elements:

- New email address:** A text input field.
- Re-enter email:** A text input field.
- I want to convert my existing account and transfer my order history and info to my business user account:** A blue hyperlink highlighted with a yellow box.

- 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.

Next step

14

# Shopping on Amazon Business

# 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

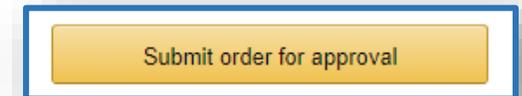
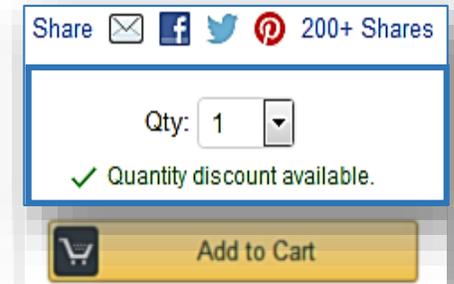
- Boston University has customized Amazon Business to their buying standards and procedures. Features that will be enabled include approval workflows and catalog curation

## 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.



# Business Prime Shipping

## 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.

Sharpie  
Sharpie Permanent Markers Fine Point  
Black - 36 Pieces  
★★★★☆ 3,783 customer reviews  
| 84 answered questions  
**#1 Best Seller** in Permanent Markers & Marker Pens

List Price: \$30.69  
Price: **\$13.05** ✓prime  
You Save: \$17.64 (57%)

**In Stock.**  
Want it Monday, Jan. 15? Choose **One-Day Shipping** at checkout.  
[Details](#)

Ships from and sold by Amazon.com. Gift-wrap available.

Size: 36-Count

Roll over image to zoom in

**Ships from and sold by Amazon.com.**

# Search & Browse Optimization

- 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

### Select desired product details to refine search

**Eligible for Free Shipping**  
Free Shipping by Amazon

**Quantity**

- Under 10 Sheets (21)
- 10 to 19 Sheets (149)
- 20 to 29 Sheets (611)
- 30 to 49 Sheets (53)
- 50 to 99 Sheets (401)
- 100 to 299 Sheets (399)
- 300 Sheets & Above (197)

**Feature Keywords**

- Photo (1,553)
- Matte (1,425)
- Fine Art (1,103)
- Professional (746)
- 19 x 13 (319)
- 17 x 11 (304)
- Heavy Weight (286)

+ See more

**Featured Brands**

- HP (291)
- Epson (255)
- Avery (373)
- Hammermill (50)
- Jacquard (2)
- Inkpress (238)
- Cricut (1)

+ See more

**Packaging Option**

- Frustration-Free Packaging

### Filter by product offers for search optimization

**Condition**

- New (6,021)
- Used (88)
- Refurbished (5)

**Price**

- Under \$25 (2,148)
- \$25 to \$50 (1,169)
- \$50 to \$100 (1,016)
- \$100 to \$200 (957)
- \$200 & Above (781)

\$  to \$

**Discount**

- 10% Off or More (1,258)
- 25% Off or More (819)
- 50% Off or More (313)
- 70% Off or More (84)

**Seller**

- Adorama Camera (1,010)
- Corgi Lamps (890)
- MotivationUSA (491)
- Shoplet (443)
- LexJet (352)
- PLEXSUPPLY (327)
- Smart Toners (316)
- LexJet Corp (285)
- OFFICE CHASE CORP. (210)
- My office innovations (208)

+ See more

**Availability**

- Include Out of Stock

### Navigate business-optimized categories to view featured departments and associated products

**Office Products**

Office Supplies  
Packaging & Shipping  
Paper  
Printers & Ink  
Writing Supplies  
(Shop All Office Products)

**Electronics & Computers**

Computers  
Networking  
Office Electronics  
Security & Surveillance  
Telecom & Video  
(Shop All Electronics)

**Software**

Antivirus & Security  
Business & Office  
Networks & Servers  
Top Productivity  
Utilities  
(Shop All Software)

**Books**

Business & Money  
Computers & Technology  
Laws  
Management  
Reference  
(Shop All Books)

**Janitorial**

Cleaning Chemicals  
Cleaning Tools  
Floor Care  
Paper Products  
Trash Cans & Liners  
(Shop All Janitorial)

**Industrial**

3D Printers  
A/B Services & Lubricants  
Automotive Service  
Maintenance Supply  
Tool & Measurement  
(Shop All Industrial)

**Sort by highlighted items, price & customer reviews**

Sort by Avg. Customer Review

- Featured
- Price: Low to High
- Price: High to Low
- Avg. Customer Review

See more choices

**Utilize recently viewed items & featured recommendations based on your browsing history**

**Business Seller** Sold by UGREEN GROUP LIMITED

**Business Sellers:**

- Are in stock at least 99% of the time
- Maintain a product quality rate higher than 99.9%

**Amazon Prime**

- Amazon.com
- PLEXSUPPLY
- CafePress
- TECHNO CITY INC
- OFFICE CHASE CORP.
- 3dRose LLC
- NEBULA STORE
- MyOfficeInnovations
- Shoplet

# 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

This information will be used to expedite the approval and fulfillment of your order using the **Norah Sangid PCard (Demo Group)** group.

**Fund Center**

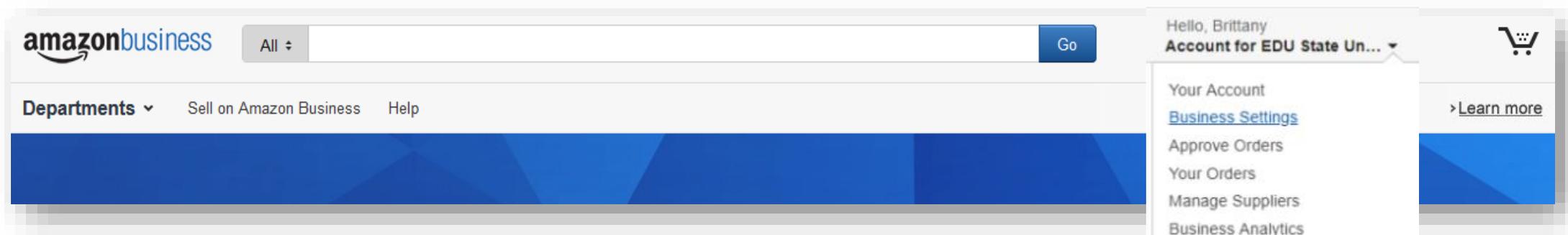
Continue



# Business Account Navigation

# 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.*



|                    |  |
|--------------------|--|
| Your Account       | Standard Amazon account information  |
| Business Settings  | Business Management pages. Add users, set up groups, configure approvals, etc.                           |
| Approve Orders     | If workflow approvals are enabled for you, approvers can view and take action on pending orders          |
| Your Orders        | View and track orders. Administrations can view orders others have placed on behalf of the organization. |
| Business Analytics | Create and filter custom reports based on your business needs to view your organization's orders         |

# Business Settings

*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.”*

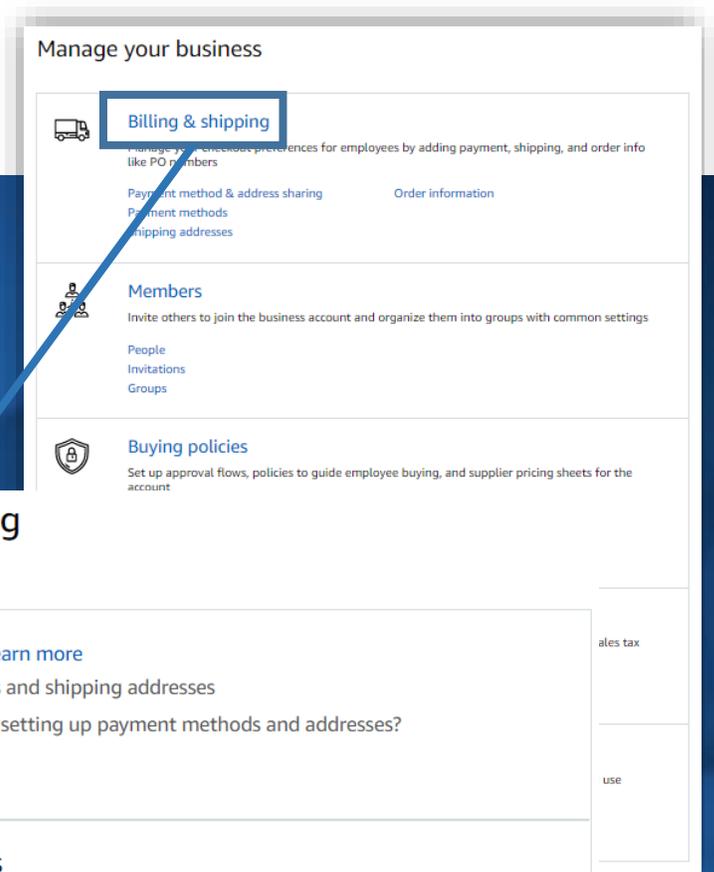
The screenshot shows the Amazon Business Settings interface for EDU State University. At the top, there is a navigation bar with the university name and a search bar. The main content area is titled "Business settings" and includes an "Add people" button. The settings are organized into several sections:

- Billing & shipping:** Manage checkout preferences for employees. Includes links for Shared settings, Payment methods, Addresses, and Business order info.
- Members:** Invite others to join the business account and organize them into groups. Includes links for People, Invitations, and Groups.
- Buying policies:** Set up approval flows, policies to guide employee buying, and supplier pricing sheets. Includes links for Guided Buying BETA, Debarment policies, Approvals, and Related offer reports.
- Account admins (8):** List of administrators including Larry Smith, Lucy Smith, and Blake Jones. Includes links for View all 8 and Add an admin.
- Business Prime Shipping:** For everyone in your business account. Includes a Learn more link and an icon of shipping boxes.
- Business profile:** Displays account information for EDU State University, including address and Business ID. Includes a View all link and a Contact customer support link.

# 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.



Manage your business

**Billing & shipping**

Manage your checkout preferences for employees by adding payment, shipping, and order info like PO numbers

Payment method & address sharing      Order information

Payment methods

Shipping addresses

**Members**

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

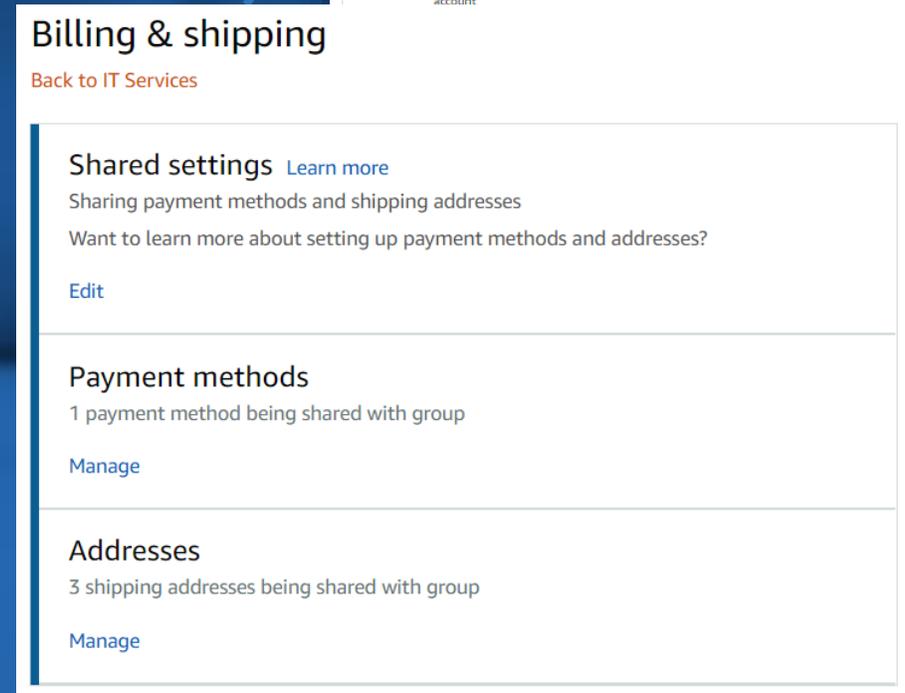
People

Invitations

Groups

**Buying policies**

Set up approval flows, policies to guide employee buying, and supplier pricing sheets for the account



**Billing & shipping**

[Back to IT Services](#)

**Shared settings** [Learn more](#)

Sharing payment methods and shipping addresses

Want to learn more about setting up payment methods and addresses?

[Edit](#)

**Payment methods**

1 payment method being shared with group

[Manage](#)

**Addresses**

3 shipping addresses being shared with group

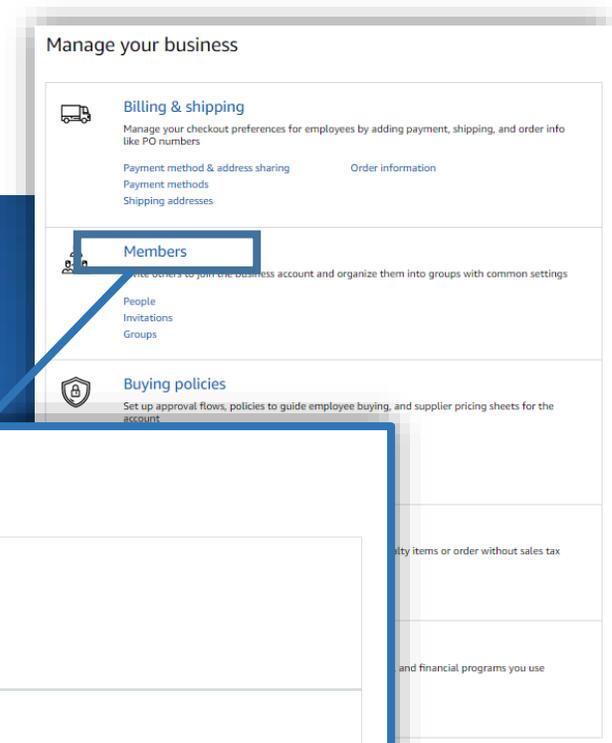
[Manage](#)



# 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.



**Members**  
Back to Test Simple Group

**People**  
19 people in account  
[Manage](#)

**Invitations**  
32 pending invitations account  
[Manage](#)

**Groups**  
127 groups within account  
[Manage](#)

**QUICK ACTIONS** ▾

- [Add People](#)
- [Upload list of people](#)
- [Download list](#)

# Add a New User

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**

The top screenshot shows a window titled "Add people to: Test Group". It features a text input field labeled "Enter email addresses", a section for "Assign Roles" with two options: "Administrator" (Manage people, groups, roles and approvals. View orders. Run order reports.) and "Requisitioner" (Place orders or submits order requests for approval), and "Cancel" and "Add" buttons at the bottom. A dropdown menu is open over the "Add people" button, showing options: "Add people", "Upload list of people", and "Download list".

The bottom screenshot shows a page titled "Approval Demo 2 - People". It includes the breadcrumb "Ravenna Garden / Approval Demo 2", a status "Displaying 10 of 10", and "Add people" and "Upload list of people" buttons.

# User Roles & Permissions

| Role           | Permissions & Functionality  | Visibility  |
|----------------|--|---|
| Administrator: | <ul style="list-style-type: none"><li>• Manage business settings &amp; business features</li><li>• Invite people to join the business account</li><li>• Remove users from the business account</li><li>• Assign a role to a user</li><li>• Set up approval workflows and spending limits</li><li>• Configure shared payment methods and shipping addresses</li><li>• Add Certifications such as Tax Exemptions to the business account</li></ul> | <ul style="list-style-type: none"><li>• Administrators can view orders and order history for all purchases in their group(s) on behalf of the business.</li><li>• Last 4 digits of any payment methods used by Requisitioners</li><li>• Billing &amp; Ship to addresses</li><li>• All Amazon Business Analytics fields for orders placed by users in their group(s)</li></ul> |
| Requisitioner: | <ul style="list-style-type: none"><li>• Place orders on behalf of the organization</li><li>• Add payment methods and shipping addresses at checkout *if individual pay is configured</li><li>• Utilize Business Analytics for their own purchases</li><li>• Can be configured as an Approver</li></ul>   | <ul style="list-style-type: none"><li>• Order history for all orders that they placed for their organization with their business user account</li><li>• Shipping addresses &amp; payment methods (last 4 digits visible), as established by the administrator</li></ul>   |

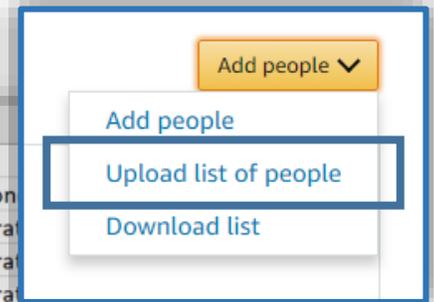
# Add Multiple Users

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.

|   | A                | B                         |               |
|---|------------------|---------------------------|---------------|
| 1 | Email Address    | Group Path                | Role          |
| 2 | Test1@amazon.com | Test Account/Test Group 1 | Requisitioner |
| 3 | Test2@amazon.com | Test Account/Test Group 2 | Administrator |
| 4 | Test3@amazon.com | Test Account/Test Group 3 | Administrator |
| 5 | Test4@amazon.com | Test Account/Test Group 4 | Administrator |
| 6 | Test5@amazon.com | Test Account/Test Group 5 | Requisitioner |
| 7 | Test6@amazon.com | Test Account/Test Group 6 | Requisitioner |
| 8 | Test7@amazon.com | Test Account/Test Group 7 | Requisitioner |
| 9 | Test8@amazon.com | Test Account/Test Group 8 | Requisitioner |



The screenshot shows an email from Amazon Business. The header includes the Amazon Business logo and a greeting: "Hello Amazon Professional Services,". The main body of the email states: "You attempted to add multiple users to your business account on Amazon Business via a spreadsheet. Here are the results of the bulk upload." Below this, there are two summary items: a green checkmark icon followed by "22 entries have been successfully processed" and a red warning triangle icon followed by "1 invitations failed to send". At the bottom, there is a link: "Please click [here](#) to go to your business management page in order to download detailed results." and a footer note: "Please note: This email message was sent from a notification-only address that cannot accept incoming email. Please do not reply to this email."

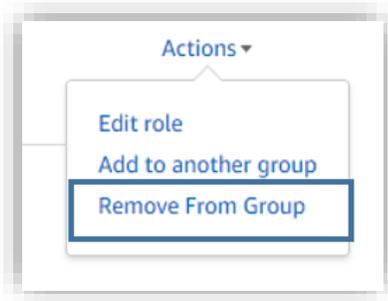
## Bulk Upload Results

- 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.

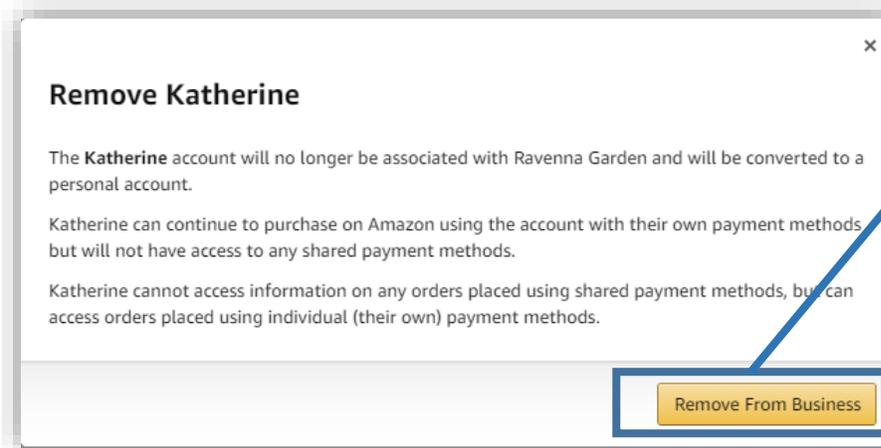
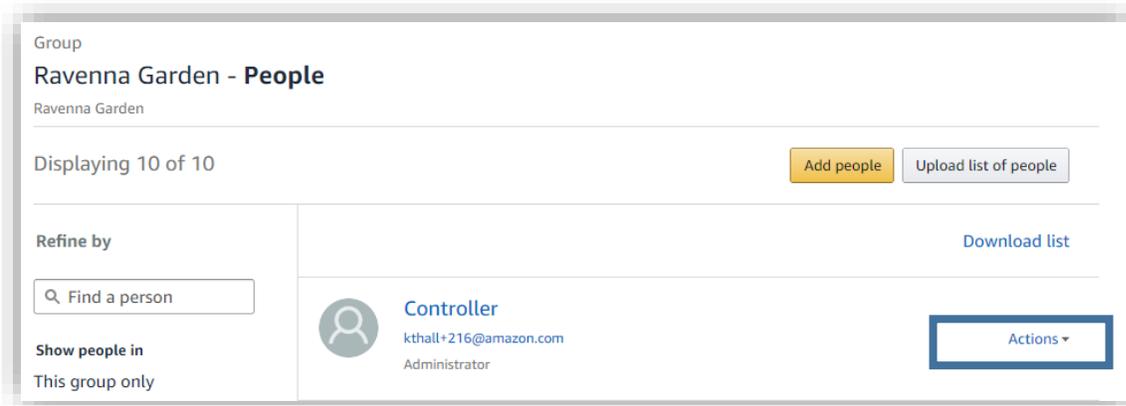
# Remove a User – using “People”

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.

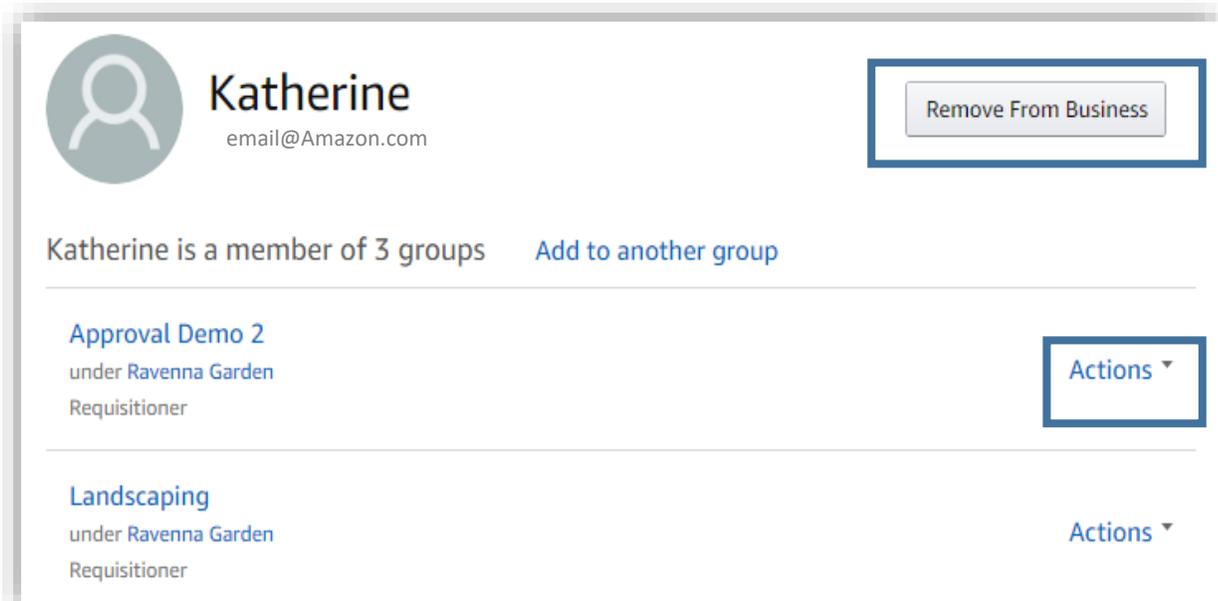
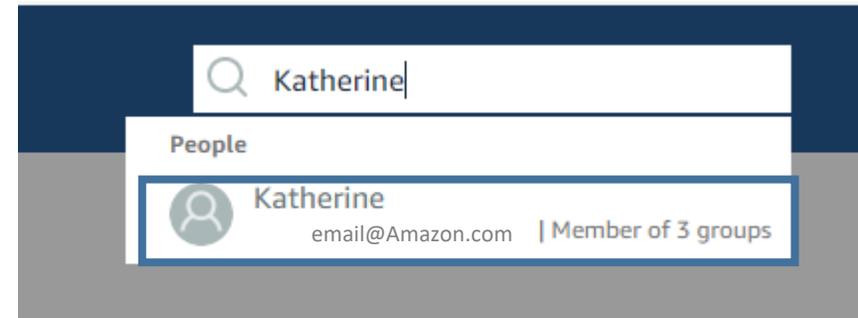


Once a user is removed from the account, they will need to accept a new invitation if they are ever need to be re-added

# 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.

# Groups

*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.*

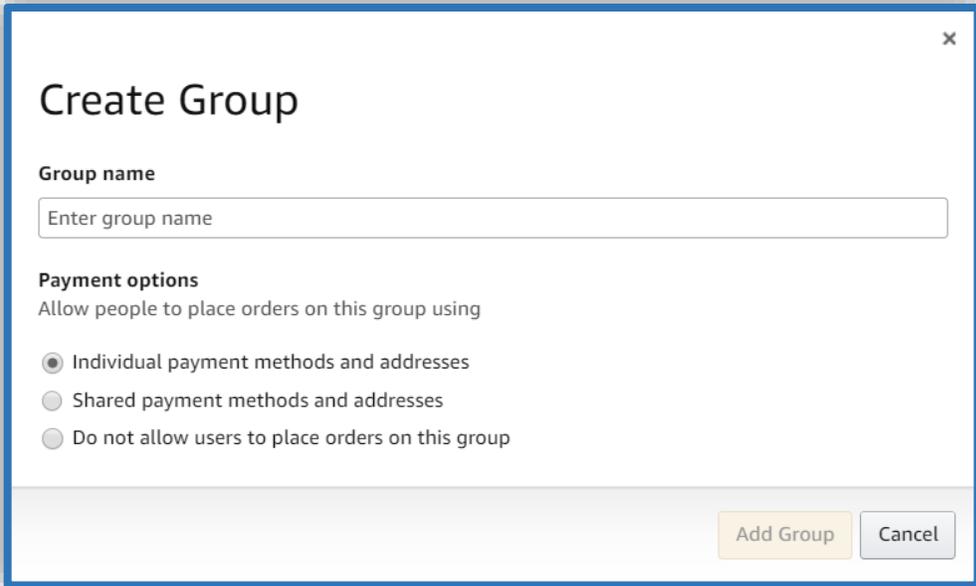
*Groups may have one or more administrators, and one or more requisitioners. You can have an administrator for the business who manages all individual groups, or an individual administrator can be created for each group.*

## 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



**Create Group**

**Group name**

Enter group name

**Payment options**

Allow people to place orders on this group using

Individual payment methods and addresses

Shared payment methods and addresses

Do not allow users to place orders on this group

Add Group Cancel



# Curation

# 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.

 **Company restricted**  
This item may not comply with the purchasing standards for your organization.  
*BU has a contracted supplier with negotiated pricing for this category. Refer to <http://www.bu.edu/sourcing/tm-catalogs>.*

 **Your order contains company restricted items**  
One or more items in your order may not comply with the purchasing standards for your organization.

 UGREEN USB 3.0 A to A Cable Type A Male to Male Cable Cord for Data Transfer Hard Drive Enclosures, Printers, Modems, Cameras (3FT)  
Sold by: UGREEN GROUP LIMITED  
**Norah Sangid PCard (Demo Group) employees:** BU has a contracted supplier with negotiated pricing for this category. Refer to <http://www.bu.edu/sourcing/tm-catalogs>.

 **Your order contains company restricted items**  
One or more items in your order may not comply with the purchasing standards for your organization.

**Payer**  
Norah Sangid PCard (Demo Group)  
(Boston University)  
[Change](#)

**Payment method** [Change](#)  
visa, ending in 1865

**Promotional Codes:**

**Shipping address** [Change](#)  
Norah Sangid  
130 W JEFFERSON AVE  
DETROIT, MI 48226-4416  
United States  
Phone: 2486820054

**Business Order Information** [Change](#)  
**Fund Center** *No value entered*

By placing your order, you agree to the [Amazon Business Accounts Terms & Conditions](#).

**Order Summary**

|                                |               |
|--------------------------------|---------------|
| Items:                         | \$7.29        |
| Shipping & handling:           | \$0.00        |
| Total before tax:              | \$7.29        |
| Estimated tax to be collected: | \$0.00        |
| <b>Order total:</b>            | <b>\$7.29</b> |

[How are shipping costs calculated?](#)  
Prime shipping benefits have been applied to your order.

# Catalog Curation- Approver View

- 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

**3 item(s) requested for approval**

 **Vornado IR400 Dual Zone Infrared Heater**  
**\$98.95** | Qty: 1  
Mark as rejected ▾

 **Lysol Disinfecting Wipes, Lemon & Lime Blossom, 330ct (3X110ct)**  
**\$12.34** | Qty: 1  
Mark as rejected ▾

 **VicTsing MM057 2.4G Wireless Mouse Portable Mobile Optical Mouse with USB Receiver, 5 Adjustable DPI Levels, 6 Buttons for Notebook, PC, Laptop, Computer, Macbook - Black**  
**\$9.99** | Qty: 1  
⚠ This product type has been identified as restricted for your business  
Mark as rejected ▾



# 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.

The screenshot shows the 'Approval settings for Britannia Huston' page. It includes a sub-header 'Which orders require approval?' with two options: 'Orders over \$ 0.00' and 'Orders with restricted items'. Below this is a modal window titled 'Who can approve orders?' with a sub-header 'Approval delegation' and a button 'Assign a temporary delegate'. The modal also contains a section for 'Level 1 approvers' with a text input field and a button 'Add another level of approvers'. At the bottom of the main page, there are 'Save' and 'Cancel' buttons.

Approval settings for Britannia Huston  
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 orders?**

You can enter up to 10 emails per level, but only 1 approval is required from each level.

Level 1 approvers

[Add another level of approvers](#)

**Approval delegation**

[Assign a temporary delegate](#)

[Save](#) [Cancel](#)

# 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

Hello, Cardholder  
Account for Boston Unive... ▾

- Your Account
- Business Settings
- [Approve Orders](#)
- Your Orders 
- Manage Suppliers
- Business Analytics
- Recurring Deliveries

---

Switch Accounts  
Sign Out

## Approval delegation

Assign a temporary delegate

### Approval delegation

Temporarily route all approval requests for this individual to a delegate. This applies to all groups.

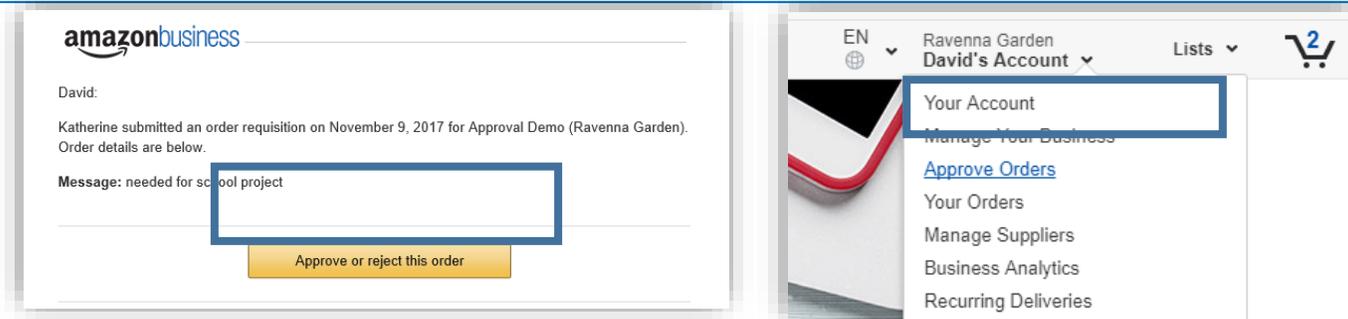
**Approver**

**Delegate**

**Start date**  **End date**

# Approving Orders

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

The screenshot shows the 'Purchase Requests' table. At the top right of the table are two buttons: 'Approve selected' (highlighted with a blue box) and 'Reject selected'. The table has the following columns: Order ID, PO #, Requisitioner, Order Date (PST), Order Total, and Status. The first column contains checkboxes, with the second row's checkbox checked (highlighted with a blue box). The table contains the following data:

| Order ID                                   | PO #      | Requisitioner | Order Date (PST) | Order Total | Status       |
|--|-----------|---------------|------------------|-------------|--------------|
| 114-2458457-6918607<br>114-9916460-6146653 | test PO   | Katherine     | November 9, 2017 | \$71.27     | Needs review |
| 114-3102336-1238618                        | sample PO | Katherine     | November 8, 2017 | \$20.29     | Needs review |

- 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

**Edit displayed columns**

**Order Info**

- Order Date
- Order ID
- Account Group
- PO Number
- Order Quantity
- Order Subtotal
- Order Shipping & Handling
- Order Promotion
- Order Tax
- Order Net Total
- Order Status
- Approver

**Customer Info**

- Account User
- Account User Email

**Invoice Info**

- Invoice Status
- Total Amount
- Invoice Due Amount
- Invoice Issue Date
- Invoice Due Date

**Payment Info**

- Payment Reference ID
- Payment Date
- Payment Amount
- Payment Instrument Type
- Payment Identifier

**Shipment Info**

- Shipment Date
- Shipment Status
- Carrier Tracking #
- Shipment Quantity
- Shipping Address
- Shipment Subtotal
- Shipment Shipping & Handling
- Shipment Promotion
- Shipment Tax
- Shipment Net Total
- Carrier Name

**Product Info**

- Product Category
- ASIN
- Title
- UNSPSC
- Brand Code
- Brand
- Manufacturer
- Product Condition
- Company Compliance
- Listed PPU
- Purchase PPU
- Item Quantity
- Item Subtotal
- Item Shipping & Handling
- Item Promotion
- Item Tax
- Item Net Total

**PO Line Item Id**

- PO Line Item Id

**Tax Exemption Applied**

- Tax Exemption Applied
- Tax Exemption Type
- Tax Exemption Opt Out

**Discount Program**

- Discount Program

**Pricing Discount applied (\$ off)**

- Pricing Discount applied (\$ off)

**Pricing Discount applied (% off)**

- Pricing Discount applied (% off)

**Organization Specific Info**

- GL Code
- Department
- Cost Center
- Project Code
- Location
- Custom Field 1

**Seller Info**

- Seller Name
- Seller Credentials
- Seller Address

Cancel Apply

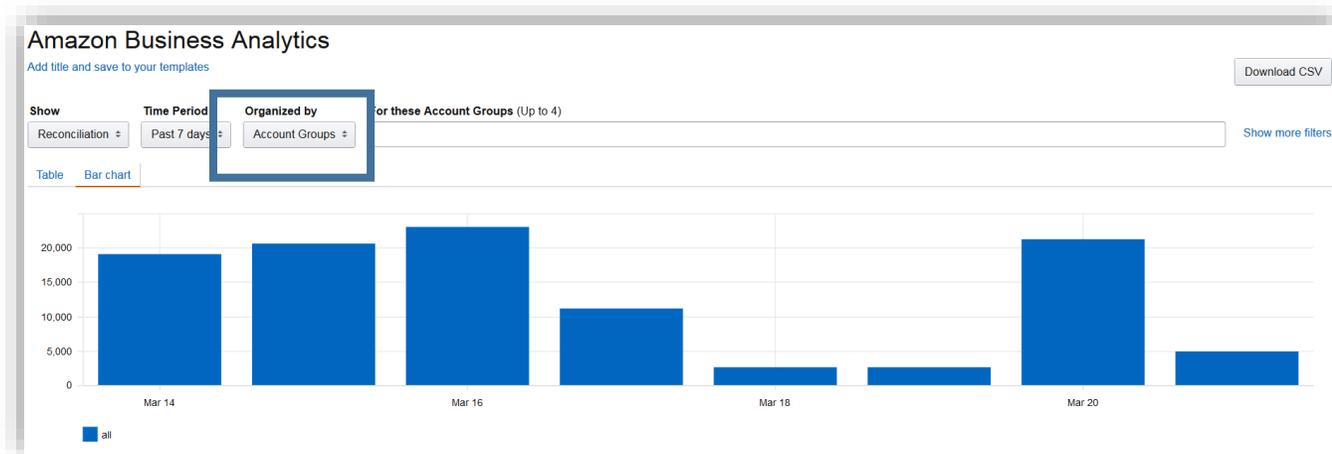
## Amazon Business Analytics provides users the ability to:

- 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 Charts vs. Table View



## 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

Amazon Business Analytics

Add title and save to your templates

Download CSV

Show: Returns Time Period: 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

Results per page: 15

Manage columns

| Order Date | Order Id            | Account Group | PO Number | Account User       | Return Date | Return Reason             | Return Quantity | Product Category  | ASIN       | Title         |
|------------|---------------------|---------------|-----------|--------------------|-------------|---------------------------|-----------------|-------------------|------------|---------------|
| 03/08/2017 | 116-5528884-980636  | 70322 - SBA   |           | Dawn Boyd          | 03/17/2017  | Ordered the wrong item    | 1               | Wireless          | B01N98UZR  | mophie juice  |
| 03/03/2017 | 104-0889722-4801055 | 65109 ERO SDG |           | Irma Ramirez       | 03/14/2017  | Undeliverable             | 12              | Personal Computer | B007AB9JK4 | Case Logic 1  |
| 03/01/2017 | 103-4159773-1661007 | 78139         |           | Manuel David Rojas | 03/15/2017  | Exchanged                 | 5               | Personal Computer | B003F1UAMY | Gearit 20-Pa  |
| 03/01/2017 | 103-4159773-1661007 | 78139         |           | Manuel David Rojas | 03/15/2017  | Exchanged                 | 2               | Personal Computer | B00X8EJ3Y4 | Gearit 16-Pa  |
| 02/28/2017 | 109-8900663-5547419 | 78235         |           | nick johnston      | 03/17/2017  | Ordered the wrong item    | 2               | Sports            | B001G5CAS  | 5.11 Tactical |
| 02/28/2017 | 103-895858-6361062  | 65297 HSI SDG |           | Elizabeth Kiley    | 03/14/2017  | Missed estimated delivery | 3               | Office Product    | B004W6JOYG | 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.

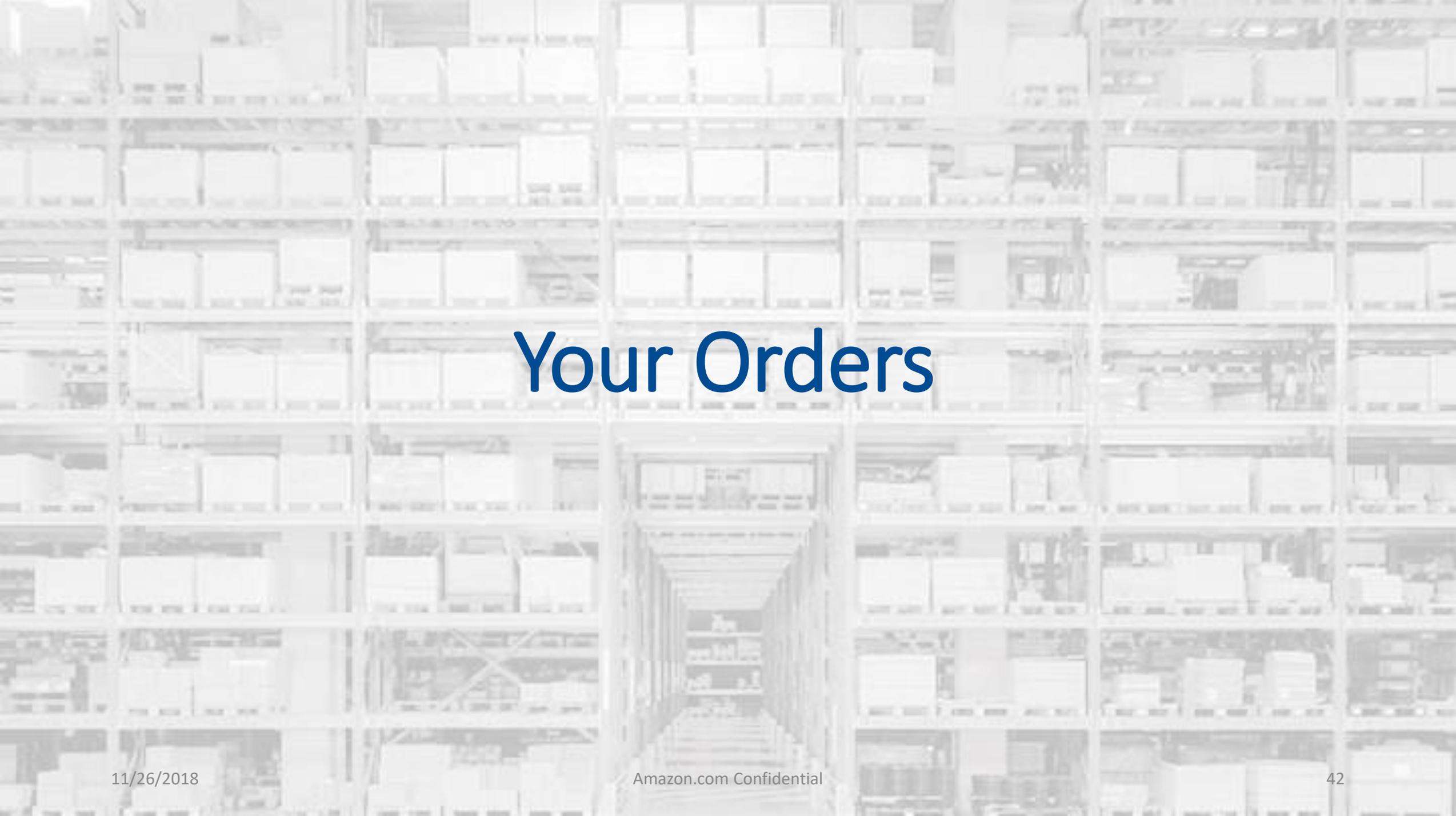
# Reporting & Reconciliation

Use the Reconciliation Report to view data including transaction 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

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



# Your Orders

# Your Orders – Admin View

Your Account > Your Orders

 To view orders placed by users in your business account, select View All Orders below or go to [Business Analytics](#).

## Your Orders

View All Orders: [Ravenna Garden](#) ▾

16 orders placed in [past 6 months](#) ▾

| ORDER PLACED | SHIP TO                       | PLACED BY                                      | TOTAL  | PO# test                    |
|--------------|-------------------------------|--|--------|-----------------------------|
| May 15, 2018 | <a href="#">Third Floor</a> ▾ | <a href="#">Katherine</a> ▾<br>Approval Demo 2 | \$0.00 | ORDER # 112-6552303-9003448 |

This order was approved. [View details](#)

### Cancelled

 [AmazonBasics 92 Bright Multipurpose Copy Paper - 8.5 x 11 Inches, 10 Ream Case \(5,000 Sheets\)](#)  
Sold by: Amazon.com Services, Inc.  
**\$0.00**

- Administrators can view a comprehensive “Your Orders” view for all order 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

### Arriving August 16 - August 20

- Ordered Sunday, August 12
- Shipped today  
[See all updates](#)
- Out for delivery

[Track package](#)

[Return or replace items](#)

[Write a product review](#)

A large warehouse with many aisles of shelving units filled with boxes. The perspective is from the end of an aisle, looking down its length. The shelves are filled with white boxes of various sizes. The lighting is bright and even.

# Business Customer Support

# 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](#).

| Get to Know Us          | Let Us Help You           | Work with Amazon        | Business Solutions        |
|-------------------------|---------------------------|-------------------------|---------------------------|
| Careers                 | Help                      | Sell on Amazon Business | Amazon Business Solutions |
| Press Releases          | Shipping Rates & Policies | Fulfillment By Amazon   | Purchasing Systems        |
| Amazon and Our Planet   | Business FAQ              | Advertise on Amazon     | Amazon Credit Line        |
| Amazon in the Community | <b>Contact Us</b>         | Sell Services on Amazon | Amazon Business Blog      |
| Company Facts           |                           | Amazon Global Selling   |                           |

### Contact Us

**1** What can we help you with?

**2** Tell us more about your issue

Select an issue

**3** How would you like to contact us?

# Common Customer Support Questions

*See below for quick resolutions to frequently asked questions from your end users and support contact information*

**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](mailto:tax-exempt@amazon.com)

**Your Customer Advisor – James Herbert – [jhherber@amazon.com](mailto: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

# What's Next?

Complete and return user list to Elyse Ryan on or before Thursday, November 1<sup>st</sup>

Requisitioner Launch- Week of November 5<sup>th</sup>

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

**amazonbusiness**