

# Thank you for attending this Amazon Business hosted webinar. We will begin shortly.

If you have not already, please take a minute to accept your invitation and register your Amazon Business account.



# Amazon Business Buyer Training

State of Hawaii

March 2019



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# State of Hawaii

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# State of Hawaii Procurement Policies

### **Transition to Amazon Business**

✓ Effective 3/15/2019, PC2019-09, Amendment 2

### **Policies:**

- Mandatory for all Executive Branch Departments/Agencies (excluding DOE, UH, OHA and HHSC) whenever an employee is selecting Amazon to make a purchase.
- Use for Goods only.
  - > Alcohol, food/groceries and services are restricted for Executive Branch. Alcohol for all jurisdictions
- Maximum spend per transaction shall NOT exceed \$2,500.
- Prime categories should be used whenever possible to avoid shipping fees.
- Authorized business use only.
  - Personal use strictly prohibited.

Departments and other CPO jurisdictions may impose additional policies & procedures.

# State of Hawaii Training Requirements\*

SPO-001	Procurement Basics
SPO-127	Understand, Detecting & Preventing Antitrust Violations
SPO-120	Small Purchase Method of Procurement
SPO-190	SPO Price & Vendor List Contract and Cooperative Purchasing

\*Required for Executive Branch, recommend for other CPO jurisdictions.

# State of Hawaii Procedures

# **PROCEDURES:**

- 1. Employee must first determine if Amazon is appropriate to use.
- 2. Check SPO Price/Vendor List
- 3. Compare the PL/VL price to Amazon, using SPO-010
- 4. If the Amazon price is less than the PL/VL, Amazon may be used.
- 5. If the PL/VL price is less expensive, Amazon shall NOT be used.
- 6. The State's pCard is the only acceptable form of payment.
- 7. Compliance verification is not required prior to issuing a pCard payment.
- 8. Employee responsible for verifying the product arrived satisfactorily at the correct price (pCard statement)

# \*Note: The department/agency may impose additional policies and procedures as appropriate.

3/18/2019

# SPO-010 (sample)

		STATE PROCUREMENT OFF	FICE MENT
Agency:	State Procurement Office	2. PO/pCard. No.	xxxx-00-1234
Date:	3/15/2019	4. Project/Requisition/Work Order No.	Office Operations
E Record fo	r: Small Purchase procurem	ents for goods, services, & construction less the ents for goods, services, & construction \$5,00	□ han \$5,000 (HRS §103D-305) 00 to less than \$15,000 (HRS §103D- <u>305)*</u>
	Small Purchase procuremed SPO Price List or Vendor I	ents for health & human services less than \$2 List Contract No.	5,000 (HRS §103F-405)
	* Small purchases \$15,000 to on an electronic procuremer	less than \$100,000 (goods & services) and less than t system.	an \$250,000 (construction) shall be conducted

# SPO-010 (sample)

7. <b>PART B.</b> Quotations Solicited - Obta Award To: (Check Box) 8. Vendor/Company Nam	ain no less than three writter 9. Representative Nam	e quotes (Ref. HAR §3-12 10. Phone No	2-75(b) & (c)): 11. Date of Quote	12. Amount Quoted
🗙 1.Amazon Business	Amazon.com		3/1/2019	18.97
2.0ffice Depot	SPO PL 17-02		3/1/2019	38.99
3.				
4.				
5.				
14. <b>PART D.</b> Justification for award to o	other than lowest responsive	, responsible vendor, if	applicable (Ref. HAR §3	-122-75(e)):
Employee conducting procurement:	Pro	ocurement Officer appr	oval:	
Buyer signature required	Ар	proval signature if requir	ed by department	
15. Signature	Date 16.	Signature	Date	

### FILE A COPY AS SUPPORTING DOCUMENTATION IN THE FILE PROCUREMENT FILE.

# State of Hawaii – Contact Information

Bonnie Kahakui

**Assistant Administrator** 

Email: <u>bonnie.a.Kahakui@Hawaii.gov</u> Phone: (808) 587-4702 Shannon Ota

Purchasing Specialist

Email: <u>Shannon.j.ota@Hawaii.gov</u>

Phone: (808) 586-0563

Website - spo.hawaii.gov Phone: (808) 586-0554 Email: <u>state.procurement.office@Hawaii.gov</u>

# Joining the Amazon Business Account



# **Invitation Email**

To access the Amazon Business account, you must accept your emailed invitation to join

- Invitations are tied to an end users email. The recipient cannot change the email you use to register for the account.
- Account invitations are valid for 21 days from date sent. Once an invitation has expired it cannot be used to join the account and will need to be re-sent. Please contact your Account Administrator if you need to have an invitation re-sent.
- Registration flow may differ depending on how a work email has been used on Amazon in the past.

# Ravenna Purchasing with Ravenna Garden has invited you to place orders for work using Amazon Business. It's just like the Amazon.com you know, but with more business products and saving options to choose from. Set up your business user account for automatic access to: millions of work-related products exclusive business pricing quantity discounts business-friendly payment options Invite expires within 21 days. If you do not set up your account before this invitation expires, you will need to contact Ravenna Purchasing (kthall+9@amazon.com) to resend your invitation. Set up your account Enjoy Amazon Business!

amazonbusiness

# First Time User Registration Guide

- 1. You will receive an email inviting you to join your organization's Amazon Business account. Click on **SET UP YOUR ACCOUNT** Invitations are time sensitive.
- 2. If you do not receive your invitation, please check your spam folder. The email will come from no-reply@Amazon.com.
- 3. Choose the scenario below that applies to you and follow the instructions.

### Scenario 1 Create a new business user account

If you have not previously used your work email address on Amazon.com, account set up is simple!



# amazon business First Time Set-up Guide

Scenario 2 Convert your existing Amazon Account

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



If you already have an Amazon account tied to your work email address and use this account solely for business purchases, you will migrate this existing account to your organization's Amazon Business account. Do not choose this option if you have made personal purchases on this account.



Scenario 3 Separate Business and Personal Shopping

Sign in to the existing account you use for business/personal purchases on Amazon.com.



If you have an existing Amazon account tied to your work email and use this account for business and personal purchases, we will separate your personal order history from your work email.

Choose a new email for your existing Amazon account. Your password stays the same

The email designated here, will be used to access your previous account, including existing order history and saved payments or shipping addresses.

# **Shopping on Amazon Business**



# g on eligible items

• If Business Prime Shipping has been purchased, it provides Free Expedited Shipping on eligible items for all users in the business account..

Business pricing and quantity discounts are only available to registered business account customers on

**Amazon Business Benefits** 

### **Buying Policies**

•

• Your account administrator has customized Amazon Business to help you comply with your organization's buying standards and procedures. Features include approval workflows, negotiated pricing, and preferred suppliers and preferred products.

### **Business-Only Selection**

**Business Prime Shipping** 

**Business Pricing & Quantity Discounts** 

Amazon. Click to learn more.

• 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. <u>Click</u> to learn more.

List Price:	\$379.00
Price:	\$266.99
usiness Price 🔻	\$248.60

Submit order for approval



# Search & Browse Optimization

- Amazon is the "everything store." With such a large selection, we do our best to make it easy for you to find what you're looking for.
- **Recommended filters:** 
  - **Business Sellers** •
  - **Prime Eligible** ٠
  - Brand •
  - Average Customer Review/Rating
  - **Diversity Credentials** ۰



Select desired product details to refine search	Filter by product offers for search optimization
Eligible for Free Shipping	Condition
Free Shipping by Amazon	New (6,021)
Quantity	Used (88)
Under 10 Sheets (21)	Refurbished (5)
10 to 19 Sheets (149)	Price
20 to 29 Sheets (611)	Under \$25 (2.148)
30 to 49 Sheets (53)	\$25 to \$50 (1.169)
50 to 99 Sheets (401)	\$50 to \$100 (1.016)
100 to 299 Sheets (399)	\$100 to \$200 (957)
300 Sheets & Above (197)	\$200 & Above (781)
Feature Keywords	S to S 00
Photo (1,553)	Discount
Matte (1,425)	10% Off or More (1.258)
Fine Art (1,103)	25% Off or More (819)
Professional (746)	50% Off or More (313)
19 x 13 (319)	70% Off or More (84)
17 x 11 (304)	
Heavy Weight (286)	Seller
+ See more	Adorama Camera (1,010)
Featured Broads	Corgi Lamps (890)
Peatured Brands	MotivationUSA (491)
	Shoplet (443)
- Epson (200)	LexJet (352)
Hammermill (50)	PLEXSUPPLY (327)
	Smart Ioners (316)
Cricut (1)	We office inservations (202)
+ See more	+ See more
Packaging Option	Availability
Erustration-Free Packaging	Availability



# **Business Prime**

### 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.com

• 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.



# **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

amazonbusiness AII ÷	Hello, Katherine Account for Ravenna Gar	۲
Departments - Sell on Amazon Business Help	Your Account	>Learn more
	Your Orders	
	Manage Suppliers	
	Business Analytics	
	Recurring Deliveries	

Your Account	Standard Amazon account information
Your Orders	View and track orders. Administrators 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. Learn more.
Business Analytics	Create and filter custom reports based on your business needs
Recurring Deliveries	Have essential items delivered automatically, based on a schedule you choose. Learn More.



# Checkout – Individual Payment Methods

When checking out on Amazon Business, be sure to enter the appropriate payment and shipping details. This information can be entered ahead of time in **"Your Account"** or during the checkout process



- Each time you add a new address, be sure to indicate if weekend deliveries can be accepted at that location. If in doubt, we recommend opting for week day deliveries only.
- Be sure to indicate if an access code is required to deliver to a specific address.
- Previously used ship to addresses will automatically be saved and made available during future checkouts.
- Ship to addresses can be audited by your account administrator at any time. Please be sure to comply with all purchasing rules and policies.



- Purchase cards are the recommended form of payment for the Amazon Business account.
- The Amazon Business account is intended for business purchases only. No purchases should be made on a personal credit card.
- If you have access and permission to use multiple different cards, multiple cards can be stored in your account information.
- Payment instruments are visible to your account administrator and can be audited.

# Checkout – Multiple Groups

Individuals who purchase on behalf of multiple departments may be a member of multiple account "groups" in order to keep reporting organized

amazon.com	SIGN IN	SHIPPING & PAYMENT	GIFT OPTIONS	PLACE ORDER
Choose a gro	oup w	hat's this? 🔻		
Group		Payment	methods	
Front Desk Admin		Shared		
Landscaping		Individual	l	
O Warehouse		Shared		
Continue	as your de	efault group		
Use the selected group	as your de	efault group		

- Choose the group you wish to purchase on behalf of during the checkout process
- Shipping and payment options may differ depending on the group you have selected during checkout

# Business Order Info

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

- All information entered will appear in Order History Reports in the Business Analytics tool
- Fields may be required or optional depending on your organization's needs
- The information fields below have been configured on your account

GL Code (optional/required) Project Code (optional/required)	Business Order	r Information
Department (optional/required)	Complete the following to ensu	re accurate routing and reporting of your order. <u>Change group</u>
Purchase Order (PO) number	GL Code	Optional Continue
(optional/required)	Department	
Cost Center (optional/required)	Cost Center	
Location(optional/required)		
Custom Field (optional/required)	Store number	Optional
	L	



# Approval Workflows

Some orders or all orders placed on the account may be subject to approval before being fulfilled

### Add Users from Manage your Business

- Depending on your role, some or all of your orders may require approval.
- There are no additional steps to take to submit your order for approval. Check out as you normally would and you will see the option at checkout.
- Your order will not be processed until it is approved by the appropriate approver. Keep this in mind for shipping timelines.
- You will be notified over email once your order is submitted and then again once your order has been approved and processed. Just as with a normal order on Amazon, you will also receive relevant shipping updates.
- If your order is not approved within 7 days, the order will automatically be canceled; however, the items in your order will not be deleted. If your order is canceled, you will need to submit the order again for approval.



# Approval Workflows

# Approval policy

Approval settings will not apply to services, digital products, or punchout accounts. Learn more 🔹



### **Buying policies**

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

Guided Buying (Catalog Curation)

Debarment policies

Approvals

Negotiated pricing

Related offer reports

### Approval policies

State of Hawaii / Buying policies

Displaying 2 of 2		ADD F
Refine by		Sort by: Lowest to
Q Name	Orders with restricted items 1 level of approval required	Ac
	Orders of \$2,500.00 or more 1 additional level of approval required	Ac
	Displaying 2 of 2	

Applies to orders for the State of Hawaii group only.

### Conditions

Apply to all orders

) Orders with restricted items 🔹

Orders with a total equal or greater than



### Approvers

OLICY

highest

ions

Requires one approval from each level. If an approver is going to be unavailable, you can assign a temporary delegate

1. Enter names or email addresses

### Add another approver level



# Guided Buying | Catalog Curation



### Company Restricted

- Some Items will have customized messaging letting you know IF and WHEN you can purchase them through Amazon Business
  - Remember, while you are able to find most items on Amazon, always abide by your organization's purchasing policies
  - Because restrictions are created at the category level, some permitted items may get unintentionally restricted.



# **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 VNSPSC 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 Tax Exemption Applied Tax Exemption Type Tax Exemption Opt Out Discount Program

×

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, shipment info, payment info, and seller info
- Customize and save report templates to meet business needs
- Download CSV files to analyze your Order History in excel

### Filters allow you to customize both the table and bar charts.

- The **Show** option allows you to select the data view you ٠ are interested in: Orders, Returns, Refunds and Reconciliation
- Time Period supports a range of default settings (month ٠ to date, quarter to date, etc.) as well as a custom range option
- Organized by allows you to drill down into spend from **Organized by** allows you to drill down into spend from specific Account Groups or Transaction Type.

# **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
02/08/20 <mark>1</mark> 6	<i>108-XXXXXXX-XXXXXX</i>	12345678901112	02/08/2016	\$199.98	Line of Credit	1234	Personal Computer	B00D78QCYK	ViewSonic VA2
02/08/20 <mark>1</mark> 6	108-XXXXXXX-XXXXXXX	12345678901112	02/08/2016	\$199.98	Line of Credit	1234	Personal Computer	B00D78QCYK	ViewSonic VA2
02/08/20 <mark>1</mark> 6	108-XXXXXXX-XXXXXX	12345678901112	02/08/2016	\$17.99	Line of Credit	1234	CE	B001F42MKG	Logitech Track
02/07/20 <mark>1</mark> 6	108-XXXXXXX-XXXXXXX	N/A	N/A	N/A	N/A	1234	Health and Beauty	B000VEDK66	Renew Life Di
	12345678901112 02/07/2016 \$221.87				CE	B0007WDIW8	Tripp Lite HDM		
		12345678901112	02/07/2016	\$221.87	Line of Credit	1234	CE	B0000AZK6H	StarTech.com
							CE	B001D5RPEK	StarTech.com
00/04/0016		12345678901112	02/08/2016	\$17.95	Line of Credit	1234	CE	B001D5RPEK	StarTech.com
02/04/2010		12245678001112	02/04/2016		Line of Oredit	1724	CE	B0007WDIW8	Tripp Lite HDM
		12343078901112	02/04/2010	\$34.UZ	Line of Credit	1254	CE	B0000AZK6H	StarTech.com
		12245672001112	00/06/0046	602.07			CE	B0007WDIW8	Tripp Lite HDM
		12345678901112	02/00/2016	\$83.U7		1234	CE	B0000AZK6H	StarTech.com



# Your Orders

Your Account > Your Orders          (i)       To view orders placed by users in your business account, select View All Orders below or go to Business Ar	nalytics.	• The "Your Orders" section provides
Your Orders     Q Search all orders       View All Orders: Ravenna Garden +     +	Search Orders	additional detail regarding the status of all orders you have placed.
16 orders placed in     past 6 months ÷       ORDER PLACED     SHIP TO       May 15, 2018     Third Floor *       Katherine *     \$0.00       Approval Demo 2	Arriving August	16 - August 20
This order was approved. View details Cancelled		Track package
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	Shipped today See all updates	Return or replace items
<ul> <li>Take a variety of actions on your orders such as initiating returns or tracking the delivery of a package.</li> </ul>	Out for delivery	Write a product review



# **Business Customer Support**

3/18/2019

- Dedicated U.S. based <u>Business Customer Support</u> can be reached a number of ways including email, chat and phone. ٠
- Not sure what you're looking for? Learn more about the features and benefits on Amazon Business HERE. ٠

Get to Know Us	Let Us Help You	Work with Amazon	Business Solutions	
Careers Press Releases Amazon and Our Planet Amazon in the Community Company Facts	Help Shipping Rates & Policies Business FAQ Contact Us	Sell on Amazon Business Fulfillment By Amazon Advertise on Amazon Sell Services on Amazon Amazon Global Selling	Amazon Business Solutions Purchasing Systems Amazon Credit Line Amazon Business Blog	
Contact Us What can we help y	rou with?	An order I placed Fire and P	Kindle Digital Services	Prime or Something else
Tell us more about your issue     Select an issue				
3 How would you like	e to contact us?	E-mai	Phone	Chat

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# **Common Customer Support Questions**

See below for quick resolutions to <u>frequently asked questions</u> and additional support contact information

### 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 <u>tax-exempt@amazon.com</u>

# amazonbusiness