# SIVERSITY OF EXCHANGE

Amazon Business Punchout
Training

Revised 5/17/2024

NIVERSITY OF ELAWARE.

#### In This Guide **TOPIC** SLIDE # **Joining the UD Amazon Business Account Error Messages Shopping on Amazon Business** <u>9</u> **Checkout Experience** <u>14</u> **Halted Orders** <u>17</u> **Buying Policies** <u>20</u> **Business Account Navigation** <u>24</u> **Your Orders** <u>26</u> **Business Analytics** <u>29</u> **Business Customer Services** <u>32</u>



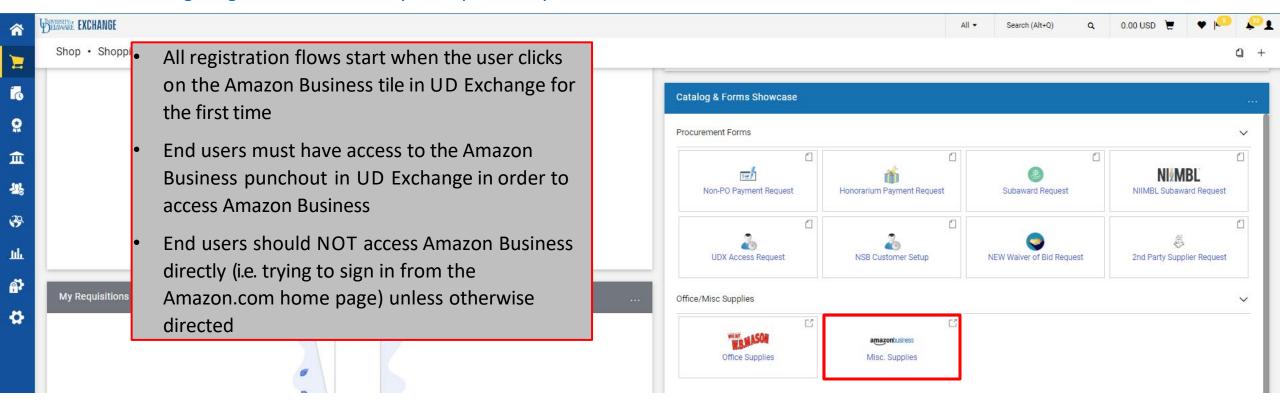
# Joining the University of Delaware Amazon Business (AB) Account





### How to Access Amazon Business

Amazon Business is integrated in UD Exchange. All users will access Amazon Business through UD Exchange regardless of how they have previously accessed Amazon.



NOTE: you may receive a pop-up page error message when punching out to Amazon. Please enable pop-ups to remedy this issue.

If you already have a profile in the University of Delaware AB account, you can disregard this and the next pages regarding registration.





# Amazon Business Registration Scenarios

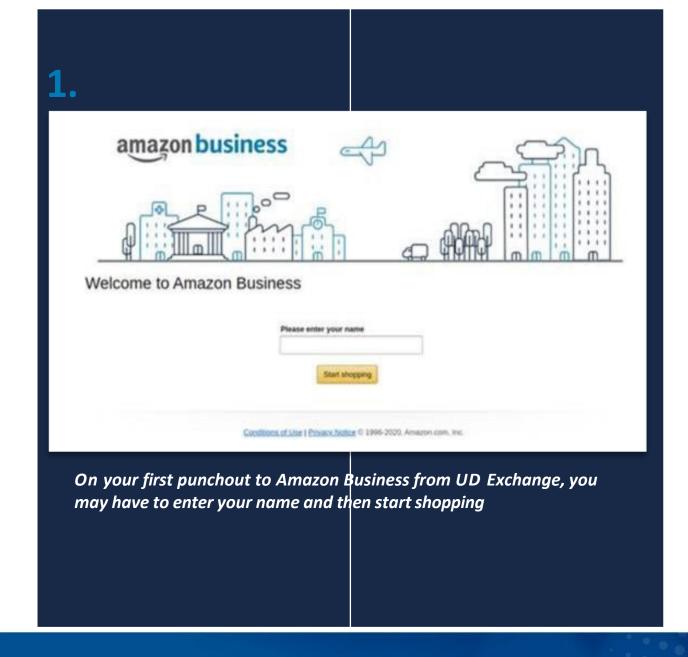
Depending on how an end user has used their work email on Amazon.com or Amazon Business in the past, they will be prompted through the corresponding registration flow.

Persona	Objective
New User	Has never used <u>@udel.edu</u> email address on any Amazon account
User to Convert	Amazon.com User ( <u>@udel.edu</u> email address linked to an Amazon.com account) whose order history will be migrated to the central University of Delaware AB Account
User to Split	Amazon.com User ( <u>@udel.edu</u> email address linked to an Amazon.com account) who would like to transfer all previous order history and account information to a personal email address, freeing up the business email and starting with a clear profile in the central University of Delaware AB Account
User to Migrate	Amazon <u>Business</u> User ( <u>@udel.edu</u> email address currently linked to an Amazon Business account) who needs to migrate account to the central University of Delaware AB account.





## **New User**







## **User To Convert**

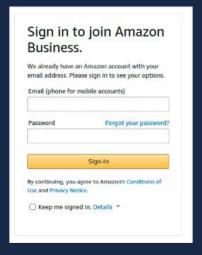
1.

amazonbusiness

Misc. Supplies

Punchout from UD Exchange to AB





The system recognizes the email. Sign in with existing password

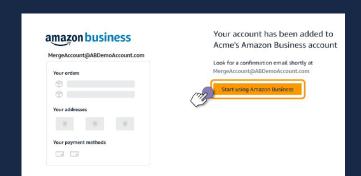
3.



Choose Organization Name business shopping only, join this account to keep the same log in info and order history

4.





Once completed with this process, you will able to shop in the Amazon Business account





# User To Split

1.

amazonbusiness

Misc. Supplies

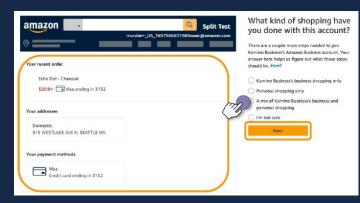
Punchout from UD Exchange to AB

2.



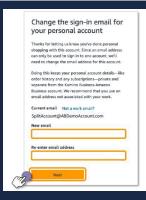
The system recognizes the email. Sign in with existing password

**3.** 



Choose option depending on whether the order history is personal or a mix of personal and Business purchases.

4.



Personal account email address updated

You'll now use this email to sign in to Amazon and anywhere else you use Amazon to sign in.

Finish joining Amazon Business

Complete the process of changing the email on your Amazon.com account to a personal email (e.g. Hotmail, Gmail, etc.) that is not associated with Amazon.





# **Error Messages**





## **Error Messages**

This section of the account provides additional detail regarding the status of all orders placed

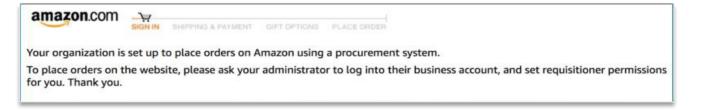
#### **Amazon Error**

 End User is receiving this message because they are attached to a separate Amazon Business account and need to be invited directly to the AB account before utilizing UD Exchange to punchout to AB.

#### **Amazon Error**

 End User is trying to place an order outside of UD Exchange after they registered their account









# **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**

• Once Business Prime Shipping has been purchased, it provides Free Two-Day Shipping on eligible items for all users in the business account. There are multiple pricing tiers to meet the needs of businesses of all sizes. Click to learn more.

#### **Buying Policies**

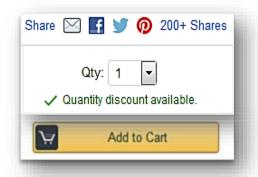
Customized Amazon Business to our organization's buying standards and procedures.
 Features include approval workflows, negotiated pricing, and preferred suppliers and preferred products.

#### **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



# 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

 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.



# **Search & Browse Optimization**

Optimizing search functions in Amazon Business allows you to find the best products to meet your needs

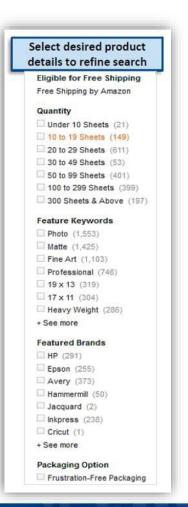
and compare prices to find the best value

Amazon is the "everything store." With such a large selection, we do our best to make it easy for you to find what you're looking for.

#### Recommended filters:

- Business Sellers
- Prime Eligible
- Brand
- Average Customer Review/Rating
- Diversity Credentials



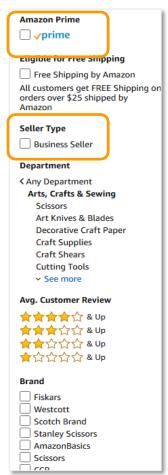




# **Search Optimization**

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

- Maximize Savings! Search All Departments & try using generic descriptors instead of brand names
- 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
- To compare offers, scroll down & select Used & new to pull up the Offer Listing page







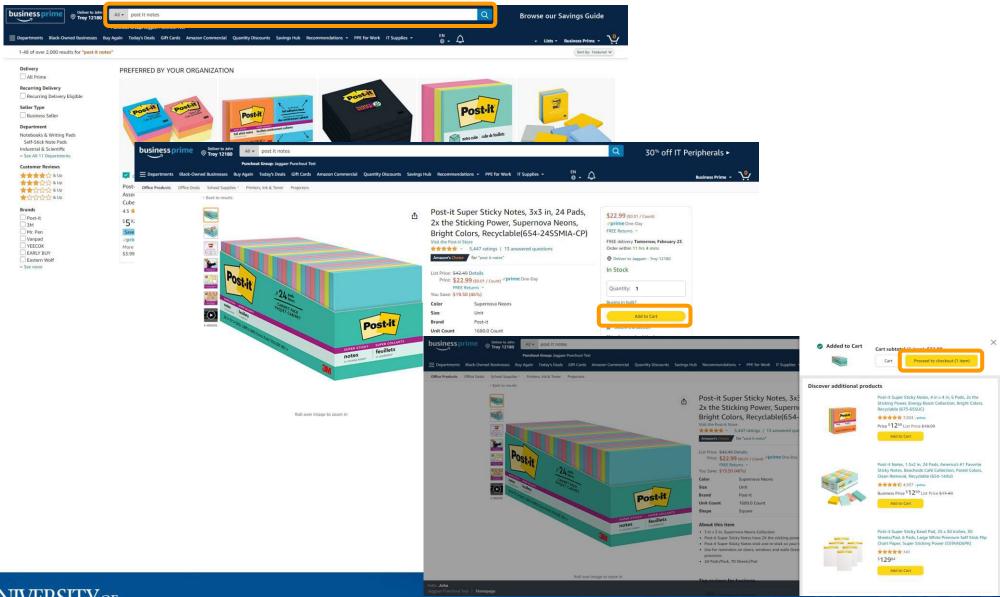


# **Checkout Experience**



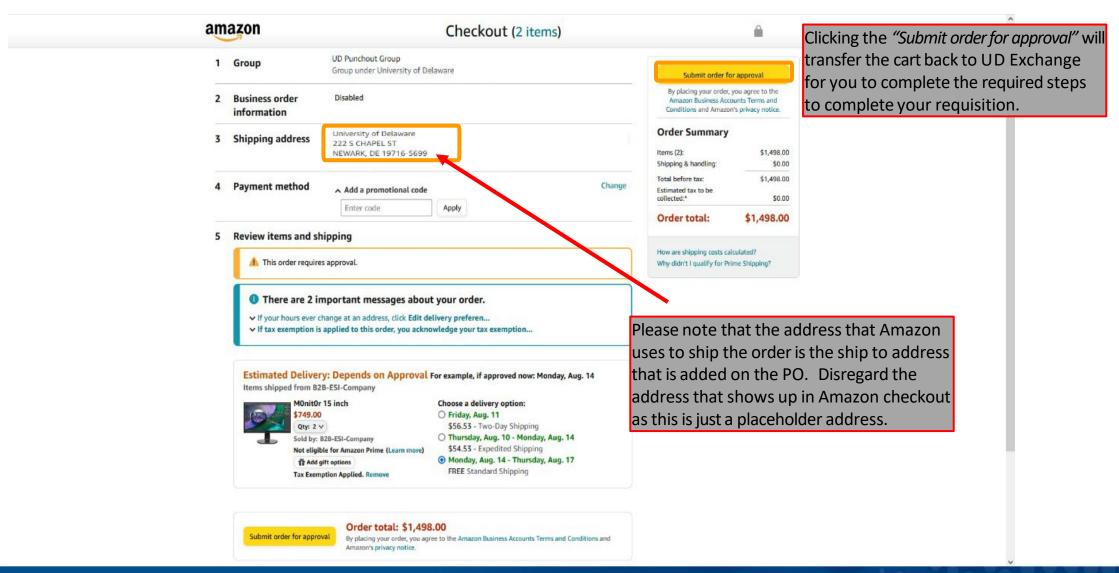


# Search for Items, Add Item to Cart and Proceed to Checkout





# Submitting Cart to UD Exchange and Completing Requisition







# **Halted Orders**





## **Halted Orders**

#### There are five instances in which orders can be halted/canceled

- **Safeguards** If the approval is not completed within the seven-day cart lock, and the order falls outside of the safeguards (set by your organization) at the time of approval, the item or order will be halted and a new order will need to be created and submitted.
- Multiple PunchOut Sessions Multiple PunchOut sessions can result in a canceled order. When shopping on Amazon
  Business through UD Exchange, make sure to use one PunchOut Session per order.
- Changing or Modifying Cart If PO is sent with deleted line items or modified quantities (modifications occur in UD Exchange after cart is transferred from Amazon Business), the order will be rejected and a new order will need to be created and submitted.
- Address on Final PO Differs From Address at Checkout If the checkout address is in the contiguous US, but the address on the final PO is outside the contiguous US, the order will be canceled and a new order will need to be created and submitted with the correct shipping address.
- **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 in Amazon Business and the item is set for next-day delivery, the order will be canceled and a new order will need to be created and submitted.





### **Halted Orders**

Amazon Business sends this email if an order hits one of the business rules (called "Safeguards") set by our organization.

#### **Things to note:**

- Refer to details provided in the email or contact Customer Service for more information.
- If an Amazon Business order has been halted, the end user will need to start over and place a new order.



Your Account

#### Order Information

Purchase Order / Reference: C0000366124

#### Hello Amy Gaffney,

Thank you for shopping with Amazon.com. Your item(s) cannot be ordered at this time. Itemized order details are below.

#### Your order has been halted

The item(s) cannot be ordered due to a change from the time the order was placed, and when it was processed. Item availability and price can change within the Amazon marketplace, and our attempt to find a replacement item was not successful. Common reasons for this error are a change in: available quantity, item price, or another situation. Please contact your organization if you have any questions.

#### Items that will not be shipped

There wasn't enough in stock to fill your order and we couldn't find a replacement. Try ordering it again.



SquareTrade 3-Year Musical Instruments Accident Protection Plan (\$200-250)

1.0 of the above will NOT be ordered.

There wasn't enough in stock to fill your order and we couldn't find a replacement. Try ordering it again.



# **Buying Policies**





## Restricted Policies



Administrators can customize messaging (up to 120 characters) to let end users know IF and WHEN you can purchase certain categories on Amazon Business





# Organization Blocked 👺



Hard blocking product categories prevents an end user from adding these product to your cart. The add to cart option will appear greyed out for any product categories that are blocked.



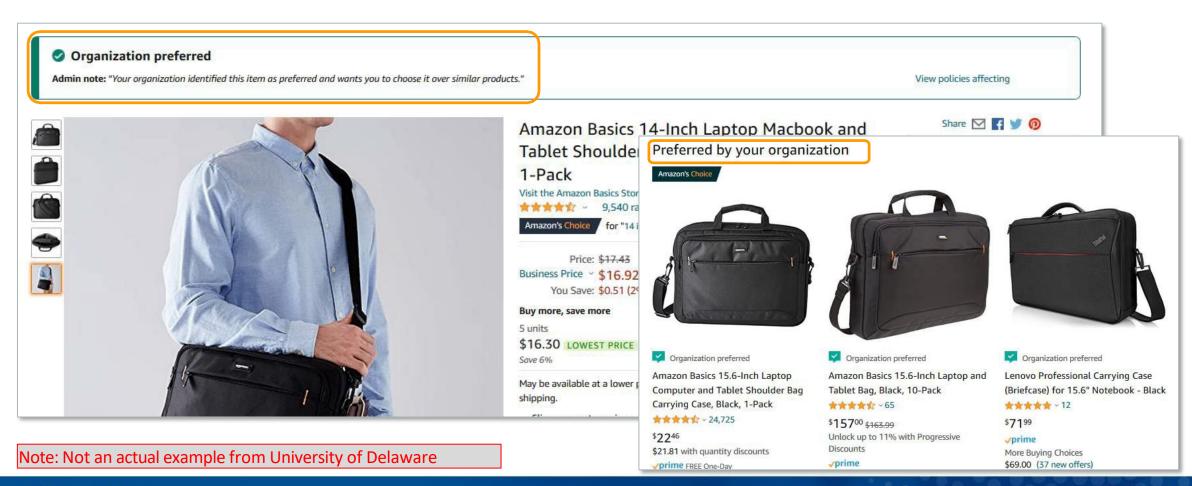




# Preferred Products



Administrators may mark products as preferred to ensure you can easily find what you are looking for. This messaging is visible throughout the shopping experience, search results, and on product detail pages.



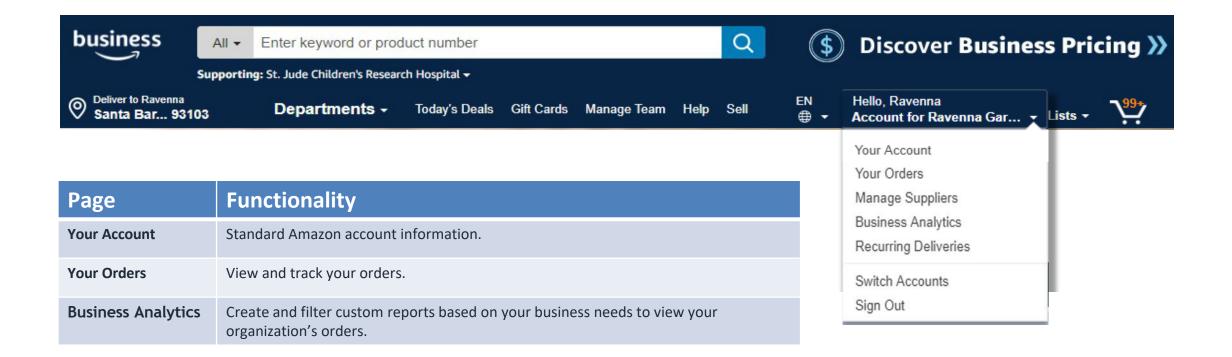


# **Business Account Navigation**





## **Business Account Navigation**







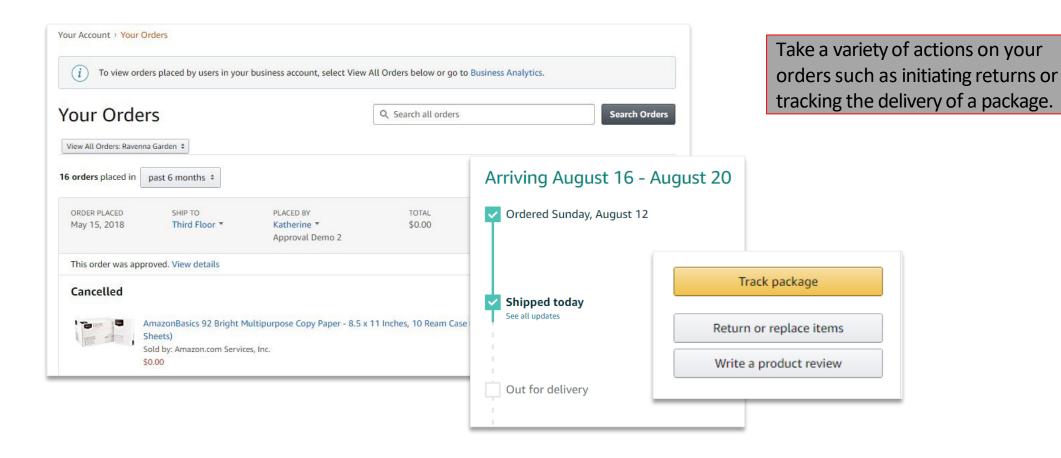
# **Your Orders**





## **Your Orders**

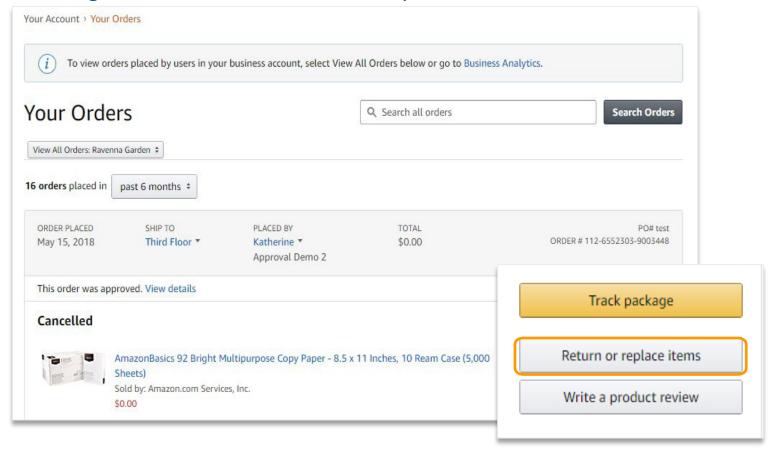
This section of the account provides additional detail regarding the status of all orders you have placed within the Business Account.





## Return an Item

#### Navigate to Your Orders from the dropdown







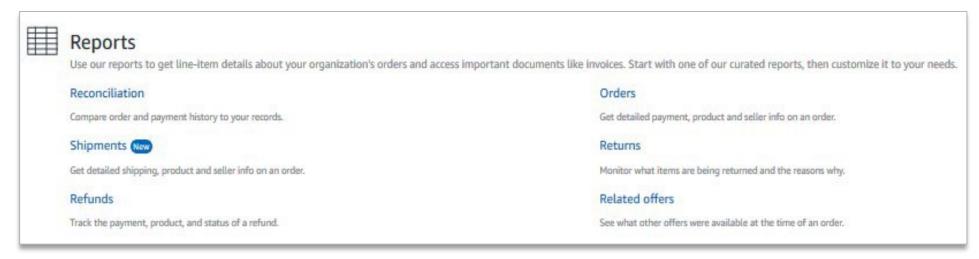


# **Business Analytics**





## **Amazon Business Analytics**



#### Amazon Business Analytics provides the ability to:

- Aggregate purchases to compare and track spending 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



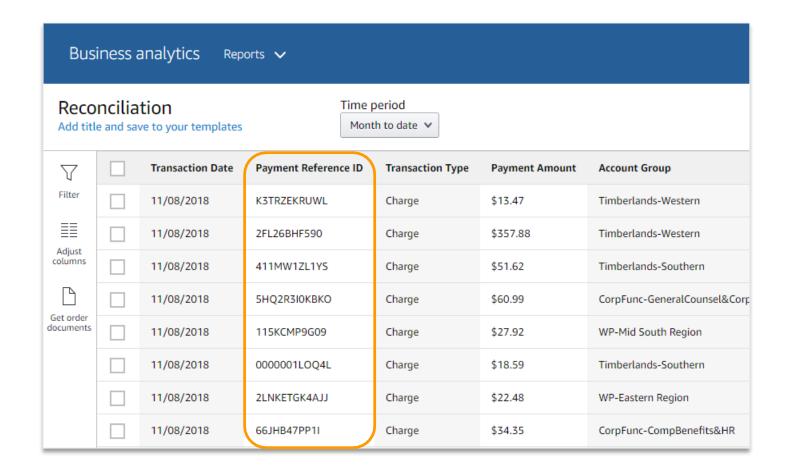


# Reporting & Reconciliation

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 the required information







# **Business Customer Service**

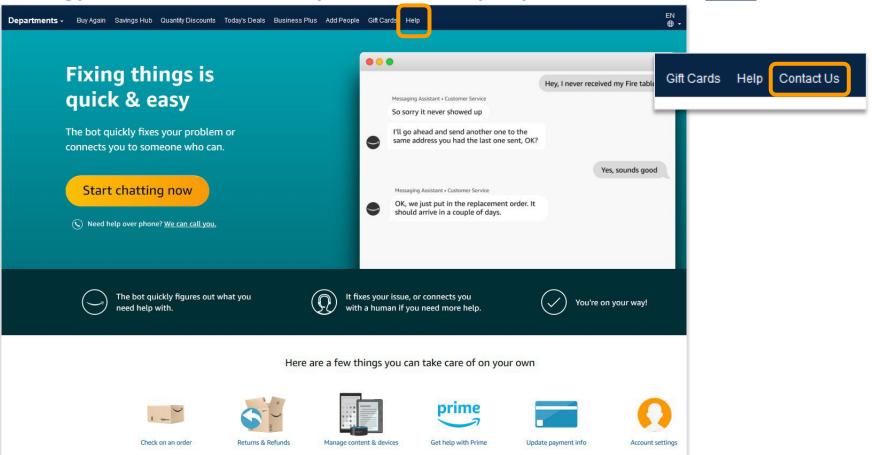




# **Business Customer Support**

Dedicated U.S. based <u>Business Customer Support</u> can be reached in several ways including email, chat, and phone.

Not sure what you're looking for? Learn more about the features and benefits of Amazon Business HERE.







# **Amazon Business Customer Support**

### Contact Business Customer Support: <u>CLICK HERE</u>

• 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

#### Call Business Customer Support:

• (888)282-7853





#### **Questions:**

procurement@udel.edu

#### **Resources:**

- Procurement Services Website
- Shopping Using Punch-Out Catalogs
- Shipping to Home Addresses
- Amazon Best Practices & Troubleshooting Tips
- Amazon Gift Cards
- Amazon Registration
- Amazon Update Your Name



