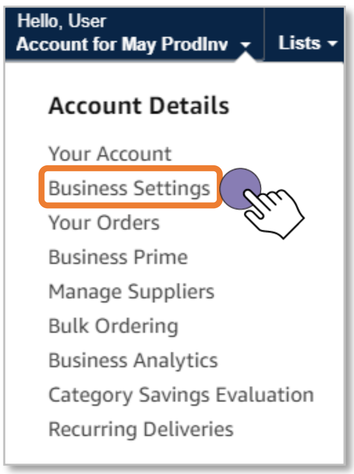
How-To Guide: Business Order Information

Business Order Information (BOI) is an Amazon Business feature set that enables organizations to reconcile order related information in their business reporting to help with business forecasts, reconciliation, cost allocation and spend analysis. Organizations are able record information such as cost-centers, account numbers, project codes, job codes, department identifiers, location codes etc. and associate them with their business orders.

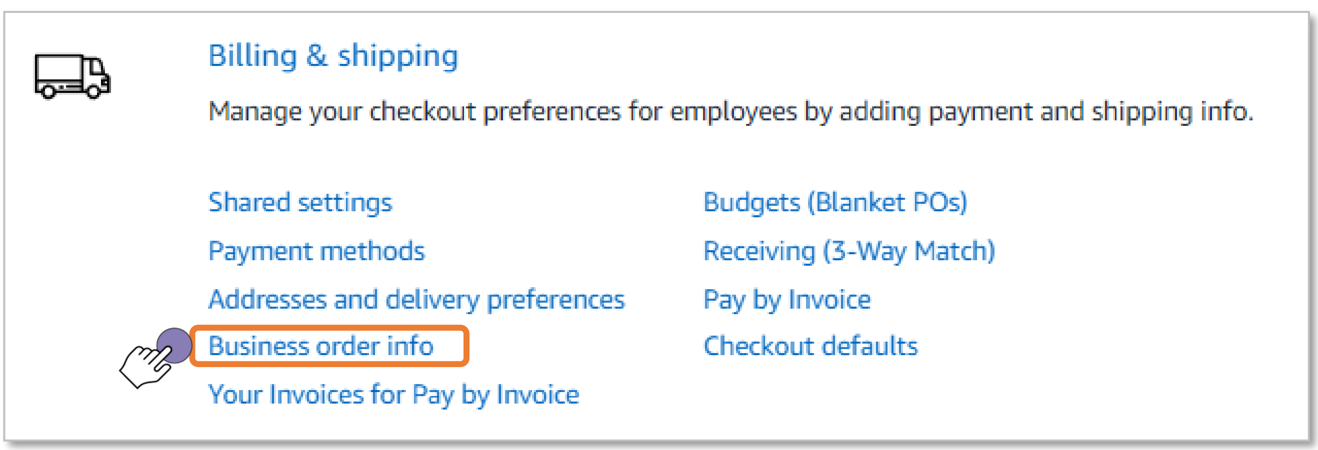
Business Order Information

NOTE: Business Order Information (BOI) fields are enabled at the root level of an Amazon Business account and will apply to all groups/sub-groups within the account. However, Group Level Administrators have the ability to edit or remove BOI fields for their specific groups.

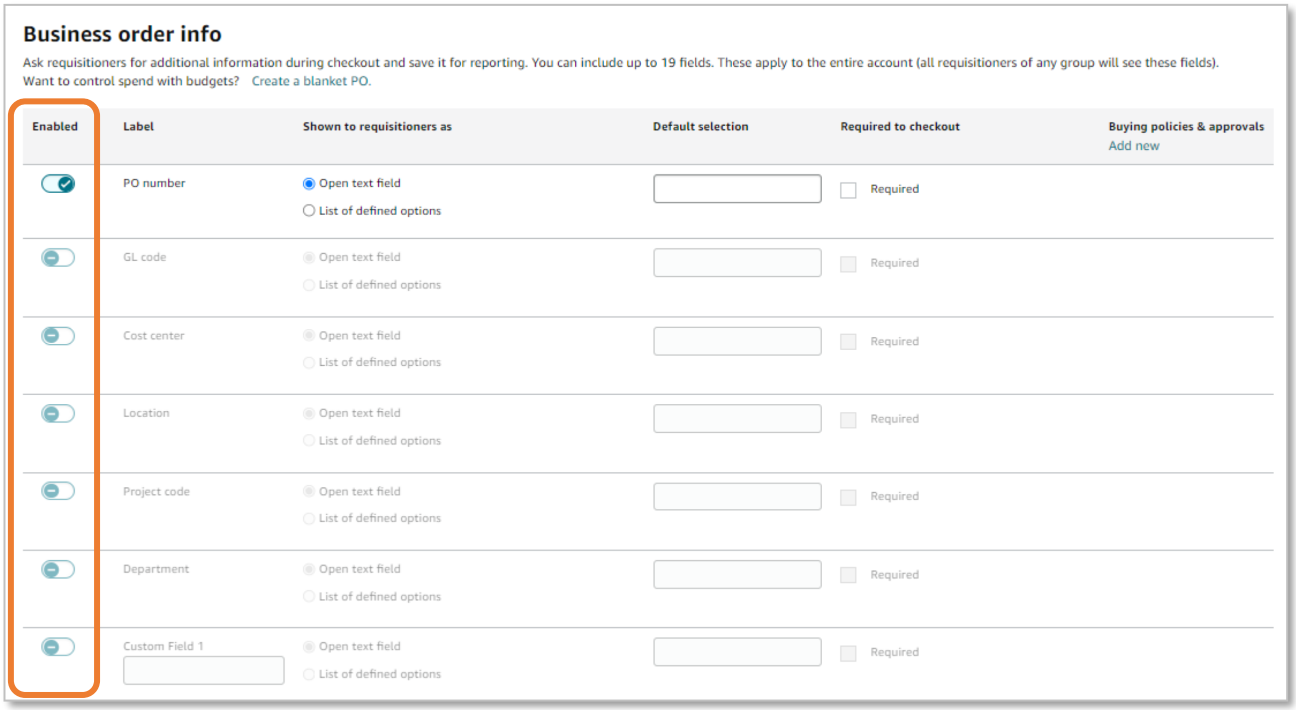
1. Hover over "Hello, NAME" in the upper right hand corner of your home page.
2. Click **Business Settings** from the drop down menu.



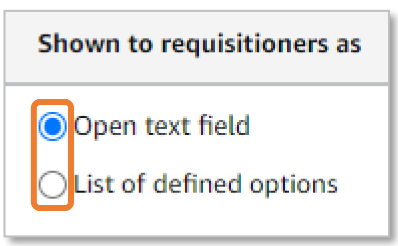
3. Click **Business Order Info**, under the **Billing & shipping** section.



4. Turn the toggle against the desired Business Order Info field(s) to enable. A maximum of 6 fields may be enabled and up to 13 additional custom fields for buyers to populate when placing an order.

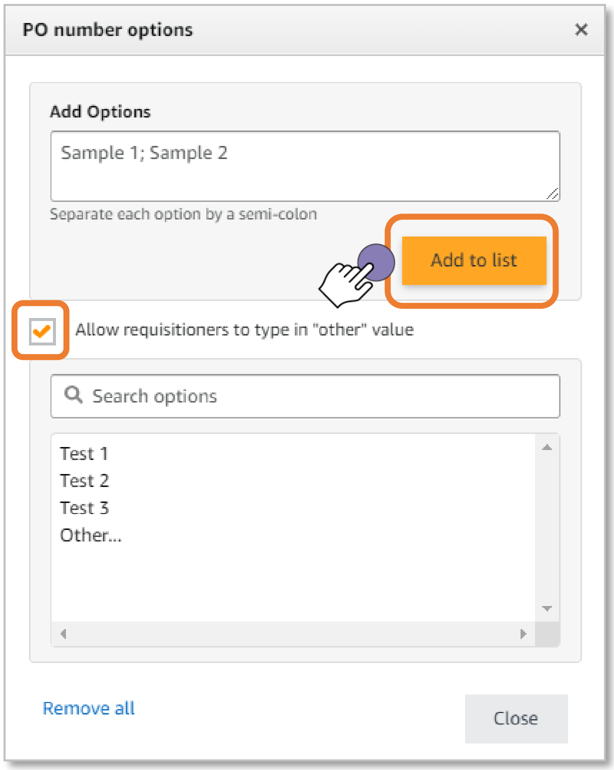


5. Select to show requisitioners an **Open text field** or a **List of defined options** for each of the enabled Business Order Information fields.

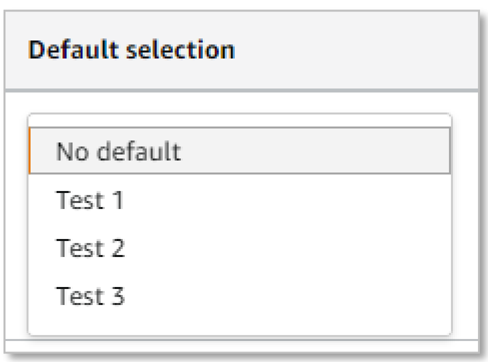


6. When choosing to show a **List of defined options**, click **Add** to create the list of options.

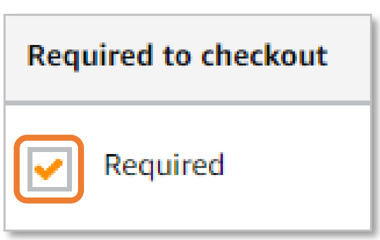
7. Enter list options in the space provided. Each option needs to be separated by a semi-colon and can be a maximum of 30 characters. Click **Add to list**. Once values are added, you can also choose to allow requisitioners to enter a one-time entry during checkout by selecting the **Allow buyer to type in "other" value** checkbox.



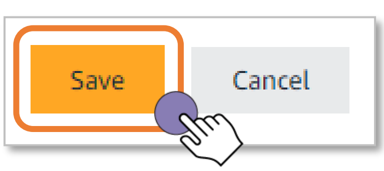
8. Select whether or not to set a default value (pre-set value) to be displayed during check out.



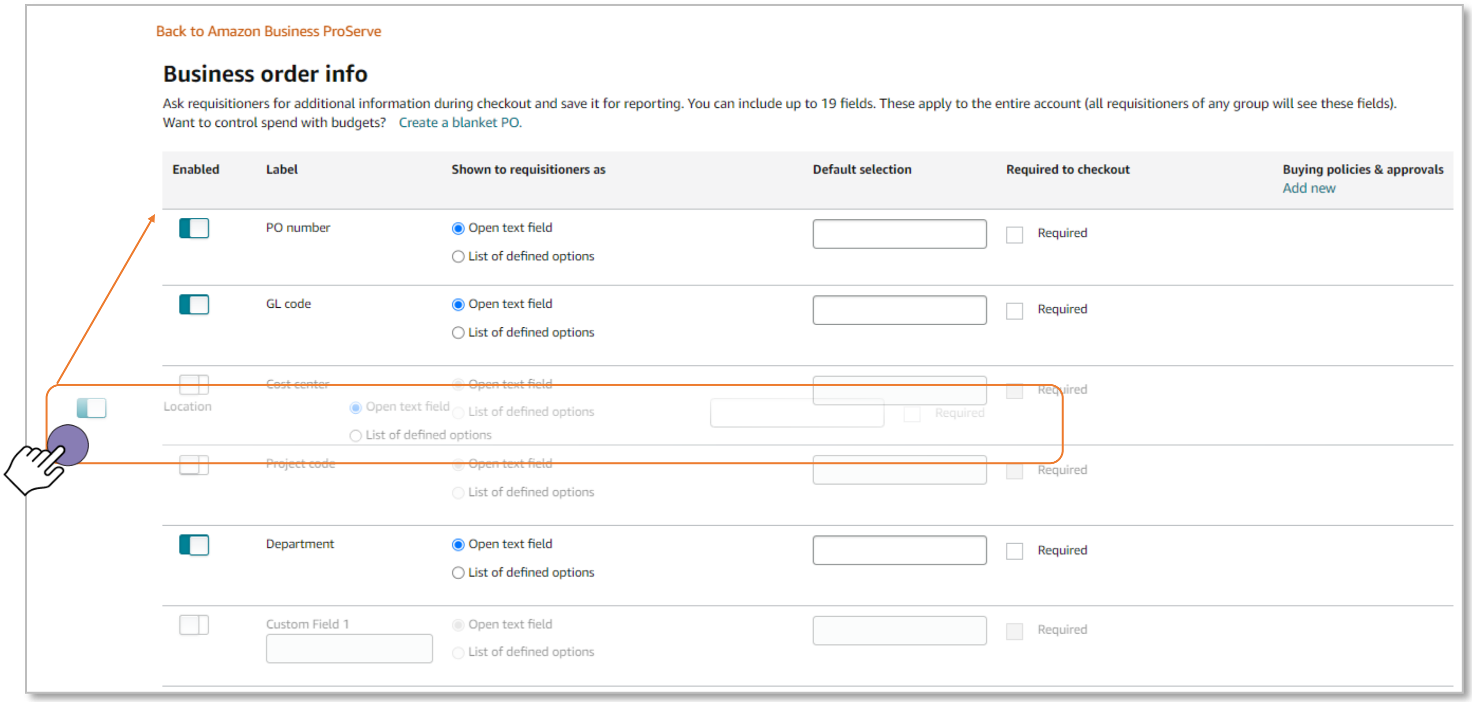
9. Select whether the Order Information field is set with entry as optional or required in order to move forward in the checkout process.

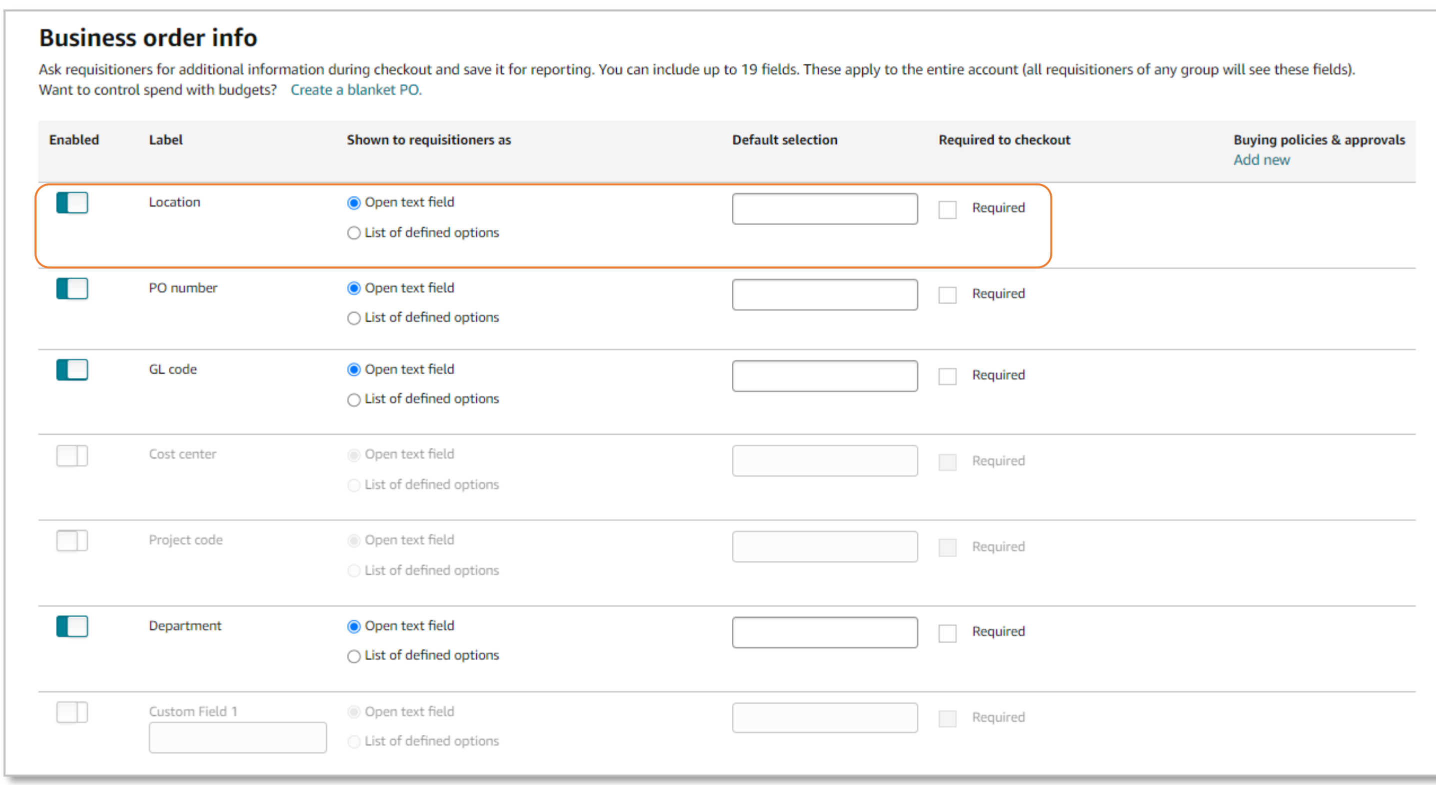


10. Click **Save**.



11. Once Information fields have been enabled, they can also be rearranged so that fields are presented to buyers in a specific order. To rearrange fields, simply click on the field and drag and drop it into the order that best suits your desired information input flow.





Business Order Information Approvals

NOTE: Approvals workflows can be set up for any of the 6 predefined fields

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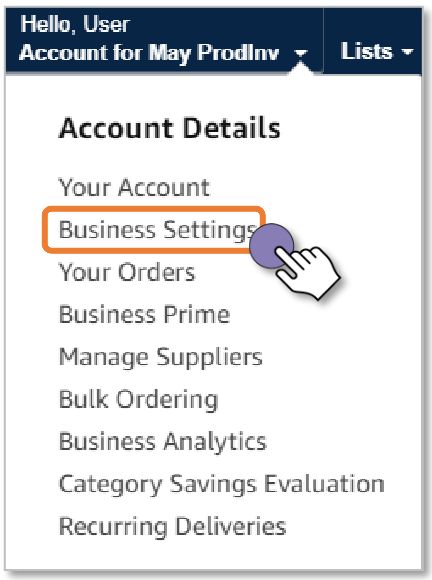
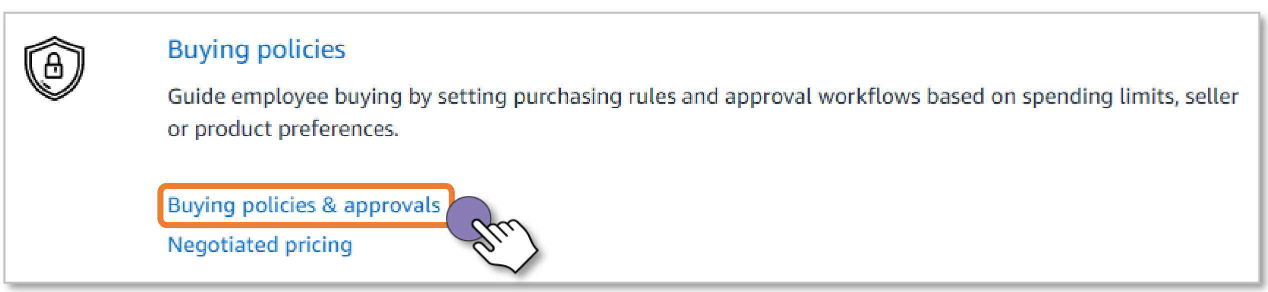
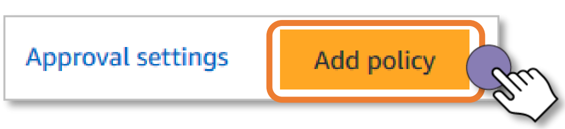


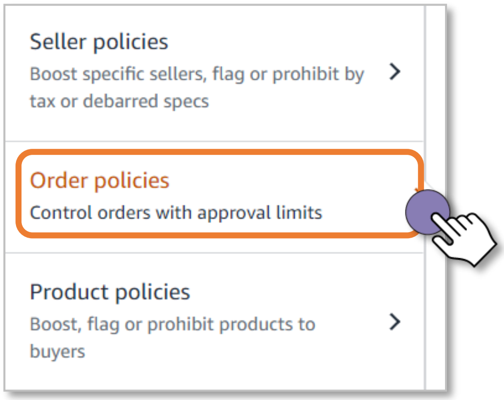
3. Start at the group level you will be applying the approval workflow to.
4. Click **Buying policies & approvals**, under the **Buying policies** section.



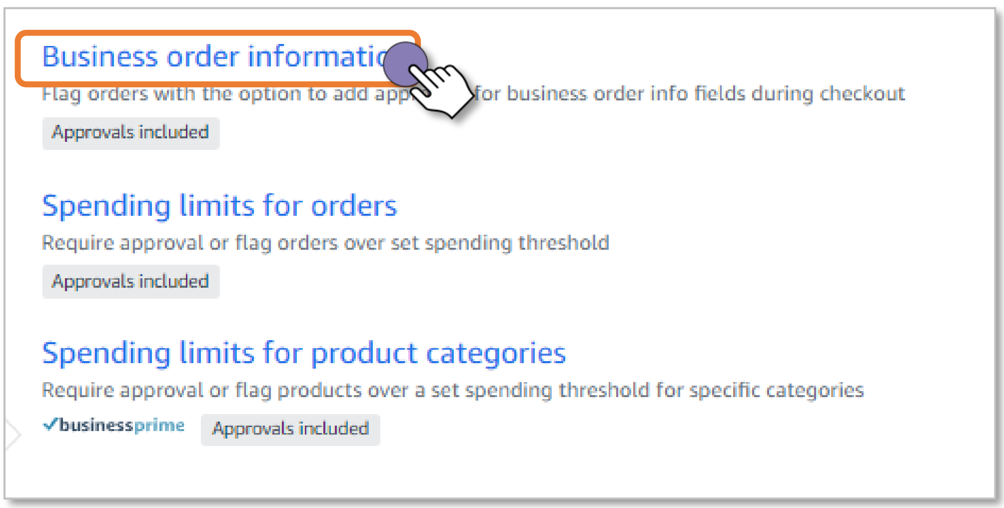
5. Click **Add policy**.



6. Click **Order policies**.

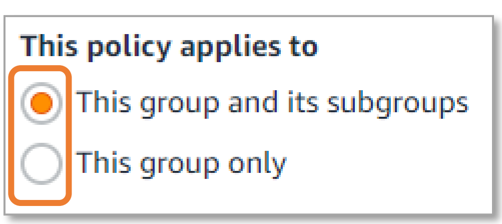


7. Click **Business order information**.

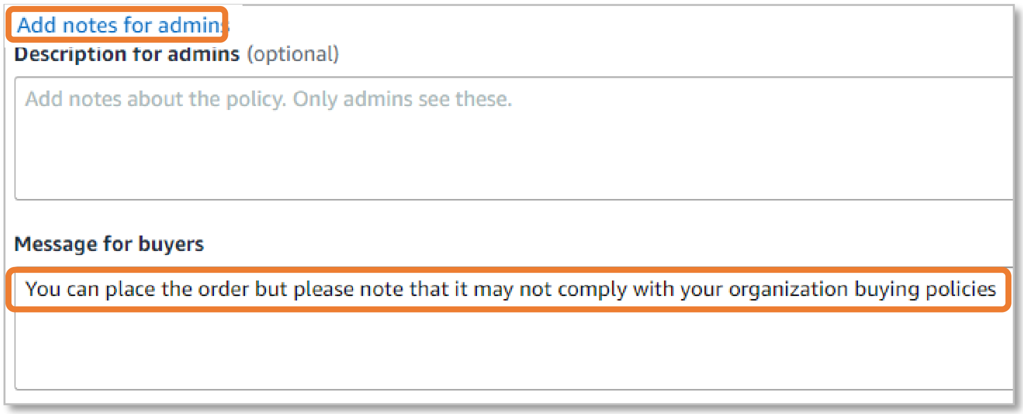


8. Enter a **Policy Name**. Approval policy names can be up to 80 characters in length.

9. Select to apply policy to the group or to the group and all of its subgroups.

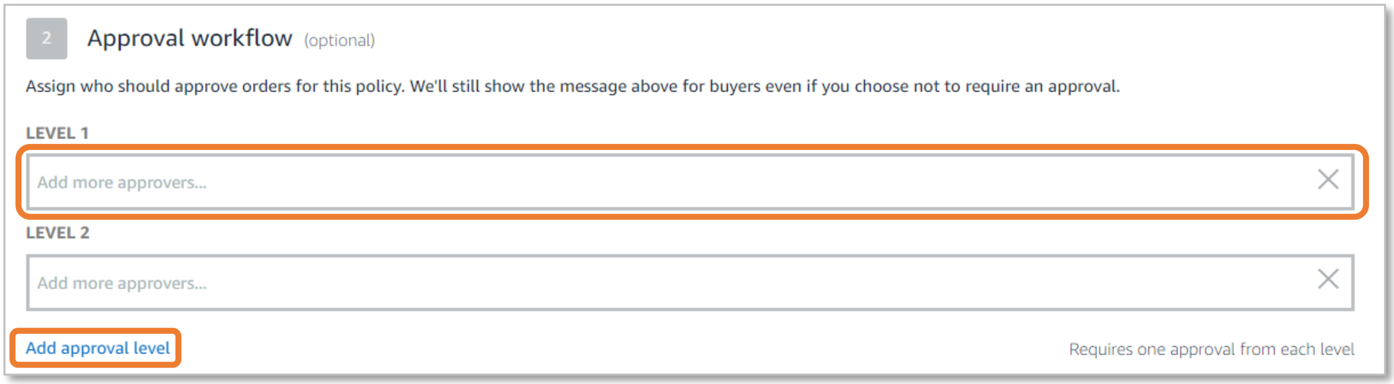


10. Enter a policy description for admins (optional) and a message that buyers will see when submitting an order that falls within the approval policy. Description to admins and messages to buyers can be up to 250 characters in length.



11. Choose any of the enabled information fields that should trigger the approval policy at checkout. To add additional fields, navigate back to Business Order Info.

12. Assign an approver or approvers to the policy. If multiple levels of approvals are required, select **Add approval level** to add additional levels to the policy.



13. Once all approvers have been assigned, **Save** the policy.

Business Order Info FAQ

Question	Answer
Is there a character limit for defined options provided to requisitioners?	Yes, each value option has a maximum limit of 30 characters.
Is there a limit to the number of options that can be made available for requisitioners to choose from?	Admins can populate up to 100 pre-defined list options for each BOI field, for selection during checkout via a dropdown list.
How many Order Info fields can be enabled?	Up to 6 of the 7 available BOI fields and up to 13 custom BOI fields.
Can the display of the fields be re-ordered?	Admins can drag and drop using their mouse to change positions of display for the order fields
Can the names of the predefined BOI options be changed?	The field names of Cost Center, Location Code, Department Code, Account Number, Project Code and General Ledger cannot be changed at this time.

Did you find this guide to be helpful? Please complete this short survey to provide feedback.