

amazon business

# Archdiocese of Atlanta + Amazon Business

Jessica Harris

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- Parish Support Specialist
  - Amazon Archdiocese Account
  - Can assist with troubleshooting, lowering and increasing credit lines, Reporting, opening and closing accounts /transitioning accounts
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# Why Amazon Business? - Advancing nonprofit buying



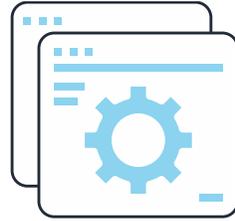
## Fast FREE Delivery

Unlimited FREE Two-Day Shipping  
(discounted plans for nonprofit  
Customers)



## Maximize donors dollars

Access to business pricing,  
quantity discounts, business  
only offers, and bulk ordering  
capabilities



## Flexible Payment Options

P-Card management or pay with  
purchase order extended terms



## Support Diverse Credentialed Sellers

Promote and report on  
purchases from local, small, and  
socio-economically diverse  
suppliers



## New data

Technology to simplify, not add to  
complexity. Strategic sourcing insights  
help leaders demonstrate value



## Tax Exempt & Compliant Purchases

Purchase through a  
competitively-awarded  
cooperative contract

# Payment Method Types

Individual Payment Methods – Employees provide their own

Shared Payment Methods – Admins will provide payment methods for the group to use

Both Shared and Individual Payment Methods – Admins can provide payments for the group, employees can also use their own

# Business analytics & reporting capabilities

Business analytics Reports

Orders

Add title and save to your templates

Time period: Past 12 months

Adjust columns

Submit

Order Info +

Customer Info +

Invoice Info +

Payment Info +

Shipment Info +

Product Info +

Organization Specific Info +

Order Date Order ID

05/08/2018 111-9252

05/08/2018 111-2597

05/07/2018 111-9317

04/05/2018 113-3351

04/05/2018 113-9152

Self Service, Exportable Analytics

- Review: orders, reconciliation, returns, and refunds
- Sort by groups, product category, user or seller certifications

business

All Enter keyword or product number

Deliver to Awesome Seattle 98109

Departments Today's Deals Gift Cards Manage Team Help

Business analytics Reports

Orders

Add title and save to your templates

Time period: Past 12 months

Filter

Adjust columns

Get order

	Order Date	Order ID	Product Category	ASIN	Title
Filter	05/08/2018	111-9252307-7957055	Office Product	B00CLHE47A	BIC Ecolutions Round Stic Ball Pen,
Adjust columns	05/08/2018	111-2597964-9342668	CE	B01NBY5SRY	Beats Solo3 Wireless On-Ear Headphones
Adjust columns	05/07/2018	111-9317723-6256255	Wireless	B01N3Q8L29	Headphones with Microphone, Hor
Get order	04/05/2018	113-3351282-4020263	CE	B013F3GB3S	TI-84 Plus Graphing Calculator Tea

Line Item, Level 3 Data

- Easy Order/Invoice Reconciliation, Detailed order Reporting, Download to CSV, Pull Reports based off time period, Group, User, or BOI fields such as Grant Name
- Links to items purchased
- 58 columns of detail including: shipping info, seller info, product detail, order, PO, group, and buyer

# Business Order Information Fields

## Business order info

Ask requisitioners for additional information during checkout and save it for reporting. You can include up to 6 fields. These apply to the entire account (all requisitioners of any group will see these fields).  
Want to control spend with budgets? [Create a blanket PO.](#)

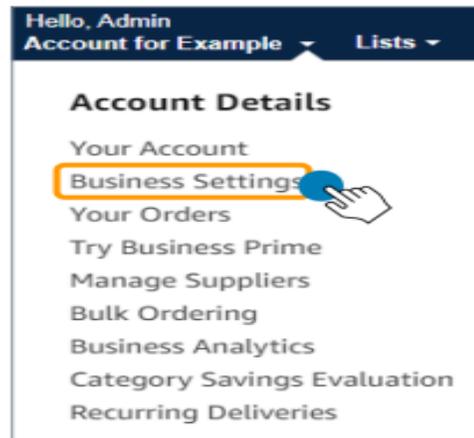
Enabled	Label	Shown to requisitioners as	Default selection	Required to checkout	Buying policies & approvals <a href="#">Add new</a>
<input checked="" type="checkbox"/>	PO number	<input checked="" type="radio"/> Open text field <input type="radio"/> List of defined options	<input type="text"/>	<input type="checkbox"/> Required	<a href="#">Applies to 3 policies</a> ▾
<input checked="" type="checkbox"/>	GL code	<input checked="" type="radio"/> Open text field <input type="radio"/> List of defined options	45 - IT Supplies	<input checked="" type="checkbox"/> Required	<a href="#">Applies to 1 policy</a> ▾
<input type="checkbox"/>	Location	<input type="radio"/> Open text field <input checked="" type="radio"/> List of defined options  10 options available <a href="#">Manage</a>	No default ▾	<input checked="" type="checkbox"/> Required	<a href="#">Applies to 2 policies</a> ▾
<input checked="" type="checkbox"/>	Cost center	<input type="radio"/> Open text field <input checked="" type="radio"/> List of defined options  1 options available <a href="#">Manage</a>	CC4 ▾	<input type="checkbox"/> Required	<a href="#">Applies to 6 policies</a> ▾
<input type="checkbox"/>	Project code	<input checked="" type="radio"/> Open text field <input type="radio"/> List of defined options	<input type="text"/>	<input checked="" type="checkbox"/> Required	<a href="#">Applies to 1 policy</a> ▾
<input type="checkbox"/>	Department	<input type="radio"/> Open text field <input checked="" type="radio"/> List of defined options  4 options available <a href="#">Manage</a>	kids ministry ▾	<input checked="" type="checkbox"/> Required	<a href="#">Applies to 2 policies</a> ▾
<input checked="" type="checkbox"/>	Grant Name	<input checked="" type="radio"/> Open text field <input type="radio"/> List of defined options	<input type="text"/>	<input checked="" type="checkbox"/> Required	

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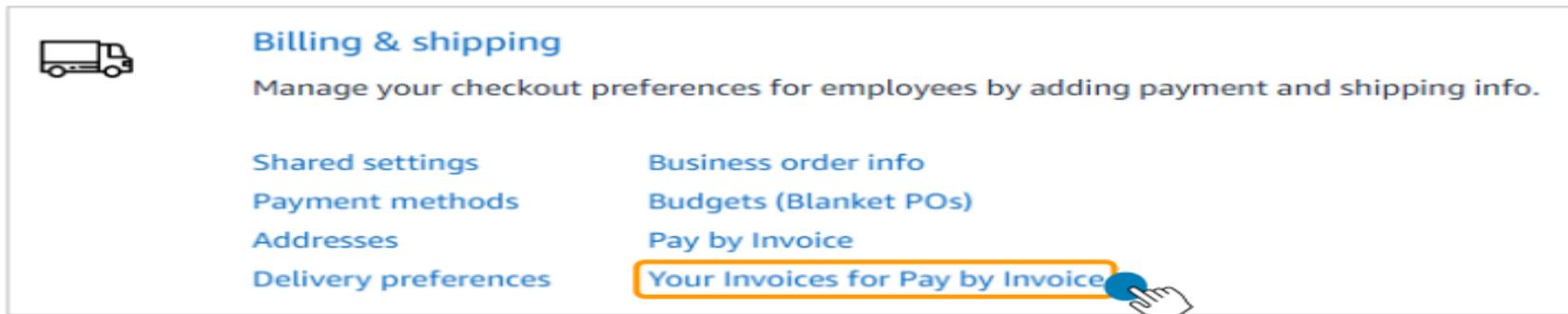
## Monitoring your Pay By Invoice Line

You can access your Pay by Invoice account information within the **Business Settings** page of your Amazon Business account. This page can be used to review your invoice account summary as well as invoices and credit notes, pending charges, or payments and refunds.

1. Hover over "Hello, NAME" in the upper right hand corner of your home page.
2. Click **Business Settings** from the drop down menu.



3. Click, **Your Invoices for Pay by Invoice** from the **Billing & Shipping** section.



# Checking Invoices-- Continued

4. Your Pay by Invoice **Account Summary** will be located at the top of the page.

Account Summary					
Outstanding balance ▼	Unapplied funds ▼	Pending charges	Available credit ▼	Terms	Related links
\$37.51	\$7,154.21	\$18.47	\$1,000.00	Net 60	<a href="#">How do I pay?</a> <a href="#">How can I pay my invoice?</a> <a href="#">Manage my credit line</a>

- **Outstanding Balance** - This amount is the total balance of unpaid invoices for your Pay by Invoice account.
- **Unapplied Funds** - The total amount of money that you can use to pay for outstanding invoices. This includes unapplied credit memos and unapplied payments.
- **Pending Charges** - Orders that have been placed that have not yet been invoiced.
- **Available Credit** - The total amount available for purchases. This is affected by the outstanding balance and pending charges.

# Checking Invoices-- Continued

5. Beneath your **Account Summary**, you can review the account's **Invoices and credit notes**, **Pending Charges**, or **Payments and Refunds**. Filter your results by using the **STATUS** and/or **TIME PERIOD** drop down options. Clicking on an invoice or credit note number will allow you to download the PDF copy of that invoice or credit note.

The screenshot displays the Amazon Business account summary interface. At the top, there are three tabs: "Pending Charges", "Invoices and credit notes" (which is selected), and "Payments and refunds". Below the tabs, there are two filter dropdown menus: "STATUS" and "TIME PERIOD". The "STATUS" dropdown is open, showing options for "Invoice" (Current, Past due, Closed, Payment processing) and "Credit memo" (Unapplied, Applied). The "TIME PERIOD" dropdown is also open, showing options like "All dates", "Last 7 days", "Last 30 days", "Last 3 months", "Last 6 months", "Last 12 months", "Month to date", "Year to date", and "Custom range". A "Search" button is located to the right of the dropdowns. Below the filters is a table with columns: "ITEM RECEIVING", "Amount", "Balance", and "Status". The table contains several rows of data, including a row for a "Request for payment" with a date of 10/1/21 and a status of "Payment due by 11/29/21". A hand cursor is pointing to the "Request for payment #" link in the table.

ITEM RECEIVING	Amount	Balance	Status
# PO12345	\$8.99	\$8.99	Payment due by 12/4/21
Request for payment # XXXX-XXX-XXXX	\$23.55	\$23.55	Payment due by 11/30/21
Request for payment # XXXX-XXX-XXXX	\$1.00	\$1.00	Payment due by 11/29/21
Request for payment # XXXX-XXX-XXXX PO # Office	\$3.97	\$3.97	Payment due by 11/26/21
Credit note # XXXX-XXX-XXXX PO # 123	\$12.74	\$12.74	Unapplied

# Checking Invoices-- Continued

6. You can also select **Generate new CSV (XX Items)** to download an Excel CSV file to view either all Invoice and credit notes or Payments and refunds.

Pending Charges **Invoices and credit notes** Payments and refunds

STATUS: Select Options... TIME PERIOD: All dates Search

Current Invoice Past due Invoice Unapplied Credit memo

25 record(s)

Select All **Generate new CSV (25 items)** Download latest CSV

	A	B	C	D	E	F	G	H	I	J	K	L
1	Issue Date	Statement Number/VAT Invoice Number	PO Number	Currency	Transaction Amount	Transaction Balance	Transaction Type	Transaction Status	Due Date	Order ID	Associate	Billing Period
2	10/5/2021	XXXX-XXXX-XXXX	PO12345	USD	8.99	8.99	Payment requests	Current	12/4/2021	123-4567890-1234567		
3	10/1/2021	XXXX-XXXX-XXXX	PO23456	USD	23.55	23.55	Payment requests	Current	11/30/2021	234-5678901-2345678		9/1/21 - 9/30/21
4	10/1/2021	XXXX-XXXX-XXXX	PO34567	USD	1	1	Payment requests	Current	11/29/2021	345-6789012-3456789		9/1/21 - 9/30/21

To request an increase to your credit limit you can contact Amazon Arch Representative or your dedicated Amazon Business Customer Advisor.

**NOTE:** Credit limit increase requests can take up to 3-5 business days.

# QUESTIONS?

# THANK YOU!