Amazon Set-Up and Conditions

Rev 8/21/2023

Overview

For a variety of reasons, the university would prefer you use vendors other than Amazon, so there are some hurdles to making an Amazon purchase.

You may only purchase from Amazon via a tax-exempt Business Prime account requested through the university. You may only use your P-Card as the single payment source on that account.

When shopping under that account, most items will appear as "Organization Restricted."

All Organization Restricted items are reviewed by the university and require a written justification. See the *Purchasing Restricted Items on Amazon* section below for details.

The approval process can take up to 24 hrs. sometimes longer. You will be notified of your approval status via email. If your order includes different items, approved items will be released to Amazon for fulfillment. Unapproved items will not be released, and they will be omitted from your order and billing.

Amazon's estimated shipping date starts AFTER the university approves the order and releases it to Amazon. As noted in the *Purchasing <u>Un</u>restricted Items on Amazon* section below, the few items which are NOT listed as "Organization Restricted" will NOT require the above conditions or approval process – just order them as you would from any vendor.

Additional Details:

The university expects you to find your items on iBuy before resorting to Amazon – BUT – we are limiting the number of grads who have access to iBuy. iBuy is a university purchasing system which allows the use of CFOAPs to make purchases, has fewer restrictions, and discount pricing. If the Approver for your Amazon order finds the item on iBuy, they will deny approval. Most of the items you purchase on Amazon will not be found on iBuy, so typically it will not be an issue, but be aware, an item's iBuy availability and pricing may affect the approval of your Amazon order. If your Amazon order is denied due to iBuy availability, staff with iBuy access can either order the item on your behalf, or help you justify Amazon as the necessary vendor. For more details, see subsection *Purchasing Restricted Items – Check iBuy First.*

Requesting an Amazon Business Prime Account Through the University

- If you have a personal Amazon account tied to your @illinois.edu address, you MUST assign it to a different email address prior to requesting a Business Prime account. Your Business Prime account will be tax exempt, and you cannot legally apply/share that tax exemption for personal purchases.
- 2. Follow the link below to request a university Business Prime account. Read the brief overview and click the "Request Amazon Business Account" button in the upper right: <u>https://help.uillinois.edu/TDClient/42/UIUC/Requests/ServiceDet?ID=732&SIDs=224</u>
- 3. You will be led through the usual UIUC authentication pages and end up on the form below. Fill out as pictured:
 - Subject: Request for University Amazon Business Prime account
 - Do you have an active P-Card? Yes
 - Description: LEAVE BLANK the Subject explains the request; don't confuse things with a note.
 - Click SUBMIT!

U-Pay Amazon for Business	♣ Show Help	🗕 Hide H	elp			
This service will be utilized to by Pcard holders to request access to Amazon Business.						
Status 🚱 New						
Contact Information						
Person Requesting Service (Requestor) * William Kephart Your Name will auto-fill		• Q	×			
College/Unit * KCPA-Admin-St (1-262001) Your College/Unit will auto-fill]	- Q	×			
Ticket Details						
Subject* Ø A short description to explain the nature of a ticket. Request for University Amazon BusinessPrime account Request for University Amazon BusinessPrime account	essPrime acc	ount				
Do you have an active P-Card? Yes Answer: Yes		ć	× •			
Description @ Format Font Size A- B I U S x, x² I_x Image: Im						
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Attachments & Screenshots CLICK SUBMIT Browse No file chosen						
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4. Usually within a few hours to a day of submission, you will receive a confirmation email of your approval:

From: Amazon Business < business@amazon.com>

Subject: University of Illinois Account Team has invited you to join Amazon Business work account

amazon business

Congratulations!

You have been invited to join your company University of Illinois Amazon Business account. Amazon Business combines the selection, convenience, and value you expect from Amazon, with features that can help improve your operations.

Ready to get started? You can join your team here:

Join Amazon Business

If you have any questions or need any tips on getting started, we are here to help. Visit Amazon Business Help or contact our Customer Service.

Thank you for choosing Amazon Business as a trusted partner for your business needs.

Please note: This email message was sent from a notification-only address that cannot accept incoming email. Please do not reply to this email.

- 5. Click the link in the email and you'll be lead through the university's usual authentication screens. The Amazon page will display you log into BusinessPrime logo in the banner. Set up the account with the following:
 - Add Shipping and Billing addresses (same for both):
 - **Krannert Center** 500 S Goodwin Ave Urbana, IL 61801
 - Add ONLY YOUR P-CARD as the payment method.
- 6. **IMPORTANT**: DO NOT SHOP UNTIL you read the "Purchasing Restricted Items on Amazon" section below.

Purchasing Unrestricted Items on Amazon

An item NOT listed as "Organization Restricted" may be purchased without issue or explanation.

While most items on Amazon are Organization Restricted, it may be worth searching for an unrestricted listing of that item, particularly if you it may be difficult to justify Amazon as your vendor.

That said, watch out for janky third-party vendors who may be more trouble than they are worth if you have returns or issues with an order.

While the checkout screen for university Business Prime purchases differs from the personal checkout screens you're used to (see below), no screen shots of an unrestricted checkout are available, but the process should be similar without the need for explanation.

Purchasing Restricted Items on Amazon

Per the university's Amazon shopping policies:

- "Amazon is intended to be an additional procurement resource to be utilized when all other purchasing avenues have been exhausted."
- Organization Restricted items CAN be purchased with a valid justification:

"Considerations for approval include but are not limited to availability of items on current contracts in iBuy, availability of diverse suppliers and pricing."

Purchasing Restricted Items - OVERVIEW:

Before attempting to purchase an Organization Restricted item on Amazon, find out if the item is available on iBuy. "Organization Restricted" items may be purchased if they meet certain criteria:

- 1. Item has PRIME SHIPPING.
- 2. Item is NOT TAXED.
- 3. JUSTIFICATION is provided for purchasing item from Amazon rather than other vendors.
- 4. University APPROVES your justification.

Any item in your order which does not have Prime shipping will likely be denied. Tax is definitely a dealbreaker. Even with Prime Shipping, ALL Organization Restricted items will REQUIRE an explanation/justification, and ALL are reviewed by someone at the university prior to releasing the order to Amazon.

The approval process can take a few hours to a day, sometimes longer.

The estimated delivery time of an item is based on the time the university approves and releases your order to Amazon - not when you actually place the order.

You will receive confirmation noting either approval or denial. Read it carefully, as they may have accepted some items and denied others.

Just beware, if an order is time-sensitive, and it takes over a day for the university to review it, and it's denied, you're now back to square one.

An effective explanation/justification is important to ensure there is as little delay as possible.

Purchasing Restricted Items – IF POSSIBLE, CHECK iBUY FIRST

If you have iBuy access, see if the item is available on iBuy. If you do not have iBuy access, proceed with your Amazon order with the assumption the item is NOT available on iBuy. For costuming items and props, iBuy will offer virtually nothing, so your Amazon should be approved. Audio/media equipment *might* be found on iBuy as B&H Photo is an iBuy vendor. The two iBuy vendors most likely to carry items typically purchased are Office Depot and Grainger. The pricing on the public sites (linked) will be significantly more than the iBuy pricing, but if the item you want isn't available on those sites, it's a fair bet you can justify an Amazon purchase. If the item IS found on iBuy, that's not a dealbreaker, but knowing the iBuy pricing and whether the item meets your exact specifications can be extremely useful in justifying an Amazon purchase. See the Justifications section on the next page.

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Purchasing Restricted Items - JUSTIFICATIONS:

A justification of your purchase MUST be entered in the "**Comments for approver**" field on the checkout page (see screen shots in example below).

- You have 100 characters to plead your case.
- Use MULTIPLE brief phrases to fill that space.
- BE HONEST. Truthfully note why you are using Amazon.

Versions of the phrases below may be useful depending on your situation. Several of these has proven effective. You'll likely need to abbreviate the wording to squeeze in multiple; adapt as you see fit:

- Not available on iBuy <<< Indicates you could not use the university vendors. This is a strong justification.
- Only available through Amazon <<< Suggests item not available on iBuy or elsewhere online and justifies Amazon as the ONLY source for the item. This is a strong justification.
- Required item [note model #, if applicable] found only on Amazon <<< Similar to the previous justification, indicates similar item may be available elsewhere but ONLY Amazon offers the exact item you require. This is a strong justification.
- Specific item is required to match existing only on Amazon <<< Again, similar to the above. Sometimes you need an identical item to match existing and it's found only on Amazon. This is a strong justification.
- Least expensive price or \$## less than all vendors <<< Note price difference, if significant. May not be as effective
 as other explanations, so add additional justifications.
- Other vendors overbudget <<< This plea indicates your university funding for the purchase is limited and it may sway an Approver. Possibly more effective than simply noting the items is more expensive elsewhere.
- *Time-sensitive, other vendors delayed* <<< Haven't tried this, but it's a fair justification.
- Amazon verified diverse supplier <<< If you can find a diverse supplier, this directly addresses the university's preference (noted above). Haven't used it but should be a strong justification.
- [For items WITHOUT Prime Shipping: you can try to justify see example below but approval is doubtful]
- [See Bill Kephart if you want to pitch another explanation or you can try it and see what happens...]

Combining the above phrases should justify most purchases.

REGARDING THE EXAMPLE BELOW:

The justifications used in the example below will LIKELY no longer work. Use the justifications above. These screen shots are from one of the first Amazon Business orders in 2022; the university has since cracked down on what they approve.

Purchasing Restricted Items - ORDER WITH SCREEN SHOTS:

1. Below is an Organization Restricted item.



	Specifications for this item	~
-		

2. Add this and any other items to your Cart:

business prime Ourbana 61801 All - Enter keyword or product number Q Wholesale made easy >					
🚍 Departments Early Black Friday Business Gift Guide Amazon Commercial Buy Again Gift Cards	EN Hello, William ⊕ - Account for University of Ill Lists - Business Prime - 1.				
Cart Subtotal: \$30 ⁰⁸ Proceed to Cart Go to Cart					
Your cart contains items restricted by your organization. One or more items in your cart may not comply with the purchasing standards of your organization.					

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- 3. Proceed to checkout and you will be presented with the university's Business Prime checkout page. Enter:
 - Department: Department Name
 - Order Notes for Reconciliation: Name of account/budget line to be charged (e.g. "Under the Stars Costuming", or "Prop Shop")
 - Comments for approver: Enter your justification here in 100 characters or less.

mazo	n Checkout (1 item))
1 Grou	up 1-UIUC Members Group under University of Illinois	Continue
2 Busin	ness order information	Set business order information to continue checking out. You'll still have a chance to review and edit your order before it's final.
lt	Your order requires approval t contains restricted items. View items (1) >	Order Summary Items: \$30.08
De	epartment	Shipping & handling: Total before tax: Estimated tax to be collected:*
	rder Notes for Reconciliation (optional)	Order total:
Add	100 characters left Id an additional approver?	
C	Continue	
3 Ship	oping address	
4 Payn	ment method	
5 Item	ns and shipping	

4. Complete the page as seen below.

NOTE: We no longer refer to accounts by codes as pictured; use the account name.

n Checkout (1 item)	Â
IP 1-UIUC Members Group under University of Illinois	Continue
ness order information	Set business order information to continue checking out. You'll still have a chance to review and edit your order before it's final.
Your order requires approval t contains restricted items. View items (1) >	Order Summary
cenic	Total before tax:
der Notes for Reconciliation (optional)	Order total:
mments for approver (optional)	How are shipping costs calculated?
pecialty lubricant unavailable on Buy. Single vendor on Amazon harges shipping. Lowest online \$\$\$	
	Checkout (1 item) P 1-UIUC Members Group under University of Illinois Dess order information Your order requires approval contains restricted items. View items (1) > partment enic der Notes for Reconciliation (optional) 112 mments for approver (optional) 112 mments for approver (optional) becialty lubricant unavailable on ux. Single vendor on Amazon arges shipping. Lowest online \$\$\$

	Continue	
,		
3	Shipping address	
4	Payment method	
5	Items and shipping	

5. Once you complete the shipping and billing fields, the pricing should appear in the Order Summary on the right. CONFIRM THE TOTAL DOES NOT INCLUDE TAX. TAXED ORDERS WILL NOT BE APPROVED. This should rarely, if ever, be the case, but no justification can change this. Stop order and contact Bill Kephart for guidance.

am	azon	Checkout (1 item)	۵
1	Group	1-UIUC Members Group under University of Illinois	Submit order for approval
2	Business order information	Department: Scenic Change Order Notes for Reconciliation: O112 Comments for approver: Specialty lubricant unavailable on iBuy. Single vendor on Amazon charges shipping. Lowest online \$\$\$ Additional approver email: No value entered	By placing your order, you agree to the Arrizon Business Accounts Terms and Conditions and Amazon's privacy potice. Order Summary
3	Shipping address	William Kephart Change KRANNERT CENTER 500 S GOODWIN AVE URBANA, IL 61801-3741 Edit delivery preferences	Shipping & handling: \$30.08 Total before tax: \$34.67 Estimated tax to be collected:* \$0.00 Order total: \$34.67
4	Payment method	MasterCard ending in 0512 Change Billing address: Same as shipping address. Add a gift card or promotion code or voucher Enter code Apply	How are shipping costs calculated? Why didn't I qualify for Prime Shipping?
5	Review items and sh	ault checkout preferences for your current order y select a new group, shipping address and payment method when I place my next order.	

6. Once tax is confirmed to be \$0.00, click "Submit Order for Approval" and you'll see this screen:



7. You will receive an email confirmation within a minute:



8. Within a few hours, though sometime 24 or longer, you'll receive an email confirming the status of your order. At this point the university has released the order to Amazon, and you should see an estimated delivery date by

opening the order in Amazon. You will also receive the usual notification emails once the item is shipped/delivered. See next step for receipt submission instructions.

Your purchase on A	mazon.com has been ap	prov	ed by Uni	versity of II	linois Acco	unt Team
Amazon Business	s <no-reply@amazon.com></no-reply@amazon.com>	\odot	← Reply	≪ Reply All	→ Forward	
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Your purchase o Team(uiamazon Comments: Cor	Your purchase order request for 1-UIUC Members was approved by University of Illinois Account Team(uiamazonbusiness@uillinois.edu). Comments: Confirmed					
Order Sur	nmary					
Order number	111-6351101-3697849					
Approved by	University of Illinois Account	Team	(uiamazonbu	siness@uillinois	s.edu)	
Deliver to	William Kephart KRANNERT CENTER 500 S GOODWIN AVE URBANA, IL 61801-3741, U	S				
Requisitioner comments	Requisitioner Specialty lubricant unavailable on iBuy. Single vendor on Amazon charges shipping. Lowest online \$\$\$					
Items in order	1					
Total	\$34.67					
Approved	items Boelube 70307-12 12 Oz. Mediur \$30.08 Qty: 1	n Blue	Paste Machin	ning Lubricant		

9. DO NOT submit this email as your receipt. As this is an online purchase, wait for the charge to post in CR, then PLEASE use the Amazon copy of the receipt found in your Amazon order history.

10. Okay, you can shop now.