



# Amazon Business Approver Training

Name

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Date

# Approval Policies

## Approval workflows provide visibility and control over purchasing

- Each level of approval can have more than one approver. Only one approval is needed at each level.
- Approvers are notified of pending orders through email as well as when they log into their Amazon Business account.
- Only active account users can be configured as approvers.

### Approval policy

Approval settings will not apply to services, digital products, or punchout accounts. [Learn more](#) ▾

Applies to orders for the **Ravenna Garden** group only.

**Conditions**

Apply to all orders

Orders with restricted items ▾

Orders with a total equal or greater than

**Approvers**

Requires one approval from each level. If an approver is going to be unavailable, you can assign a temporary delegate

1.  ✕

2.  ✕

[Add another approver level](#)

# Approving Orders

- When a user places an order with an approval policy required, the approver will get an email notifying them of the request.
- Once a purchase is submitted for approval, the order is held for 7 days. Approval requests that take longer than 7 days will be rejected
- Purchase requests can be approved directly from the email or by navigating to **Approve Orders** in the top right drop down of your account.

amazon business

**Approval required**

Approver Name:

User Name submitted an order requisition on May 19, 2021 for Example (Example). Order details are below.

[Approve or reject this order](#)


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### Order Summary

Order Number	<a href="#">114-2829344-2769019</a>
Placed by	User Name on May 19, 2021
Deliver to	User Name 1 LINCOLN ST 33 FLOOR BOSTON, MA 02111-2901, US
Items in Order	1
Total	\$27.08

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### Items in Order

	<a href="#">Amazon Basics Multipurpose Copy Printer Paper - White, 8.5 x 11 Inches, 8 Ream Case (4,000 Sheets)</a> \$25.49   Qty: 1
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# Approving Orders

- Purchase requests can be approved directly **from the email (edit if SSO)** or by navigating to **Approve Orders** in the top right drop down of your account.

The screenshot shows the Amazon Business account dashboard. At the top, there is a navigation bar with various options like 'Departments', 'Buy Again', 'Add People', etc. The main content area features a 'Workplace safety & reopening solutions' banner and several promotional cards. A 'Pending approvals' card is highlighted with an orange box and a hand icon, showing '01' pending approvals. Below this, a modal window titled 'Needs approval 1 of 1' is open, displaying order details and an 'Approve purchase request?' section with 'Approve', 'Reject', and 'See details' buttons. The 'Approve' button is highlighted with an orange box and a hand icon.

This screenshot shows the top right navigation menu of the Amazon Business account. The user is logged in as 'Hello, Approver' for 'Account for Example'. The 'Lists' dropdown is visible. The menu is organized into several sections: 'Account Details' (Your Account, Business Settings, Your Orders, Try Business Prime, Manage Suppliers, Bulk Ordering, Business Analytics, Category Savings Evaluation, Recurring Deliveries), 'Manage Your Business' (Buying Policies & Approvals, Billing & Shipping, Members, Certifications, System Integrations), and 'Quick Actions' (Add People, Set Spending Limits, Approve Orders, Switch Accounts, Sign Out). The 'Approve Orders' option in the Quick Actions section is highlighted with an orange box and a hand icon.

# Purchase requests page

- The **Purchase requests** page allows you to review orders that have been submitted for approval.
- You can select the check box on the left hand side of the order and **Approve selected** or **Reject selected** order(s) from this page.
- If you wish to review the order in further detail, you can select **Needs Review**.
- If you have multiple orders awaiting approval, you have the option to approve or reject them in bulk

**Purchase requests**

[Approve selected](#) [Reject selected](#)

<input checked="" type="checkbox"/>	Order ID	PO #	Requisitioner	Order Date (PST)	Order Total	Status
<input checked="" type="checkbox"/>	114-2829344-2769019		User Name	May 19, 2021	\$27.08	<a href="#">Needs review</a>

**Purchase Requests**

[Approve selected](#) [Reject selected](#)

<input type="checkbox"/>	Order ID	PO #	Requisitioner	Order Date (PST)	Order Total	Status
<input checked="" type="checkbox"/>	114-2458457-6918607 114-9916460-6146653	test PO	Katherine	November 9, 2017	\$71.27	<a href="#">Needs review</a>
<input type="checkbox"/>	114-3102336-1238618	sample PO	Katherine	November 8, 2017	\$20.29	<a href="#">Needs review</a>

# Approve/Reject

- Review order details and **Approve** or **Reject** the order. You are also able to include comments on the reasoning for order approval or rejection for the user to review.

Purchase requests > Order details

## Approve purchase request?

**Comments for User Name**

Optional


100 characters left

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### Request details

<b>Cost center</b>	No value entered	<a href="#">Change</a>
<b>Location</b>	No value entered	
<b>Department</b>	No value entered	

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<b>Order ID</b>	114-2829344-2769019
<b>Placed by</b>	User Name on May 19, 2021 1:57 PM
<b>Payment method</b>	 American Express ending in XXXX
<b>Deliver to</b>	User Name 1 LINCOLN ST 33 FLOOR BOSTON, MA, US

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Now approving

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### 1 item(s) requested for approval

 [Amazon Basics Multipurpose Copy Printer Paper - White, 8.5 x 11 Inches, 8 Ream Case \(4,000 Sheets\)](#)  
\$25.49 | Qty: 1

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### Request summary

Items	\$25.49
Shipping & handling	\$24.94
Order discount	\$0.00
Shipping discount	-\$24.94
Total before tax:	\$25.49
Estimated tax to be collected*	\$1.59
<b>Request total</b>	<b>\$27.08</b>

# Email Confirmation

- Once an order is approved or rejected, you will receive a confirmation and the order requestor will also be notified via email.

Purchase requests > Order details


✓ This purchase has been approved.

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### Request details

PO number	XXXX
Location	105

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Order ID	114-7797508-8602631
Placed by	User on May 24, 2021 9:09 AM
Payment method	 American Express ending in XXXX
Deliver to	Lincoln 1 LINCOLN ST FL 33 BOSTON, MA, US

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### Request summary

Items	\$25.49
Shipping & handling	\$24.94
Order discount	\$0.00
Shipping discount	-\$24.94
Total before tax:	\$25.49
Estimated tax to be collected*	\$1.59

**Request total \$27.08**


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^ Completed Approvals

Approved by User  
[ExampleEmail123@amazon.com](mailto:ExampleEmail123@amazon.com)  
May 24, 2021 9:13 AM

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### 1 item(s) approved

 Amazon Basics Multipurpose Copy Printer Paper - White, 8.5 x 11 Inches, 8 Ream Case (4,000 Sheets)  
\$25.49 | Qty: 1

# Assign an Approval Delegate

An approver can assign an approval delegate for time periods where that primary approver will be out of the office or unable to approve orders.

- Navigate to your approval queue by selecting **Approve Orders** from the drop down menu in the top right hand corner of your homepage.
- Click **Assign a temporary delegate**.
- Enter approval delegate's email address and the start and end date for the approval delegation to be applied and save.

Account menu for 'Hello, Approver' with account 'Account for Example'. The 'Approve Orders' option is highlighted with an orange box and a hand cursor. Other options include Account Details, Manage Your Business, Quick Actions, and Switch Accounts.

- Account Details
  - Your Account
  - Business Settings
  - Your Orders
  - Try Business Prime
  - Manage Suppliers
  - Bulk Ordering
  - Business Analytics
  - Category Savings Evaluation
  - Recurring Deliveries
- Manage Your Business
  - Buying Policies & Approvals
  - Billing & Shipping
  - Members
  - Certifications
  - System Integrations
- Quick Actions
  - Add People
  - Set Spending Limits
  - Approve Orders
- Switch Accounts
- Sign Out

The 'Approval delegation' modal window features a button labeled 'Assign a temporary delegate' which is highlighted with an orange box and a hand cursor.

The 'Approval delegation' form contains the following fields:

- Approver:** A text field containing 'solarij+testreg@amazon.com' and a label 'ApproverEmail@Example.com' below it.
- Delegate:** A text field with the placeholder 'Enter email'.
- Start date:** A date field containing '06/24/2021'.
- End date:** An empty date field.

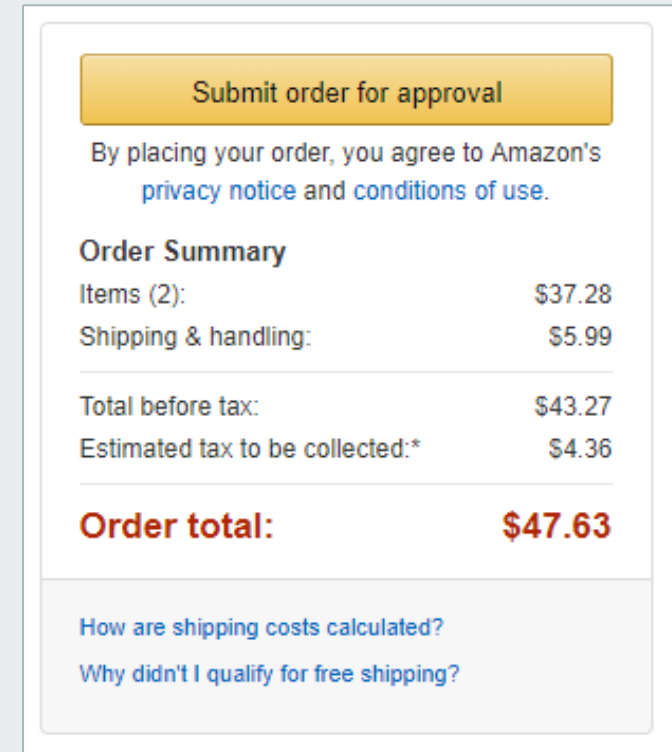


# Approval Workflow – User Experience

All orders placed on the account are subject to approval before being fulfilled

## How do I order with Approvals configured?

- There are no additional steps to take to submit your order for approval. Check out as you normally would and you will see the option at checkout. As an approver, you will not have to approve your own orders despite selecting **Submit order for approval** at checkout.
- Your order will not be processed until it is approved by the appropriate approver. Keep this in mind for shipping timelines. You will be notified over email once your order is submitted and then again once your order has been approved and processed. Just as with a normal order on Amazon, you will also receive relevant shipping updates.
- If your order is not approved **within 7 days**, the order will automatically be canceled; however, the items in your order will not be deleted. If your order is canceled, you will need to submit the order again for approval.



Submit order for approval

By placing your order, you agree to Amazon's [privacy notice](#) and [conditions of use](#).

**Order Summary**

Items (2):	\$37.28
Shipping & handling:	\$5.99
<hr/>	
Total before tax:	\$43.27
Estimated tax to be collected:*	\$4.36
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<b>Order total:</b>	<b>\$47.63</b>

[How are shipping costs calculated?](#)

[Why didn't I qualify for free shipping?](#)

# Business Customer Support

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# Business Customer Support

Dedicated U.S. based [Business Customer Support](#) can be reached a number of ways including email, chat and phone. *Not sure what you're looking for? Learn more about the features and benefits on Amazon Business [HERE](#).*

Departments - Buy Again Savings Hub Quantity Discounts Today's Deals Business Plus Add People Gift Cards **Help** EN

## Fixing things is quick & easy

The bot quickly fixes your problem or connects you to someone who can.

[Start chatting now](#)

Need help over phone? [We can call you.](#)

Hey, I never received my Fire tablet

Messaging Assistant - Customer Service  
So sorry it never showed up

I'll go ahead and send another one to the same address you had the last one sent, OK?

Yes, sounds good

Messaging Assistant - Customer Service  
OK, we just put in the replacement order. It should arrive in a couple of days.

Gift Cards Help **Contact Us**

The bot quickly figures out what you need help with.

It fixes your issue, or connects you with a human if you need more help.

You're on your way!

Here are a few things you can take care of on your own

- Check on an order
- Returns & Refunds
- Manage content & devices
- Get help with Prime
- Update payment info
- Account settings

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