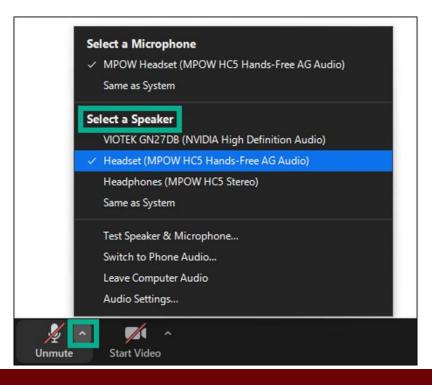
Welcome to the training!

- We'll get started at 10:00 am.
- You should hear music. If not, check your audio settings in Zoom by clicking the arrow next to the microphone at the bottom of your Zoom window.
- Locate the Q&A feature. This is how you will submit questions throughout the session.
- Slides available here: https://go.iu.edu/handouts





Sarah Chavez
Financial Training &
Communications

Brittany Veal
Procurement Card
Services

Kyle Burdette
Exelane Lanzaga
Amazon Business

A Buyer's Guide to Amazon Business

Procurement Card Services

Agenda

- Policy & procedure
- Knowledge check
- Meet Amazon Business
- How to make a purchase
- Bulk purchases
- Wrap-up & resources



Learning objectives

- Describe when it's appropriate to make purchases from Amazon Business.
- Request an exception to purchase an item from Amazon instead of a BUY.IU catalog supplier.
- Describe the benefits of establishing an Amazon Business account.
- Establish an Amazon Business account for your department.
- Make individual and bulk purchases from Amazon Business.



Policy & procedure

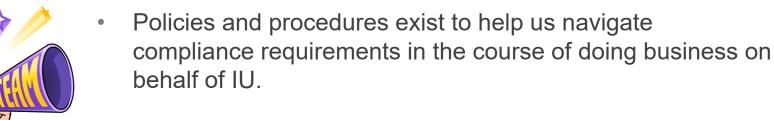
Stewardship and you

- Are you spending IU money? You are a steward of IU funds!
- We all play a part in using IU's resources for the right reasons and must be able to support the choices we make, if asked.
 - If an independent person reviewed the situation, would they come to the same conclusion?
- As a public institution, IU's financial choices are under scrutiny from state and federal governments, granting agencies, etc.



So, I'm kind of a big deal?

- Yes, you are!
- It takes everyone at IU following the policies and procedures that are in place to ensure compliance.





Procurement hierarchy

#1

- · Hosted or punchout catalog.
- Suppliers like Guy Brown, Neta Scientific, CDW-G, etc. that sell frequently purchased products.

#2

- · Check request form.
- One-time payments that do not involve a signature or purchase of restricted items.

#3

- · Non-catalog order.
- Purchases that involve a contract that are not allowable on a check request form or available via catalog.

#4

- Procurement card aka P-Card.
- P-Card purchases from non-contracted suppliers like Amazon Business.

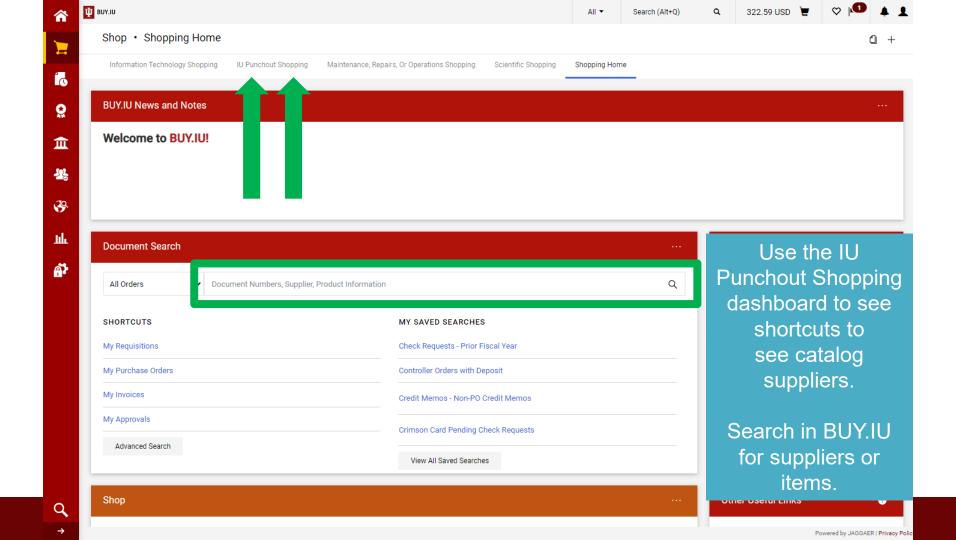
What drives this hierarchy?

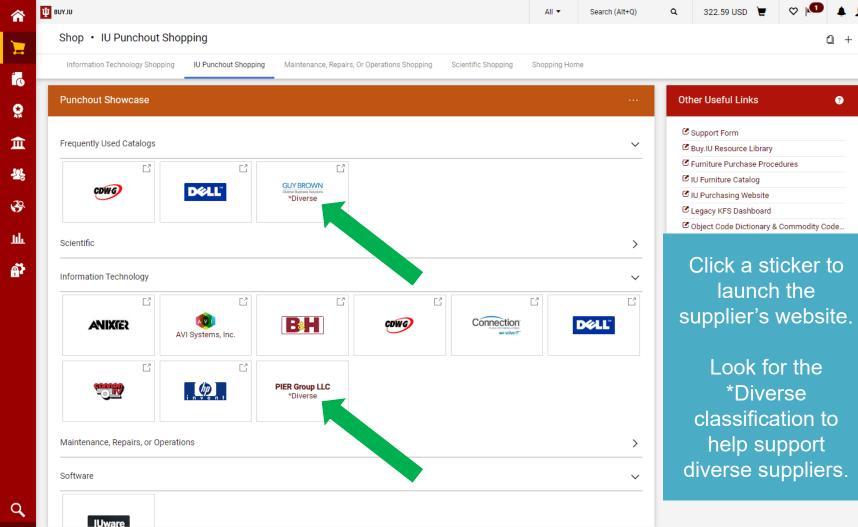
FIN-PURCH-02: University Procurement Contracts

Faculty and staff will purchase goods and services through contracts established by Purchasing.

- Contracted suppliers are legally bound to provide a certain level of service to IU.
- Consolidating IU's spend with these suppliers empowers
 Purchasing to leverage greater discounts and better service in the future.







But it's cheaper from [insert supplier name]!

The upfront price tag may be lower, but consider that:

- Contracted suppliers are vetted by Purchasing and meet IU's standards for doing business.
 - What this ultimately means is they meet the policy guidelines we've put in place that are built to accommodate government and agency requirements.
 - Examples: data security requirements, negotiated payment terms, diverse spend goals, refunds/kick-backs, guaranteed 1-2 day shipping.
- Purchasing can help you locate a comparable item from a contracted supplier.

Storytime

The Training team needed headsets for the office. We found the pair we wanted from CDW-G for \$55, the same pair on Amazon for \$49.

Purchasing found the same headsets from B&H Foto (another BUY.IU catalog supplier) for \$38!

We saved money, got our items quickly, and used a contracted supplier 🖔

Contact Purchasing via the Support Form. Select "Suppliers" then "Locate a supplier" for help.

How do I request an exception?

- If you need to make your purchase from the non-contracted supplier with the P-Card, request a P-Card exception via the Support Form.
 - Use form options "P-Card or Meeting Card" and "Exception Request"
- Card Services will consult the Purchasing Category Manager (CM) of the commodity you need.
 - The CM will search for a similarly-priced, contracted, item.
 - If they can't find one, they may approve the purchase from a noncontracted supplier using a P-Card.
 - Save this approval and attach it to the P-Card Reconciliation document.



I can't find what I need in BUY.IU.

- In this situation, consult SOP-PCARD-04: Restricted Items.
- Is the item you need to purchase listed here?
 - No: purchase from Amazon Business (or another seller) using the P-Card.
 - Yes: follow the instructions stated in SOP-PCARD-04 to compliantly make your purchase or request an exception to purchase another way.





What is a restricted item?

- An item that carries additional compliance considerations, or situations where using the P-Card is inappropriate.
- Some examples:
 - Cell phones
 - Furniture
 - Gift cards
 - Payment for services

- Contracted items
- Software
- Recurring payments
- Payments involving a signature

So essentially:

- As purchaser, you are a steward of IU funds and responsible for following IU policy and procedure.
- 2. Whenever possible, use a BUY.IU supplier.
- 3. Unrestricted item not available in BUY.IU? Use Amazon Business (or another non-contracted supplier).
- 4. Item available in BUY.IU but drastically cheaper from another seller? Submit a support form and request an exception.
- 5. Purchasing is here to help! Not sure what supplier to use? Submit a support form.

Knowledge check

Which of the following individuals is a steward of IU funds? Select all that apply.

- A. A Fiscal Officer responsible for multiple account types within a department.
- B. An administrative assistant ordering supplies for a student meeting.
- C. A faculty member purchasing research equipment using a research account.



You support several labs in your department. One of the lab leaders emails you a list of items to purchase from Amazon Business including gloves, cleaning agents, and glassware.

How should you proceed?

- A. Place the order using a P-Card.
- B. Search BUY.IU and determine if the items are available from a catalog supplier.
- C. Submit a support form and request an exception to purchase the items using the P-Card.



True or false: Saving money is the most important consideration when purchasing on behalf of IU.

- A. True saving money ensures we are putting IU's resources to use as responsibly as possible.
- B. False saving money is ideal, but there are other considerations, such as consolidated spend and supplier contracts, that must be considered.





Your HR Business Partner finds a book on Amazon Business that they want to purchase. You review SOP-PCARD-04 and confirm books are not restricted items.

What should you do next?

- A. Purchase the book from Amazon Business using a P-Card.
- B. Notify them that they can purchase the book from Amazon Business using their personal credit card.
- C. Submit a support form and request an exception to use Amazon Business.

Meet Amazon Business

What is Amazon Business?

- Like the Amazon you may use personally but offers benefits to organizations like IU such as:
 - Tax exempt purchases: IU's tax exemption automatically applied to participating sellers. For all available states, not just Indiana.
 - Special products and shipping: bulk purchases and quantity discounts.
 - Two-day shipping: free Business Prime shipping.
 - Customer service: exclusive access to the Amazon Business support team via phone ☎

How does it work?

- IU has a central Amazon Business account. Departments or users create accounts within this centralized account.
 - To take advantage of IU's benefits, account must be created through Card Services, not directly on Amazon's site.
 - Check with your department before requesting an account. A departmental account may already exist.
 - Request an invite by completing a support form. Select "P-Card or Meeting Card" then "IU Amazon Business Account."



When can I use Amazon Business?

Remember this?

#

- · Hosted or punchout catalog.
- Suppliers like Guy Brown, Neta Scientific, CDW-G, etc. that sell frequently purchased products.

#2

- · Check request form.
- One-time payments that do not involve a signature or purchase of restricted items.

#3

- · Non-catalog order.
- Purchases that involve a contract that are not allowable on a check request form or available via catalog.

#4

- · Procurement card aka P-Card.
- P-Card purchases from non-contracted suppliers like Amazon Business.

A quick note

- The guidelines described on the next slide are from the University Administration perspective.
- Your campus, department, or business office may have additional considerations or restrictions.
- Always check with your local office to make sure you're following their procedures.



When can I use Amazon Business?

- 1. The item you need is not available in BUY.IU.
 - a. Consult SOP-PCARD-04: Restricted Items. If the item you need is listed as restricted, submit a support form to request an exception.
- 2. The item you need is available in BUY.IU but there are considerable savings through Amazon Business.
 - a. Before you purchase submit a support form to request an exception.
- 3. You need to purchase items in bulk.
 - a. The P-Card cannot be used at wholesale clubs like Sam's Club or Costco. Use Amazon Business instead.

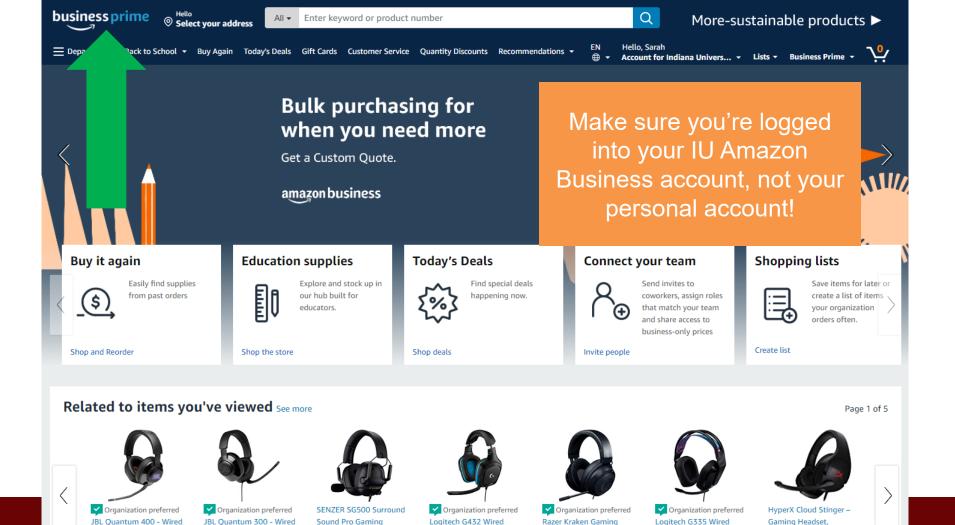
How to make a purchase

Scenario

Your HR Business Partner finds a book on Amazon Business that they want to purchase. You review SOP-PCARD-04 and confirm books are not restricted items.

Let's purchase 5 copies of the book *Speed of Trust* from Amazon Business for the Financial Training & Communications team (UA-ESTC).





Gaming Headset, 7.1

Headset: Lightweight

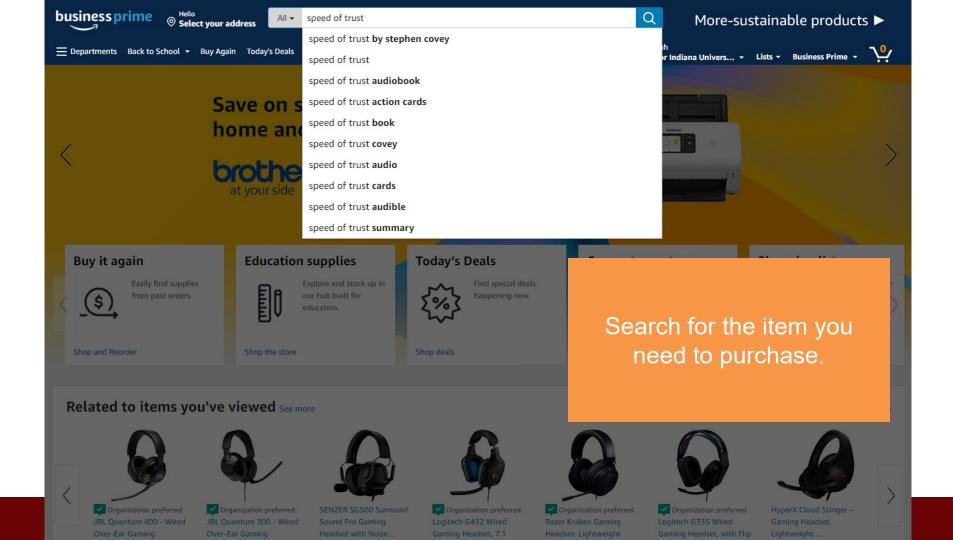
Gaming Headset, with Flip

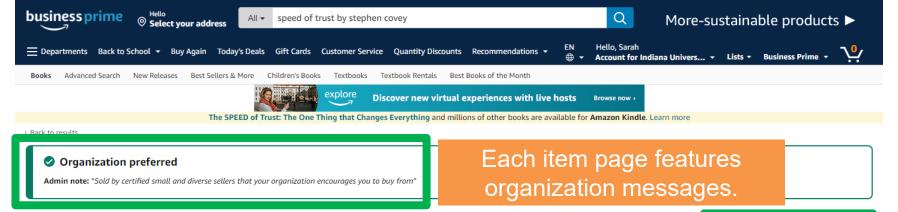
Lightweight,...

Over-Ear Gaming

Over-Ear Gaming

Headset with Noise...







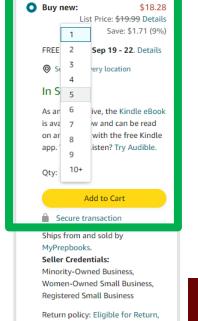
Language

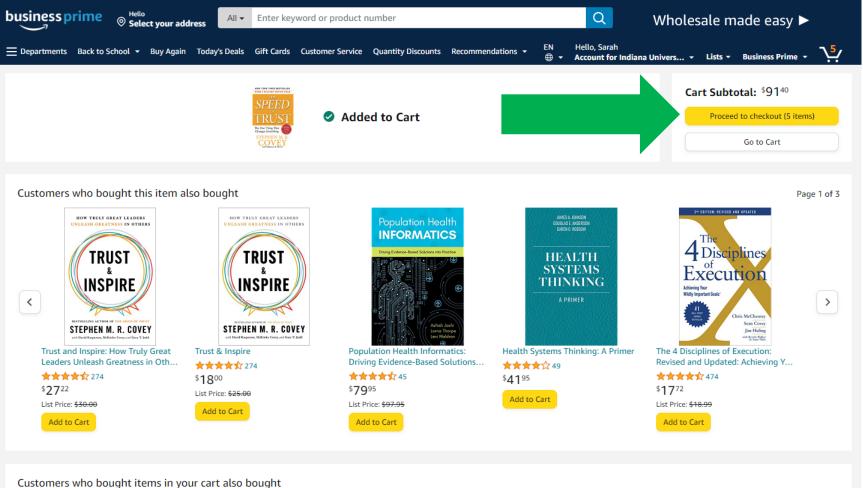
Publication date

Print length

Follow the Author

javascript:void(0)



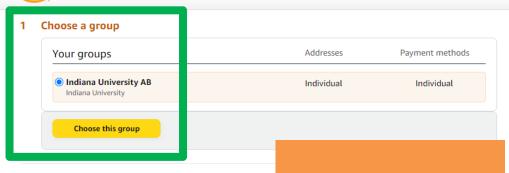






Checkout (5 items)





- 2 Business order information
- 3 Shipping address
- 4 Payment method
- 5 Items and shipping

*Why has sales tax been applied? See tax and seller information.

Need help? Check our Help pages or contact us

For an item sold by Amazon.com: When you click the "Place your order" button order. Your contract to purchase an item will not be complete until we send yo

Important information about sales tax you may owe in your state

You may return new, unopened merchandise in original condition within 30 day Returns Policy.

If you're a member of a subgroup, you'll see it listed here and should select it.

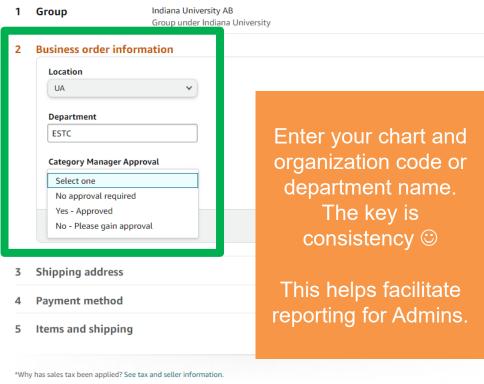
Otherwise, select Indiana University AB.

Choose this group	
Choose a group to continu	e
Order Summary	
Items (5):	\$91.40
Shipping & handling:	
Total before tax:	
Estimated tax to be collected:*	
Order total:	

Need to add more items to your order? Continue shopping on the Amazon.com homepage.

Checkout (5 items)





Continue

Set business order information to continue checking out. You'll still have a chance to review and edit your order before it's final.

Order Summary

Items (5): \$91.40

Shipping & handling: -
Total before tax: -
Estimated tax to be collected:* -
Order total: -
How are shipping costs calculated?

Select the appropriate Category Manager Approval option.

Be prepared to provide the CM's approval email.

Need help? Check our Help pages or contact us

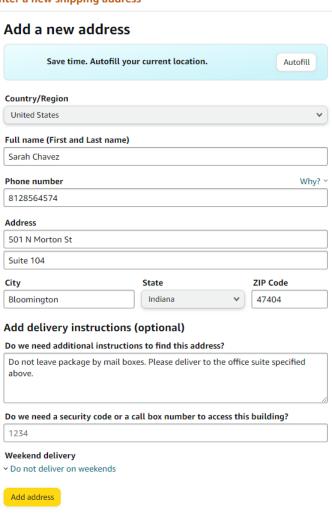
For an item sold by Amazon.com: When you click the "Place your order" button, we'll send you an email message acknowledging receipt of your order. Your contract to purchase an item will not be complete until we send you an email notifying you that the item has been shipped.

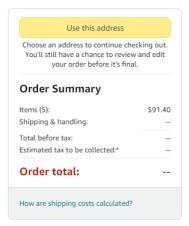
Important information about sales tax you may owe in your state

You may return new, unopened merchandise in original condition within 30 days of delivery. Exceptions and restrictions apply. See Amazon.com's Returns Policy.

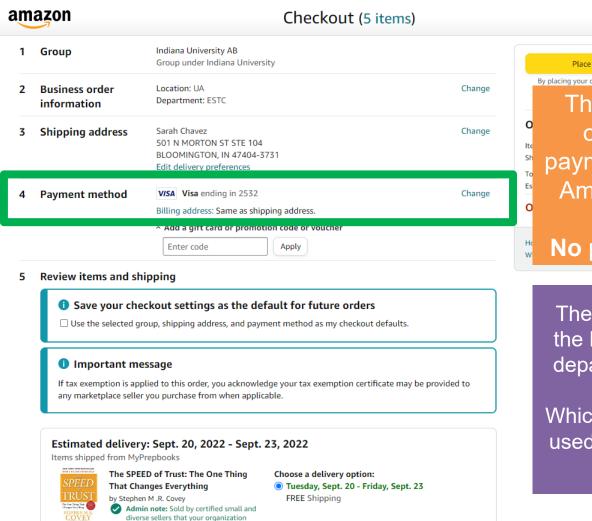
Need to add more items to your order? Continue shopping on the Amazon.com homepage.

8 Enter a new shipping address





Enter your shipping address and any additional notes for the delivery driver.



encourages you to buy from

Place your order

By placing your order, you agree to the

The P-Card is the only allowable payment method with Amazon Business.

No personal cards!

The Billing Address of the P-Card is like your department's address.

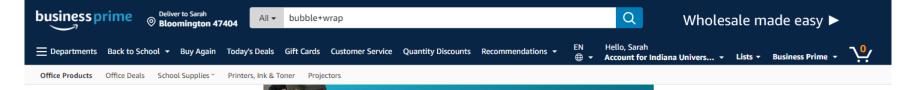
Whichever address was used when applying for the card.

Bulk purchases

How do I make a bulk purchase?

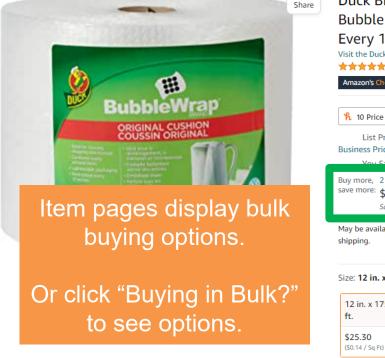
- Reminder: The P-Card cannot be used at wholesalers like Sam's Club or Costco.
- Amazon Business offers two ways to search for and purchase products in bulk.

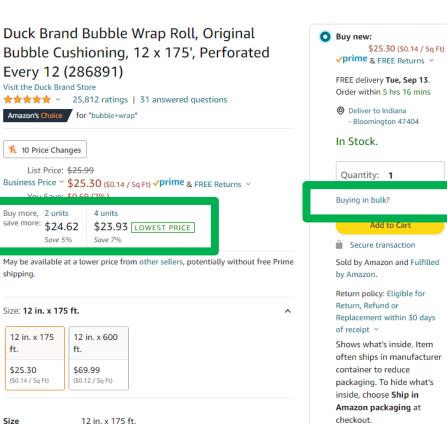




Virtually teleport for your next adventure

Office Products > Office & School Supplies > Envelopes, Mailers & Shipping Supplies > Packing Materials > Bubble Wrap





Browse now >



Office Products > Office & School Supplies > Envelopes, Mailers & Shipping Supplies > Packing Materials > Bubble Wrap



Roll over image to zoom in











Duck Brand Bubble Wrap Roll, Original Bubble Cushioning, 12 x 175', Perforated Every 12 (286891)

Browse now +

Visit the Duck Brand Store

Virtually teleport for your next adventure

**** × 25,812 ratings | 31 answered questions

Amazon's Choice for "bubble+wrap"

10 Price Changes

List Price: \$25.99

Business Price × \$25.30 (\$0.14 / Sq.Ft) √prime & FREE Returns ×

You Save: \$0.69 (2%)

Buy more, 2 units

save more: \$24.62 \$23.93 LOWEST PRICE

> Save 5% Save 7%

May be available at a lower price from other sellers, potentially without free Prime shipping.

Size: 12 in. x 175 ft.

12 in. x 175 ft. \$25.30 (\$0.14 / Sq Ft)

Size

12 in. x 600 ft.

\$69.99 (\$0.12 / Sq Ft)

12 in. x 175 ft.

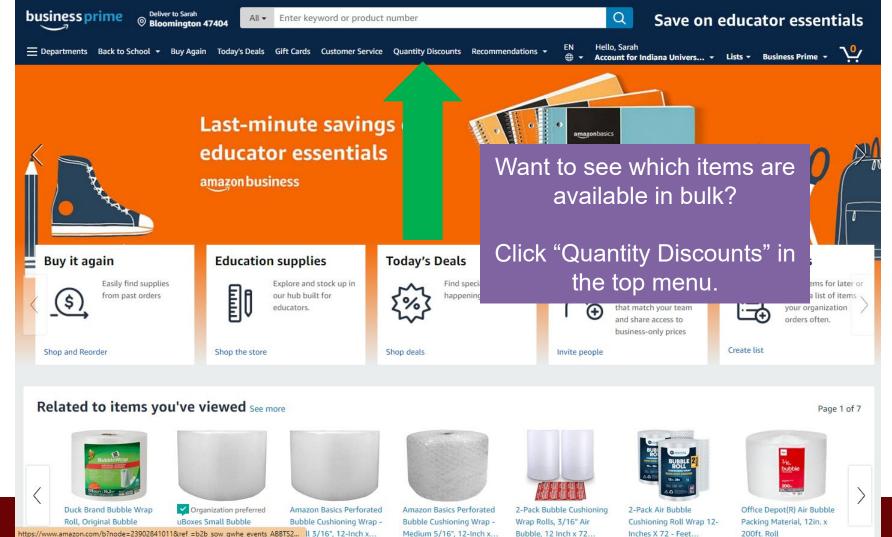
Buy new: \$25.30 (\$0.14 / Sq Ft) √prime & FREE Returns ∨ FREE delivery Tue, Sep 13. Order within 5 hrs 16 mins O Deliver to Indiana - Bloomington 47404 In Stock.



Return policy: Eligible for Return, Refund or Replacement within 30 days of receipt ~

^

Shows what's inside. Item often ships in manufacturer container to reduce packaging. To hide what's inside, choose Ship in Amazon packaging at checkout.





Save up to 10% with Quantity Discounts



Discount tiers start as low as 2 items and are available on over 40 million products.

Join over 700,000 business customers who already save today.

Quantity Discounts on top-rated products

Shop by category

BREAKROOM OFFICE IT PERIPHERALS JANITORIAL & SANITATION

MAINTENANCE, REPAIR, & OPERATIONS APPAREL & SHOES OUR BRANDS



When every detail matters



Select a category to explore options.



Quantity Discounts on top-rated breakroom products

See more >

Shop breakroom categories







Snacks







Coffee

Beverages

Plates, utensils, storage

Spills and clean up

Highly rated

Department

≺ Top Quantity Discounts

Top Quantity Discounts -Breakroom

Department

≺ Grocery & Gourmet Food

≺ Home & Kitchen

Health, Household & Baby
 Care

✓ Industrial & Scientific

✓ Arts, Crafts & Sewing

Appliances

≺ Tools & Home Improvement

< Electronics

✓ Toys & Games

♦ Sports & Outdoors

← Clothing, Shoes & Jewelry

≺ Beauty & Personal Care

≺ Office Products

✓ Garden & Outdoor

≺ Automotive Parts &
Accessories

€ Raby

1-12 of over 7,000 results for Top Quantity Discounts - Breakroom

Amazon's Choice



Amazon Basics 48 Pack AA High-Performance Alkaline Batteries, 10-Year Shelf Life, Easy to Open Value Pack 48 Count (Pack of 1)

★★★☆ ~ 474,029



Energizer 2032 Batteries, Lithium CR2032 Battery, 2 Count

★★★☆ ~ 57,562

\$5⁴⁷ (\$2.74/Count)

✓prime FREE Delivery Tue, Sep 13



Click on an item for bulk pricing details.

6 Count (Pack of 4)

★★★★ ~ 98,081

After placing an order

- Your order may route for review by Procurement Card Services.
 - Card Services reviews orders that:
 - Are over \$4,999 (the P-Card transaction limit).
 - Contain restricted items.
 - In the case of restricted items, Card Services will contact you to request verification that the purchase was approved by a Category Manager.
 - Remember that exception request? Be prepared to provide it.



Wrap-up & resources

Purchasing essentials:

- As purchaser, you are a steward of IU funds and responsible for following IU policy and procedure.
- 2. Whenever possible, use a BUY.IU supplier.
- 3. Unrestricted item not available in BUY.IU? Use Amazon Business (or another non-contracted supplier).
- Item available in BUY.IU but drastically cheaper from another seller? Submit a support form and request an exception.
- 5. Purchasing is here to help! Not sure what supplier to use? Submit a support form.

Amazon Business essentials:

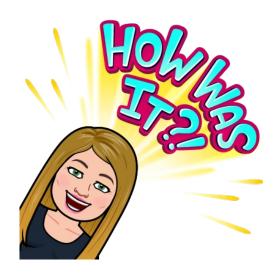
- 1. Amazon Business should **not** be your first stop for shopping, but it's a great option in compliant situations!
- 2. If there are substantial cost savings between an item in BUY.IU and Amazon Business, submit a support form and request an exception.
- 3. Purchases must be made using a P-Card. Do not use or save personal credit cards in Amazon Business.
- 4. It's possible to purchase items in bulk instead of using wholesalers like Sam's Club or Costco.

Resources

- FIN-PURCH-02: University Procurement Contracts
- Policy Feature FIN-PURCH-02 newsletter article
- SOP-PCARD-04: Restricted <u>Items</u>

- Purchasing, P-Card, AP, and SDM Support Form
- Training team email: estc@iu.edu

Thank you!



How was the session?

Let us know by completing a short feedback survey

https://go.iu.edu/azeval

Or scan this QR code with your phone's camera:

