



# Amazon Business Finance Role 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.

# 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

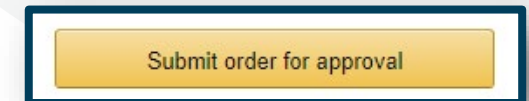
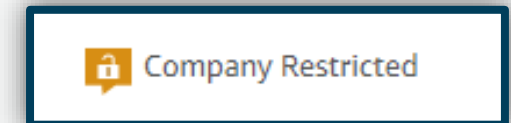
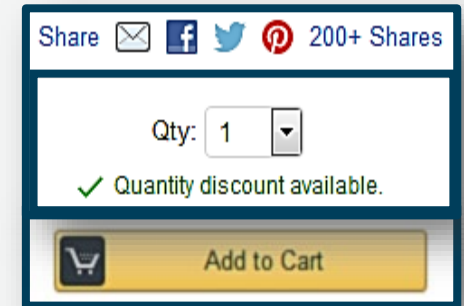
- Customize Amazon Business to your organization's buying standards and procedures. Features include approval workflows set up by City of Plano.

## Business-Only Selection

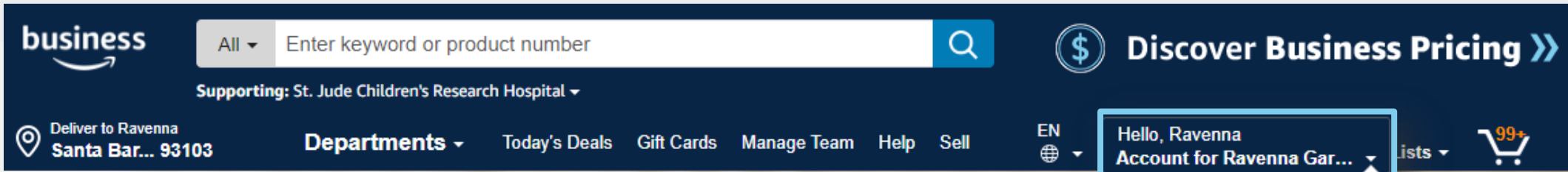
- Business-only selection refers to items and offers that are only available for purchase by Amazon Business customers.

## 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.



# Business Account Navigation



# Business Account Navigation

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

# 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	
GL Code	Cost Center
Project Code	Location
Department	*Custom named field*
Purchase Order (PO)	

## Business Order Information

Complete the following to ensure accurate routing and reporting of your order.

**PO Number** (optional)

**GL Code** (optional)  
Select one ▼

**Department** (optional)  
Select one  
Finance  
Sales  
Operations  
IT  
Other...

# User Roles & Permissions

Each user can have multiple roles -- finance or requisitioner, or both. Account administrators can change user permissions at any time.

Role	Permissions & Functionality	Visibility
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>
Finance	<ul style="list-style-type: none"><li>Access invoices, credit notes, analytics, and order history.</li></ul>	<ul style="list-style-type: none"><li>Finance 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>



# 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.

The image shows two parts of the Amazon Business approval process. The top part is an email notification from Amazon Business. It includes the Amazon Business logo, the name 'David', and a message stating that Katherine submitted an order requisition on November 9, 2017, for 'Approval Demo (Ravenna Garden)'. The message notes that the order is needed for a school project. A yellow button labeled 'Approve or reject this order' is circled in blue. The bottom part is a screenshot of the 'Purchase Requests' web interface. It features a table with columns for Order ID, PO #, Requisitioner, Order Date (PST), Order Total, and Status. The first row is selected, and a blue box highlights the selection checkboxes. At the top right of the interface are buttons for 'Approve selected' and 'Reject selected'.

amazonbusiness

David:

Katherine submitted an order requisition on November 9, 2017 for Approval Demo (Ravenna Garden).  
Order details are below.

**Message:** needed for school project

Approve or reject this order

Purchase Requests

Approve selected Reject selected

<input type="checkbox"/>	Order ID	PO #	Requisitioner	Order Date (PST)	Order Total	Status
<input checked="" type="checkbox"/>	114-2458457-6918607 114-9916460-6146653	test PO	Katherine	November 9, 2017	\$71.27	Needs review
<input type="checkbox"/>	114-3102336-1238618	sample PO	Katherine	November 8, 2017	\$20.29	Needs review

- 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

# Related offer reports

Capture alternative purchase prices for all purchases over a specific dollar threshold to verify your buyers are shopping for the best prices.

- Select the dollar threshold for which you would like to start capturing alternative offers as well as the number of offers you would like included in the report.
- Data will automatically be captured as your buyers purchase on the business account. These reports are available for download at an time through the Business Analytics tool.
- Give buyers the option to provide reasons for these purchases. Any time a user makes a purchase over your designated threshold they will be prompted to provide a reason such as “order required expedited shipping” or “lowest price offer.”

## Related offer reports

In case you need to justify a purchase, Amazon Business can automatically capture alternative product purchase that exceeds your set threshold. These different sell [Analytics](#) for a limited time after the purchase date. The offers stored are available at the time of purchase, subject to change.

**At what price point should we start recording related offers?**

**How many similar offers should we include in the report?**

*Note: the number selected will be in addition to the offer purchased*

- 2
- 3
- 4
- 5

# 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.

# 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
- Customize report columns and filters at the left to find required information

Business analytics Reports

### Reconciliation

Add title and save to your templates

Time period: Month to date

	<input type="checkbox"/>	Transaction Date	Payment Reference ID	Transaction Type	Payment Amount	Account Group
Filter	<input type="checkbox"/>	11/08/2018	K3TRZEKRUWL	Charge	\$13.47	Timberlands-Western
	<input type="checkbox"/>	11/08/2018	2FL26BHF590	Charge	\$357.88	Timberlands-Western
Adjust columns	<input type="checkbox"/>	11/08/2018	411MW1ZL1YS	Charge	\$51.62	Timberlands-Southern
	<input type="checkbox"/>	11/08/2018	5HQ2R3I0KBKO	Charge	\$60.99	CorpFunc-GeneralCounsel&Corp
Get order documents	<input type="checkbox"/>	11/08/2018	115KCMP9G09	Charge	\$27.92	WP-Mid South Region
	<input type="checkbox"/>	11/08/2018	0000001LOQ4L	Charge	\$18.59	Timberlands-Southern
	<input type="checkbox"/>	11/08/2018	2LNKETGK4AJJ	Charge	\$22.48	WP-Eastern Region
	<input type="checkbox"/>	11/08/2018	66JHB47PP1I	Charge	\$34.35	CorpFunc-CompBenefits&HR

# Your Orders

# Your Orders

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

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
May 15, 2018	Third Floor	Katherine Approval Demo 2	\$0.00

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

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

### 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

Administrators have the ability to view their own orders or a comprehensive view of all orders placed in on the account

# 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 callout line pointing to the contact form below. The contact form is titled 'Contact Us' and consists of three steps: 1. 'What can we help you with?' with a search bar and buttons for '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 the text '< 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

## Amazon Business Pay By Invoice (Accounts Receivable):

- You can contact Accounts Receivable at [ar-businessinvoicing@amazon.com](mailto:ar-businessinvoicing@amazon.com). You can also contact Accounts Receivable at 888-283-2209 from 7:30 a.m. to 4:30 p.m. Pacific Time, Monday to Friday

## 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

# Amazon Business Resource Center

See below for support collateral from our Resource Center

- [Amazon Business Getting Started Resource Center](#)
- [Invite Your Coworkers](#)
- [Create Approval Workflows](#)
- [Benefits of Business Prime](#)
  - [Fast, FREE business delivery](#)
  - [Spend Visibility](#)
  - [Guided Buying](#)
  - [Member-Only Offers](#)
- [Set Up Payment Methods](#)
- [Amazon Business Analytics](#)

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Thank You