Walmart Business – Admin User Onboarding Guide

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Welcome to the Admin User Onboarding Guide for Walmart Business!

This guide is designed to provide you with step-by-step instructions on how to activate your account, add or edit delivery addresses, review payment methods & set monthly spend & transaction limits for your team. It will also guide you on how to make purchases for shipping, pickup or delivery.

In addition, this guide includes information on how to download & use the Walmart Business app & Walmart Pay, as well as how to access customer support.

By following this guide, you will be able to efficiently manage your Walmart Business account, saving you time, money & hassle!

We hope this guide will be a valuable resource for you as you navigate your Walmart Business account.

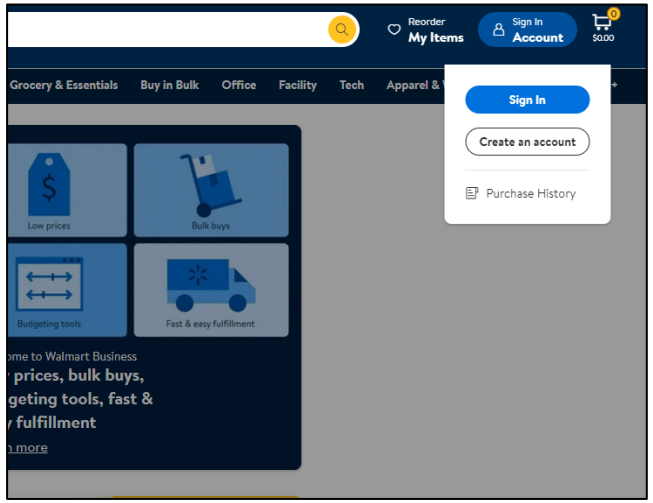
- Walmart Business Onboarding Team

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Walmart Business

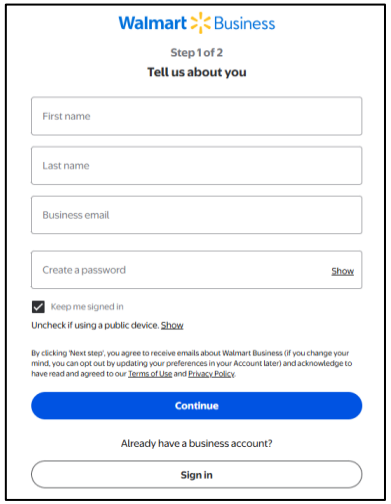
Account Creation

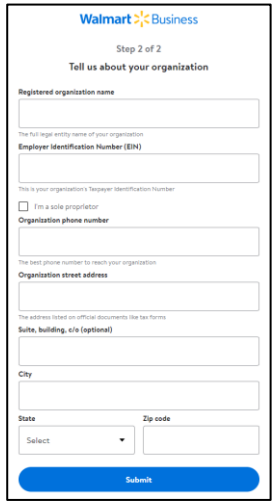
STEP 1



- Navigate to www.Business.Walmart.com.
- Hover over the “Account” button on the top right corner of the page.
- Select the “Create an Account” button.

STEP 2





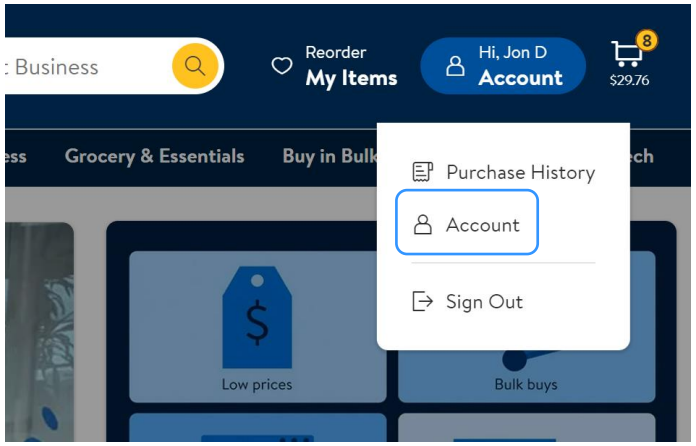
- Complete the necessary account setup fields in “Tell us about you” section.
- Complete the required fields in the “Tell us about your organization” section.

NOTE: Please ensure that the information provided matches the legally registered business information. This information is key for the registration & verification of your Walmart Business account.

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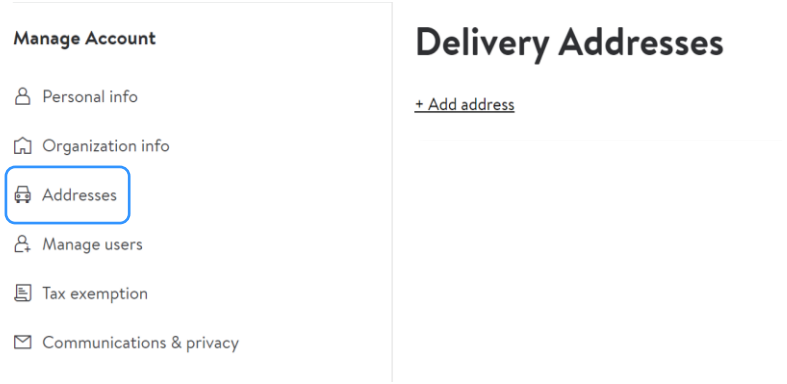
Adding / Editing Delivery Addresses

STEP 1



- Hover over the “Account” button on the top right corner of the page.
- Select “Account” in the drop-down menu.

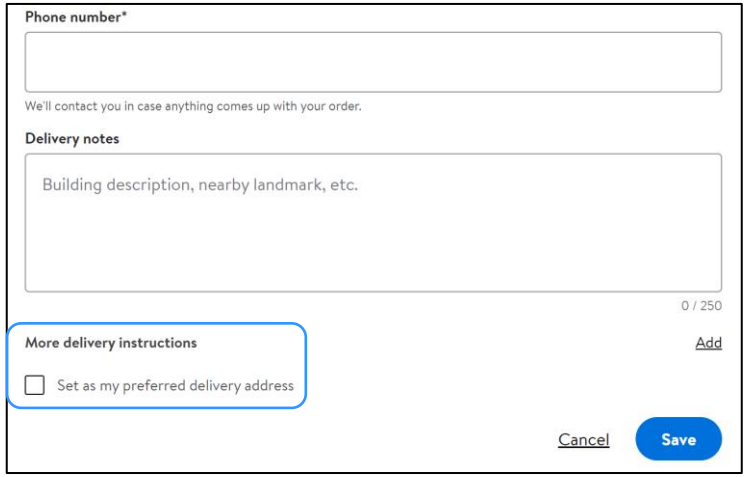
STEP 2



- On the Account Settings page, select “Addresses” on the left-side menu under the “Manage Account” Section.
- To Add New: Select “Add address.”

NOTE: You can add up to 20 addresses per account.

STEP 3



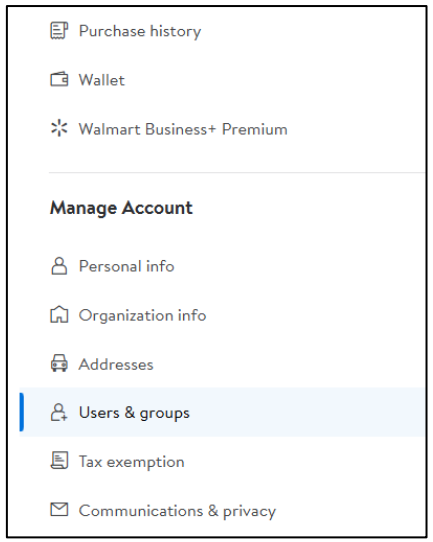
- Complete the required fields & include any necessary delivery notes.
- Check “preferred delivery address,” as shown above, if the new address is the preferred option.

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Walmart Business

Managing Users – Adding a New User

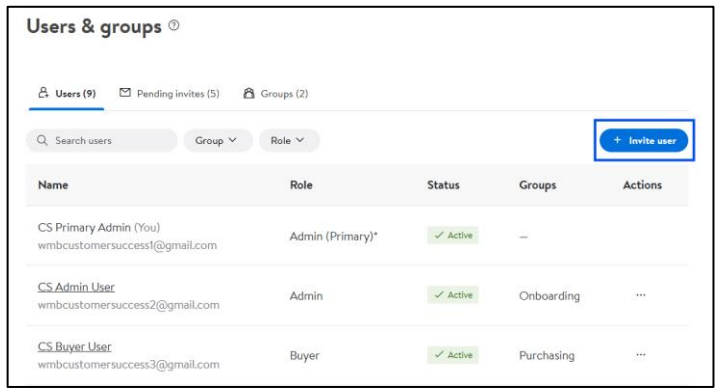
STEP 1



- Navigate to the Account Settings page.
- Select “Users & Groups” from the left-side navigation menu.

NOTE: Non-Walmart Business+ users will select “Manage users” from the left-side navigation menu.

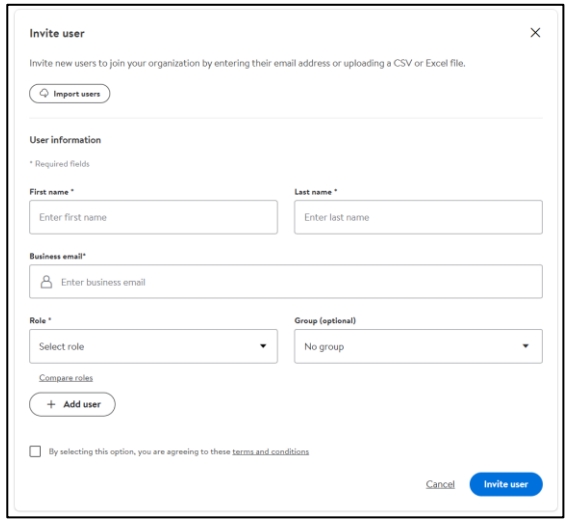
STEP 2



- Select blue “+ Invite User” button.

NOTE: If a user accidentally deleted or cannot locate their email invite, utilize the “Pending invites” tab on the “Users & groups” page to resend their invitation.

STEP 3

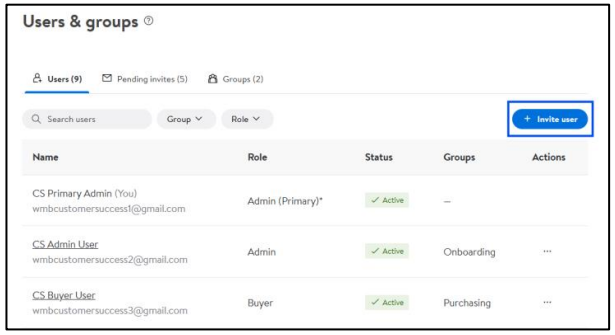


- Provide the First Name, Last Name & Email Address for the user.
- Select the User Role:
  - Buyer – No access to Account Settings.
  - Admin – Access to organization purchase history, spend analytics (Walmart Business+ users only), ability to manage users & groups.
- Check box agreeing to the terms & conditions, then click the blue “Invite user” button.

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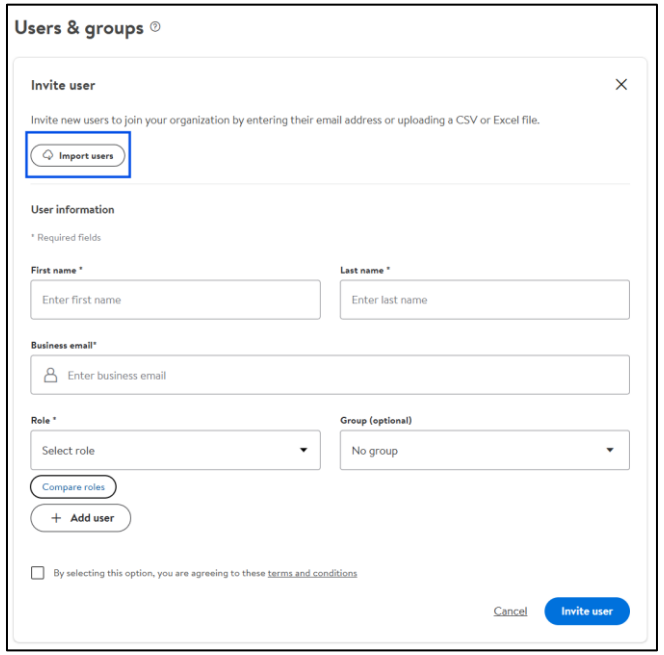
Managing Users – Bulk User Upload *(Accounts >5 Users Only)*

STEP 1



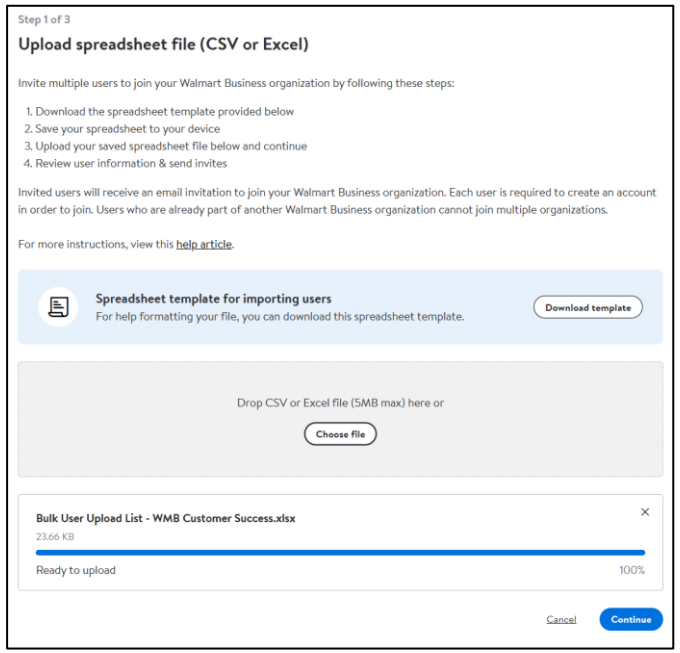
- Navigate to the Account Settings page.
- Select “Users & Groups” from the left-side navigation menu.
- Select blue “+ Invite user” button.

STEP 2



- Click the “Import users” button.

STEP 3



- Follow step-by-step instructions on-screen to upload a CSV or Excel file with the required user information.
- Once your file is successfully uploaded, click the blue “Continue” button.

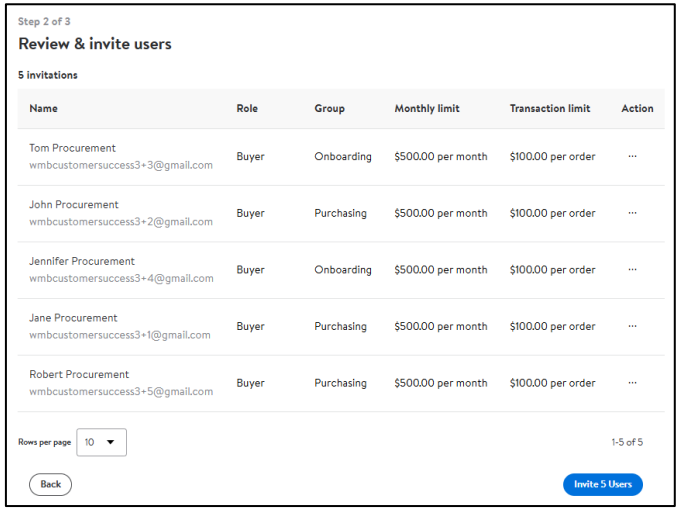
NOTE: Adding users to groups & applying spend limits are optional when completing your bulk upload file.

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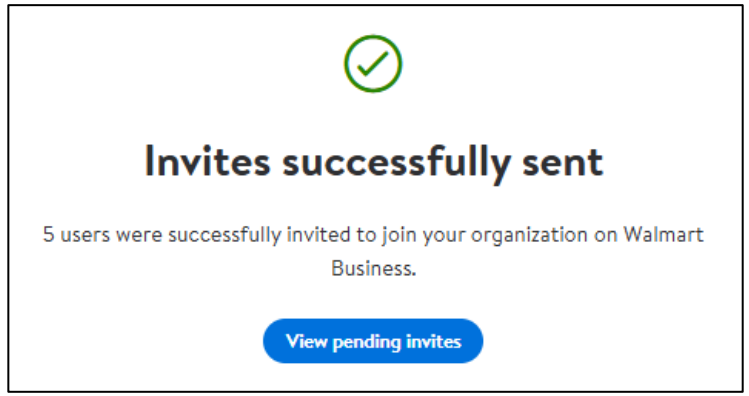
Managing Users – Bulk User Upload *(Accounts >5 Users Only)*

STEP 4



- Review user information.
- Once reviewed, click the blue “Invite Users” button.

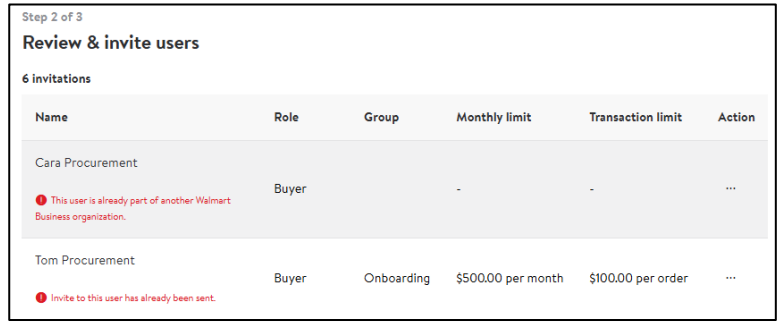
STEP 5



- An on-screen confirmation will show once your invites are successfully sent.

NOTE: Once users are invited, they’ll be sent an automated email with next steps for accepting their invitation to join your organization’s Walmart Business account.

ADDITIONAL INFO



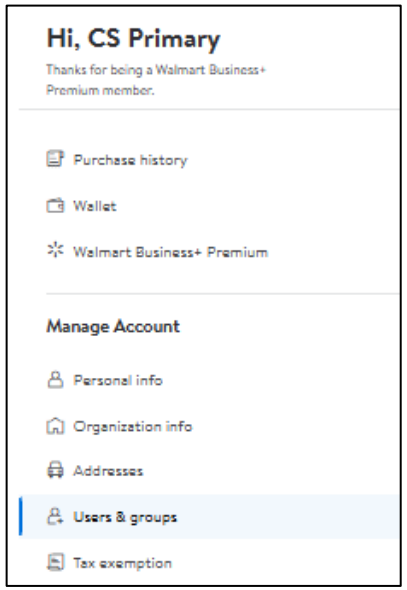
- While reviewing user information, some users may have red error messages if they:
  - Have already been invited to join your Walmart Business account, or
  - Are already part of another Walmart Business organization.
- To proceed, click the three dots under the “Action” column for affected user(s) & click to remove from bulk upload list.

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Managing Users – Editing / Deleting Users

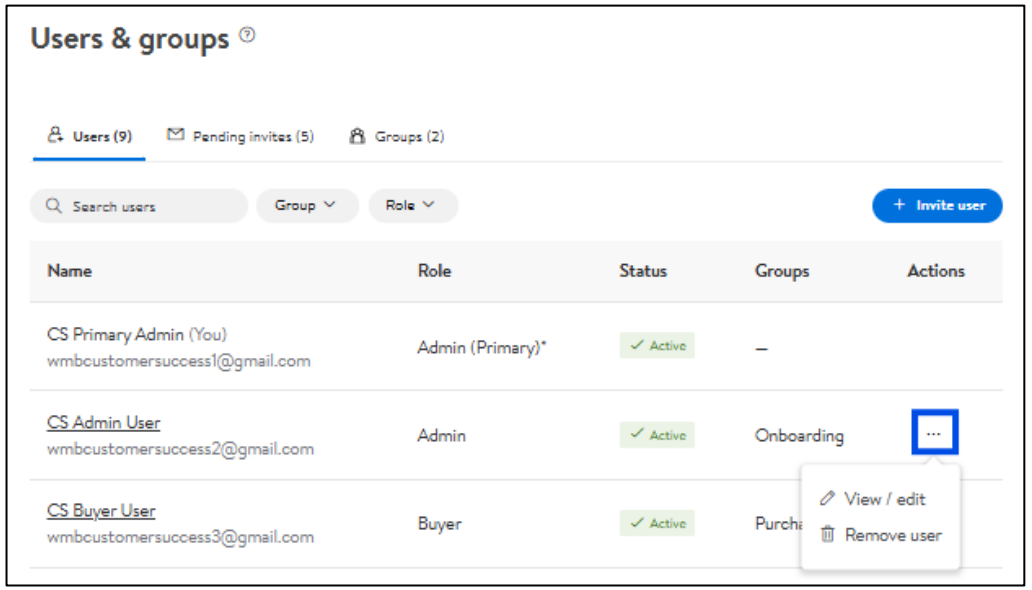
STEP 1



- Navigate to the Account Settings page.
- Select “Users & groups” from the left-side navigation menu.

NOTE: Non-Walmart Business+ users will select “Manage users” from the left-side navigation menu.

STEP 2



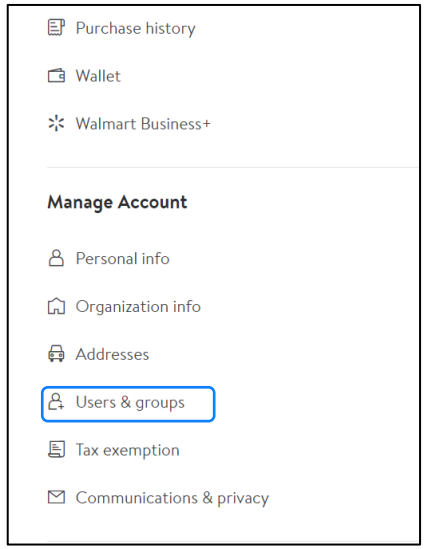
- Select the three horizontal dots adjacent to the user, as shown above.
- This will allow you to perform the following tasks:
  - Remove user
  - Update user roles
  - Add/update user monthly spend limits
  - Add/update user transaction limits

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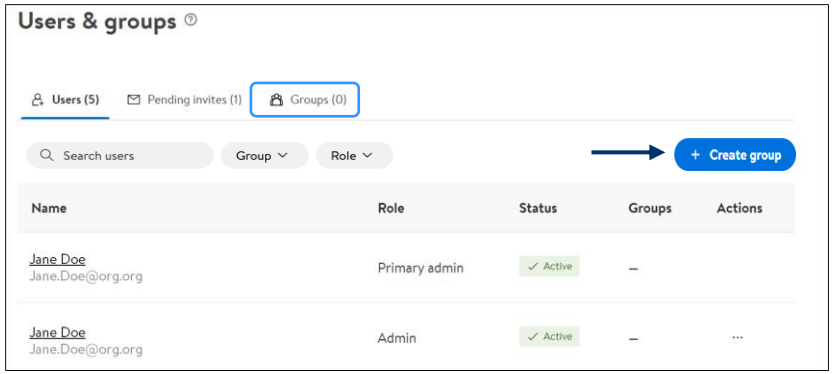
Creating a Group *(Accounts >5 Users Only)*

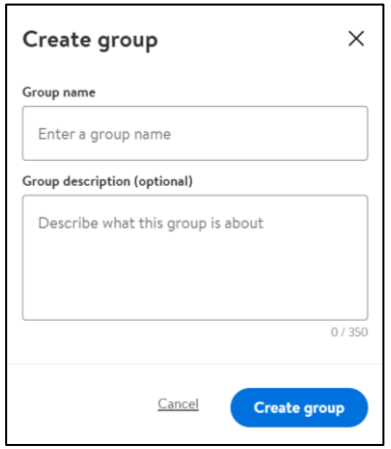
STEP 1



- Navigate to the Account Settings page.
- Select “Users & groups” from the left-side navigation menu.

STEP 2



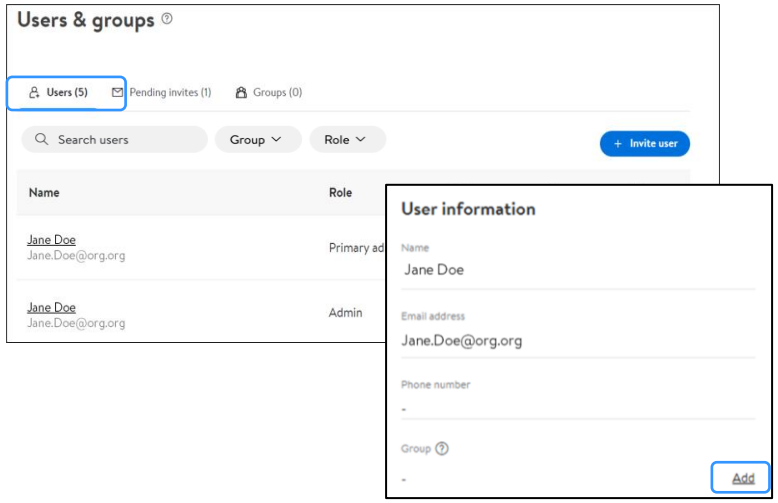


- Navigate to the “Groups” tab.
- Click the blue “Create group” button.
- Enter a group name.
- Add a group description (optional).
- Select “Create group” button to save.

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Adding Users to a Group *(Accounts >5 Users Only)*

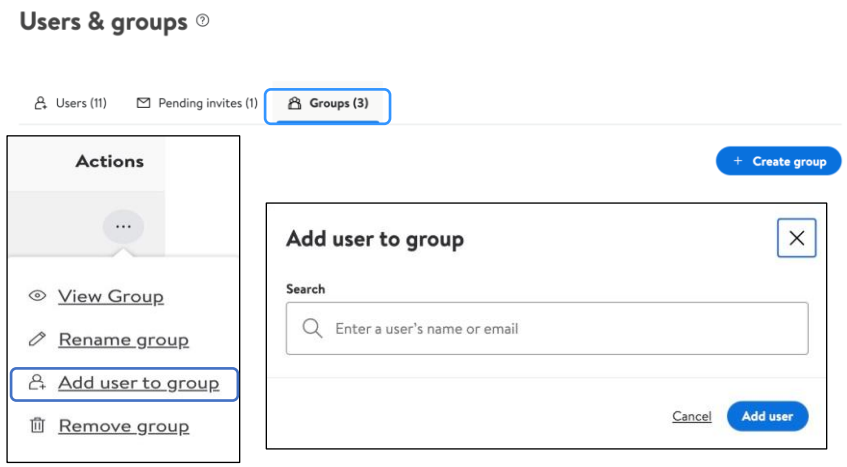
From User Profile



- Select the three horizontal dots adjacent to the user in the “Users” section & click “View / Edit.”
- Select “Add” under the group section, select the desired group, & click “Save.”

NOTE: Locate specific users faster by utilizing the search bar and/or filters at the top of the page.

From Group Profile



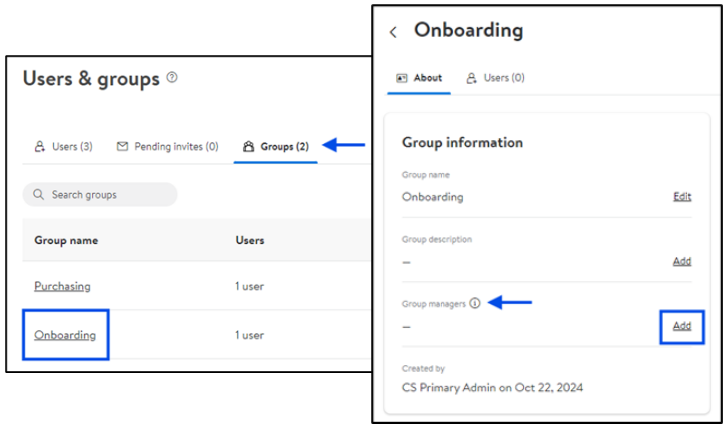
- Select the three horizontal dots adjacent to the group in the “Groups” section & click “Add user to group.”
- Search for the desired user & click “Add user.”

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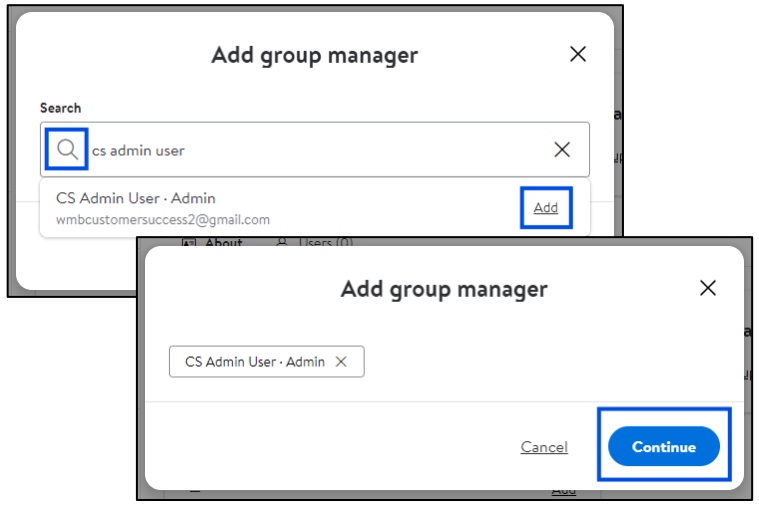
Adding a Group Manager *(Accounts >5 Users Only)*

STEP 1



- From the “Groups” tab, select the group to which you’d like to add a Group Manager.
- From the group’s “About” tab, find the “Group managers” section & click “Add.”

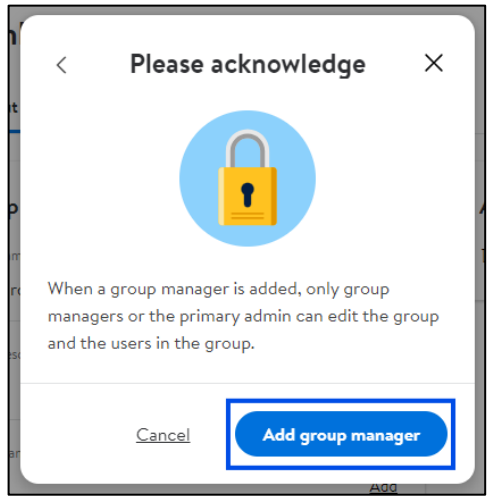
STEP 2



- Search for the name of the Admin user you’d like to add as the Group Manager, then click “Add.”
- Click the blue “Continue” button.

NOTE: Only users with the roles of Primary Admin or Admin can be Group Managers. Users with the Buyer role cannot be Group Managers.

STEP 3



- Read the on-screen acknowledgement, then click the blue “Add group manger” button.

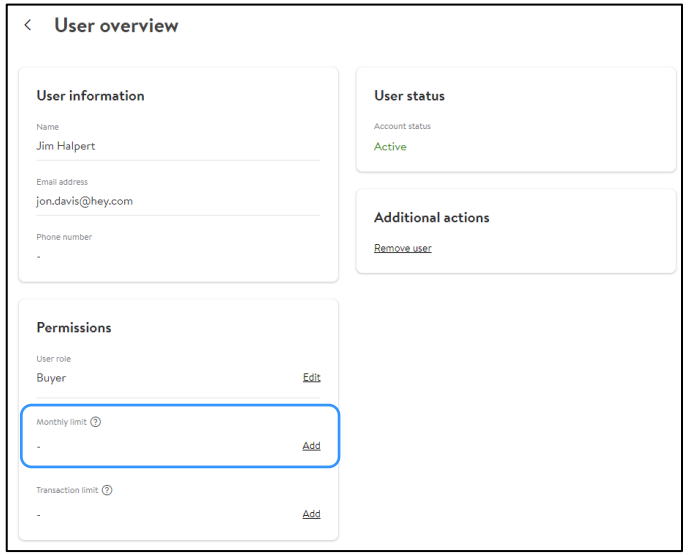
NOTE: When a group manager is added, only group managers or the Primary Admin can edit the group & the users in the group.

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Walmart Business

Setting Monthly Spend Limits

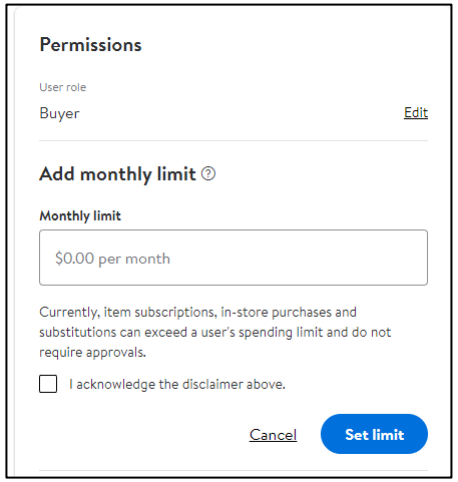
STEP 1



- Navigate to the “User overview” page of the user requiring the spend limit.
- Select “Monthly limit” under the “Permissions” section.
- Select “Add” next to Monthly limit.

NOTE: Only Primary Admin users can add spend limits to Admin & Buyer user accounts.

STEP 2

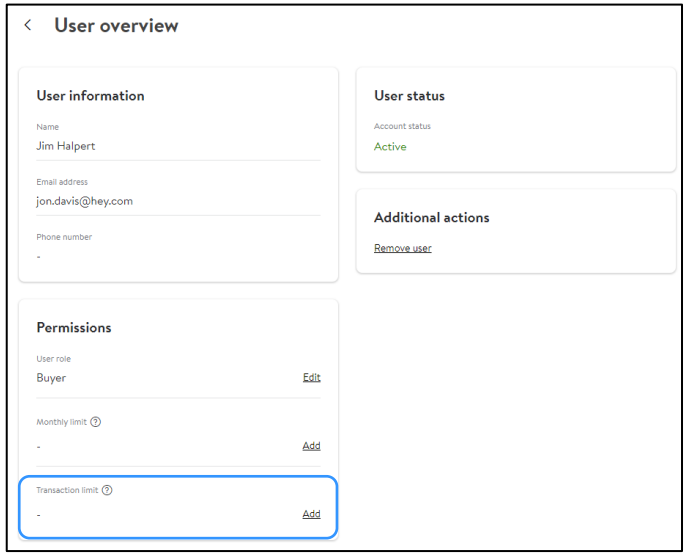


- Enter a monthly spend limit for the user.
- A monthly limit:
  - Limits how much a user can spend per month
  - Requires approval for orders that exceed the limit
  - Resets on the 1st of the month, every month
  - Can be updated any time
  - Includes all purchases within the given month, including in-store purchases paid with Walmart Pay on the Walmart Business app.

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Setting Transaction Limits

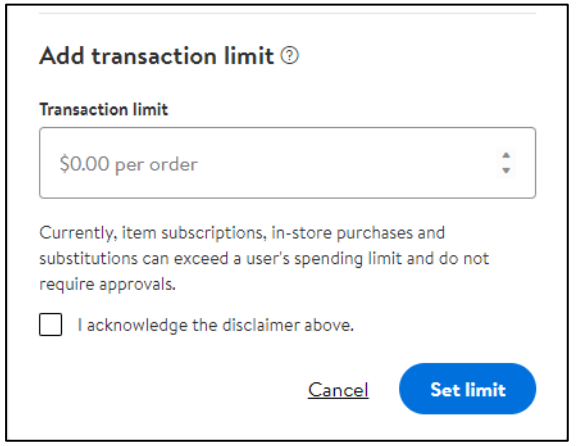
STEP 1



- Navigate to the “User overview” page of the user requiring the spend limit.
- Select “Transaction limit” under the “Permissions” section.
- Select “Add” next to Transaction limit.

NOTE: Only Primary Admin users can add spend limits to Admin & Buyer user accounts.

STEP 2



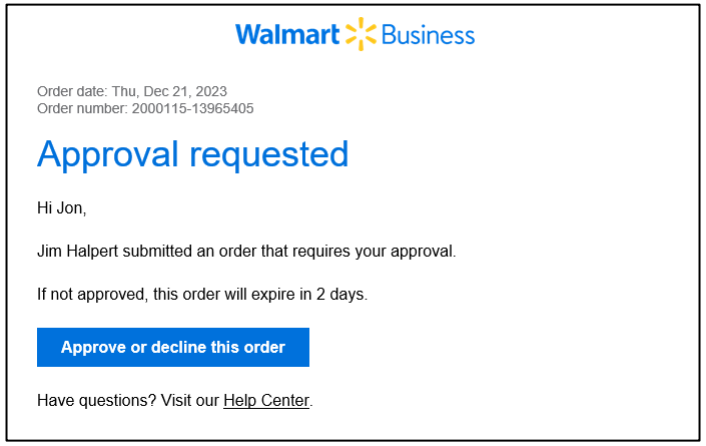
- Enter a transaction limit for the user.
- A transaction limit:
  - Restricts how much a user can spend per order
  - Requires approval for orders that exceed the limit
  - Takes effect immediately
  - Can be updated any time

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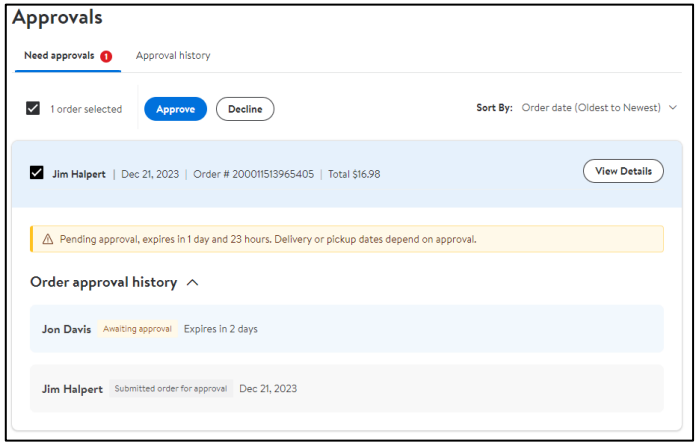
Admin Order Approvals

STEP 1



- When a user places an order that is over their monthly or transaction-level limit, the order will be submitted to the Primary Admin for approval.
- The Primary Admin will receive an email notification prompting them to “approve” or “decline” the order.

STEP 2



- The Primary Admin can access the “Approvals” page via the link in the email, or by selecting “Approvals” under the “Spend Control” section of the account settings menu.

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Admin Order Approvals

APPROVAL WINDOWS

There is a fixed amount of time for approval on an order. Orders that do not get actioned will expire & cancel.

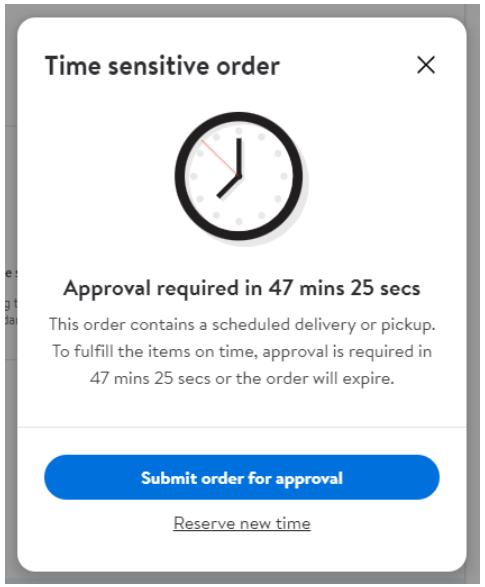
Scheduled Pickup or Delivery:

- Orders ready in 4 hours will have a 30-minute approval window.
- Orders ready in 5 hours will have a 1 hour 30-minute approval window.
- For every hour of fulfillment time over 5 hours, there's another hour to approve the order with a max of 2 days.

All Unscheduled Orders:

- Orders will have an approval window ranging from >8 hours to 2 days, depending on the promised "arrives by" date at checkout.
- Orders that qualify for same day delivery may have a shortened approval window.

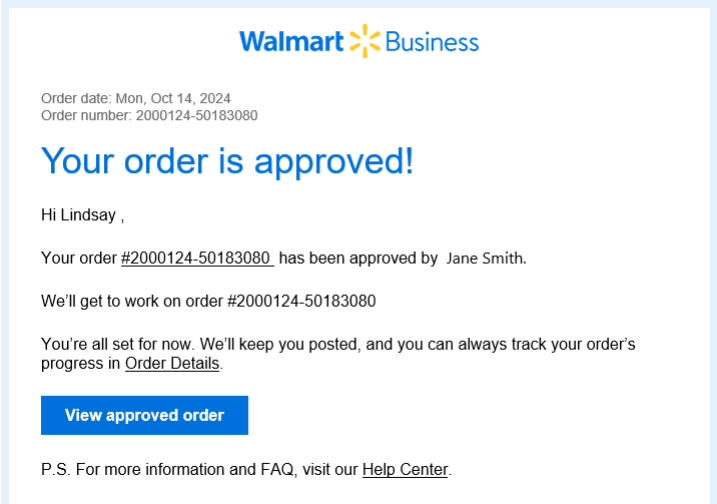
TIME SENSITIVE ORDERS



Time sensitive orders are **scheduled orders** that are fulfilled within **16 hours or less**.

- These orders will receive a notification at checkout.

EMAIL COMMUNICATION



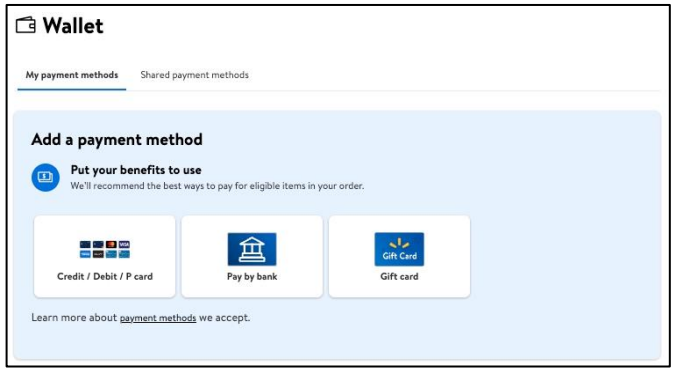
Primary admins & **buyers** will receive emails for:

- Orders submitted for approval
- Approved orders
- Canceled orders
- Declined orders
- Expired orders

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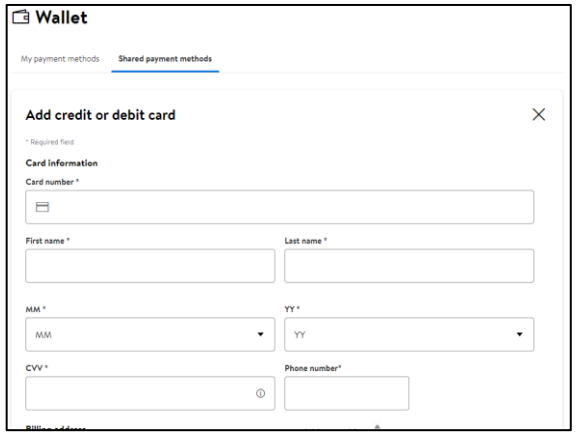
Wallet & Shared Payments

User-Specific



- User & account payment methods can be managed under the “Wallet” section in the Account Settings.
- Each user has access to a user-specific payment method, as well as Shared Payment Methods that are managed by the Primary Admin.

Shared Payment



- From the “Wallet” menu, navigate to the “Shared payment method” tab.
- Complete the required fields for payment method.

NOTE: Only the Primary Admin of the account can add / edit the shared payment method. Once added, the shared payment method will be available to all users.

Payment Methods

You can use any of the following to pay for your Walmart Business orders:

- Debit Cards
- Credit Cards*
- Gift Cards
- Purchase Cards (P-Cards)
- Pay-by-Bank/ACH/eCheck

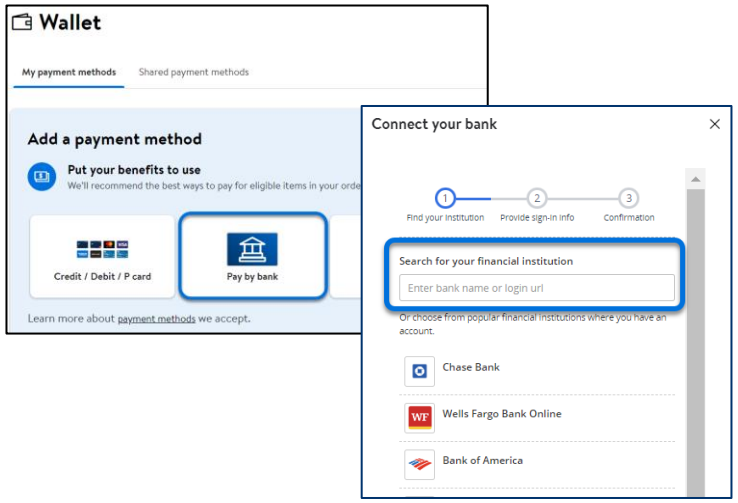
*The Walmart Business site does **not** currently accept:

- Walmart Business Card
- Walmart Community Card
- Sam’s Club Private Label Card
- Purchase Orders (PO)
- Net30
- Invoices

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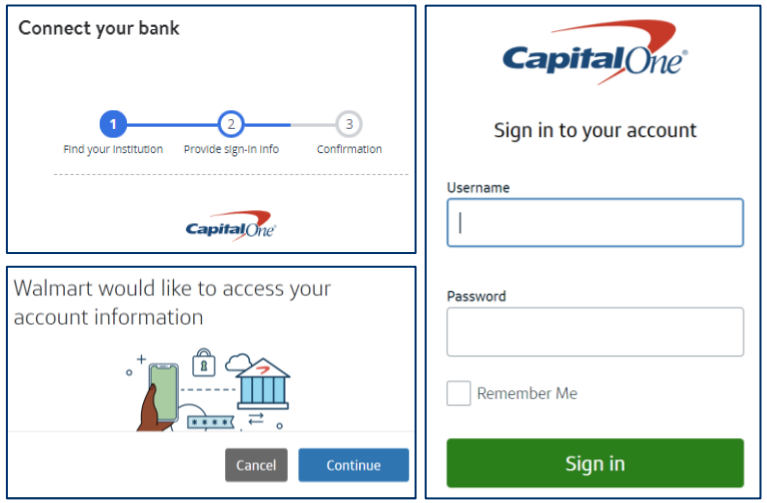
Adding Pay-by-Bank to User Wallet

STEP 1



- Navigate to the “Wallet” section of Account Settings.
- Click on the “Pay by bank” option to add as a payment method.
- Search for your financial institution or select from the options listed below.

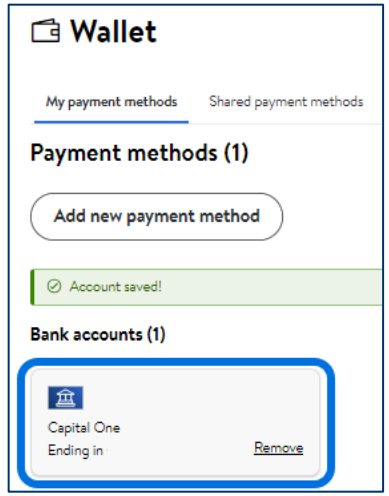
STEP 2



- Follow the on-screen prompts to provide the sign-in information to your selected bank.

NOTE: The images above will vary depending on your selected financial institution.

STEP 3



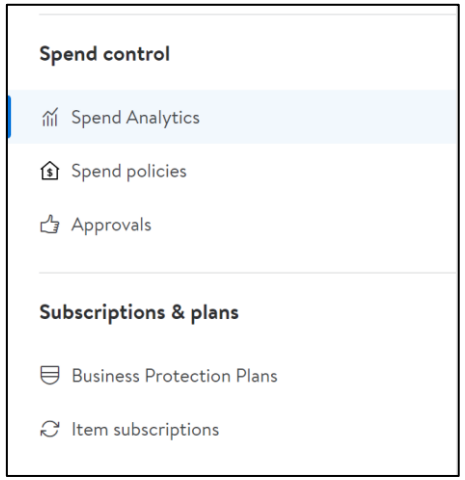
- Once your account is added you’ll be redirected back to the “Wallet” section of Account Settings.
- The newly added bank account will now show under ”Payment methods.”

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Walmart Business

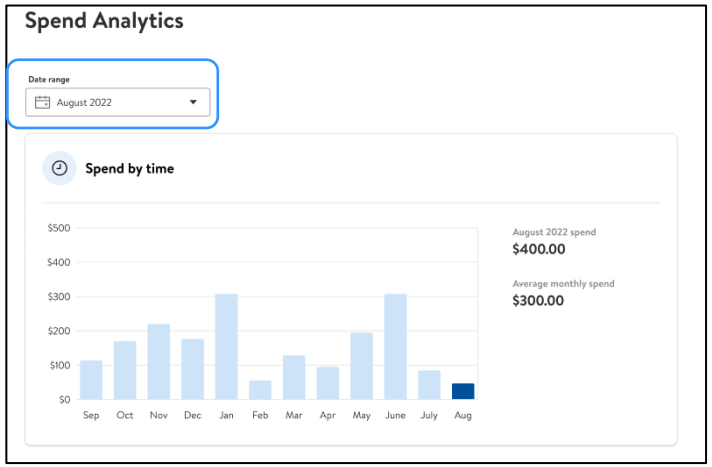
Spend Analytics *(Walmart Business+ Only)*

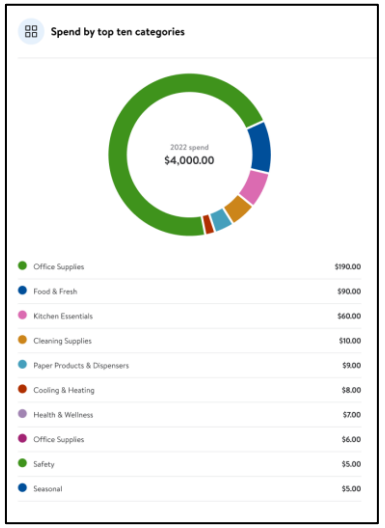
STEP 1

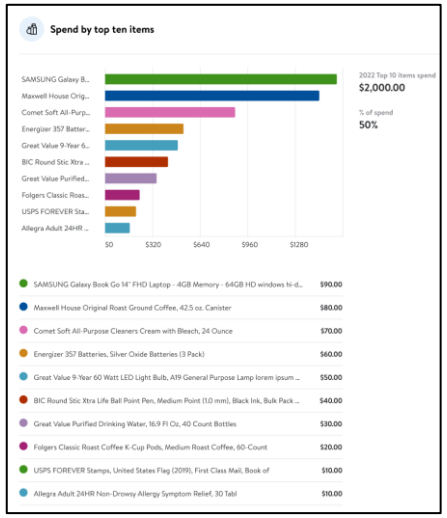


- Navigate to the Account Settings page.
- Select “Spend Analytics” from the left-side navigation menu under “Spend control.”

STEP 2







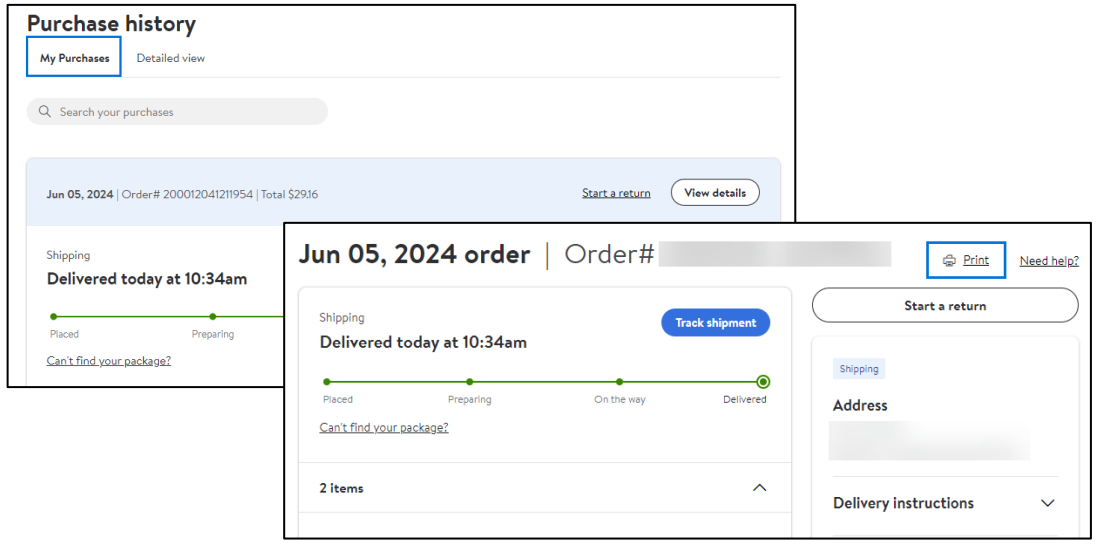
- Select the month that you would like to review.
- Spend Analytics allows you to review data in the following views:
  - Spend by time
  - Spend by top ten categories
  - Spend by top ten items
  - Spend by user

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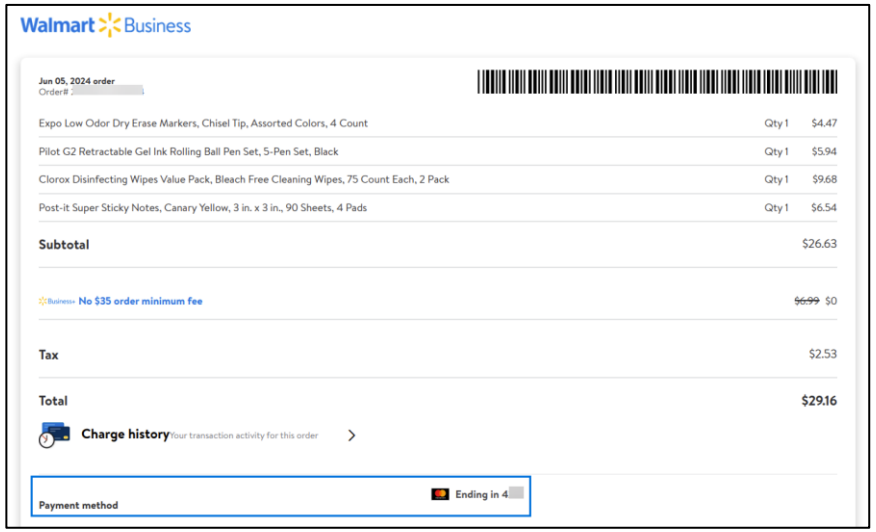
Accessing Receipts – My Purchases

My Purchases



- Navigate to the "**Purchase history**" section of Account Settings.
- Scroll to view past purchases.
- To view more details of a purchase, click the "**View details**" button in the heading of the desired purchase.
    - Additional details on this page include items purchased, total cost, **payment method** & many more.
    - For a printer-friendly version of this page, click "**Print**" in the upper right-hand side of the page.

Print View



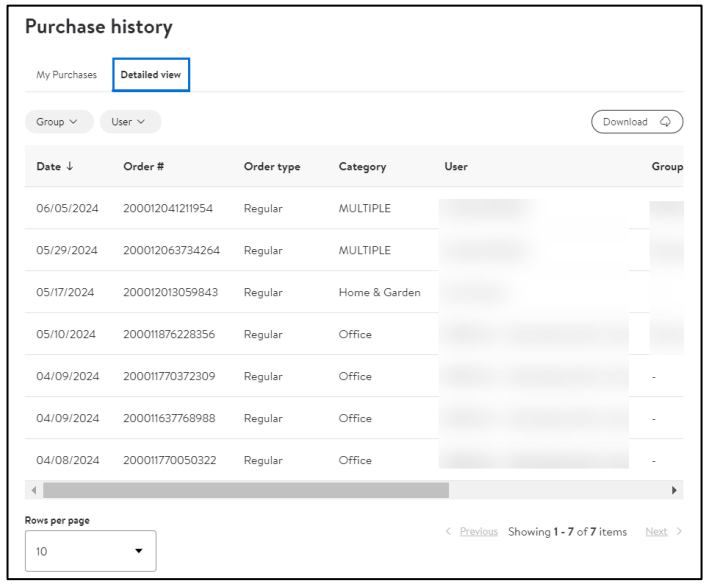
- The **printer-friendly receipt** provides a more condensed version of order details, including:
    - List of items purchased, quantity & cost
    - Total cost including delivery & tax, if applicable
    - Payment method
        - If paid by credit card, the last 4 digits of the card used will appear

NOTE: Many uses find it helpful to send a PDF copy of this receipt to appropriate persons for expense tracking/reporting.

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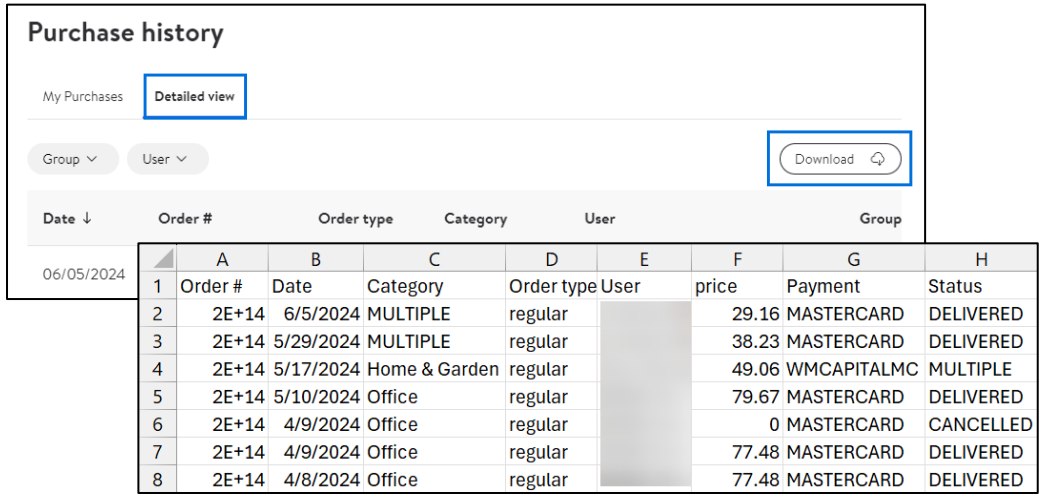
Accessing Receipts – Detailed View

Detailed View



- Navigate to the "**Purchase history**" section of Account Settings.
- Click on the "**Detailed view**" tab.
- From this tab a list displays with details of each purchase including date, order #, order type, category, total cost, payment & status.
    - Orders from **all users** will appear in this view for **Admin users only**. Buyers will only see their own purchases.
    - Additional details for Admins include the **user** of each purchase & their **group**, if applicable, & can filter the list by both/either of those details.

Download Version



	A	B	C	D	E	F	G	H
1	Order #	Date	Category	Order type	User	price	Payment	Status
2	2E+14	6/5/2024	MULTIPLE	regular		29.16	MASTERCARD	DELIVERED
3	2E+14	5/29/2024	MULTIPLE	regular		38.23	MASTERCARD	DELIVERED
4	2E+14	5/17/2024	Home & Garden	regular		49.06	WMCAPITALMC	MULTIPLE
5	2E+14	5/10/2024	Office	regular		79.67	MASTERCARD	DELIVERED
6	2E+14	4/9/2024	Office	regular		0	MASTERCARD	CANCELLED
7	2E+14	4/9/2024	Office	regular		77.48	MASTERCARD	DELIVERED
8	2E+14	4/8/2024	Office	regular		77.48	MASTERCARD	DELIVERED

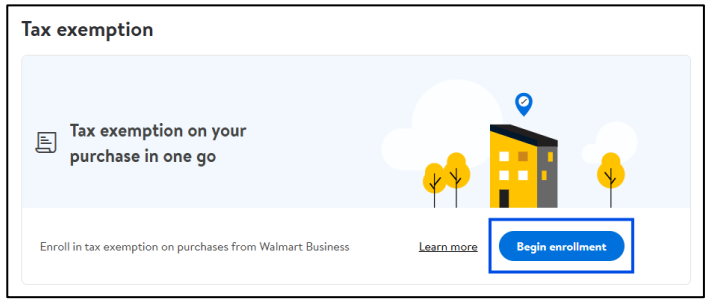
- The "Detailed view" tab features a "**Download**" button located in the upper right-hand side of the page.
- Clicking the "Download" button initiates downloading an **Excel version** of the purchase history list
    - Orders from **all users** will appear in the Excel sheet for **Admin users only**. Buyers will only see their own purchases.
    - Additional details for **Admin** users include the **user** of each purchase.
    - In the downloaded version, Excel's sort and/or filter functions are available.

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Walmart Business

Applying For Tax Exemption

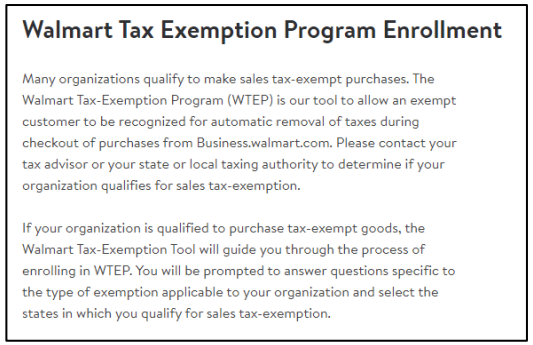
STEP 1



- Navigate to "Tax exemption" under your account settings.
- Select “Begin enrollment“

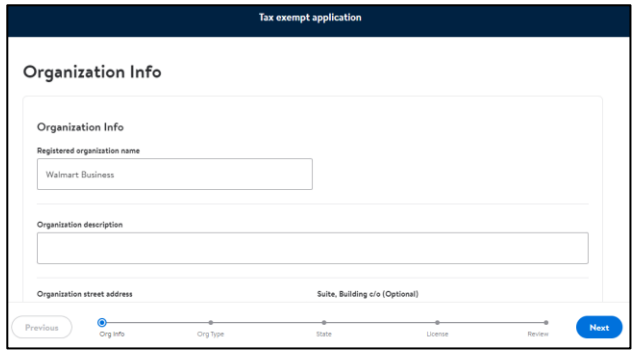
NOTE: Only the Primary Admin can enroll / manage tax exemption.

STEP 2



- The Program Enrollment page will guide you through the whole process for your Tax Exemption Enrollment.
- This helpful resource includes step-by-step instructions, links to resource guides & other helpful links to facilitate a successful enrollment.

STEP 3



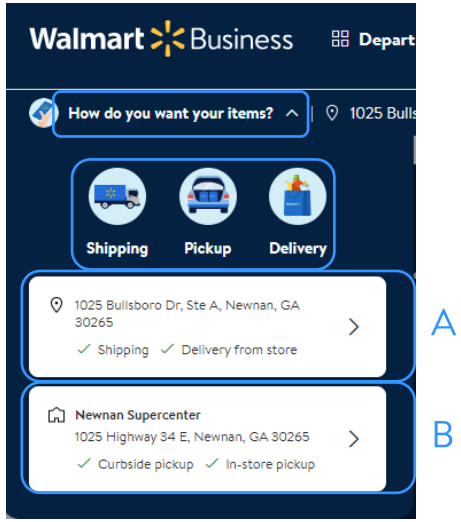
- The Program Enrollment page will lead you to the actual enrollment application.
- Please reference the Program Enrollment page for detailed instruction on how to complete this application.

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Walmart Business

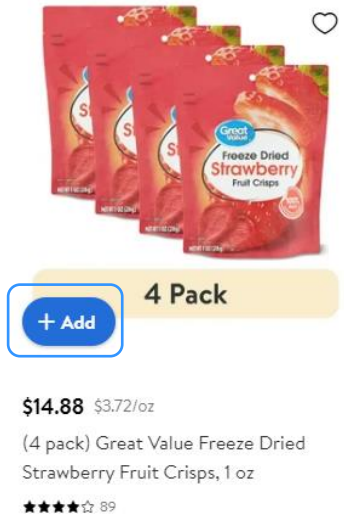
Making a Purchase – Order for Shipping

STEP 1



- Using the drop-down menu in the navigation bar, select that you want to place an order for “Shipping.”
- Address bar “A” shows your current shipping/delivery address.
- Address bar “B” shows the store that will be fulfilling your order.

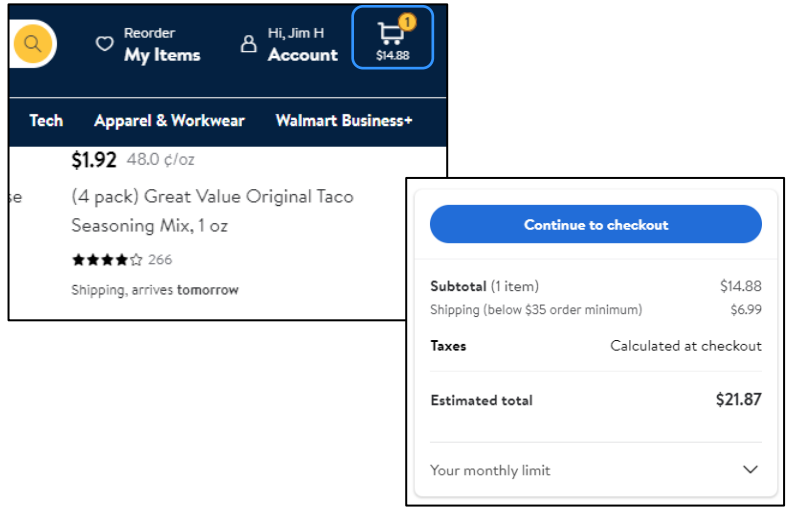
STEP 2



- Identify an item that you would like to purchase.
- Select the “Add” button to add the item to your cart.

NOTE: Some items may be unavailable for shipping. Shopping carts might include multiple fulfillment types with some items being shipped, & others available for pickup or delivery.

STEP 3

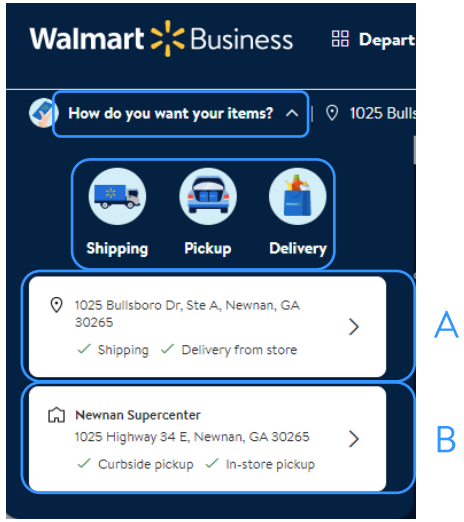


- Select the Shopping Cart icon when you are ready to complete your purchase.
- Review your items & select the “Continue to checkout” button.
- Review your selected delivery address & enter your payment method.

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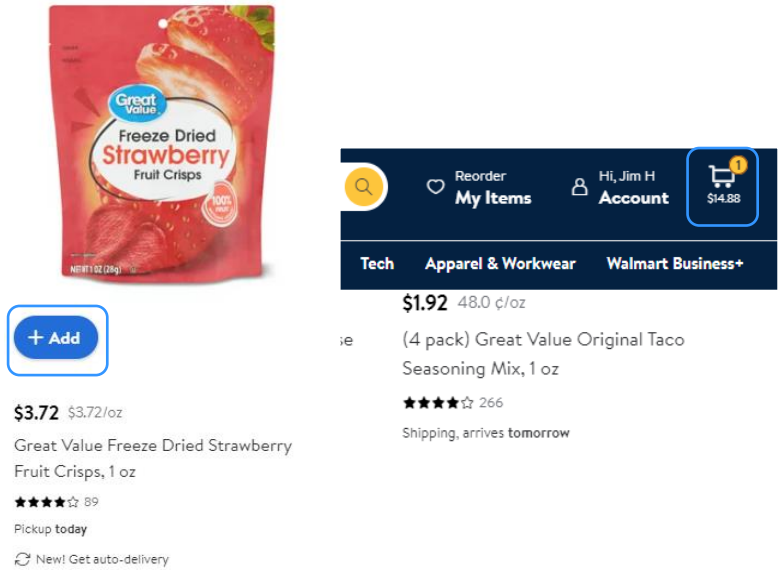
Making a Purchase – Order for Pickup

STEP 1



- Using the drop-down menu in the navigation bar, select that you want to place an order for “Pickup.”
- Address bar “A” shows your current shipping/delivery address.
- Address bar “B” shows the store where you will pick up your order.

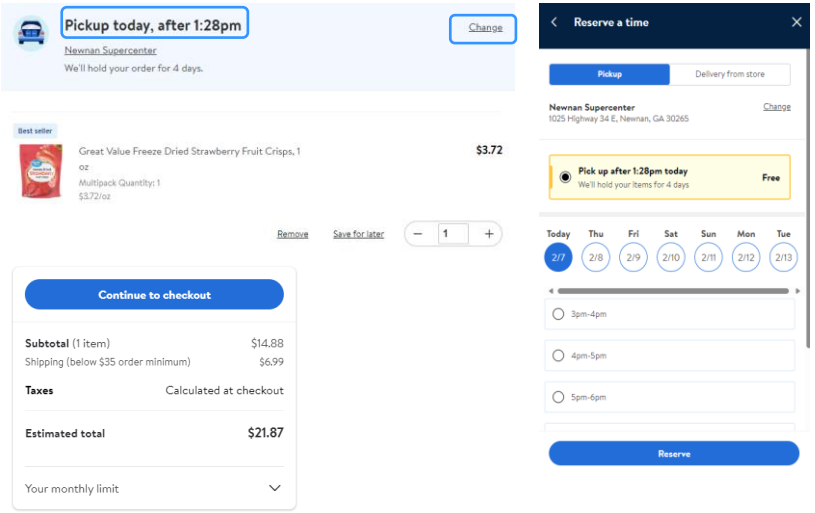
STEP 2



- Identify an item that you would like to purchase.
- Select the “Add” button to add the item to your cart.
- Select the Shopping Cart icon when you are ready to complete your purchase.

NOTE: Some items may be unavailable for pickup. Shopping carts might include multiple fulfillment types with some items being shipped, & others available for pickup or delivery.

STEP 3



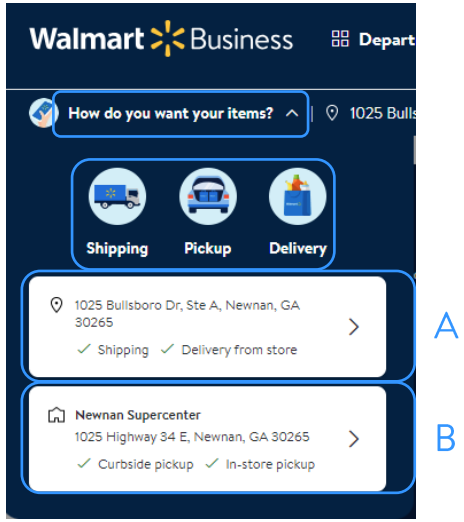
- Review the auto-selected pickup time. Select “Change” if you would like a different pickup date/time.
- Select “Continue to checkout.”
- Review your order information & enter your payment method.
- Follow instructions in your confirmation email for pickup. You can also review the step-by-step guide HERE.

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Walmart Business

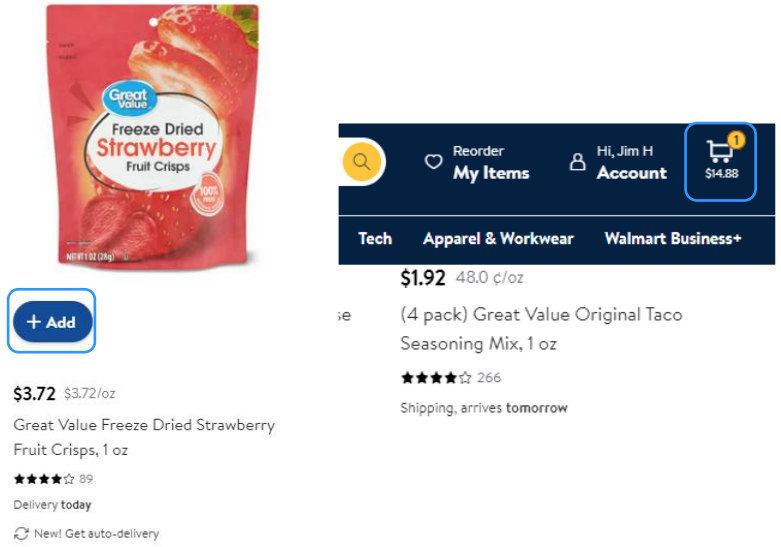
Making a Purchase – Order for Delivery

STEP 1



- Using the drop-down menu in the navigation bar, select that you want to place an order for “Delivery.”
- Address bar “A” shows your current shipping/delivery address.
- Address bar “B” shows the store that will fulfill your order.

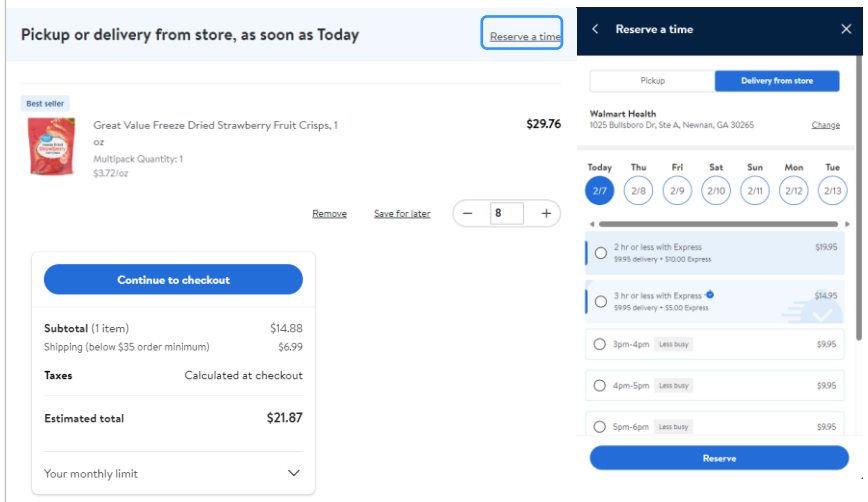
STEP 2



- Identify an item that you would like to purchase.
- Select the “Add” button to add the item to your cart.
- Select the Shopping Cart icon when you are ready to complete your purchase.

NOTE: Some items may be unavailable for delivery. Shopping carts might include multiple fulfillment types with some items being shipped, & others available for pickup or delivery.

STEP 3



- Select “Reserve a time” to schedule your delivery.
- Select “Continue to checkout.”
- Review your order information & enter your payment method.
- Follow the instructions in your confirmation email to receive your delivery order. You can also review the step-by-step guide HERE.

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Making a Purchase – In-Store

Overview

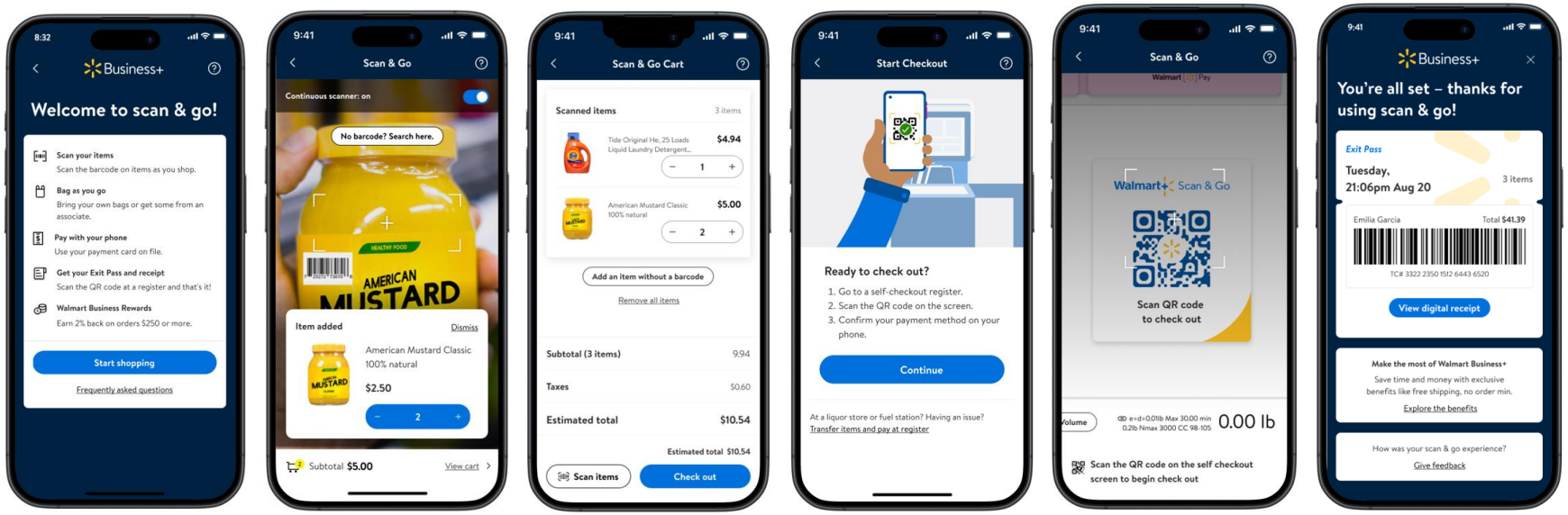
Walmart Business customers can easily make in-store purchases at any Walmart location.

- To **link** in-store purchases to your Walmart Business account, utilize the **Walmart Pay** feature within the **Walmart Business app**.
- You can find more information on the Walmart Business app & Walmart Pay within this guide by clicking the links above.

Tax Exemption (If Applicable):

- If your account has tax exemption status, in-store purchases made using Walmart Pay via the Walmart Business app will **automatically** apply your tax exemption.

Scan & Go *(Optional)*



Walmart Business+ customers have the **option** to check out as they shop to make in-store shopping fast & contact-free.

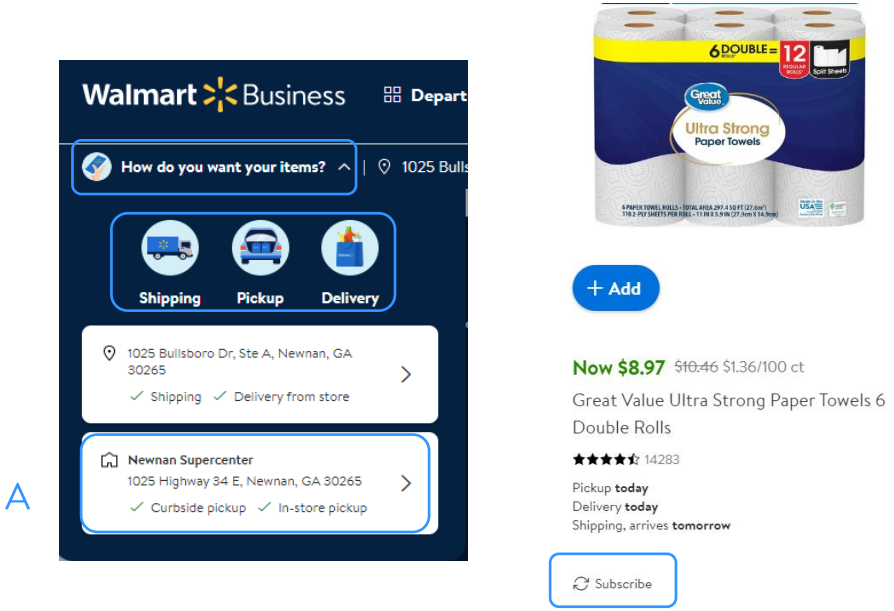
How it Works:

1. Open the Walmart Business app when you're inside a Walmart Store
2. Select **Start shopping**
3. Scan an items bar code as you place it in your cart
   - You can adjust the quantity of the item in the app
4. When you're finished shopping, select **Review & Pay**
5. Head to the self-checkout & **scan the QR code** on the screen
6. Select the **payment method** you want to use from your Walmart Business wallet

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Making a Purchase – Item Subscriptions

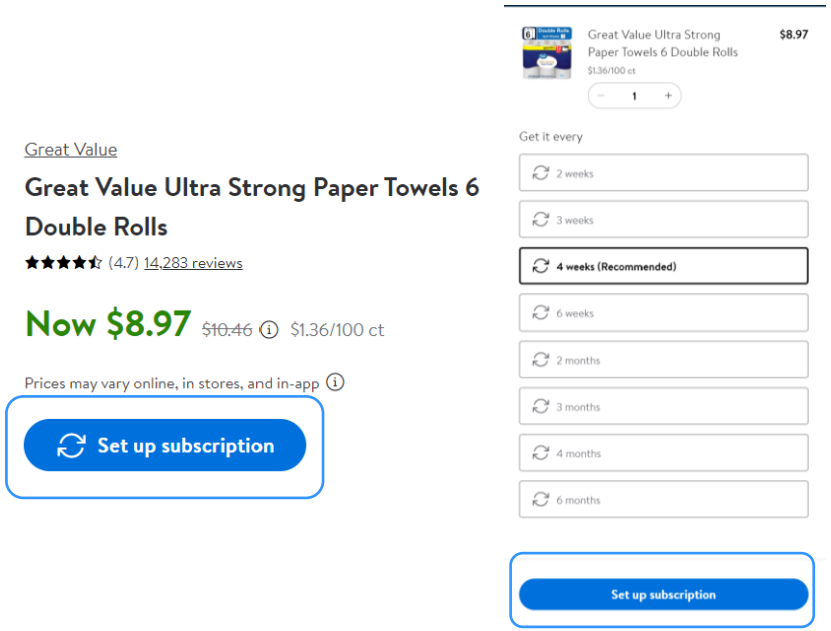
STEP 1



- Using the drop-down menu in the navigation bar, select that you want to place an order for “Shipping.”
- Address bar “A” shows your current shipping/delivery address.
- Search for an item that you would like to set up on a subscription. Subscription eligibility can be identified by the “Subscribe” tag, as shown above.

NOTE: You can filter the search results by “subscription” by using the tools at the top of the page.

STEP 2

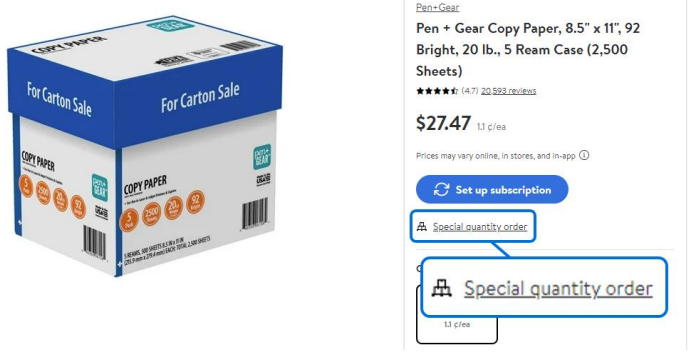


- Once the item is identified, select the item to view the item page.
- Select the “Set up subscription” option to initiate the subscription set up.
- Review & confirm the subscription details, including:
  - Quantity
  - Order Frequency
- Select “Set up subscription” to finalize the subscription.

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Making a Purchase – Special Quantity Order

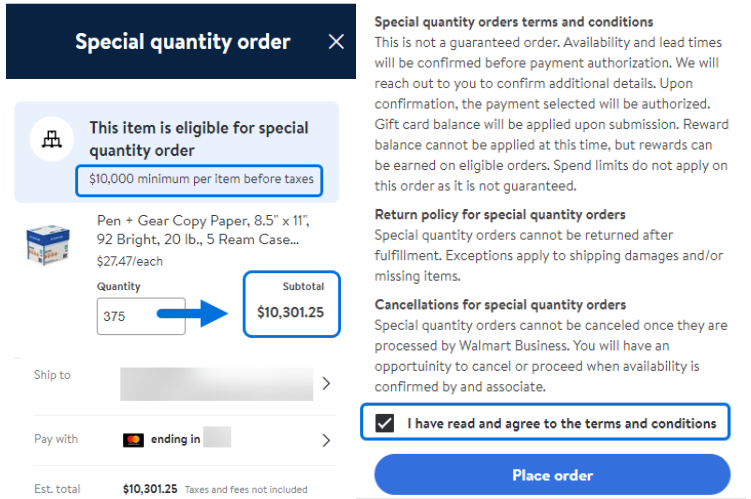
STEP 1



- Special Quantity orders are available for Walmart Business customers to purchase an item in a quantity that is equal to $10,000 or above.
- To place a Special Quantity order, navigate to the product you would like to special order & click the link titled, "**Special quantity order**."

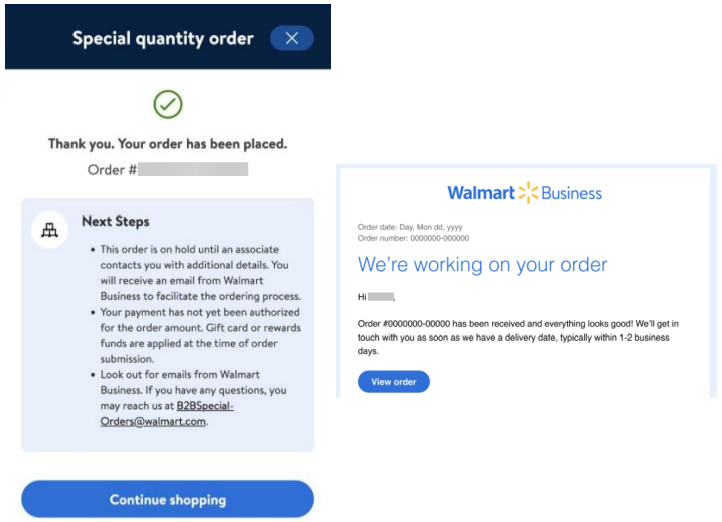
NOTE: Not all products are available for Special Quantity order & are subject to availability.
At this time Special Quantity orders cannot be placed for food, medicine/OTC, 1P Apple products, Sports Trading Cards or Gift Cards.

STEP 2



- A "Special quantity order" page will appear on the product page.
- Enter the **quantity** you would like to order, ensuring the subtotal before taxes it equal to **$10,000 or above**.
- Confirm your form of payment & ship to address for the order.
- Scroll down to view the "**Special quantity orders terms and conditions**."
- Check the box to **agree** & click the "**Place order**" button.

STEP 3



- A confirmation will appear on screen with information on next steps.
- You will also receive an email confirmation with a link to track your order.

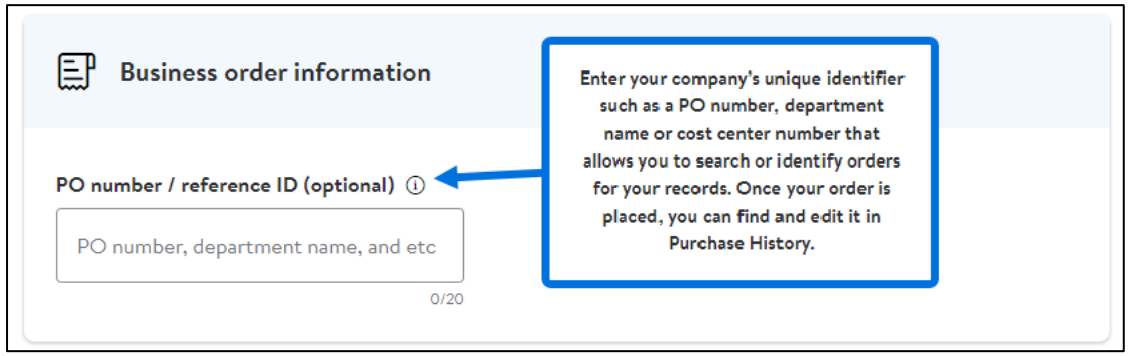
NOTE: You will be contacted upon placement of your order to confirm details. If you have questions about your order, reach out to B2BSpecial-Orders@walmart.com.

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Walmart Business

Custom PO Number or Reference ID *(Optional)*

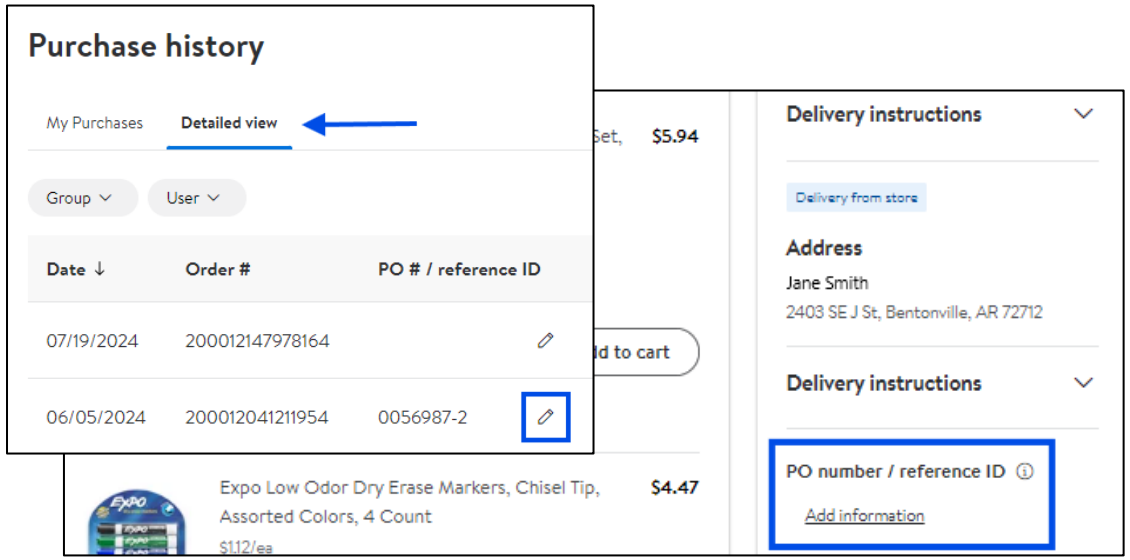
During Checkout



At checkout, users can add a customer PO number or reference ID to their order:

- Go to the **checkout** page.
- Add a custom PO Number / Reference ID under "**Business order information**."
  - Maximum of 20 characters
  - Alphanumeric, dashes & spaces allowed
- If entered, this will show on the order confirmation page & in the Order Details.

After Purchase



After an order is placed, users can add or edit a customer PO number or reference ID multiple ways:

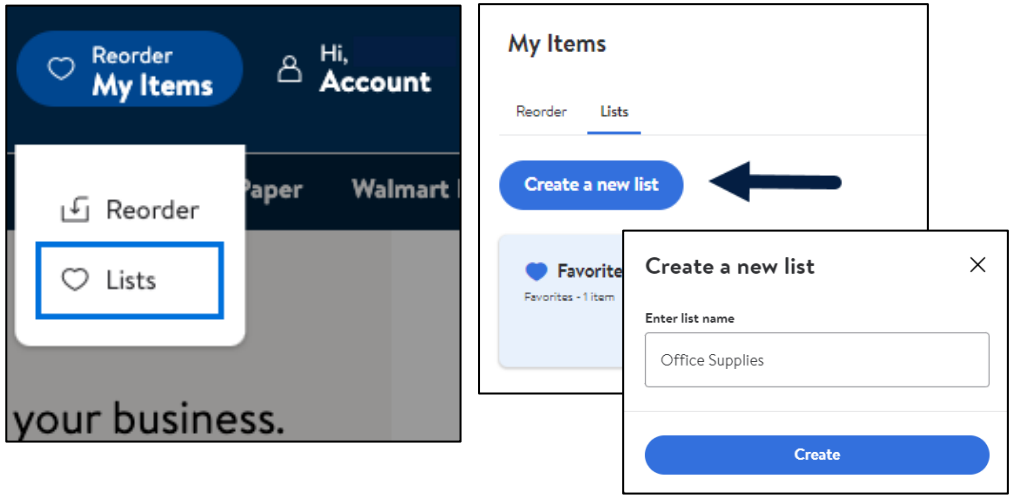
- From **Purchase history**, select **Detailed view** tab.
  - In the PO # / reference ID column, click the pencil icon next to order you'd like to add/edit.
- From **Purchase history**, select **View details** of the order.
  - Select Add information or Edit.
  - Enter the custom PO number or reference ID.

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Walmart Business

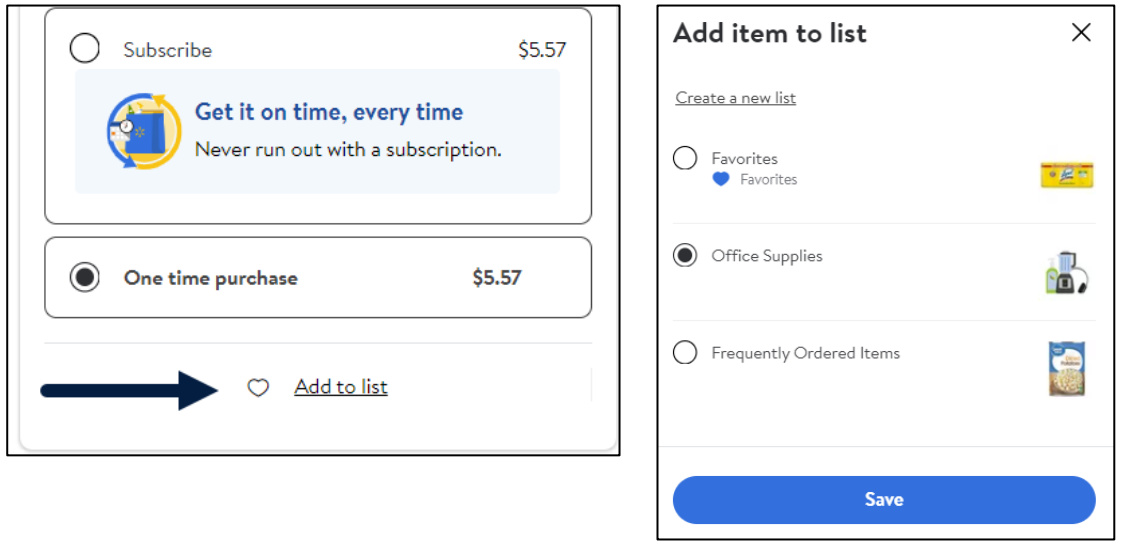
Lists

Creating a New List



- From the homepage, click on the "**My Items**" link located at the top-right of the screen.
- Select "**Lists**"
- Click the "**Create a new list**" button.
- Enter a list name & click "**Create.**"

Adding to a List



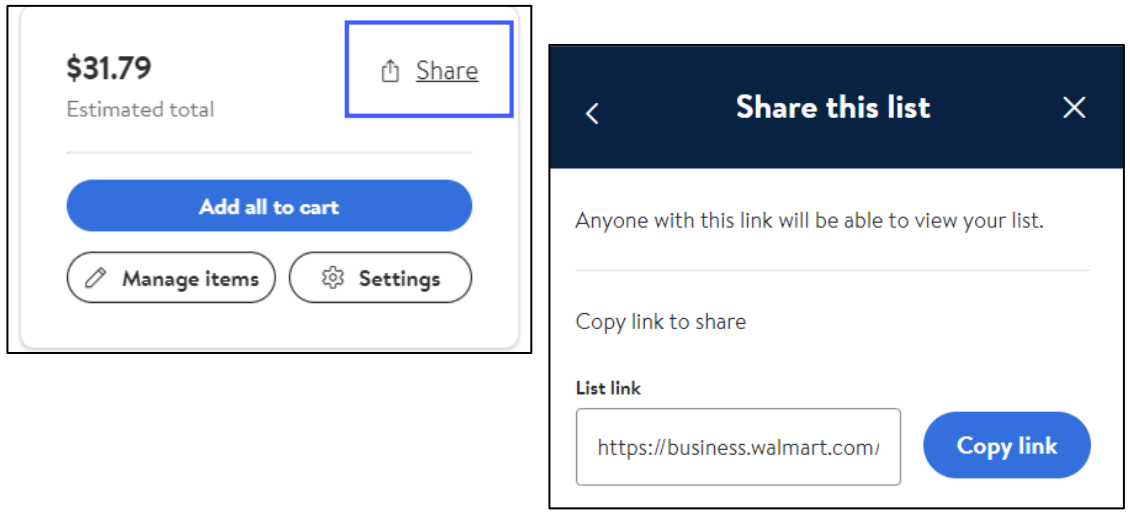
- Navigate to the product you'd like to add.
- In the options below "Add to Cart," select "**Add to list.**"
- Choose the appropriate list (or create a new list) & click "**Save.**"

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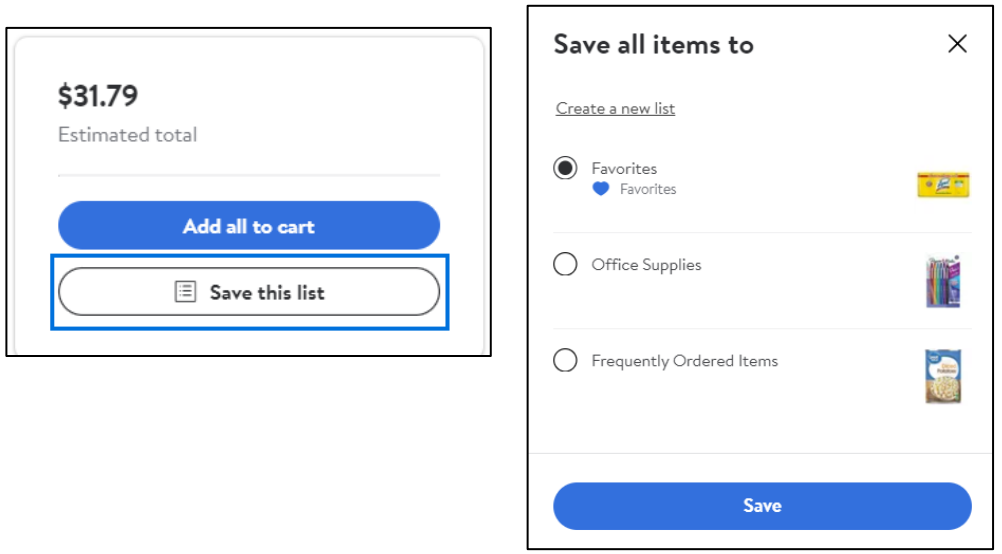
Sharing a List

Sharing a List



- From the list you'd like to share, click on the "**Share**" link located at the top-right of the screen.
- Select "**Copy link**"
- Share link.

Saving a Shared List



- Follow the link to the shared list.
- Click on the "**Save this list**" link located at the top-right of the screen.
- Choose the appropriate list (or create a new list) & click "**Save**."

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Walmart Business

Download the Walmart Business App

The Walmart Business app

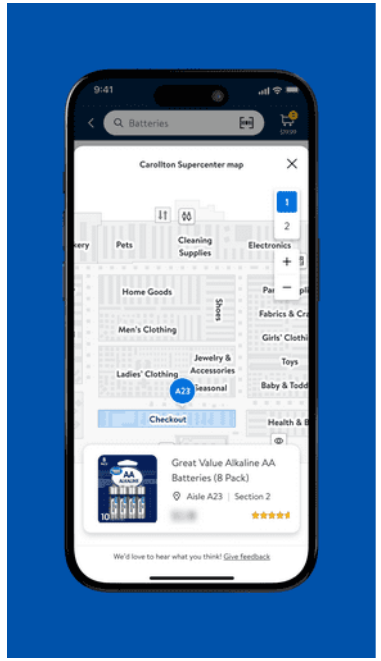
Shop on the go, get essentials & save more for your business.

Download on the App Store

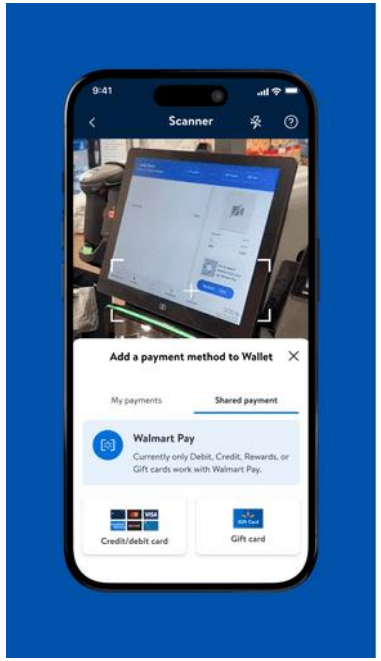
GET IT ON Google Play



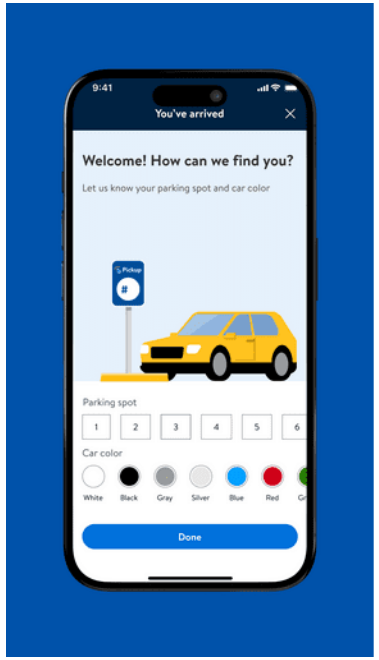
Check a price



Find an item



Walmart Pay



Curbside Pickup

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Walmart Business

Get Started with Walmart Pay



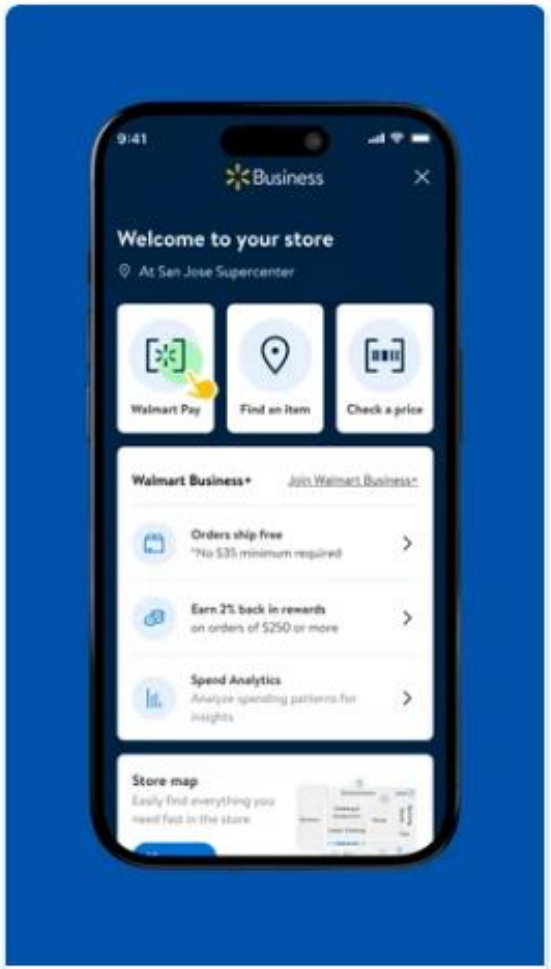
1. Download the app

Open it up once you get into the store.



2. Choose payment type

Add credit or debit cards or choose an existing payment method.



3. Go to any checkout

Scan your items with the register scanner, then open Walmart Pay.



4. Use Walmart Pay

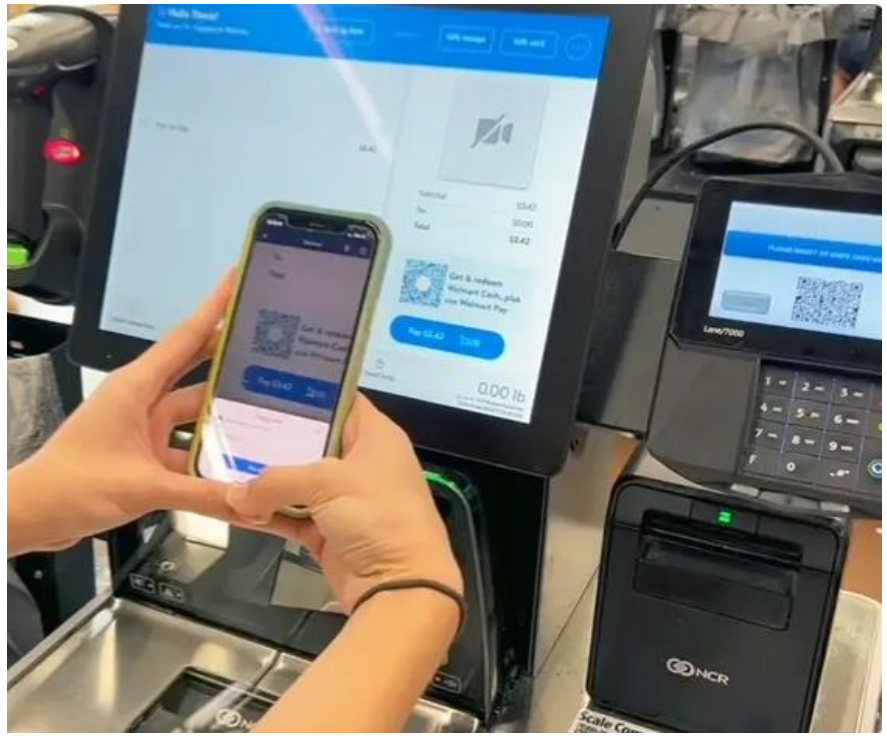
Hold your phone's camera over the register QR code to pay.

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How to Use Walmart Pay

Overview

Walmart Pay lets you speed up the checkout process when you shop at Walmart stores. You'll use your smartphone to check out instead of pulling out your cards, cash or loose change.



At the Store Checkout

1. Shop as usual & go to any checkout lane.
2. Scan your items.
3. Open your Walmart Business app & tap Walmart Pay. Use Touch ID or enter your passcode.
4. Your preferred method of payment will show at the bottom of the screen. This includes shared payment methods that have been added to your account by your account administrator. If you haven't saved any cards yet, we'll ask you to add one or more credit, debit, or Walmart gift cards.
5. If you have a gift card, that amount will automatically be used for payment first, unless you have that feature turned off.
6. Choose the payment method you want to use with Walmart Pay.
7. To pay, hold your phone over the QR code that's displayed on the register.
8. Listen for the chime that indicates your purchase is confirmed. You'll also receive a notification on your phone when your e-receipt is ready.
9. You're all set! There is not need to wait for a paper receipt; your e-receipt is stored in the app.

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Customer Support:



Help Center:

Business.Walmart.com/Help



Contact Us:

Select the “Contact Us” button located in the online Help Center



Hours of Operation:

7am-8pm CT (M-F): Phone & Chat
8am-5pm CT (Saturday): Phone