



# **Amazon Business Requisitioner and Approver Training**

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# City of Plano Goals

- Efficiency
- Savings
- All purchases strictly for City business.
- All purchases are in compliance with Policy 330.002 (Procurement Cards).
- If there is a City contract for an item or items, and you buy those items from Amazon because the price is better, be sure to notify your buying team.

# Shopping on Amazon Business

# Amazon Business Benefits

## Business Pricing & Quantity Discounts

- Business pricing and quantity discounts are only available to registered business account customers on Amazon. [Click](#) to learn more.

## Business Prime Shipping

- Once Business Prime Shipping has been purchased, it provides Free Two-Day Shipping on eligible items for all users in the business account. There are multiple pricing tiers to meet the needs of businesses of all sizes. [Click](#) to learn more.

## Buying Policies

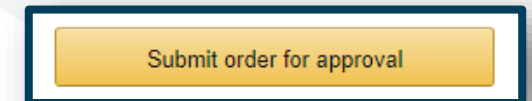
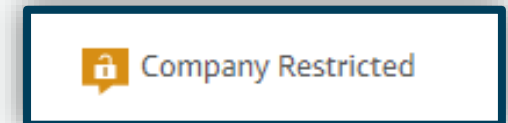
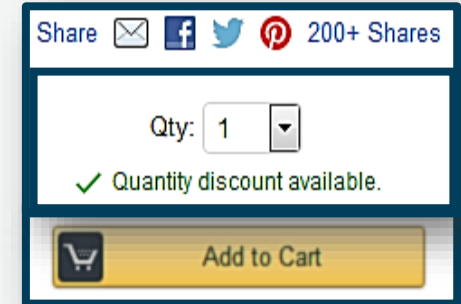
- Customize Amazon Business to your organization's buying standards and procedures. Features include approval workflows set up by City of Plano.

## Business-Only Selection

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

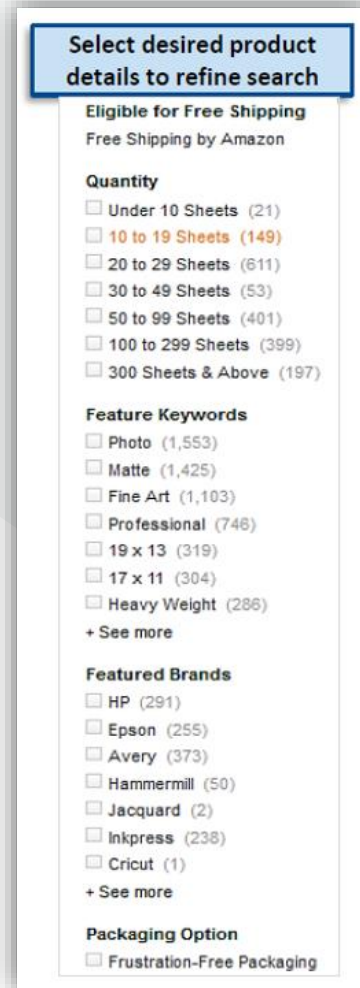
## Amazon Business Analytics

- 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. [Click](#) to learn more.



# 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**







## Take Advantage of Amazon Prime Shipping Benefits

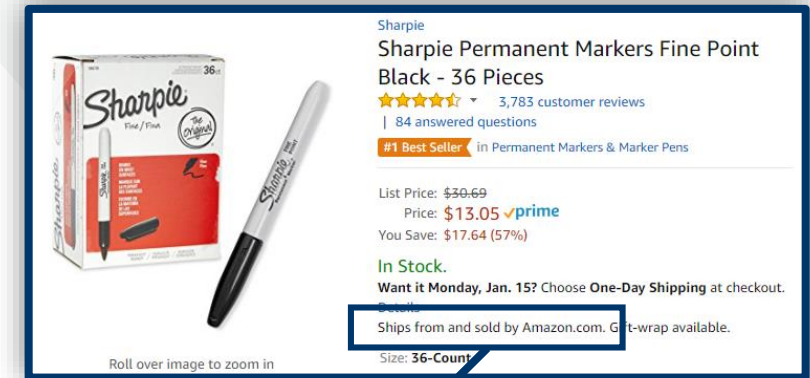
- An easy way to ensure that your products arrive on time and as expected, is to order products fulfilled directly from Amazon. All products clearly mark who the seller is on the product detail page.

## Prime Eligibility – Fulfilled by Amazon

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

## What's not Included?

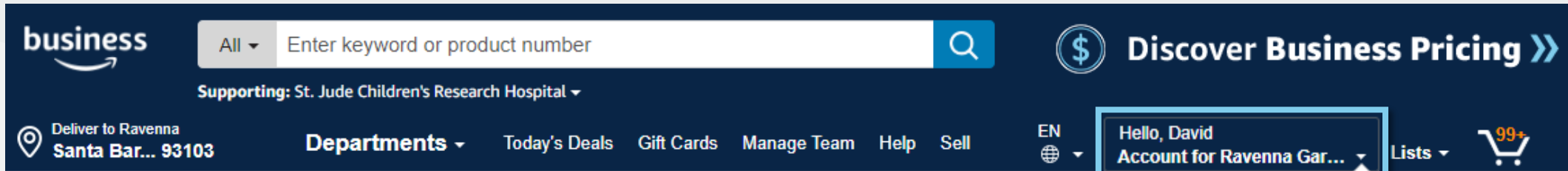
- Business Prime Shipping does not include additional Prime benefits such as Amazon Fresh, Pantry, Video, or Music.



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

# **Business Account Navigation**





# Business Account Navigation

Page	Functionality
Your Account	Standard Amazon account information
Approve Orders	If workflow approvals are enabled, approvers can view and take action on pending orders
Your Orders	View and track your orders. Administrations can view orders others have placed on behalf of the organization
Manage Suppliers	Easily find suppliers on Amazon Business and add them to your list of Saved Suppliers. <a href="#">Learn more.</a>
Business Analytics	Create and filter custom reports based on your business needs to view your organization's orders
Recurring Deliveries	Have essential items delivered automatically, based on a schedule you choose. <a href="#">Learn More.</a>

Dwayne Jackson:

Jane Doe submitted an order requisition on November 17, 2017 for Arsenal (English Premier League). Order details are below.

Approve or reject this order

## Order Summary

Order Number **114-2012814-3368200**  
Placed by Jane Doe on November 17, 2017  
Deliver to  
555 Boren Ave  
Seattle, WA 98109, US  
Items in Order 1  
Total \$44.46

## Items in Order

[Beckham Hotel Collection Gel Pillow \(2-Pack\) - Luxury Plush Gel Pillow - Dust Mite Resistant & Hypoallergenic - Queen](#)

Purchase requests > Order details

## Approve purchase request?

Comments for Jane Doe

Optional

100 characters left

Approve

Reject

## Request details

Purchase Order (PO)  
Number

[Change](#)

Org ID

Order ID 114-8607031-0191427  
Placed by Jane Doe on November 16, 2017  
Deliver to  
555 Boren Ave  
Seattle, WA, US


## Request summary

Items (1) \$33.99  
Shipping & handling \$10.47  
Order discount \$0.00  
Shipping discount \$0.00  
Total before tax: \$44.46  
Estimated tax to be collected\* \$0.00

**Request total \$44.46**

[Pending Approvals](#)

## 1 Item(s) Requested (Total: \$44.46)

 [Beckham Hotel Collection Gel Pillow \(2-Pack\) - Luxury Plush Gel Pillow - Dust Mite Resistant & Hypoallergenic - Queen](#)  
\$33.99 | Qty: 1

Approve selected

Reject selected

<input type="checkbox"/>	Order ID	PO #	Requisitioner	Order Date (PST)	Order Total	Status
<input checked="" type="checkbox"/>	112-4160299-4420266	R122-2932	Jane Doe	November 26, 2017	\$12.08	<a href="#">Needs review</a>
<input checked="" type="checkbox"/>	111-2033446-3856268	R122-2933	Jane Doe	November 26, 2017	\$15.37	<a href="#">Needs review</a>
<input type="checkbox"/>	111-4538074-5969001	R122-2934	Jane Doe	November 26, 2017	\$15.37	<a href="#">Needs review</a>

Approvers should be looking for item appropriateness as well as correct Cost Center and Object codes. This approval is the last opportunity to check the codes. When AP gets the bill, they will charge the selected codes.

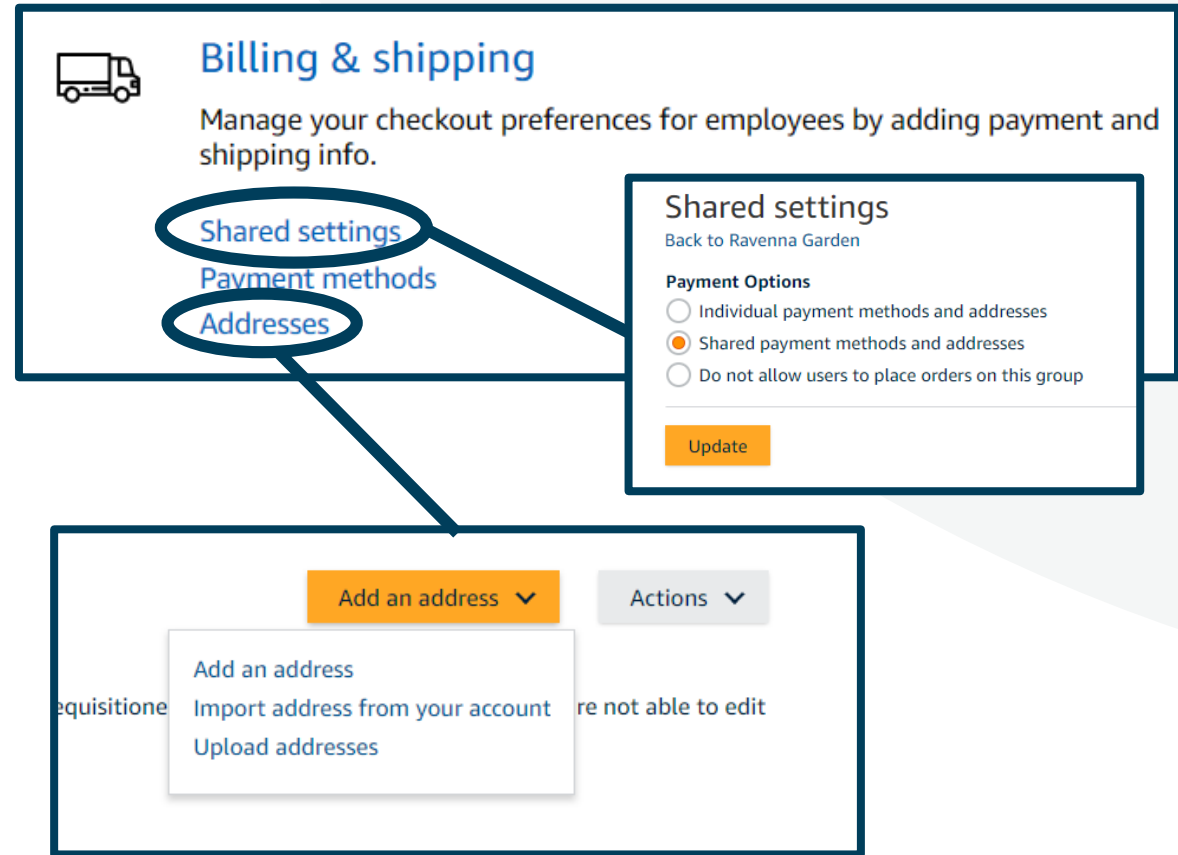
# Account Configuration

# Shared Payment Methods

Administrators can configure shared payment methods at any group, limiting the payment methods and ship to addresses that are made available to **requisitioners** during checkout

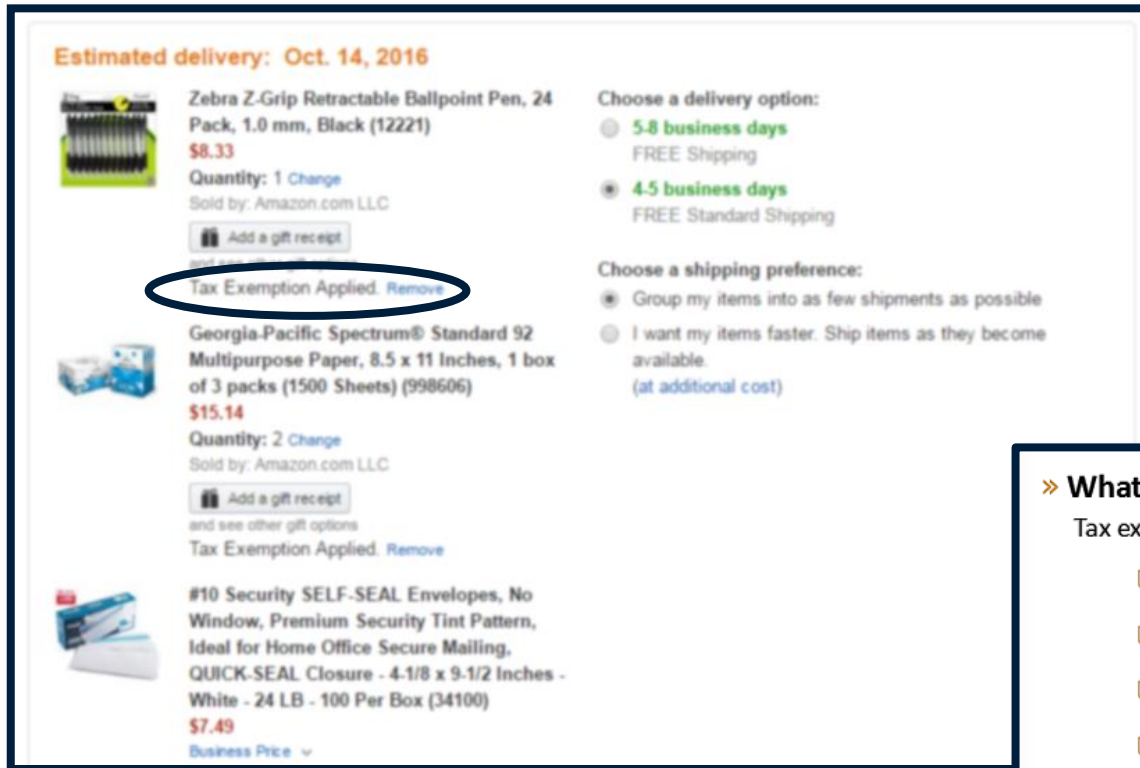
## Shared Payment

- 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.
- Group administrators can click into either “Payment methods” or “Shipping addresses” at any time to modify the options displayed to Requisitioners in that group.
- Addresses can either be added new, imported from a saved address book, or uploaded in bulk via a CSV file



# Checking out with Tax Exemptions

All products purchased from Amazon or any of the 95% of third party sellers who participate in ATEP will automatically reflect that tax exemptions have been applied during the checkout process



## Confirm tax exemptions are applied:

- On the Review Your Order page (checkout), verify and/or modify which items should be charged sales tax.

### » What items are eligible for tax exemption?

Tax exemption applies to items sold by . . .

- ☐ Amazon.com LLC
- ☐ Amazon Digital Services LLC
- ☐ Warehouse Deals LLC
- ☐ Amazon Services LLC
- ☐ Sellers (Non-Amazon) participating in ATEP

# Business Order Information

Track and manage orders by setting up custom fields that display on order documentation and reports

- All information entered will appear in Order History Reports in the Business Analytics tool
- Settings can be adjusted under **Business Settings>Billing & shipping>Business order info** by root level admins
- These fields are set at the account level – not the group
- Each field can be required or optional
- Up to 20 options can be pre-configured in a drop down style menu

Available Fields	
Cost Center	3 digit department code. Enter other if you don't see your code.
Object Account (4 digits)	4 digit code. Enter other if you don't see your code.
These codes are the same codes used to reconcile pcard statements or to place an order in JD Edwards.	

# **Business Analytics**



# Amazon Business Analytics

## Amazon Business Analytics provides 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



### Reports

Use our reports to get line-item details about your organization's orders and access important documents like invoices. Start with one of our curated reports, then customize it to your needs.

#### Reconciliation

Compare order and payment history to your records.

#### Returns

Monitor what items are being returned and the reasons why.

#### Related offers

See what other offers were available at the time of an order.

#### Orders

Get detailed shipping, product, and seller info on an order.

#### Refunds

Track the payment, product, and status of a refund.

# Your Orders

# Your Orders

This section of the account provides additional detail regarding the status of all orders placed

Take a variety of actions on your orders such as initiating returns or tracking the delivery of a package.

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

Search all orders

Search Orders

View All Orders: Ravenna Garden


16 orders placed in

past 6 months

ORDER PLACED May 15, 2018	SHIP TO Third Floor	PLACED BY Katherine Approval Demo 2	TOTAL \$0.00
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This order was approved. [View details](#)

Cancelled



AmazonBasics 92 Bright Multipurpose Copy Paper - 8.5 x 11 Inches, 10 Ream Case (Sheets)

Sold by: Amazon.com Services, Inc.

\$0.00

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

amazon business

AMAZON CONFIDENTIAL

# **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](#).*

The screenshot displays the Amazon Business Customer Support interface. At the top, there are four main navigation categories: 'Get to Know Us', 'Let Us Help You', 'Work with Amazon', and 'Business Solutions'. Under 'Let Us Help You', the 'Contact Us' link is highlighted with a blue box and a blue arrow pointing to the 'Contact Us' form below. The form is titled 'Contact Us' and consists of three steps: 1. 'What can we help you with?' with a dropdown menu and four buttons: 'An order I placed', 'Fire and Kindle', 'Digital Services', and 'Prime or Something else'. 2. 'Tell us more about your issue' with a dropdown menu labeled 'Select an issue' and a placeholder '< Please make a selection >'. 3. 'How would you like to contact us?' with three buttons: 'E-mail', 'Phone', and 'Chat'.

# Common Customer Support Questions

See below for quick resolutions to frequently asked questions from your end users as well as contact information for a variety of support resources

## Contact Business Customer Support: [CLICK HERE](#)

- 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 – Tania San Miguel-Bounds

- 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



**Thank You**