Amazon Tax Exemption Program (ATEP)

Procurement Services

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Why Does IU Need a New Amazon Program?

- Amazon is the top p-card vendor, and a favorite among IU faculty and staff.
- On January 1, 2014, Amazon began collecting sales tax on Indiana residents, including IU.
- Amazon has a tax exemption program for accounts, but the way it’s structured presents a problem for IU.
  - IU faculty and staff may not use the IU’s tax exemption certificate for non-IU related purchases, and/or with their personal credit card.
  - Need to ensure appropriate use of the certificate
- To receive the appropriate tax credit when using the p-card for eligible Amazon purchases, departments should create a ‘Payer’ account, enroll in ATEP and invite buyers in the account using Purchase Delegation.
What is the process?

amznpur@indiana.edu

IU Tax Exemption Certificate

Shipping Address
P-Card#

Buyer Delegate 1

Shipping Address
P-Card#

Buyer Delegate 2

Shipping Address
P-Card#

Buyer Delegate 3
Create a Departmental Account with IU

https://itaccounts.iu.edu

Welcome anderpaa
Select a service
- home
- change current passphrase
- create more accounts
- manage your email
- set up passphrase questions
- view your accounts
- help information

Faculty and Staff Services
- manage affiliates
- manage group accounts
- manage conference accounts

Create Group Account Username:

Your group account user name will be used as the identification to your group accounts on the IU systems. It will also be used as the basis of your group email address.
* denotes required information

*Type Group: AMZNPUR
Username: AMZNPUR
*Display name: [Enter name]
*Campus: Bloomington
*Department: UA-PUR-PURCHASING
*Purpose: Amazon

Submit  Cancel
Create a departmental account with Amazon

Registration
New to Amazon.com? Register Below.

My name is: First Last
My e-mail address is: department@iu.edu
Type it again: department@iu.edu
My mobile phone number is: (Optional)

Protect your information with a password
This will be your only Amazon.com password.

Enter a new password: **************
Type it again: **************

Create account
Enroll in ATEP

Select a file from your computer. Files must be less than 4 MB in size. We accept pdf, jpg, gif, png, doc, and docx file formats.

[ ] I have read and accept the Terms & Conditions

[Upload] [Contact Us]
Welcome to Purchase Delegation

Purchase Delegation allows users to make purchases using shipping addresses and payment methods you create.

Use a business account

Buyers will be able to make purchases using all addresses and payment methods associated with this account.

If this account is currently used for making personal purchases, we strongly recommend creating a new account solely for business use.

Tips for creating business accounts:
- Use a generic email address (i.e. purchasing@univ.edu) in case of personnel changes
- Give the account an identifiable name (i.e. University Purchasing).

Add Shipping Addresses

Tips for adding useful shipping addresses:
- Give addresses identifiable titles (i.e. Zoology Stockroom, R & D Lab)
- Try to add them in reverse alphabetical order (Z to A), making it easier for Buyers to find the correct address
- Remember, addresses added in the future will need to be associated with a payment method to activate.

Add Payment Methods

Tips for adding Payment Methods:
- Use any major credit card or Line of Credit
- Do not use Amazon Store Cards or Bank Accounts
- Remember, payment methods added in the future will automatically be associated with any existing shipping addresses
- Remember, to associate an existing payment method to several new shipping addresses, re-add the payment method.

Invite Buyers

Tips for inviting Buyers:
- Before inviting Buyers, create a local, secure document (i.e. MS Word, MS Excel) with the names, email addresses, and activation keys of prospective Buyers
- Shortly after inviting Buyers, send their individual activation keys via a separate email or other method
- Use this page to cancel invites or Buyer permissions in the future if needed.

Create a new account

Use this account for Delegated Purchasing

Add a Shipping Address

Add a Payment Method

April 17, 2014
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**Purchasing Delegation has been enabled for this account.**

[Disable Purchase Delegation on this account]

1 Shipping Address is available

[Add another Shipping Address]

1 Payment Method is available

[Add another Payment Method]

Buyers can use this account to make purchases

[Invite New Buyer]
Your Account  >  Manage Buyers

Your invite has been sent.

Invite New Buyer  Your invitation has been sent.

Review Buyer Status

<table>
<thead>
<tr>
<th>Buyer</th>
<th>Date Invited</th>
<th>Date Accepted</th>
</tr>
</thead>
<tbody>
<tr>
<td>Jane Doe</td>
<td>02/19/2014</td>
<td>Retract Invite</td>
</tr>
<tr>
<td><a href="mailto:anderpaa@iu.edu">anderpaa@iu.edu</a></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Cancel selected purchasing permissions
Order Items as a Buyer Delegate

1. Login using the email address used to invite you.

2. Add the items to your shopping cart.

3. Click **Proceed to Checkout** and select the applicable Payer account.

4. Select the correct p-card account and shipping address
   - *Buyers aren’t able to add new payment methods or shipping addresses to the Payer’s account*—see Fiscal Officer.

5. After the order is placed, the Buyer and the Payer will receive confirmation.
Tips for Inviting Buyers & Other Features

• Before inviting Buyers, create a local, secure document in Word or Excel with the names, email addresses, and activation keys of prospective buyers.

• After inviting buyers, send them their activation key via a separate email.
  ➢ *Consider using the employee’s telephone number as the activation key.*

• Fiscal Officers can cancel invites or buyer permissions in the future if needed.
  ➢ *When an employee leaves the department, remove them as a purchase delegate.*

• Up to 300 buyers can be authorized per account.
Questions