Placing Amazon orders using an MSU Pcard

January 28, 2021
Welcome!

Agenda

• Introductions
• Overview
• Amazon Catalog Demo
  • Shopping
  • Account Configuration
  • Analytics
  • Your Orders
  • Business Customer Support
• Q&A
MSU Purchasing Team

- Melinda Phillips – Strategic Contracts Manager
- Denise O’Brien – MSU Pcard Program Manager

Amazon Team

- Kain Anderson – Senior Customer Success Manager
- James Herbert – Senior Customer Advisor - Education
Amazon Business Account Benefits

- Dedicated 24/7 Support
- Price and Quantity Discounts
- Business Prime
- Exclusive Products
Important

- Check University Stores first
- Orders can only be placed using a Pcard
- Restrictions on items per the Pcard Manual and MBP
- Personal Amazon accounts tied to an MSU email address must be changed to a non-MSU address (Amazon will cover)
Amazon Catalog

Punchout process—locate the catalog logo
# Process Differences

<table>
<thead>
<tr>
<th>Spartan Marketplace Checkout</th>
<th>Amazon</th>
<th>Other Catalogs in Spartan Marketplace</th>
</tr>
</thead>
<tbody>
<tr>
<td>Displays a “Submit Order for Approval” button</td>
<td>✓</td>
<td>✗</td>
</tr>
<tr>
<td>Requires “Deliver To” and MSU account information</td>
<td>✗</td>
<td>✓</td>
</tr>
<tr>
<td>Order is routed through KFS</td>
<td>✗</td>
<td>✓</td>
</tr>
<tr>
<td>Appears in Order History</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Displays a Req or PO number in Order History</td>
<td>✗</td>
<td>✓</td>
</tr>
</tbody>
</table>
Submit order for approval tile in Amazon catalog

- Click “Submit for Approval” tile to proceed placing order
- Orders approve automatically – they do not route for approval
- After clicking the button, the order routes back to your cart in Spartan Marketplace. Click the "Checkout" button to send the order to Amazon
Join the Amazon Business Account
Registration Overview

Admin sends email to end Members announcing AB program and new AB punchout option in Spartan Marketplace.

Member accesses Spartan Marketplace, selects Amazon Business tile.

- New to Amazon (NTA)
  - Begin shopping.
  - Use Forgot Password workflow your first time accessing a non-shopping page.

- Existing .com
  - User chooses Separate/Convert

- Existing Business*

Existing business account end-users must contact their administrator to be removed.
New to Amazon

Member accesses Spartan Marketplace, selects Amazon Business tile

- Begin shopping
- Use Forgot Password workflow your first time accessing a non-shopping page

Email address will not auto populate. Member must enter email (must use same email address that was sent the invitation).

One Time Password will be sent to Member via email.
Existing Amazon.com

Member accesses Spartan Marketplace, selects Amazon Business tile

Would you like to join Amazon Business with your current account?
Your order history will be migrated and will be visible to your business account Administrator.

- Yes, join this account.
- No, I want to create a new account for Amazon Business.

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

Welcome to Amazon Business!

You are now a part of the Amazon Business account.

Start shopping
Shopping on Amazon Business
Amazon Business Benefits

**Business Prime Shipping**
- Provides Free Two-Day Shipping on eligible items for all Members in the business account. [Click](#) to learn more.

**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.
Amazon Business Discounts

There are a variety of discounts available on Amazon Business that your organization can take advantage of to unlock savings.

**Business Pricing**
- Business pricing is cheaper pricing available only for registered Amazon Business customers. No action is needed to turn on business pricing and is available on select items.

**Quantity Discounts**
- Quantity Discounts are volume-tiered discounts, only available for registered Amazon Business customers. Quantity discounts appear on the product detail page and Members can review the tiered discounts available.
Search & Browse Optimization

Optimizing search functions in Amazon Business allows you to find the best products to meet your needs and compare prices to find the best value.

- Amazon is the “everything store.” With such a large selection, we do our best to make it easy for you and your end Members to find what you’re looking for.

- Recommended filters:
  - Business Sellers
  - Prime Eligible
  - Brand
  - Average Customer Review/Rating
  - Diversity Credentials
Search Optimization

Optimizing search functions in Amazon Business allows you to find the best products to meet your needs and compare prices to find the best value.

1. **Maximize Savings!** Search All Departments & try using generic descriptors instead of brand names.
2. Consider refining search results with filters available on the left side of your screen, such as Prime or Business Seller.
3. Sort results by options listed on the top left of your screen, such as Price: Low to High.
4. In many cases, you can also Select **Quantity Discounts** to review quantity discounts and purchasing options.
5. To compare offers, scroll down & select **Used & new** to pull up the Offer Listing page.
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.
Reorder & Shopping Lists

How do lists work on Amazon Business?

- Lists make it easy to keep track of the things you need and are easy to share with others. Any Member on Amazon Business can create a shopping list.
- Choose between multiple list types depending on if you want the items to remain on a list after they are ordered.
- To share your list, create a public list and use the URL to email it directly to your desired audience.
- When a list is shared with you, you can save it to your own account or make a copy to edit yourself.
Business Account Navigation
### Business Account Navigation

<table>
<thead>
<tr>
<th>Page</th>
<th>Functionality</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your Account</td>
<td>Standard Amazon account information</td>
</tr>
<tr>
<td>Your Orders</td>
<td>View and track your orders. Administrations can view orders others have placed on behalf of the organization</td>
</tr>
<tr>
<td>Manage Suppliers</td>
<td>Easily find suppliers on Amazon Business and add them to your list of Saved Suppliers. <a href="#">Learn more</a></td>
</tr>
<tr>
<td>Business Analytics</td>
<td>Create and filter custom reports based on your business needs to view your orders</td>
</tr>
</tbody>
</table>
When checking out on Amazon Business, be sure to enter the appropriate payment and shipping details. This information can be entered 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 weekday 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.

- Pcards are the only accepted 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.
Updating Your Address Preferences:

Your Account > Your Addresses > Edit Delivery Instructions

1. Click into Your Account
2. Click into Your Addresses
3. Click 'Add delivery instructions'
Updating Your Address Preferences

4. Enter weekend delivery preferences
   - Add delivery instructions
   - Nikola Test
   - 325 9TH AVE N, SEATTLE, WA, 98109-5122, US

   - Is this address closed for deliveries on Saturdays & Sundays?
     - Saturday: Closed, Open
     - Sunday: Closed, Open

   - Where should we leave your packages at this address?

   - Do we need a security code, call box number or key to access this building?

   - Do we need additional instructions to find this address?

5. Select preferred package drop-off location
   - Add delivery instructions
   - Nikola Test
   - 325 9TH AVE N, SEATTLE, WA, 98109-5122, US

   - Is this address closed for deliveries on Saturdays & Sundays?

   - Where should we leave your packages at this address?

   - Do we need a security code, call box number or key to access this building?

   - Do we need additional instructions to find this address?

6. Enter Building access instructions (if applicable)
   - Add delivery instructions
   - Nikola Test
   - 325 9TH AVE N, SEATTLE, WA, 98109-5122, US

   - Is this address closed for deliveries on Saturdays & Sundays?

   - Where should we leave your packages at this address?

   - Do we need a security code, call box number or key to access this building?

   - Do we need additional instructions to find this address?

7. Enter any additional instructions (free text field)
   - Add delivery instructions
   - Nikola Test
   - 325 9TH AVE N, SEATTLE, WA, 98109-5122, US

   - Is this address closed for deliveries on Saturdays & Sundays?

   - Where should we leave your packages at this address?

   - Do we need a security code, call box number or key to access this building?

   - Do we need additional instructions to find this address?

   - Provide details such as building description, a nearby landmark, or other navigation instructions.
Select ship-to Address During Checkout

Address defaults to Spartan Marketplace database
Select ship-to Address During Checkout

If needed, change shipping address on final checkout screen.
Order Confirmation

There are three order-related emails

- **Spartan Marketplace Purchase Order Release** – sent from noreply@esmsolutions.com

- **Amazon Order Confirmation** – sent from noreply@amazon.com
  - Check/confirm ship-to address
  - Contact customer support to correct/modify shipping address

- **Shipment Notification** - sent from shipment-tracking@amazon.com
  - Includes “Track your package” link
Halted Orders

There are five instances in which orders can be halted/cancelled

- **Multiple PunchOut Sessions** – Multiple PunchOut sessions will result in a cancelled order. When shopping on Amazon Business through PunchOut, make sure to use one PunchOut session per order.

- **Changing or Modifying Cart** – If PO is sent with deleted line items or modified quantities, the order will be rejected.

- **Safeguards** – If the approval is not completed within the seven day cart lock, and the order falls outside of the safeguards at the time of approval, the item or order will be halted.

- **Address on Final PO Differs From Address at Checkout** – If the checkout address is in the contiguous US, but the address on the PO is outside the contiguous US, the order will be cancelled.
  - If default addresses are set up in the account and orders are being shipped outside the contiguous US, please make sure to contact your administrator to add in a default address with your ship-to location.

- **Zip Code Change for Next Day Delivery** – If the zip code on the final PO differs from the zip code used for the address at checkout and the item is set for next day delivery, the order will be cancelled.
Account Configuration
Your Account Administrator has restricted categories for purchase within Amazon Business based on your organization’s buying policies.

- Restricted products will be clearly marked throughout the buying process.
- Administrators have direct visibility into any restricted purchases via Business Analytics.
Organization Blocked

Your Administrator has blocked product categories that are prohibited based on your organization's buying policies. The “Add to Cart” option will appear greyed out for any product categories that are blocked.
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.
- If needed, you can manually add tax by clicking Remove next to the specific item.

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 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
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
Your Orders
Your Orders

This section of the account provides additional detail regarding the status of all orders you have placed within the Business Account.

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

Navigate to Your Orders from the dropdown
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.
Common Customer Support Questions

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

**Contact Business Customer Support:** [CLICK HERE]
- Provides end Members 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 Member 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

**Your Customer Advisor – James Herbert – 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.