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Accessing the San Diego Unified School District Amazon Business Account
Onboarding Request Process

Email Will Raynor (wraynor@sandi.net) with the following information:

1. Your name and your Principal’s name
2. The school site you’re requesting to join, or requesting users be added to
3. Documentation of your Principal/Supervisor’s approval
4. Indicate whether your school’s teachers use Clever or not
   • If no, please note which teachers or personnel you’d like added

Next Steps for PCardholders

1. Accept your invitation and join the SDUSD business account. Ensure your Principal has also accepted their invitation.
2. Add your PCard as the shared payment method for your group
3. Setup the approval workflow for your school group
4. Onboard your teachers
5. Approve orders

Amazon business
Email Invitation

This was sent from business@amazon.com so check your spam or clutter folder if you’re not seeing it in your inbox
4 Possible Registration Scenarios

New to Amazon

**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

Next steps will vary if you created an Amazon account with your San Diego USD email address in the past.
Existing Amazon.com account with @sandi.net email address

**Scenario 2**
Convert your existing Amazon Account

Sign in to the existing account that you use for business purchases on Amazon.com.

![Convert my existing Amazon account](image)

Start shopping

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.

![Create a separate business account](image)

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

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.
Existing Amazon Business account with @sandine.net email address

- When user clicks on **Join**, he/she is taken to a page to download order history and start the process of moving.

- With one-click, the account is automatically de-registered and user is automatically to the official account.

- Same user credentials work, no password reset needed!
Update your username in Amazon Business

If you registered using your school site name rather than your first and last name, please follow the steps outlined below to update:

1. Head to [www.amazon.com/business](http://www.amazon.com/business) and login

2. Hover over **Hello** in the upper right corner of the page and select **Your Account** from the drop-down menu

3. From this page, select **Login & Security**

4. Click the **Edit** button beside **Name:**

5. Enter your full name in the **Name** field and click **Continue**. This will update your account information.
Process for Pcard holders only
Add your Pcard as a Payment Method
Configure Payment Method

Pcard holders are responsible for adding their Pcard in Business Settings

Instructions:

1. Login to your business account and click Business Settings from the drop down menu

2. Click Shared settings and select Shared Payment Methods and Individual Addresses

   Once Shared settings are turned on, teachers cannot add their own payment methods for a purchase during checkout. They can only choose from the option you configure.

3. Click into Payment methods and add your Pcard

4. Click Add your card to complete the process
Process for Principals / Pcard Holders
Setup the Approval Workflow
Setup Approval Workflow

Pcard holders are also responsible for inviting their Principal and establishing the approval workflow for their school in Amazon Business.

Instructions:

1. Login to your business account and click Business Settings from the drop down menu
2. Scroll down to Buying Policies and click Buying Policies & Approvals
3. Click Add Policy and select Order Policies from the left navigation
4. Click Spending limits for orders and fill out all required fields below.
   - **Policy Name**: Principal > Pcard Holder
   - **Message for buyers**: Amazon orders require approval. Please continue to submit your order for approval.
   - **Spending Limit**: Orders over $0
   - **Level 1 Approver**: Principal
   - **Level 2 Approver**: Pcard Holder (you)
**Edit Existing Approval Workflow**

Process for Principals/Pcard Holders to edit an existing approval workflow

**Instructions:**
1. Login to Amazon Business and navigate to **Business Settings**
2. Scroll down to Buying Policies and click **Buying Policies & Approvals**
3. Beside the policy named **Principal > Pcard holder** click **Actions**

4. Ensure the **Spending limit** is set to “$0”
5. Update **Level 1 approver** to your **Principal**
   - They must be a member of the business account to be configured as an approver
   - Use their name or email address to find them
6. Update **Level 2 approver** to your name
7. Click **Save** to finalize the policy
Process for Pcard holders only
Onboard your teachers
Onboard all of your teachers through Clever

1. Instruct your teachers to click on the Amazon Business tile in Clever to establish their access
2. Send them the Educator Guide linked here
Approve Orders
Approve Orders: Principals & PCard Holders

Any time an order is routed to you for approval, you'll get an email notifying you of the request. These requests can be approved directly from the email or by navigating to Approve Orders in the top right drop down of your account.

• Once a purchase is submitted for approval, the order is held for 7 days. Approval requests that take longer than 7 days will be automatically rejected.

• Any time you reject an order, you can send comments back to the requisitioner explaining why the order was rejected.

• When an order is approved, an order confirmation email is sent to the requisitioner letting them know that their order was approved and is now being processed by Amazon.

• If you have multiple orders awaiting approval, you have the option to approve or reject them in bulk.
Approve Orders: Principals & PCard Holders

Take action to approve or reject the entire cart or reject line items that are not needed, non-compliant, or too expensive.

A. Click Approve or Reject to take action on the whole cart at once

B. OR use the Mark as Rejected dropdown menu to reject specific line items in an order request.

- Any time you reject an order, you can use the comments box to communicate with the requestor about why their request was rejected
Assign a Temporary Approval Delegate
As an approver, it’s very important to “assign a temporary delegate” if you are going to be out of the office.

1. Navigate to **Approve Orders** from the dropdown menu in the upper right corner of your homepage

2. Scroll down to Approval delegation and click **Assign a temporary delegate**

3. Enter your email into the **Approver** field

4. Enter the email of the temporary delegate under **Delegate**

5. Enter the **Start date** and **End date** for the delegate to be in place

**Note:** The delegate you select must be a member of the business account before they can approve orders.
Site Change Process
SDUSD School Site Change Process

Email **Will Raynor** ([wraynor@sandi.net](mailto:wraynor@sandi.net)) with the following information:

1. Your name and your Principal’s name
2. The name of the new school site you’d like to be added to
3. The name of the old school site you’d like to be removed from
4. Email with your Principal/Supervisor’s approval
5. If the school Pcard approver is moving sites, they must ensure there is a new approver in place
Shopping Best Practices
The SDUSD business account has Amazon 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 refining your search by Prime eligible items to get fast free shipping.

**What’s not Included?**

- Business Prime Shipping does not include additional Prime benefits such as Amazon Fresh, Pantry, Video, or Music.
Search & Browse Optimization
Filter your search results to quickly find the best products to meet your needs

Use broad search terms to uncover best value
For example: search for sticky notes instead of Post-Its to see all available options.

Recommended Refine by Filters
- Business Sellers
- Prime Eligible
- Average Customer Review/Rating
- Diversity Credentials
- Brand

See offers from Diverse Suppliers
Meet sourcing requirements by purchasing from sellers that have been recognized by a third party (i.e. U.S. federal government or other standard-defining organizations).

amazon business
Maximize savings in the Amazon Business marketplace

**Compare Offers**
- If there are multiple offers available for a product in the marketplace, you’ll see a link labelled “Used & new (#) from $X.XX”
- Click this link to navigate to a page where you can compare all available offers on one screen. Filter by product condition or shipping options, see available quantity, and compare delivery times to ensure you’re making the best selection.

**Business Pricing and Quantity Discounts**
- Business pricing and quantity discounts are only available to registered business account customers on Amazon. 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.
District Approved Shopping Lists

Check the district approved shopping lists “organization preferred” to ensure you’re authorized to purchase items from these restricted categories.

Accessing the Lists:
1. Login to Amazon Business and click Lists
2. District approved Lists are available under “Shared with organization” or hyperlinked below
3. Browse the Lists and click Add to Cart beside any items you’d like to add to your order.

District Approved Lists:
- District Approved Snacks
- Janitorial Sanitation Approved Products
District Restricted Products

The district has restricted several product categories that should not be purchased on Amazon Business. Orders with restricted items will automatically route for Procurement approval and will likely be denied.
District Preferred Products

Some specific products may be marked as preferred. This is configured by SDUSD Procurement. This messaging is visible throughout the shopping experience, search results, and on product detail pages.
Business Analytics

Helpful tool for month end reconciliation
Available Reports
Start with one of our curated report templates and customize to meet your needs

Reports
Use our reports to get line-item details about your organization's orders and access important documents like invoices. Start with one of our curated reports, then customize it to your needs.

Reconciliation
Compare order and payment history to your records.

Orders
Get detailed payment, product and seller info on an order.

Shipments
Get detailed shipping, product and seller info on an order.

Returns
Monitor what items are being returned and the reasons why.

Refunds
Track the payment, product, and status of a refund.

Related offers
See what other offers were available at the time of an order.

Savings
Track your savings on Amazon Business.

Credentials
Get detailed seller diversity and product sustainability information for all your purchases on Amazon Business.
Filter Functionality

Use filters to search your order history or customize reports

Available Filters
- Account Groups
- Account Users
- ASIN
- Company Compliance
- Order Date
- Order ID
- Order Type
- Payment Reference ID
- PO Number
- Product Categories
- Refund Date
- Refund Reason
- Refund Type
- Seller Credentials
- Seller Name
- Title
- Transaction Date
- Transaction Type

![Filter screenshot](image-url)

<table>
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<th>Order Date</th>
<th>Order ID</th>
<th>PO Number</th>
<th>Payment Date</th>
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<th>Payment Instrument Type</th>
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<td>52002362</td>
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<td>11/20/2019</td>
<td>$17.98</td>
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</table>
Adjust Columns

Adjust the columns in your custom reports to highlight important data for your reports.

The Orders report has more than 70 available columns:

- Click + to button to see sub-categories
- Click - to de-select a section of columns
P-Card Reconciliation
More easily reconcile your purchasing card using the customizable Reconciliation report

Add **Filters** and **Adjust Columns** to more easily match Amazon orders to the transactions on your monthly p-card statement.

### Reconciliation

<table>
<thead>
<tr>
<th>Transaction Date</th>
<th>Payment Reference ID</th>
<th>Transaction Type</th>
<th>Payment Amount</th>
<th>Account Group</th>
<th>Payment Instrument Type</th>
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<tbody>
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<td>10/23/2019</td>
<td>5BA39W3ERUS</td>
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<td>Visa</td>
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<td>Creekmoor Elementary</td>
<td>Visa</td>
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<td>Charge</td>
<td>$163.05</td>
<td>Eagle Glen Elementary</td>
<td>Visa</td>
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<td>EAKYN5wKYOAH5nH4</td>
<td>Charge</td>
<td>$89.99</td>
<td>Child Nutrition</td>
<td>Visa</td>
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<td>$107.98</td>
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<td>10/23/2019</td>
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<td>$11.07</td>
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<td>Visa</td>
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<td>Charge</td>
<td>$13.97</td>
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<td>Visa</td>
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<td>10/23/2019</td>
<td>24F01TH1AX</td>
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<td>$35.98</td>
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<td>Charge</td>
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<td>$152.94</td>
<td>Peculiar Elementary</td>
<td>Visa</td>
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<tr>
<td>10/22/2019</td>
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<td>Charge</td>
<td>$42.70</td>
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<td>6RY522KX85</td>
<td>Charge</td>
<td>$124.49</td>
<td>Raymore-Peculiar High School</td>
<td>Visa</td>
</tr>
</tbody>
</table>

If you require Printable Order Summaries for matching purposes, click **Get Order Documents**. Check the box beside the orders you need documentation for OR select all at the top. This will cause a zip folder with these documents to download to your computer.
Questions about an order?

Contact Amazon Business Customer Support
Amazon Business Customer Support

Contact Business Customer Support for questions related to orders, returns, refunds, or delivery.

Click HERE to chat with Business Customer Support
Returns process

Initiate a return from the Your Orders page by clicking the Return or replace items button below.
Add San Diego Unified School District as your AmazonSmile beneficiary
Follow the steps below to ensure 0.5% of your purchase is donated back to SDUSD

What is AmazonSmile?
AmazonSmile is a website operated by Amazon with the same products, prices, and shopping features as the Amazon you know. The difference is that when you shop on AmazonSmile, the AmazonSmile Foundation will donate 0.5% of the purchase price of eligible products to the charitable organization of your choice.

How do I shop on AmazonSmile?
1. To shop at AmazonSmile simply go to smile.amazon.com from the web browser on your computer or mobile device.
2. Search for your San Diego Unified School District click Select
3. Bookmark smile.amazon.com/business to ensure all purchases are eligible for donation.

Confirm your selected charity
Any time you are logged into AmazonSmile, your charity is displayed below the search bar. Use the drop down to learn about your selected non-profit, see how much your shopping has contributed, and edit the charity you are supporting.
Bulk Ordering Process
Bulk ordering

- Create bulk book orders by searching for **ISBNs in batches** OR **uploading an Excel file**

- Order form can process up to **49 different products** for **999 total items**

- Only **ISBN** and **quantity** are required

- Get price, availability, shipping, and delivery information in real-time

- Edit or filter order details and **submit shopping cart for approval**

*Amazon business*
Ship items to more than one address

Select a shipping address

Is the address you’d like to use displayed below? If so, click the corresponding “Deliver to this address” button. Or you can enter a new shipping address.

Or ship to an Amazon Pickup location

Amazon Pickup locations offer package pickup at self-service Amazon Lockers and at staffed locations. Search for an Amazon Pickup location near you

Olivia Pearson
1 LINCOLN ST
WEWORK C/O AMAZON 32ND FL
BOSTON, MA 02111-2901
United States
Phone:
Edit delivery preferences

Deliver to this address

Choose where to ship each item

Forgot someone? Enter a new shipping address

<table>
<thead>
<tr>
<th>Type/Item/Price</th>
<th>Qty.</th>
<th>Send to</th>
</tr>
</thead>
<tbody>
<tr>
<td>AmazonBasics Pre-sharpened Wood Cased #2 HB Pencils, 150 Pack</td>
<td>1</td>
<td>Olivia Pearson, 1 LINCOLN ST, BOSTON</td>
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<tr>
<td>AmazonBasics Pre-sharpened Wood Cased #2 HB Pencils, 150 Pack</td>
<td>1</td>
<td>Olivia Pearson, 1 LINCOLN ST, BOSTON</td>
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<td>AmazonBasics Pre-sharpened Wood Cased #2 HB Pencils, 150 Pack</td>
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<td>AmazonBasics Pre-sharpened Wood Cased #2 HB Pencils, 150 Pack</td>
<td>1</td>
<td>Olivia Pearson, 1 LINCOLN ST, BOSTON</td>
</tr>
</tbody>
</table>

amazonbusiness
San Diego Unified School District
Checkout Process - *What teachers will see*
Start shopping
Browse by **department** or use the **search bar** to find your requested items
Build your shopping cart
Once you’ve found what you need click Add to Cart
Begin checkout process
Review shopping cart and click **Proceed to checkout**
Choose a group

If you purchase for multiple schools or departments you’ll be prompted to **Choose a group** during the checkout process.

Select **Continue** to proceed to checkout.
Code your order
Fill in all **Business order information** fields and select **Continue**

- **Department**
  Please enter department name here

- **Justification for order:**
  Add relevant details about your request to expedite the review process
Select a shipping address or enter a new address.

Be sure to **add delivery instructions** and update **weekend delivery preferences**.

Click **Deliver to this address** to continue.
Select a payment method

Choose the pre-loaded payment method and click **Continue**

You’ll have an opportunity to review your order on the next screen.
Choose delivery options

Select your **Shipping Options** and click **Continue**.

Take advantage of **prime** shipping when possible
Review and confirm order details

Be sure to double check:

✓ Payment method
✓ Shipping address
✓ Business order information
✓ Requested items
✓ Item quantities

Click **Submit Order for approval** to continue
Approval expectations

• You’ll receive an email confirmation when your order has been submitted for approval and a second email when the order has been approved or rejected.

• Estimated delivery timeline depends on how quickly the order is approved. There is a 7 day window of time for this process to take place. See district buyer guide pg. 26 for more information.

• Carts not approved within 7 days will expire and will need to be resubmitted.
View and track your orders

Check the status of an order at any time via **Your Orders**.

- Take a variety of actions on your orders such as initiating returns or tracking the delivery of a package.
- The default here is **View your Orders: Paid by You**. Toggle to **View All Orders** if you’re looking for an order and can’t find it.
Thank You