

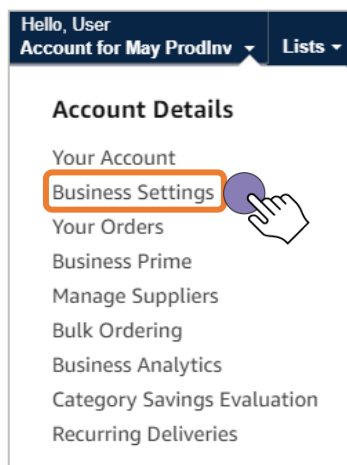
How-To Guide: Business Order Information

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.

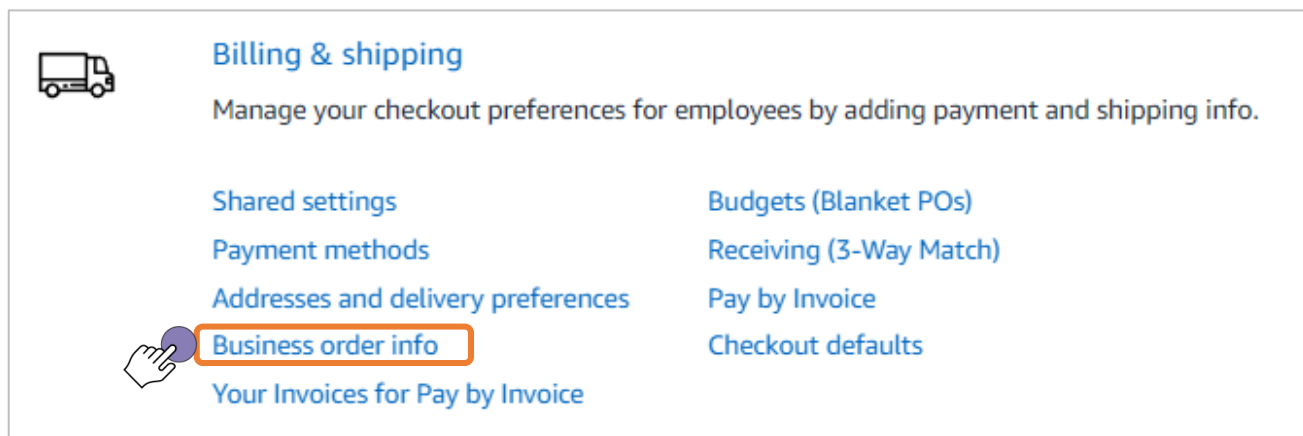
Business Order Information

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.





- 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.

Business order info

Ask requisitioners for additional information during checkout and save it for reporting. You can include up to 19 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 Add new
<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	
<input checked="" type="checkbox"/>	GL code	<input checked="" type="radio"/> Open text field <input type="radio"/> List of defined options	<input type="text"/>	<input type="checkbox"/> Required	
<input checked="" type="checkbox"/>	Cost center	<input checked="" type="radio"/> Open text field <input type="radio"/> List of defined options	<input type="text"/>	<input type="checkbox"/> Required	
<input checked="" type="checkbox"/>	Location	<input checked="" type="radio"/> Open text field <input type="radio"/> List of defined options	<input type="text"/>	<input type="checkbox"/> Required	
<input checked="" type="checkbox"/>	Project code	<input checked="" type="radio"/> Open text field <input type="radio"/> List of defined options	<input type="text"/>	<input type="checkbox"/> Required	
<input checked="" type="checkbox"/>	Department	<input checked="" type="radio"/> Open text field <input type="radio"/> List of defined options	<input type="text"/>	<input type="checkbox"/> Required	
<input checked="" type="checkbox"/>	Custom Field 1	<input checked="" type="radio"/> Open text field <input type="radio"/> List of defined options	<input type="text"/>	<input type="checkbox"/> Required	

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

Shown to requisitioners as

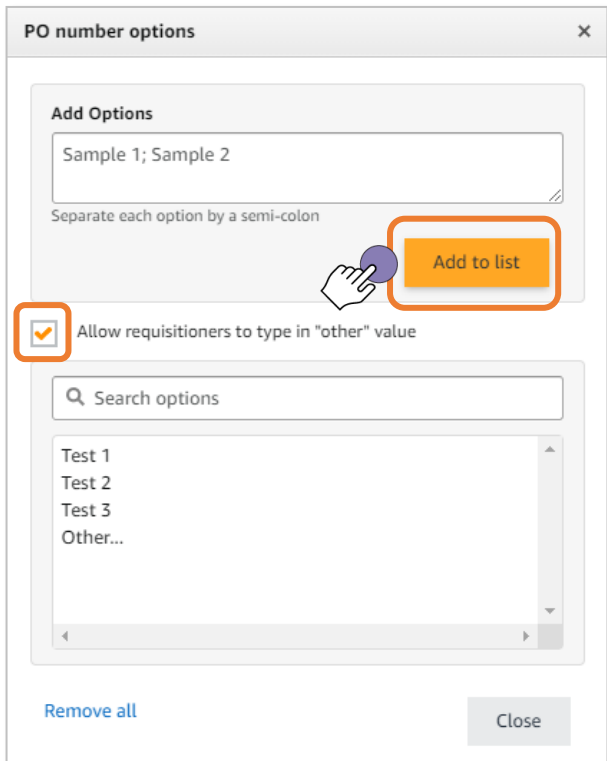
☒ Open text field
☐ List of defined options

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

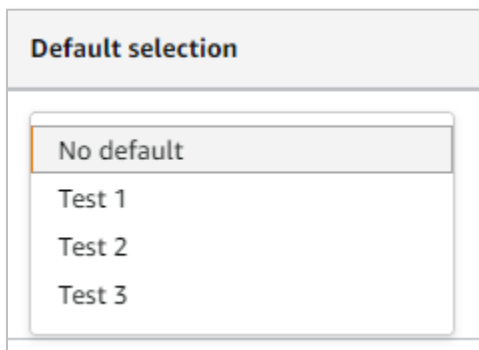
☐ Open text field
☒ List of defined options

0 options available [Add](#)

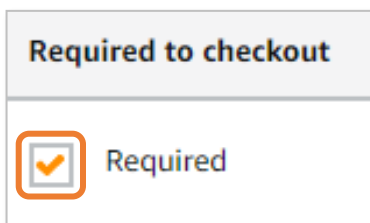
7. Enter list options in the space provided. Each option needs to be separated by a semi-colon and can be a maximum of 30 characters. Click **Add to list**. Once values are added, you can also choose to allow requisitioners to enter a one-time entry during checkout by selecting the **Allow buyer to type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



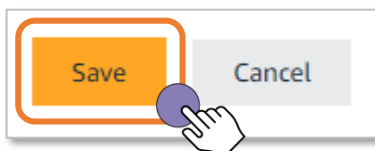
8. Select whether or not to set a default value (pre-set value) to be displayed during check out.



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.

[Back to Amazon Business ProServe](#)

Business order info

Ask requisitioners for additional information during checkout and save it for reporting. You can include up to 19 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 Add new
<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	
<input checked="" type="checkbox"/>	GL code	<input checked="" type="radio"/> Open text field <input type="radio"/> List of defined options	<input type="text"/>	<input type="checkbox"/> Required	
<input type="checkbox"/>	Cost center	<input type="radio"/> Open text field <input type="radio"/> List of defined options	<input type="text"/>	<input type="checkbox"/> Required	
<input checked="" type="checkbox"/>	Location	<input checked="" type="radio"/> Open text field <input type="radio"/> List of defined options	<input type="text"/>	<input type="checkbox"/> Required	
<input type="checkbox"/>	Project code	<input type="radio"/> Open text field <input type="radio"/> List of defined options	<input type="text"/>	<input type="checkbox"/> Required	
<input checked="" type="checkbox"/>	Department	<input checked="" type="radio"/> Open text field <input type="radio"/> List of defined options	<input type="text"/>	<input type="checkbox"/> Required	
<input type="checkbox"/>	Custom Field 1	<input type="radio"/> Open text field <input type="radio"/> List of defined options	<input type="text"/>	<input type="checkbox"/> Required	

Business order info

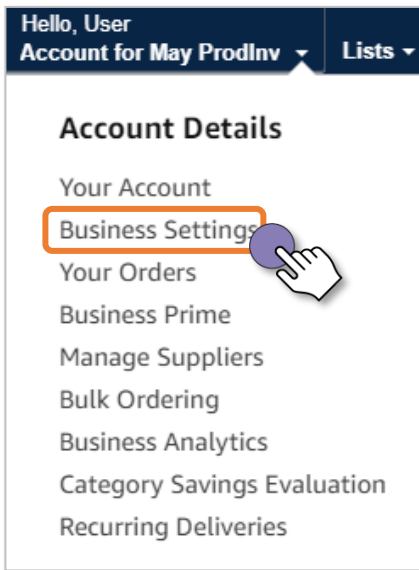
Ask requisitioners for additional information during checkout and save it for reporting. You can include up to 19 fields. These apply to the entire account (all requisitioners of any group will see these fields).
Want to control spend with budgets? [Create a blanket PO.](#)

Enabled	Label	Shown to requisitioners as	Default selection	Required to checkout	Buying policies & approvals Add new
<input checked="" type="checkbox"/>	Location	<input checked="" type="radio"/> Open text field <input type="radio"/> List of defined options	<input type="text"/>	<input type="checkbox"/> Required	
<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	
<input checked="" type="checkbox"/>	GL code	<input checked="" type="radio"/> Open text field <input type="radio"/> List of defined options	<input type="text"/>	<input type="checkbox"/> Required	
<input type="checkbox"/>	Cost center	<input type="radio"/> Open text field <input type="radio"/> List of defined options	<input type="text"/>	<input type="checkbox"/> Required	
<input type="checkbox"/>	Project code	<input type="radio"/> Open text field <input type="radio"/> List of defined options	<input type="text"/>	<input type="checkbox"/> Required	
<input checked="" type="checkbox"/>	Department	<input checked="" type="radio"/> Open text field <input type="radio"/> List of defined options	<input type="text"/>	<input type="checkbox"/> Required	
<input type="checkbox"/>	Custom Field 1	<input type="radio"/> Open text field <input type="radio"/> List of defined options	<input type="text"/>	<input type="checkbox"/> Required	

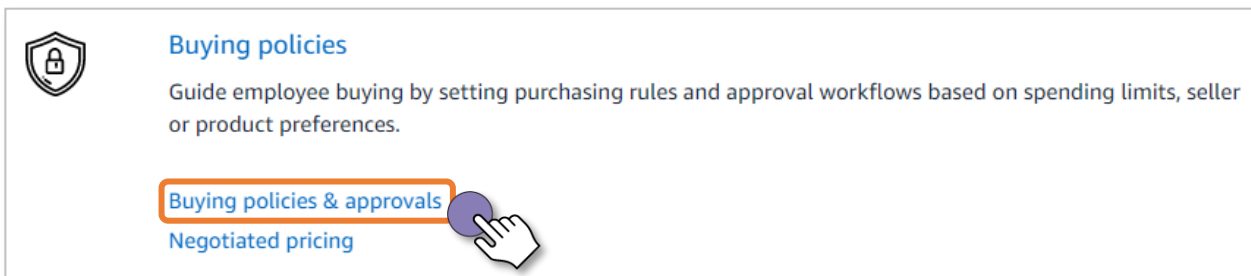
Business Order Information Approvals

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

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. 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**.

Seller policies
Boost specific sellers, flag or prohibit by tax or debarred specs >

Order policies
Control orders with approval limits

Product policies
Boost, flag or prohibit products to buyers >

7. Click **Business order information**.

Business order information
Flag orders with the option to add approvals for business order info fields during checkout
Approvals included

Spending limits for orders
Require approval or flag orders over set spending threshold
Approvals included

Spending limits for product categories
Require approval or flag products over a set spending threshold for specific categories
✓businessprime Approvals included

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

Policy name0/80

Enter a policy name

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

This policy applies to

☒

This group and its subgroups

☐

This group only

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.

[Add notes for admin](#)

Description for admins (optional)

Add notes about the policy. Only admins see these.

Message for buyers

You can place the order but please note that it may not comply with your organization buying policies

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.

1 Define criteria

Choose any of the fields that should trigger this policy in checkout. To add new fields or options, go to [Business order info](#).

<input checked="" type="checkbox"/>	PO number	Enabled ⓘ
<input type="checkbox"/>	GL code	Disabled ⓘ
<input type="checkbox"/>	Cost center	Disabled ⓘ
<input type="checkbox"/>	Location	Disabled ⓘ
<input type="checkbox"/>	Project code	Disabled ⓘ
<input type="checkbox"/>	Department	Disabled ⓘ

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.

2

Approval workflow (optional)

Assign who should approve orders for this policy. We'll still show the message above for buyers even if you choose not to require an approval.

LEVEL 1

Add more approvers...

×

LEVEL 2

Add more approvers...

×

Add approval level

Requires one approval from each level

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

Cancel

Save



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.