

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 Admin Training

State of Hawaii

February 2019



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State of Hawaii

Amazon Policy Guidance

Amazon Business

- Joining the Amazon Business Account
- Shopping on Amazon Business
 - Checkout Shipping & Payment Options
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- Amazon Business Analytics & Your Orders
- Administrator Functions
- Business Customer Support



State of Hawaii Procurement Policies

Transition to Amazon Business

✓ Effective 3/1/2019, 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.
- 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.

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 |

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.

SPO-010 (sample)

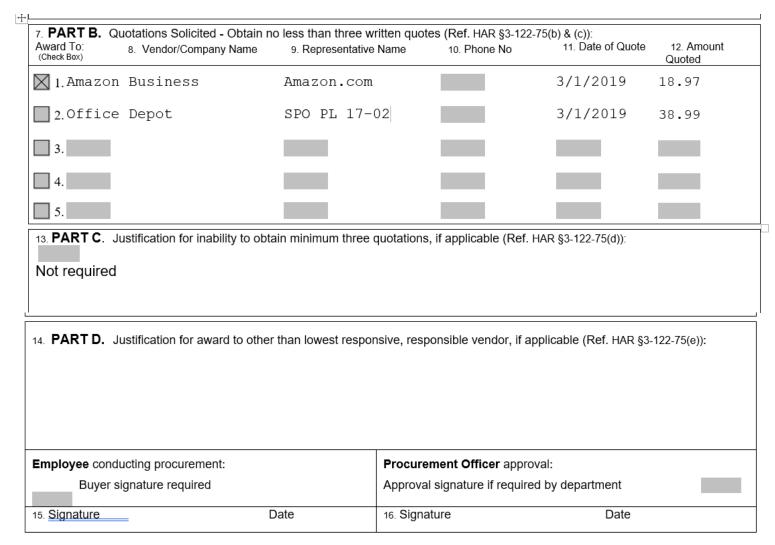
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STATE PROCUREMENT OFFICE RECORD OF PROCUREMENT

| 1. Agency: | State Procurement Office | 2. PO/pCard. No. | xxxx-00-1234 | | | |
|--------------|--|--|--|--|--|--|
| з. Date: | 3/15/2019 | 4. Project/Requisition/Work Order No. | Office Operations | | | |
| 5. Record fo | r: Small Purchase procurement | ents for goods, services, & construction less th | nan \$5,000 (HRS §103D-305) | | | |
| | Small Purchase procurem | ents for goods, services, & construction \$5,000 | 0 to less than \$15,000 (HRS §103D- <u>305)*</u> | | | |
| | Small Purchase procurements for health & human services less than \$25,000 (HRS §103F-405) | | | | | |
| | SPO Price List or Vendor I | List Contract No. | | | | |
| | * Small purchases \$15,000 to on an electronic procuremen | less than \$100,000 (goods & services) and less than t system. | n \$250,000 (construction) shall be conducted | | | |
| 6. PART A. | Description of good/service/cons | truction to be procured (Ref. HAR chapter 3-122 | , subchapter 8): | | | |
| three hole | punch heavy duty – padded han | dle | | | | |

SPO-010 (sample)



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

State of Hawaii — Contact Information

Bonnie Kahakui Shannon Ota

Assistant Administrator Purchasing Specialist

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

Phone: (808) 587-4702 Phone: (808) 586-0563

Website - spo.hawaii.gov

Phone: (808) 586-0554

Email: state.procurement.office@Hawaii.gov

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.

amazonbusiness

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!

Amazon.com | Help

First Time User Registration Guide

1. You will receive an email inviting you to join your organization's Amazon Business account. Click on **Invitations are time sensitive.**

SET UP YOUR ACCOUNT

- 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!

Enter your full name and choose your business password

Next step

Start shopping

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

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

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

Buying Policies

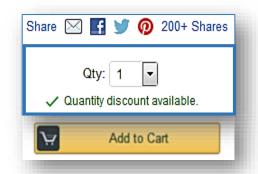
• Your account administrator has customized Amazon Business to help you comply with your organization's buying standards and procedures. Features include approval workflows, negotiated pricing, and preferred suppliers and preferred products.

Business-Only Selection

• Business-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.



Submit order for approval

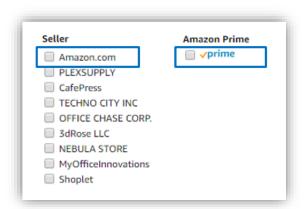
List Price: \$379.00

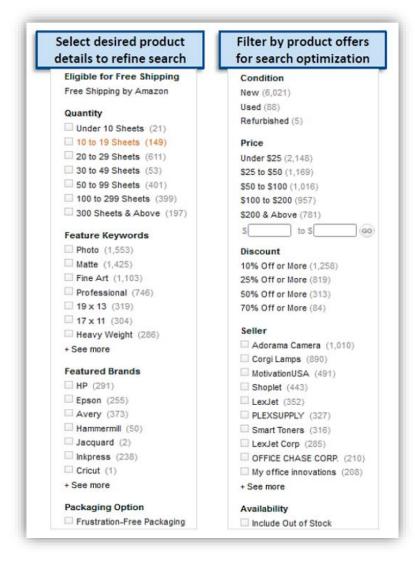
Price: \$266.99

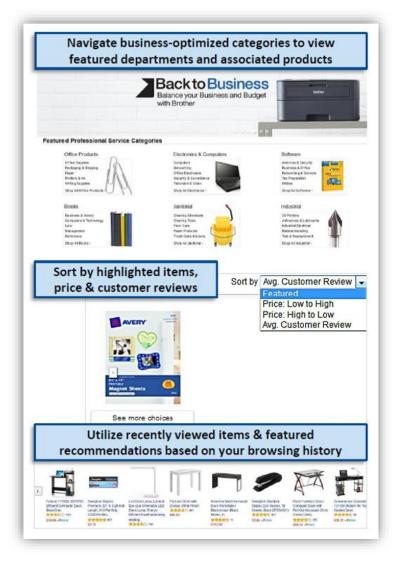
Business Price ▼ \$248.60

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
 - Brand
 - Average Customer Review/Rating
 - Diversity Credentials







Business Prime

Take Advantage of Amazon Prime Shipping Benefits

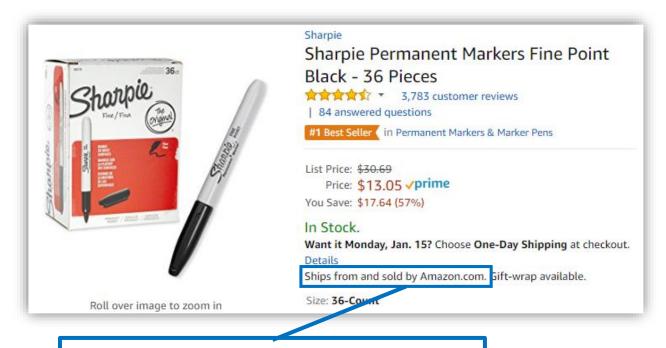
• An easy way to ensure that your products arrive on time and as expected, is to order products fulfilled directly from Amazon. All products clearly mark who the seller is on the product detail page.

<u>Prime Eligibility – Fulfilled by Amazon.com</u>

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

What's not Included?

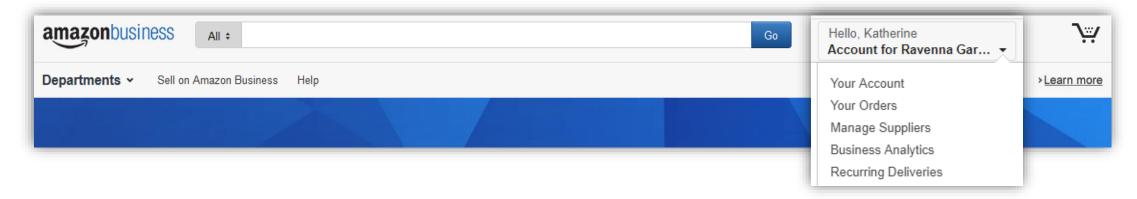
 Business Prime Shipping does not include additional Prime benefits such as Amazon Fresh, Pantry, Video, or Music.



Ships from and sold by Amazon.com.

Business Account Navigation

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

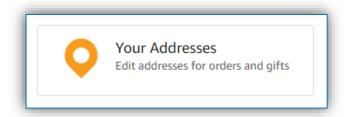


| Your Account | Standard Amazon account information |
|----------------------|---|
| Your Orders | View and track orders. Administrators can view orders others have placed on behalf of the organization. |
| Manage Suppliers | Easily find suppliers on Amazon Business and add them to your list of Saved Suppliers. <u>Learn more.</u> |
| 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. <u>Learn More</u> . |

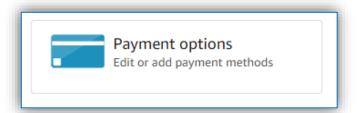
Checkout

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



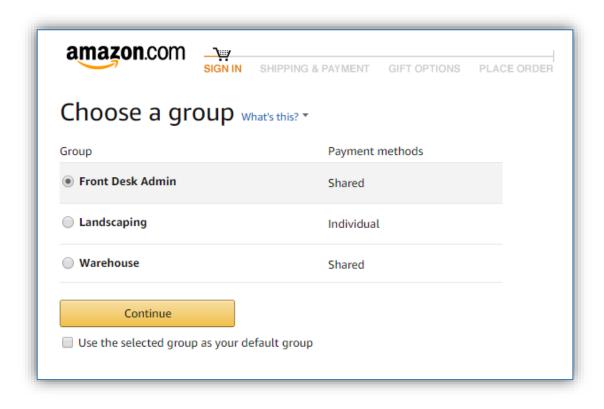
- Each time you add a new address, be sure to indicate if weekend deliveries can be accepted at that location. If in doubt, we recommend opting for week day deliveries only.
- Be sure to indicate if an access code is required to deliver to a specific address.
- Previously used ship to addresses will 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



- 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)

Department (optional/required)

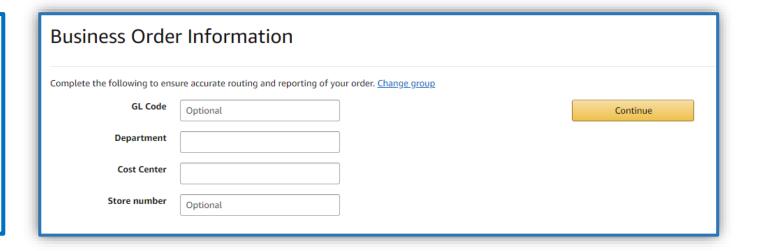
Purchase Order (PO) number

(optional/required)

Cost Center (optional/required)

Location(optional/required)

Custom Field (optional/required)



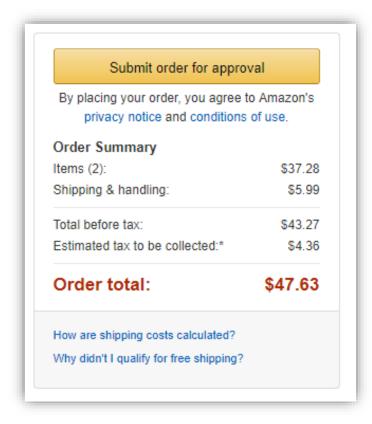
Approvals

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



Buying policies

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

Guided Buying (Catalog Curation)

Debarment policies

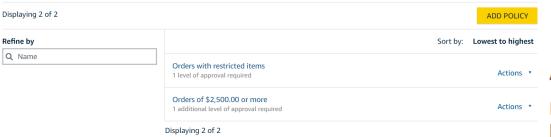
Approvals

Negotiated pricing

Related offer reports

Approval policies

State of Hawaii / Buying policies



Approval policy

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

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

\$ Enter amount

Approvers

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

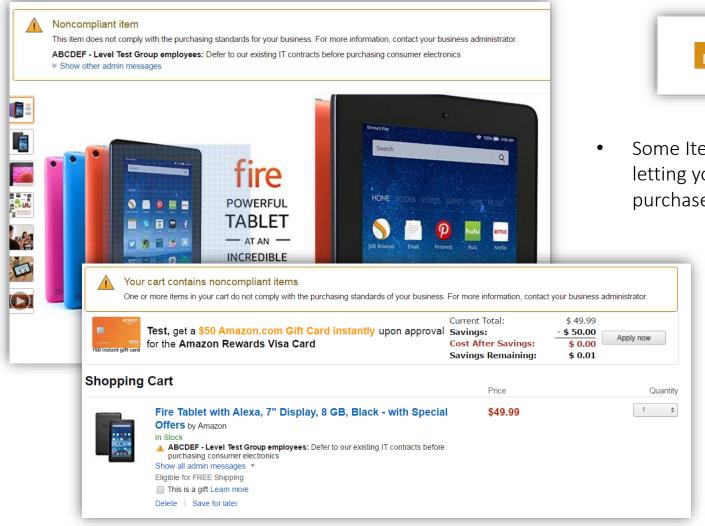
1. Enter names or email addresses

Add another approver level

Guided Buying



Guided Buying | Catalog Curation



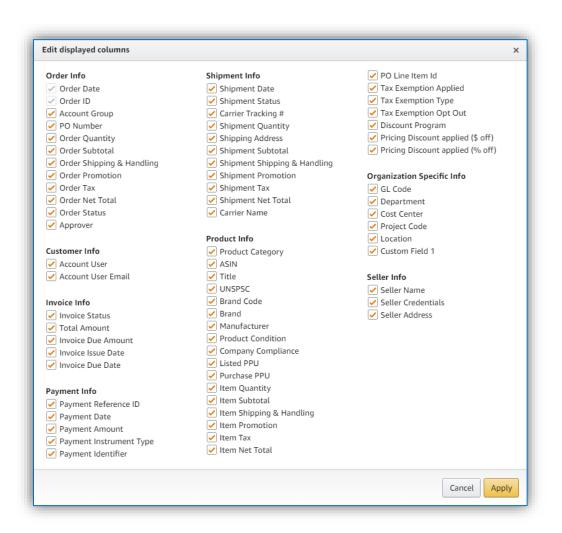


Some Items will have customized messaging letting you know IF and WHEN you can purchase them through Amazon Business

- 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.

Business Analytics

Amazon Business Analytics



Amazon Business Analytics provides users the ability to:

- Aggregate purchases to compare and track spend over time
- Monitor and track 60+ data fields including, 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

<u>Filters allow you to customize both the table and bar charts.</u>

- The **Show** option allows you to select the data view you are interested in: **Orders, Returns, Refunds** and **Reconciliation**
- 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
 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.

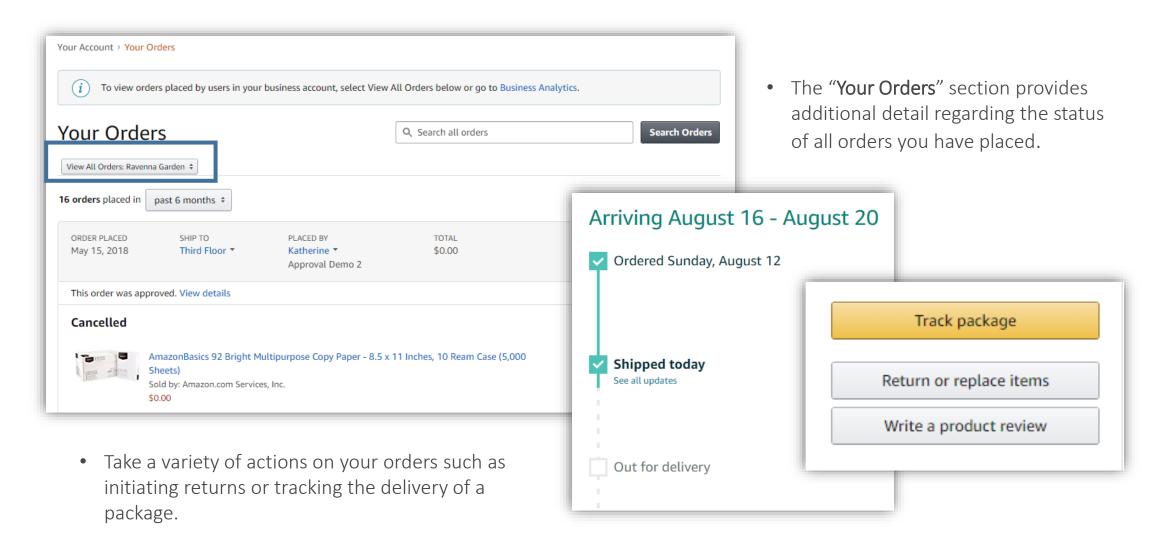
Simplify the reconciliation process by matching corporate credit card charges to each item in a shipment.

- 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 |
|-------------------------------|---------------------|------------------------------|--------------|-------------------|-------------------------|--------------------|-------------------|------------|--------------|
| 02/08/2016 | 108-XXXXXXX-XXXXXXX | 12345678901112 | 02/08/2016 | \$199.98 | Line of Credit | 1234 | Personal Computer | B00D78QCYK | ViewSonic W |
| 02/08/2016 | 108-XXXXXXX-XXXXXXX | 12345678901112 | 02/08/2016 | \$199.98 | Line of Credit | 1234 | Personal Computer | B00D78QCYK | ViewSonic V |
| 02/08/2016 | 108-XXXXXXX-XXXXXX | 12345678901112 | 02/08/2016 | \$17.99 | Line of Credit | 1234 | CE | B001F42MKG | Logitech Tra |
| 02/07/2016 | 108-XXXXXXX-XXXXXXX | N/A | N/A | N/A | N/A | 1234 | Health and Beauty | B000VEDK66 | Renew Life |
| 02/04/2016 106-XXXXXXX-XXXXXX | | | | \$221.87 | Line of Credit | 1234 | CE | B0007WDIW8 | Tripp Lite H |
| | | 12345678901112 | 02/07/2016 | | | | CE | B0000AZK6H | StarTech.co |
| | | | | | | | CE | B001D5RPEK | StarTech.co |
| | 105 VVVVVVV VVVVVV | 12345678901112 | 02/08/2016 | \$17.95 | Line of Credit | 1234 | CE | B001D5RPEK | StarTech.co |
| | 106-XXXXXXX-XXXXXXX | 12345678901112 02/04/ | 0010410040 | 2/04/2016 \$34.02 | Line of Credit | 1234 | CE | B0007WDIW8 | Tripp Lite H |
| | | | 02/04/2016 | | | | CE | B0000AZK6H | StarTech.co |
| | | 12345678901112 02/06/2016 | 0010010040 | 000.07 | Line of Credit | 1234 | CE | B0007WDIW8 | Tripp Lite H |
| | | | 02/06/2016 | \$83.07 | | | CE | B0000AZK6H | StarTech.co |

Your Orders

Your Orders



Administrator Functions

How to add users



State of

Q

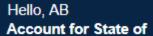
Search across your business account

Add people

Download list

Upload list of people

Business settings



Your Account

Business Settings

Your Orders

Manage Suppliers

Business Analytics

Recurring Deliveries

Switch Accounts

Sign Out



Billing & shipping

Manage your checkout preferences for employees by adding payment and shipping info.

Shared settings

Business order info

Payment methods

Pay by Invoice

Addresses

Delivery preferences



Members

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

People

Invitations

Groups

Account admins (2)



AB Gov



Symone

Add an admin

Business Prime

For everyone in your business account

Learn more



Add people V

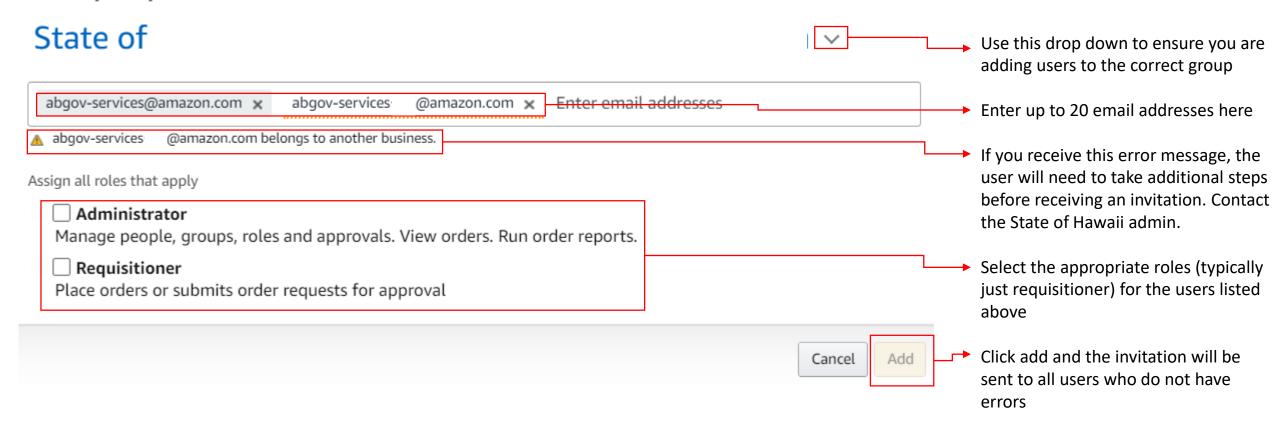
Business profile

State of

EO1 North Wort Ctroot

How to add users

Add people to:



What your users will see

Note: email will come from no-reply@amazon.com

amazon business

with State of has invited you to manage the Amazon Business account for your organization. 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 (see 1.gov) to resend your invitation.

Set up your account

Enjoy Amazon Business!

How to add groups



State of

Q

Search across your business account

Add people

Download list

Upload list of people

Business settings



Your Account

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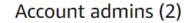
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AB Gov



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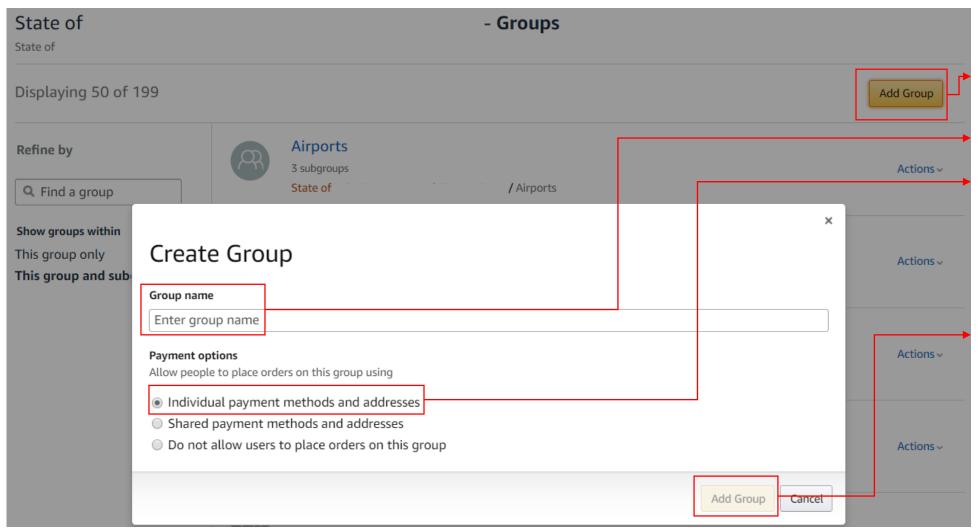
Add people >

Business profile

State of

EO1 North Wort Ctroot

How to add groups



Click add group to create a subgroup within the group you are already in

Enter group name

Select individual payment methods and addresses. Each user will input their pcard payment information and shipping address. (If you have questions about this, contact the State of Hawaii admin)

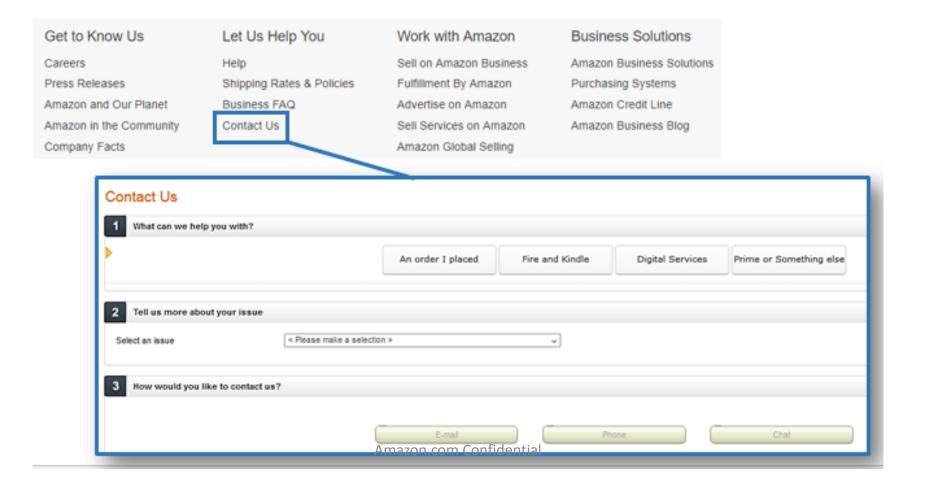
Click add group when finished.

Note: Groups must be created BEFORE you can invite anyone to them.

Business Customer Support

Business Customer Support

- Dedicated U.S. based <u>Business Customer Support</u> 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 <u>HERE</u>.



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