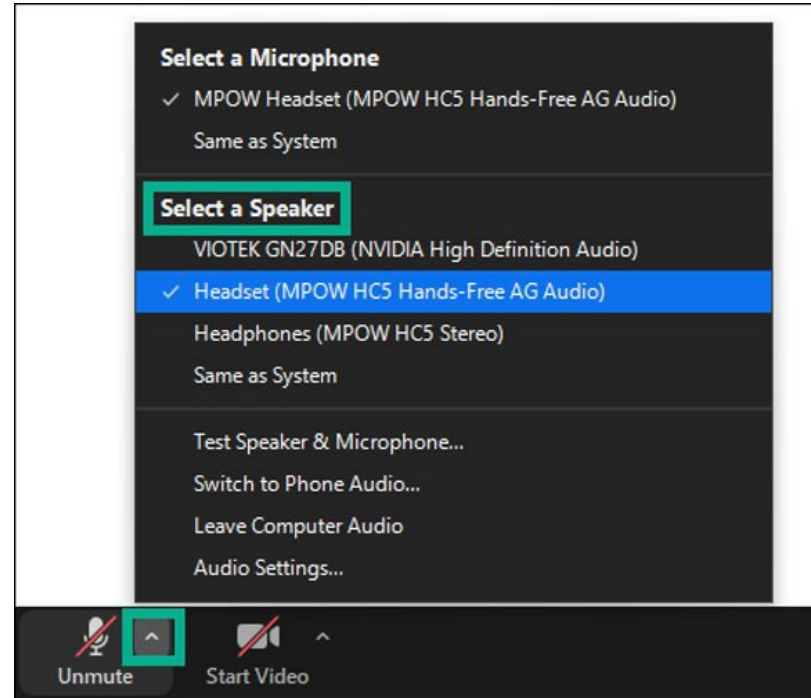# Welcome to the training!

- 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.

- Please use the Q&A to 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

Amazon Guidance for Fiscal Approvers

Procurement Card Services

INDIANA UNIVERSITY

Agenda

- Policy & procedure

- Quick check #1

- Meet Amazon Business

- Subgroup functionality

- Locating orders & receipts

- Quick check #2

- 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 contracted catalog supplier in BUY.IU.

- Describe the benefits of establishing an Amazon Business account.

- Determine if establishing a subgroup for your department is appropriate.

- Manage subgroup members and preferences.

- Locate orders and receipts for past purchases.

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.

- Policies and procedures exist to help us navigate compliance requirements in the course of doing business on behalf of IU.
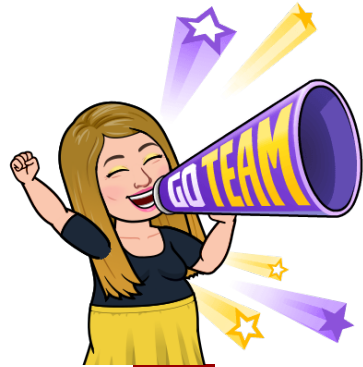
Procurement hierarchy

#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, kickbacks/refunds to IU, guaranteed 1-2 day shipping, etc.

- Purchasing can help you locate a comparable item from a contracted supplier.

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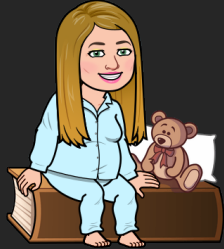
The Training team needed headsets for the office. We found the pair we wanted from CDW-G for $55, the same pair on Amazon for $49.

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 non-contracted 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.

GOT IT
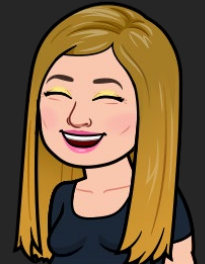
What is a restricted item?

- 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:

1. Anyone working with IU funds is a steward of those 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.

Quick check #1

Question 1

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.
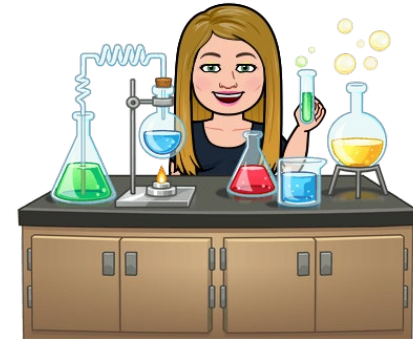
Question 2

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 using personal funds and request a reimbursement.

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 ☎

Are there other benefits?

- Yes!

  - Save your department P-Card as the default payment option.

    - A P-Card is the only valid payment method in Amazon Business.

  - Save frequently-used shipping addresses.

  - Categorize purchases with chart and organization or department information.

  - Request a subgroup and export purchase history.

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.

    - Request an invite by completing a support form. Select "P-Card or Meeting Card" then "IU Amazon Business Account."

  - Check with your department before requesting an account. A departmental account may already exist.

When can I use Amazon Business?

Remember this?

#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.

When to 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.

Purchasing controls

- Orders that meet either of the following criteria will route to the Procurement Card Services team for review:

    - Orders over $4,999 (the P-Card transaction limit).

    - Orders containing restricted items.

- Buyer will be notified that their order has routed for review and prompted to provide an approved exception request.

Subgroup functionality

Admin functionality

- Every Amazon Business user can access and export their own order history.

- Option for departments: request a subgroup.

  - Admins of a subgroup can access purchase history for themselves plus other group members.

Who should request a group?

- Requesting a subgroup is appropriate if three or more users in your department will be making purchases from Amazon Business.

  - Submit a support form using the "P-Card or Meeting Card" then "IU Amazon Business Account" option.

- Each subgroup must have an individual with the Admin role.

  - Admins can add and remove users from the subgroup and view purchasing history for members of the subgroup.

Hello
Select your address

All

Enter keyword or product number

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EN 🌐

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Account for Indiana Univers... ▾

Lists ▾   Business Prime ▾   🛒 0

Best sellers in Office & School Supplies

Amazon Basics Multipurpose Copy Printer
Paper, 8.5 x 11 Inch 20Lb Paper - 8 Ream C...
$36.99 ($0.01/Count) ✓prime
Add to Cart

Amazon Basics 50-Sheet Legal Note Pad,
Wide Ruled, 8.5 x 11.75 Inches, White - Pa...
$13.99 ($0.02/Count) ✓prime
Add to Cart

Hammermill Printer Paper, 20 Lb Copy
Paper, 8.5 x 11 - 8 Ream (4,000 Sheets) - 9...
$38.99 ($0.01/Count) ✓prime
Add to Cart

Account Details

Your Account

Your Orders

Business Settings

Business Analytics

Business Prime

Manage Recurring Deliveries

Bulk Ordering

Category Savings Evaluation

Your Interactions

Manage Your Business

Buying Policies & Approvals

Billing & Shipping

Members

Tax Exemption & Licenses

System Integrations

Quick Actions

Add People

Manage Budgets

Set Spending Limits

Today's Deals

Find special deals
happening now.

Shop deals

Page 1 of 13

As the subgroup
Admin, login to
Amazon Business,
click your name,
then Your Account.

Purchased by your c

https://www.amazon.com/gp/css/homepage.html?ref_=abn_yadd_ad_ya

IUPUC ✏️

Indiana University / IUPUC

⚠️ **Pending requests to join your account**

Approve or deny the request from your team members to join this business account.

Manage requests   Dismiss

🚚 **Billing & shipping**

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

Shared settings   **Receiving (3-Way Match)**

Payment methods

Addresses

Budgets (Blanket POs)

Group admins (1)

👤 IUPUC Amazon Account
     amzncolu@iupuc.edu

Add an admin

Admins can invite users and assign roles by clicking on People in the Members section.

👥 **Members**

Invite o[the] [   ]he business account and organize them into gr[   ] common settings

People

Invitations

Back to IUPUC

Add People to IUPUC

Invite by email　Upload a spreadsheet　Share an invite link

Enter their email addresses

| julcrobe@iu.edu, ✕ | stgmill@iu.edu ✕ | |

Assign their roles

Role	Able to
☑ Buyer (requisitioner)	Place orders or request order approvals.
☐ Admin	Manage people and approvals. Perform Finance and Tech roles.
☐ Tech	Set up system integrations.
☐ Finance	Access order history, invoices, and credit notes.

Tip - You can change people and roles at any time on the People page.

Invite people

Unlock these benefits by adding people to your team.

Save time by delegating purchases.

Maintain control with spending guardrails.

Keep track of purchases **in one place.**

Enter the email address(es) you wish to invite and select what role they should have.

Individuals invited this way do not have to be invited by Card Services via the Support Form.

Locating orders & receipts

Hello
Select your address

All

Enter keyword or product number

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Account for Indiana Univers... ▾   Lists ▾   **Business Prime** ▾   🛒 0

Best sellers in Office & School Supplies

Amazon Basics Multipurpose Copy Printer Paper, 8.5 x 11 Inch 20Lb Paper - 8 Ream C...
$36.99 ($0.01/Count) ✓prime
Add to Cart

Amazon Basics 50-Sheet Legal Note Pad, Wide Ruled, 8.5 x 11.75 Inches, White - Pa...
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Category Savings Evaluation
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System Integrations

Quick Actions

Add People
Manage Budgets
Set Spending Limits

Today's Deals

Find special deals happening now.

Shop deals

Page 1 of 13

After logging in, click your name then Your Orders.

Purchased by your c

All ▾   Enter keyword or product number   🔍

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Account for Indiana Univers... ▾   Lists ▾   **Business Prime** ▾   🛒 0

Your Account › Your Orders

ℹ To view orders placed by users in your business account, select View All Orders below or go to Business Analytics.

Your Orders

🔍 Search all orders   **Search Orders**

[View Your Orders: Paid by You ▾]   Orders   Buy Again   Not Yet Shipped   Digital Orders   Local Store Orders   Cancelled Orders

0 orders placed in [last 30 days ▾]

You have not placed ~~~~~~~~~ months

Orders you've placed
load automatically.

Click the View Your
Orders drop-down to
view group
purchases.

Deals trending on Amazon Business

Page 1 of 9

‹   TNS American Flag 3x5 ft   Gifeen Spinning GIF Art   Sceptre Curved 24"   Fire TV Stick 4K streaming   Sceptre IPS 27" LED   ›

business prime

Hello
Select your address

All

Enter keyword or product number

Deals week is here ▶

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EN 🌐 ▾   Hello, Financial
Account for Indiana Univers... ▾   Lists ▾   Business Prime ▾   🛒 0

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

🔍 Search all orders   Search Orders

| View Your Orders: Paid by You | ers | Buy Again | Not Yet Shipped | Digital Orders | Local Store Orders | Cancelled Orders |

View All Orders: Indiana University

View All Orders: [Your Group]

You have not placed any orders in last 30 days. View orders in past

If you're a member of a subgroup, select the subgroup to see group purchases.

Deals trending on Amazon Business

Page 1 of 9

TNS American Flag 3x5 ft

Cifeez Spinning Gif Art

Sceptre Curved 24"

Fire TV Stick 4K streaming

Sceptre IPS 27" LED

‹   ›

Hello
Select your address

All ▼

Enter keyword or product number

Deals week is here ▶

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EN 🌐

Hello, Financial
Account for Indiana Univers... ▼

Lists ▼   Business Prime ▼   🛒 0

Your Account › Your Or...

ⓘ To view orders

Your Orders

View All Orders: Indiana U

Best sellers in Office & School Supplies

Amazon Basics Multipurpose Copy Printer Paper, 8.5 x 11 Inch 20Lb Paper - 8 Ream C...
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Hammermill Printer Paper, 20 Lb Copy Paper, 8.5 x 11 - 8 Ream (4,000 Sheets) - 9...
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Buying Policies & Approvals
Billing & Shipping
Members
Tax Exemption & Licenses
System Integrations

Quick Actions

Add People
Manage Budgets
Set Spending Limits

-0200713-1410667
Printable Order Summary

ackage

-6988305-3445814
Printable Order Summary

ORDER PLACED
September 14, 202

Select Business Analytics to quickly review subgroup activity or export history.

https://www.amazon.com/gp/css/homepage.html?ref_=abn_bnav_youraccount_btn

Hello
Select your address

All ▾

Enter keyword or product number

🔍

Deals week **is here** ▶

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EN 🌐 ▾

Hello, Financial
Account for Indiana Univers... ▾

Lists ▾   Business Prime ▾   🛒 0

Business Analytics

Home   **Spend Visibility**   Reports ⇕

Report types

↰ ↱ ↺

Reconciliation

ement Dashboard / 🔖 Original dashboard

Orders

This dashboard shows data over the pas

ially cancelled

Shipments

Returns

Total Spend (TTM)   Shipping   Refunds

rage Order Size (T...   Number

Related offers

You can't access this visual because the data is restricted. Contact the dataset owner to update the row-level security rules.

Savings

Credentials

Your reports

Download history

Learn more
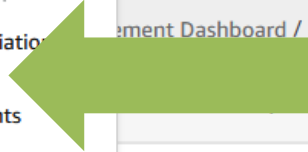
This page will default to the Spend Visibility tab.

Click Reports, then select Orders.

Shipping Cost Savings

Spend by Month and

javascript:void(0)

Hello
Select your address

All ▾

Enter keyword or product number

Deals week is here ▶

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Busi...

Update the Time period to see additional history.

Click an Order ID link to view the invoice/receipt in a new tab.

Export data in a CSV file by clicking Download CSV.

Reports ⇕

...yment, product, and seller info on an order.
...you need? See our help page

Time period

Month to date ▾

Download CSV

Orders

Add title

🔻¹
Filter

Order Date ⓘ | Order ID ⓘ | Account ...der Quantity ⓘ

Week to date

09/13/2022 | 113-1795144-1338607 ▾ | IUPUC

≣≣
Adjust columns

Past 7 days

09/13/2022 | 113-4901717-1869807 ▾ | IUPUC

Month to date

📄
Get order documents

09/13/2022 | 113-7706047-2697820 ▾ | IUPUC

Past 4 weeks

Last Month

09/12/2022 | 114-7577471-4936254 ▾ | IUPUC

Quarter to date

Add new filter

Past 12 weeks

Next page →

Year to date

Submit

Past 12 months

Remove all filters x

Custom Range

‹ ›   ‹ ›

Quick check #2

Question 3

When is it appropriate to request a subgroup in Amazon Business? Select all that apply.

A. You are the sole person in your department purchasing goods from Amazon Business.

B. Your department has at least three users making purchases from Amazon Business.

C. You are a fiscal approver who needs to be able to review the purchase history of individuals in your department.

Question 4

True or false: IU staff can make purchases from Amazon Business using their personal credit card.

A. True – as long as the purchase is being made in Amazon Business it doesn't matter what payment method is used.

B. False – Purchases must be made using a P-Card. Personal cards should never be used in Amazon Business.
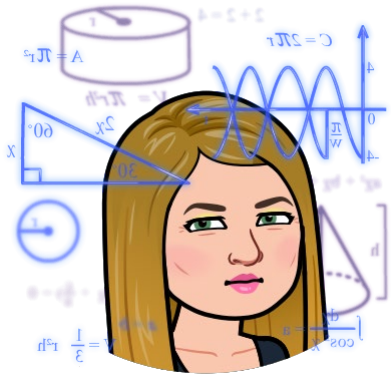
Wrap-up & resources

Purchasing essentials:

1. Anyone working with IU funds is a steward of those 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.

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. If your department has 3 or more buyers, request a subgroup via the Support Form.
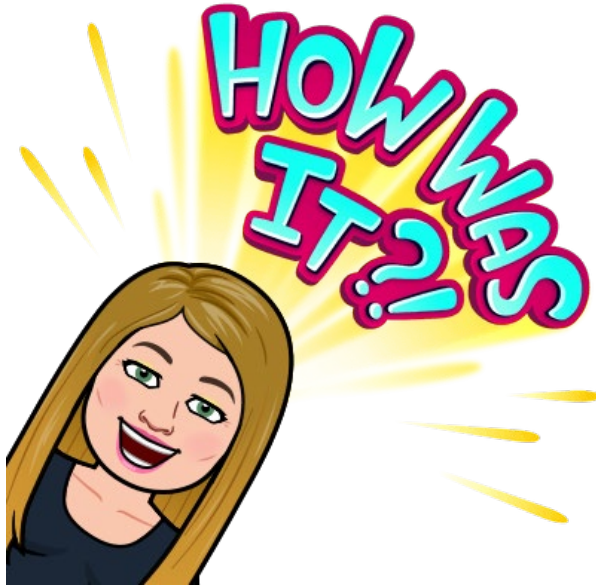
Resources

- [FIN-PURCH-02: University Procurement Contracts](#)

- [Policy Feature FIN-PURCH-02 newsletter article](#)

- [SOP-PCARD-04: Restricted Items](#)

- [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: