FINE WINE & GOOD SPIRITS

The PLCB Licensee Online Order Portal (LOOP) 2.0

Training Guide

RELEASE DATE 7/5/2015 V 2.0

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About the Portal

The Pennsylvania Liquor Control Board (PLCB) has undertaken several initiatives to serve licensees across the Commonwealth of Pennsylvania. One of those initiatives is the Licensee Online Order Portal (LOOP), which allows licensees to place PLCB wine and spirits orders online using a desktop computer, laptop or tablet and a high-speed Internet connection. In addition to placing orders, you can also:

- View order history and sales reports
- Create order templates
- Browse current and upcoming promotional pricing
- And more...

Upon registering, you will have the ability to place orders online and have them available for pickup at a Fine Wine & Good Spirits store of your choosing.

The PLCB also offers the ability for licensees to receive delivery of products directly to their location from one of our three distribution centers throughout the state. Orders in this program do require full-case quantity orders and a minimum order quantity, and a delivery charge will be applied. You can contact a customer service representative at RA-LBLDP@pa.gov to learn more about the PLCB delivery program.

Dashboard

Overview

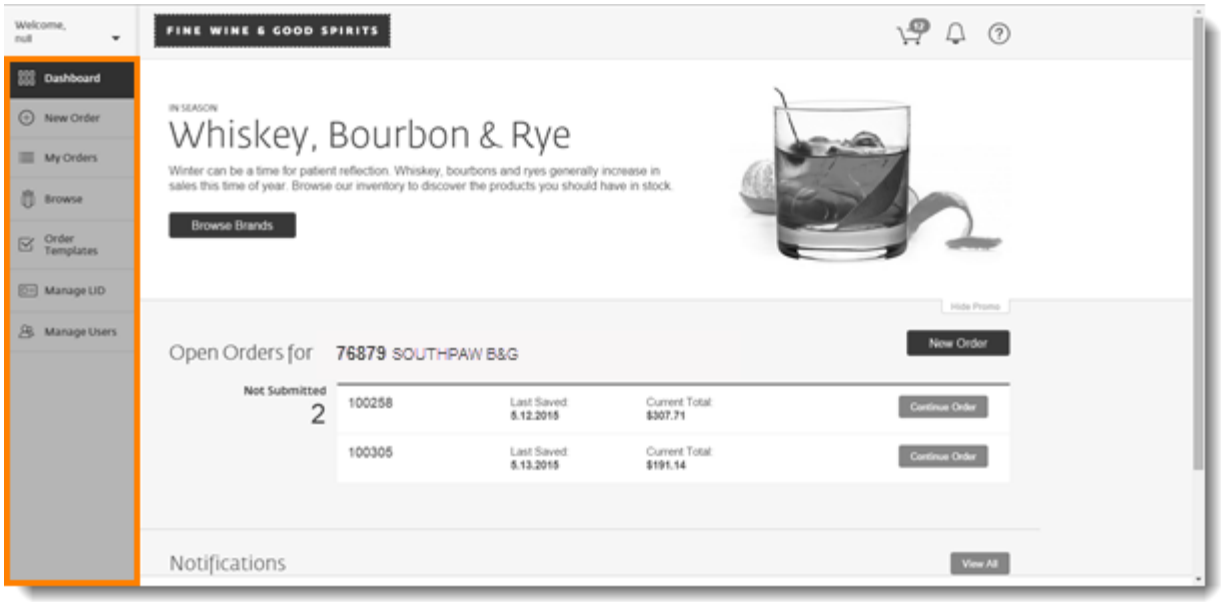
The Dashboard will be your starting point each time you log on to the Licensee Online Order Portal (LOOP). From the Dashboard, you can perform the following tasks:

- Navigate to other screens in the portal
- Create a new order
- View your open orders
- Copy orders that are in either processing or submitted status
- Continue orders that have not yet been submitted
- View notifications from the PLCB
- Browse upcoming product promotions

Navigation

The primary method for navigating the portal will be the menu on the left side of your screen. Click on the name of the screen to navigate to that page.

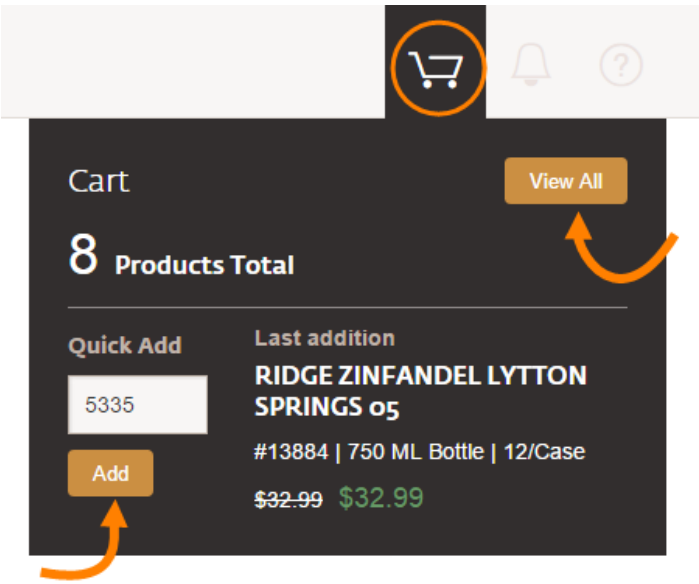
Note: It is important to use the navigation menu to navigate from screen to screen. ***Using the back button in your web browser will log you out of the portal***. For example, if you click ***New Order*** and you intended to click ***My Orders***, do not click the back button. Click ***My Orders*** to navigate to that screen.



You can click on the Fine Wine & Good Spirits logo (see below) from any screen in the portal to return to the Dashboard.

Clicking the shopping cart icon in the top-right corner of your screen allows you to:

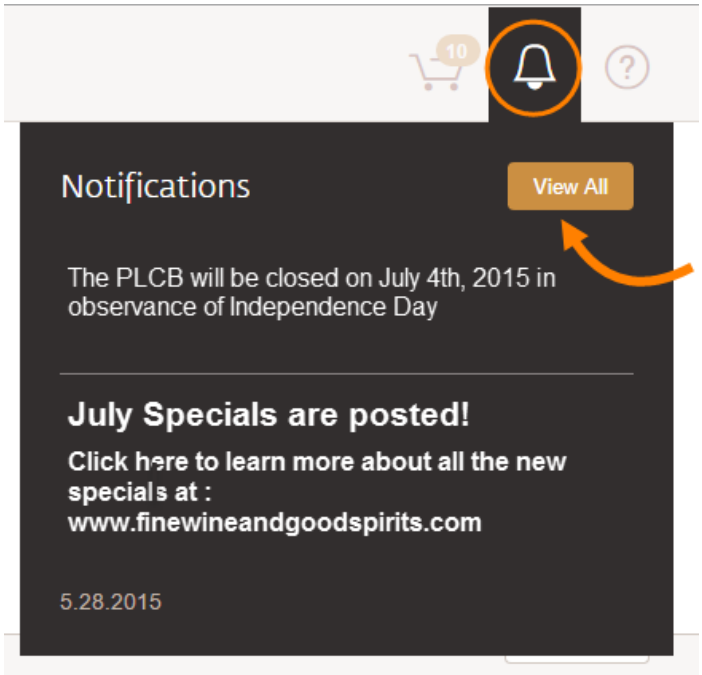
- View the contents of your cart
- Add items to your cart using the “Quick Add” feature
- View the contents of your cart using the ***View All*** button



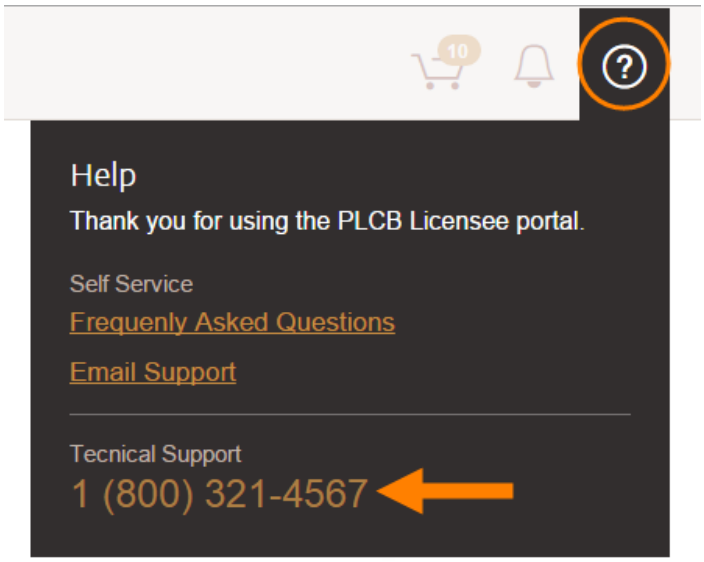
Clicking the bell icon allows you to:

- View recent notifications from the PLCB

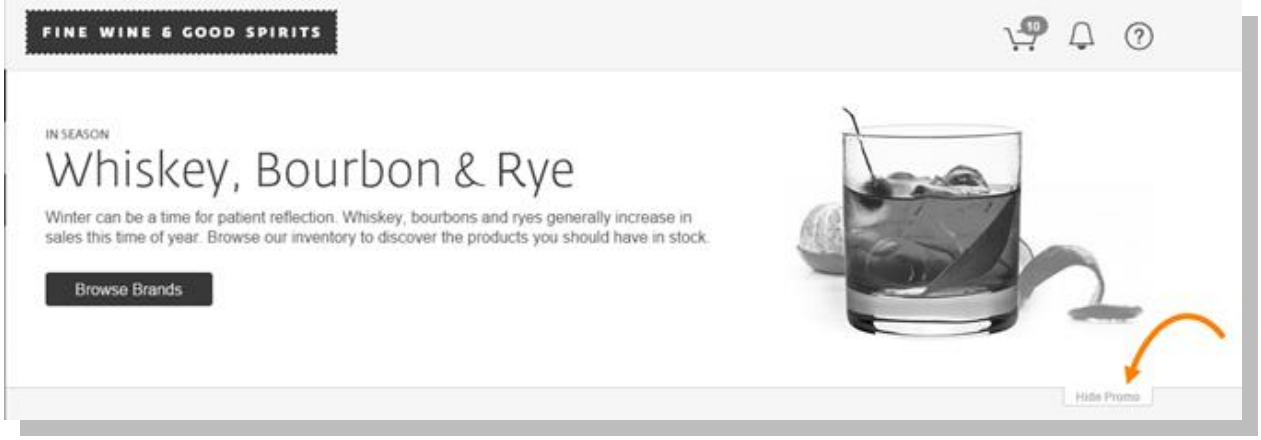
NOTE: Click ***View All*** to view all notifications from the PLCB.



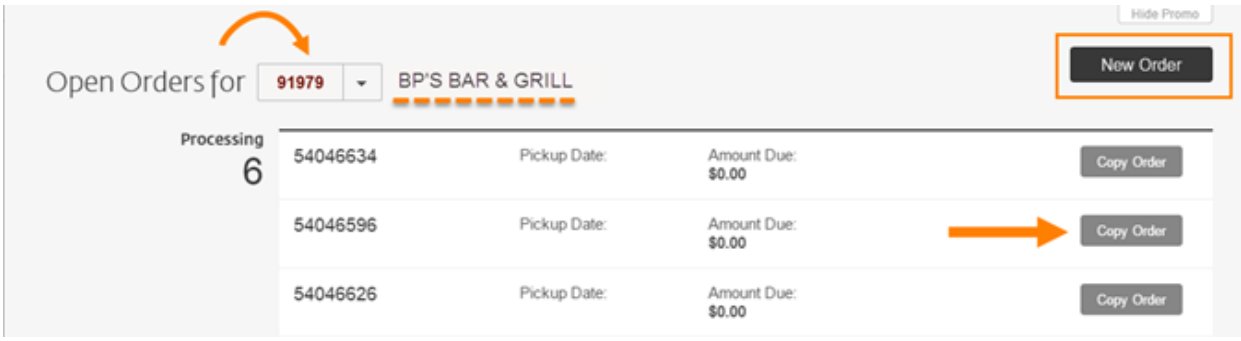
Additional help can always be found by clicking on the help icon and additional links:



You can hide the promo banner at the top of the screen anytime by clicking ***Hide Promo***.

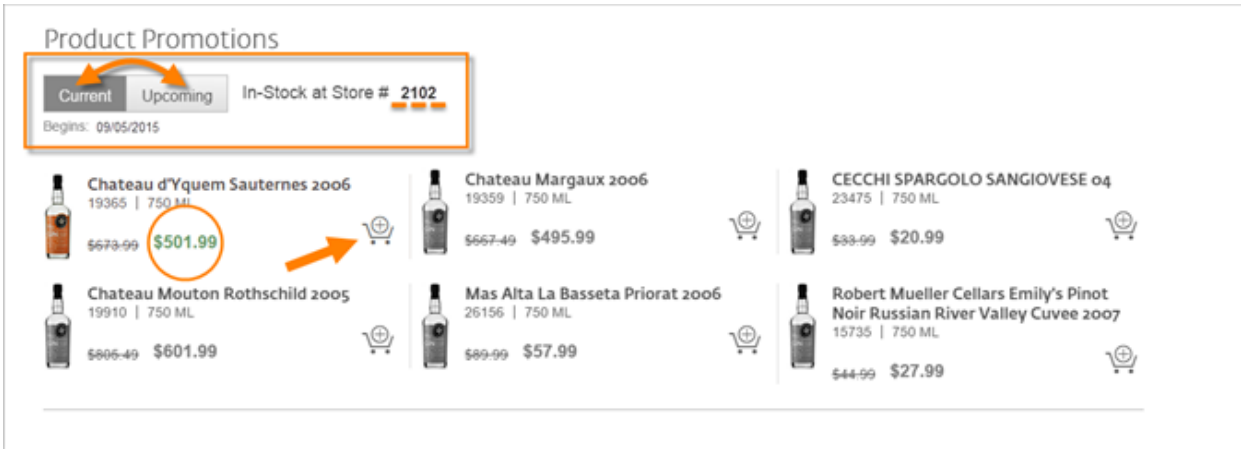


If you have multiple LIDs registered in LOOP, you can view open orders by LID using the dropdown menu. Additionally, you can create ***New Orders***, ***Copy Orders*** and continue orders started but not yet submitted.



At the bottom of the LOOP Dashboard, you can view current or upcoming promotions in stock at your PLCB home store. You can toggle back and forth between ***Current*** and ***Upcoming***, adding items to your cart as you go.

Note: When viewing promotions, pay close attention to the promotion end date. ***Promotional prices are based on the time of pickup or delivery, not the day the order was placed.***

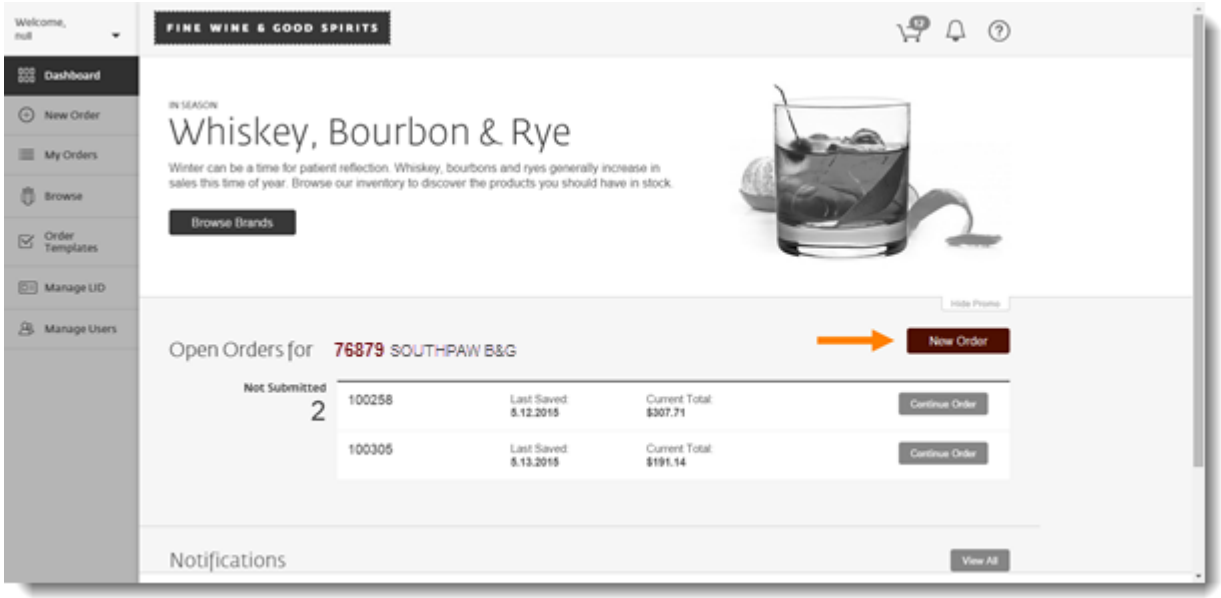


Dashboard Orders

There are multiple ways to begin a new order from the LOOP Dashboard.

New Order

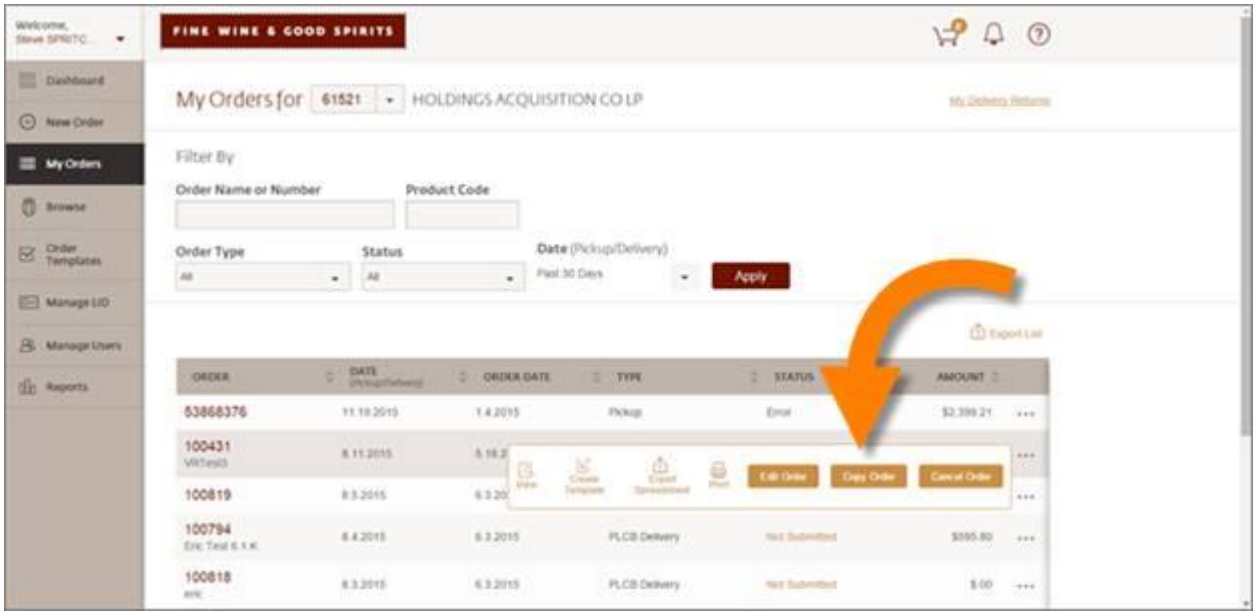
The simplest way to place a new order is to click the ***New Order*** button located just below the banner at the top of the screen and just above your ***Open Orders*** as seen below.



Copy Order

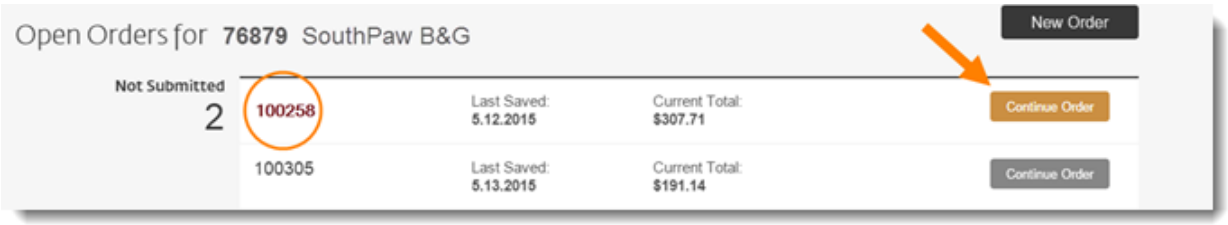
For orders where the status is either “Processing” or “Submitted,” you have the option to create a new order from a previous order. This is called "copying an order." To copy the order, click the ***Copy Order*** button. On the following screen, update the ***Delivery Date*** or ***Pickup Date***, depending on which type of order you are copying, then click ***Continue***.

The order details from the previous order are displayed. Update the items and quantities as necessary and submit your order.

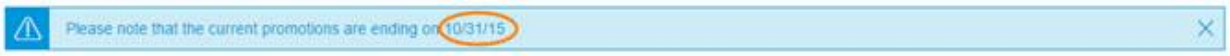


Continuing an Order

Orders which have been saved but not been submitted will appear on the Dashboard as **Not Submitted.** To modify and/or submit this order, click on the order number at the beginning of the row containing the order you wish to continue, or click on the ***Continue Order*** button in the same row.



On the next screen, note the blue ribbon at the top (see below). Promotional prices are based on the time of pickup or delivery, not the day the order was placed. It is possible that, since you last saved the order, some of the pricing may have changed or is about to change.

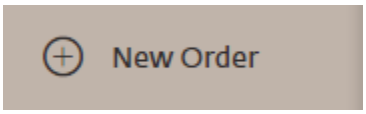


New Order

Creating a New Store Pickup Order

Navigate to the New Order Screen:

1. Click the ***New Order*** link on the left side of your screen.

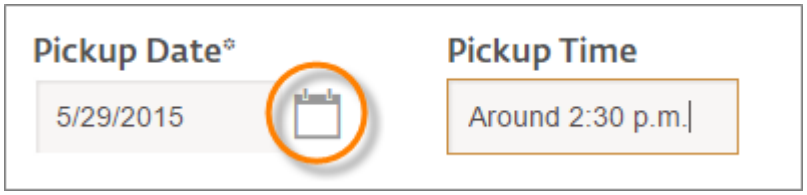


2. Verify the correct LID is displayed at the top of the New Order screen. If you only have one LID registered, it will display by default. If you have multiple LIDs registered, you can select the correct LID from the dropdown menu if it is not already displayed.

3. Click the ***Store Pickup*** button. (Note: If you are not registered for PLCB delivery, you will be taken directly to step 4).

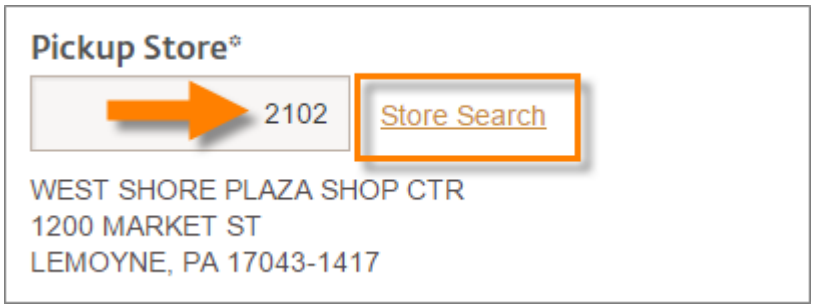
Filling Out the Order Settings

4. Click on the calendar button to select your desired ***Pickup Date***, then enter an approximate ***Pickup Time***.



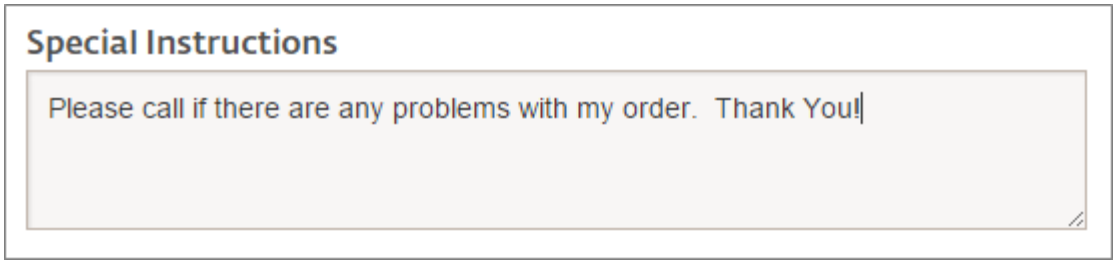
Note: *Pickup times are not guaranteed. Every effort will be made to fill your order by the requested time. Your order will not be available for pickup until you receive an email notification from the PLCB indicating your order is ready for pickup.*

5. Confirm your ***Pickup Store*** or use the ***Store Search*** link to locate a different store.



Note: *Your Pickup Store will default to the store set in the Manage LID screen. This can be overridden on an order-by-order basis on the New Order screen. If you are an administrator of the LID, you can set the Default Store for Pickup at any time on the Manage LID page.*

6. Enter any ***Special Instructions*** you may have for the Fine Wine & Good Spirits staff.



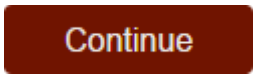
Note: *If you are an administrator of the LID, you can set default special instructions on the Manage LID screen. This feature saves you from entering the message every time you place an order if the message always stays the same.*

7. Enter an ***Order Name*** for the order (optional). The order will be assigned an order number, but it may be easier for you to give it a name you will recognize.

8. Confirm the ***Primary Contact Person***.

Note: *By default, this field will display with the name of the user who is logged in. You can select a different contact from the dropdown menu.*

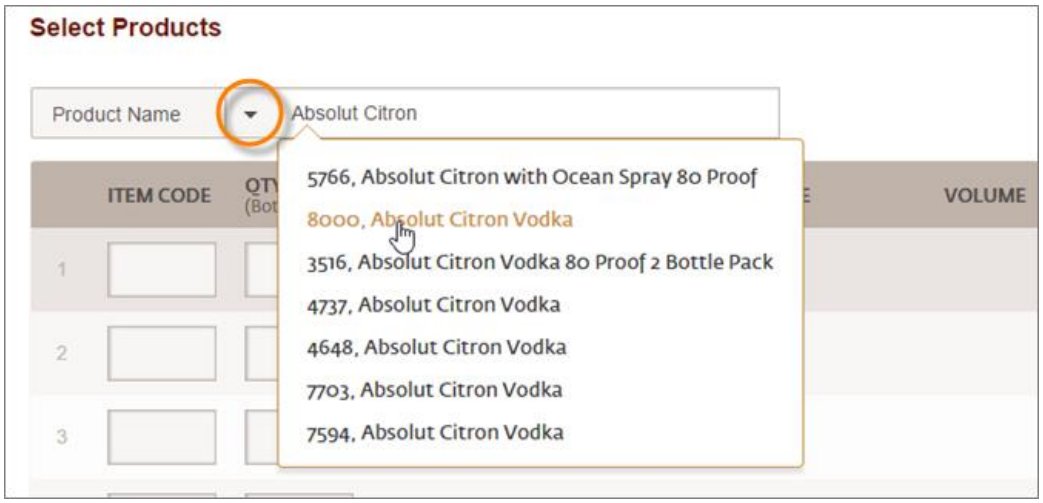
9. Click ***Continue***.



Selecting Products

10. Click the ***New*** button.

11. Search for items by ***Product Name***, ***PLCB Item Code*** or ***UPC Code*** using the search bar. When you locate item you wish to order, click on the item or press “Enter” on your keyboard.

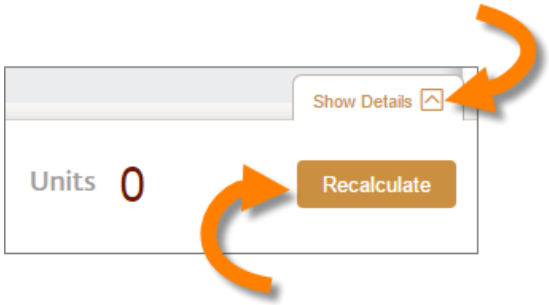


12. Place your cursor in the ***QTY*** field next to the ***PLCB Item Code*** you just entered and enter the quantity you wish to order.

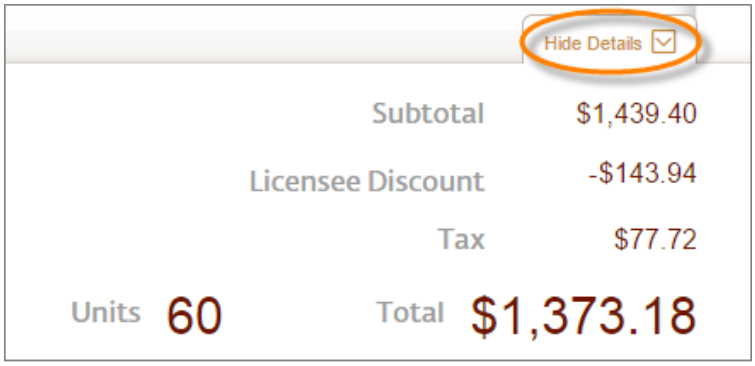
Note: *After you enter in the quantity you wish to order, press "Tab" on your keyboard once to highlight the* ***X*** *at the end of the row. Clicking the* ***X*** *will remove the item from the order. Press "Tab" again to navigate to the next PLCB Item Code field.*

13. If you already know the PLCB Code of the item you wish to order, enter it directly into the *PLCB Item Code* column. Press "Tab" and enter the quantity you wish to order. Press "Tab" twice to navigate to the next *PLCB Item Code* field.

14. After you have completed entering all of your items, click ***Recalculate*** to see your order total and total number of units being ordered. You can click ***Show Details*** to view the total details.

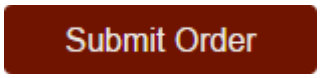


Note: Click ***Hide Details*** to collapse the total details.

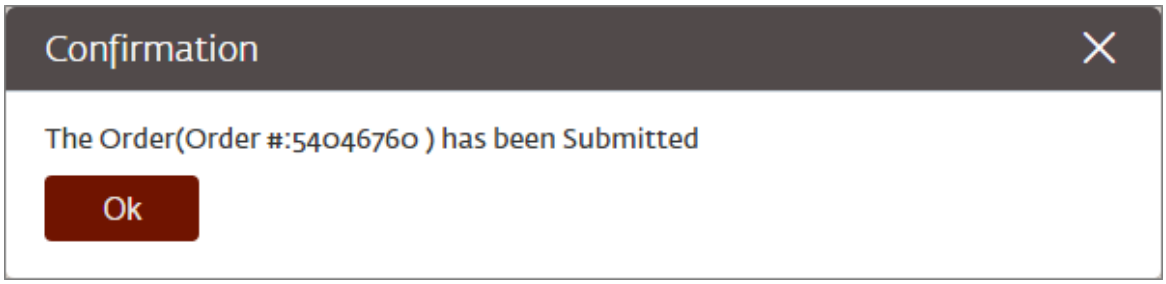


15. Click ***Save*** if you wish to come back and make changes. You can come back and update the order at any time, but it will not be sent to the PLCB to be prepared for pickup until you click ***Submit Order***.

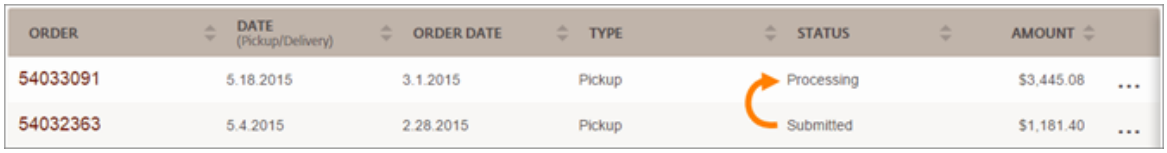
16. Click ***Submit Order*** to submit your order to a Fine Wine & Good Spirits store.



17. Click on ***Ok*** in the confirmation window.



Note: *Your order can be edited up until the point where the status moves from Submitted to Processing, which can be seen on the* ***My Orders*** screen.

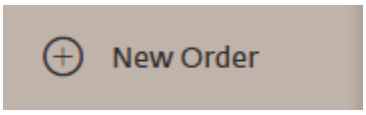


ORDER	DATE (Pickup/Delivery)	ORDER DATE	TYPE	STATUS	AMOUNT	
54033091	5.18.2015	3.1.2015	Pickup	Processing	$3,445.08	...
54032363	5.4.2015	2.28.2015	Pickup	Submitted	$1,181.40	...

Creating a New PLCB Delivery Order

Navigate to the New Order Screen:

1. Click the ***New Order*** link on the left side of your screen.

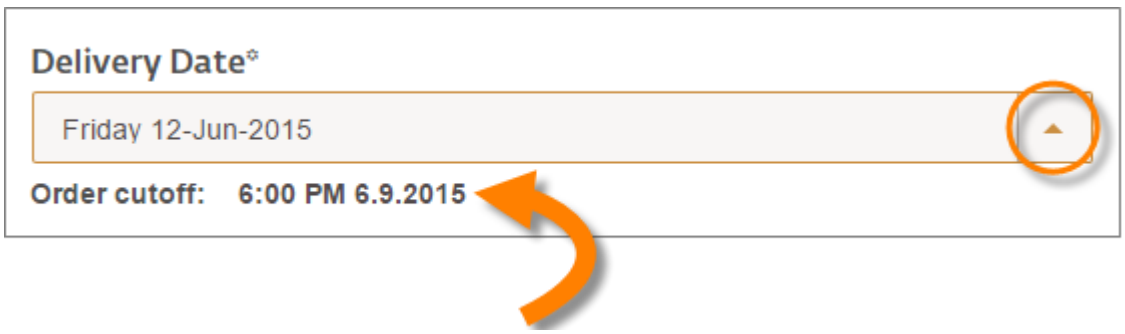


2. Verify the correct LID is displayed at the top of the ***New Order*** screen. If you only have one LID registered, it will display by default. If you have multiple LIDs registered, you can select the correct LID from the dropdown menu if it is not already displayed.

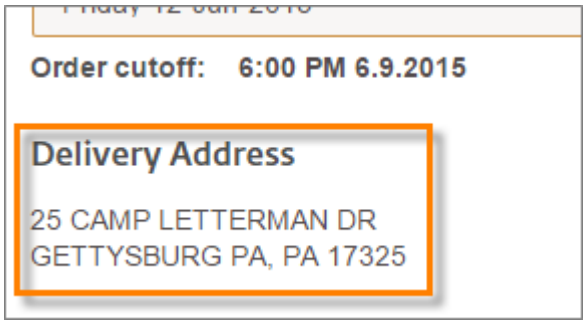
3. Next, click the ***PLCB Delivery*** button. (Note: If you are not registered for PLCB Delivery, you will be taken directly to step 4.)

Filling Out the Order Settings

4. Select a ***Delivery Date*** from the dropdown menu. Delivery dates are based on when the PLCB is able to deliver in your area and are determined when you register for PLCB delivery. Make note of the order cutoff. You may save, submit, edit and cancel orders up until this time. After 6:00 PM on your cutoff day, you will need to contact a PLCB customer service representative the next business day to change or cancel an order.



6. Confirm your ***Delivery Address***.



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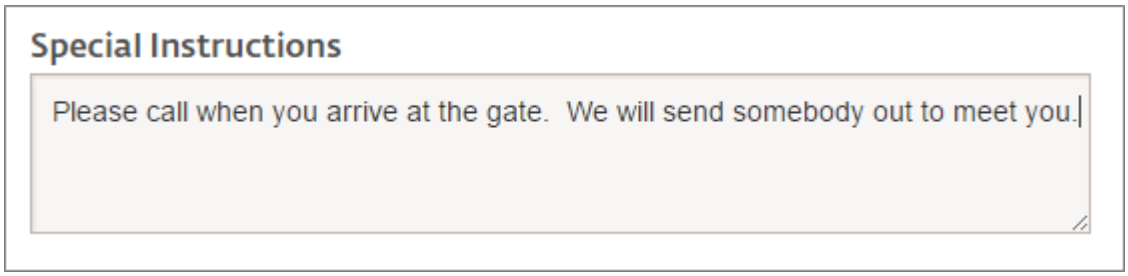
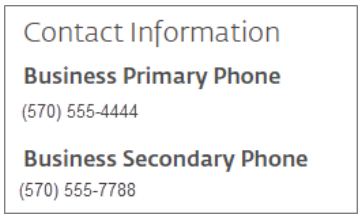


Note: *If you are an administrator of the LID, you can set default special instructions on the Manage LID screen. This feature saves you from entering the message every time you place an order if the message always stays the same.*

8. Select your payment method from the ***Payment Information*** dropdown menu.

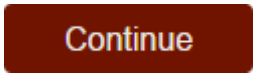
9. Enter an ***Order Name*** for the order (optional). The order will be assigned an order number, but it may be easier for you to give it a name you will recognize.

10. Confirm the ***Contact Information***.



Note: *Contact information can be updated by an account administrator. If the contact information only needs to be updated for one order, you may want to consider making note of the contact information in the special instructions instead of changing the contact information.*

11. Click ***Continue***.



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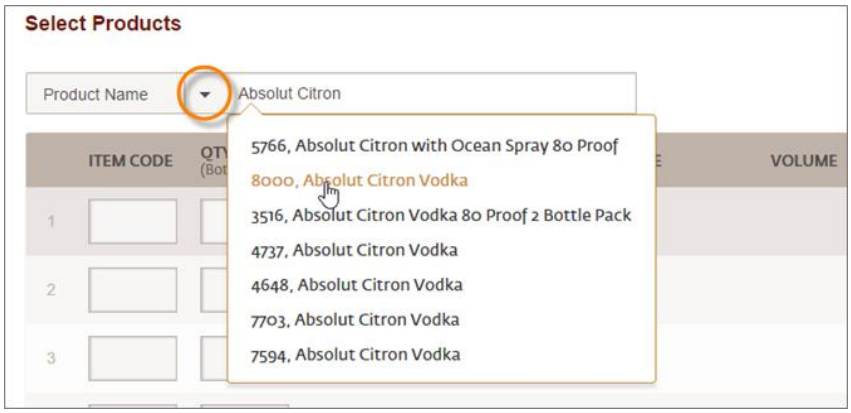

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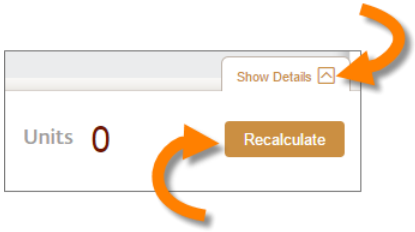
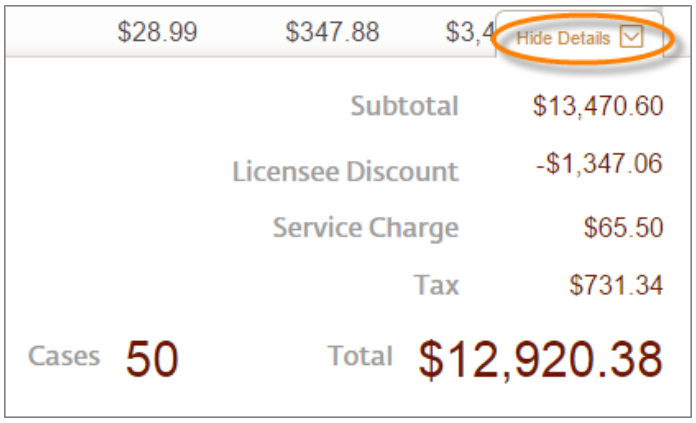
at the end of the row. Clicking the **X** *will remove the item from the order. Press "Tab" again to navigate to the next PLCB Item Code field.*

15. If you already know the PLCB Code of the item you wish to order, enter that directly into the *PLCB Item Code* column, press "Tab" and enter the quantity you wish to order. Press "Tab" twice to navigate to the next *PLCB Item Code* field.

16. After you have entered all of your items, click ***Recalculate*** to see your order total and total number of units being ordered. Click ***Show Details*** to view the total details.

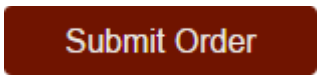


Note: Click ***Hide Details*** to collapse the total details.

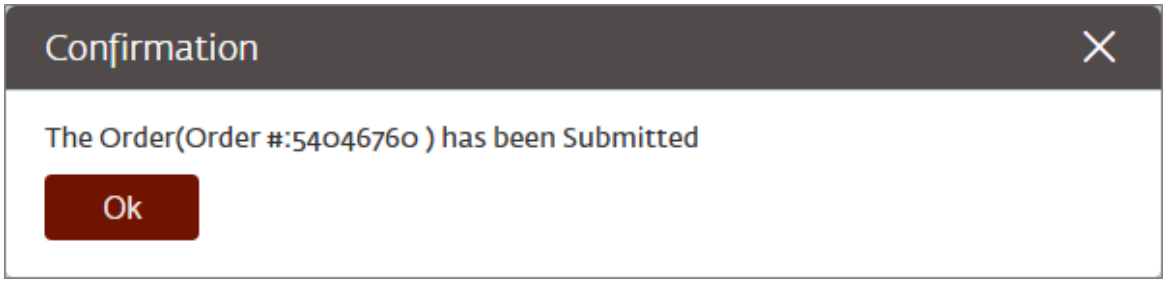


17. Click ***Save*** if you wish to come back and make changes if you are not ready to submit the order to the PLCB.

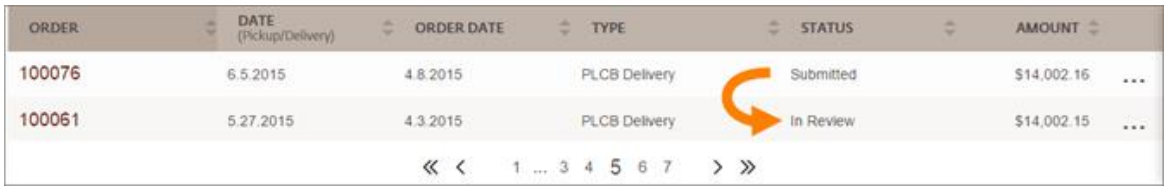
18. Click ***Submit Order*** to send your order to the PLCB for review and processing.



19. Click on ***Ok*** in the confirmation window.



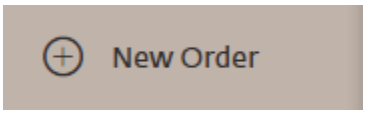
Note: *Your order can still be edited up until the point where the status moves from Submitted to In Review which can be seen on the* ***My Orders*** *screen.*



Creating a New PLCB Order from a Previous Order

Navigate to the New Order Screen:

1. Click the ***New Order*** link on the left side of your screen.



2. Verify that the correct LID is displayed at the top of the ***New Order*** screen. If you only have one LID registered, it will display by default. If you have multiple LIDs registered, you can select the correct LID from the dropdown menu if it is not already displayed.

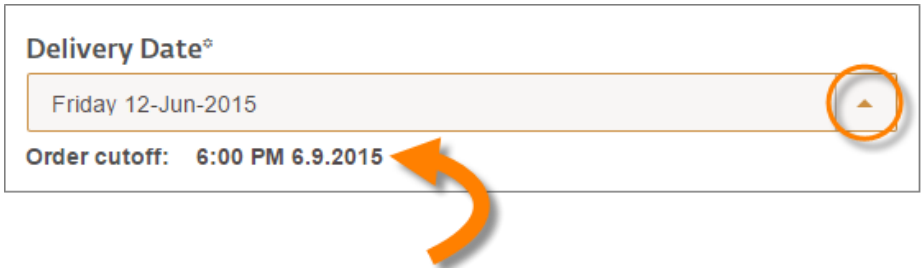
3. Next, select your order type either ***Store Pickup*** *or* ***PLCB Delivery***.

Note: You are enabled for store pickup orders when you register for LOOP. PLCB's delivery orders require an administrator of the account to take additional registration steps on the Manage LID screen. If you do not see the option for PLCB delivery, please check with your account administrator.

Filling out the Order Settings

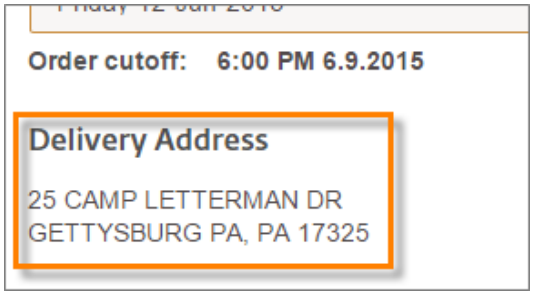
In the following example, we will create a PLCB delivery order.

4. Select a desired ***Delivery Date*** from the dropdown menu. Make note of your ***Order Cutoff***. You may save, submit, edit, and cancel orders up until this time. After 6:00 PM on your cutoff day, you will need to contact a PLCB customer service representative the following business day to change or cancel an order.

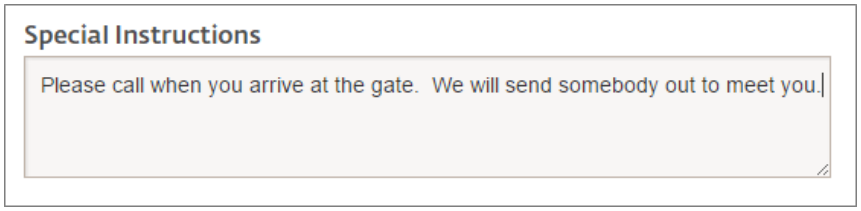


Note: *Delivery dates are based on when the PLCB is able to deliver in your area and are determined when you register for PLCB delivery.*

6. Confirm your ***Delivery Address***.



7. Enter any ***Special Instructions*** you may have for the Fine Wine & Good Spirits staff.



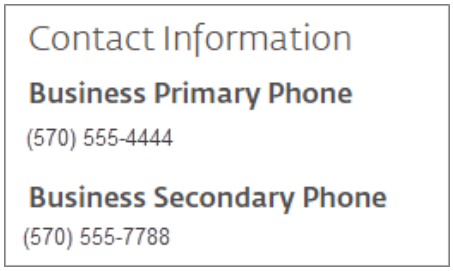
Note: *If you are an administrator of the LID, you can set default special instructions on the* ***Manage LID*** *screen. This feature saves you from entering the message every time you place an order if the message always stays the same.*

8. Select your payment method from the ***Payment Information*** dropdown menu.

Note: *You can register one ACH account and as many credit cards as necessary to use as payment methods. To change your payment method, you must contact the PLCB Cash Management Office on Monday to Friday from 9:00 AM to 5 PM at 717.783.7562.*

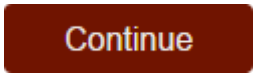
9. Enter an ***Order Name*** for the order (optional). The order will be assigned an order number, but it may be easier for you to give it a name you will recognize.

10. Confirm the ***Contact Information***.



Note: *Contact information can be updated by an account administrator. If the contact information only needs to be updated for one order, you may want to consider making note of the contact information in the Special Instructions field instead of changing the contact information.*

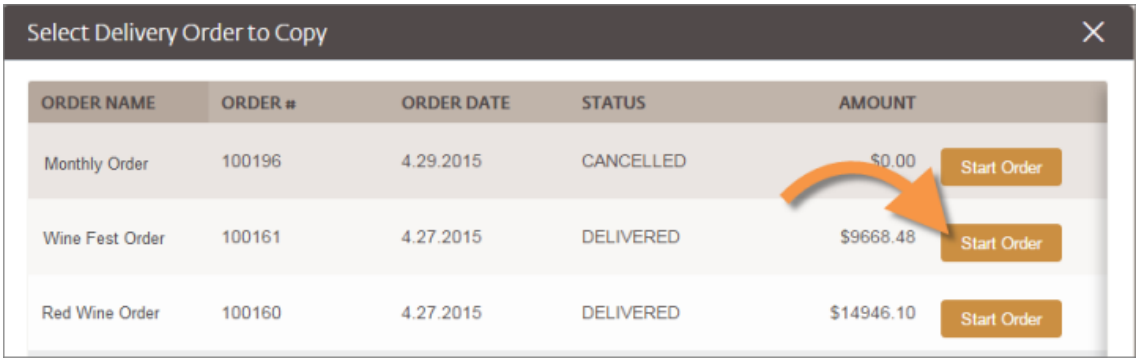
11. Click ***Continue***.



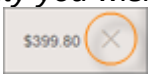
Selecting Products

12. Click **Previous Order**.

13. Locate the previous order you would like to place again and click ***Start Order***.



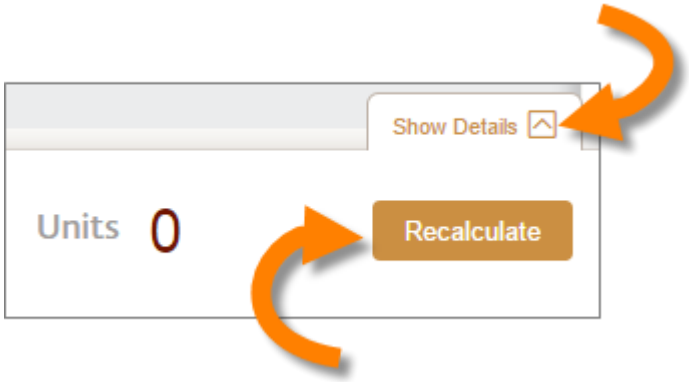
14. Adjust PLCB Item Codes and quantities as necessary.

Note: *After you enter in the quantity you wish to order, press "Tab" on your keyboard once to highlight the* ***X*** 

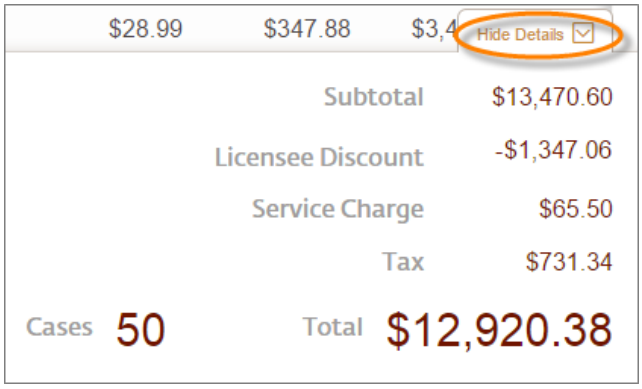
at the end of the row. Clicking the ***X*** *will remove the item from the order. Press "Tab" again to navigate to the next* ***PLCB Item Code*** *field.*

15. Enter the PLCB code for any additional items you wish to order in the ***PLCB Item Code*** column and press "Tab" and enter the quantity you wish to order. Press "Tab" twice to navigate to the next ***PLCB Item Code*** field.

16. After you have reviewed your order, click ***Recalculate*** to see your order total and the total number of units being ordered. Click ***Show Details*** to view the total details.

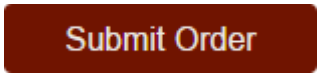


Note: Click ***Hide Details*** to collapse the total details.

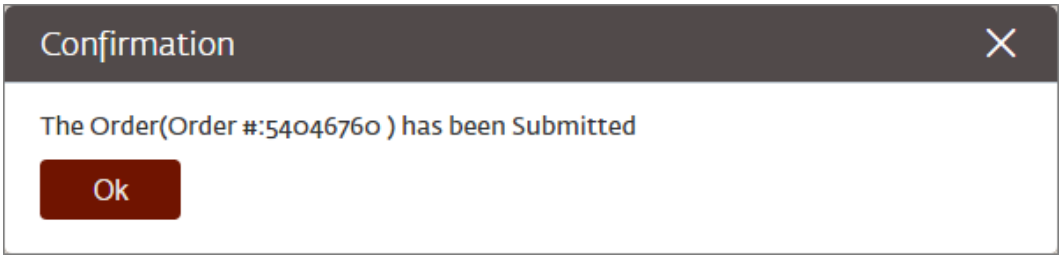


17. Click ***Save*** if you wish to come back and make changes. You can come back and update the order at any time, but it will not be sent to the PLCB to be picked for delivery until you click ***Submit Order***.

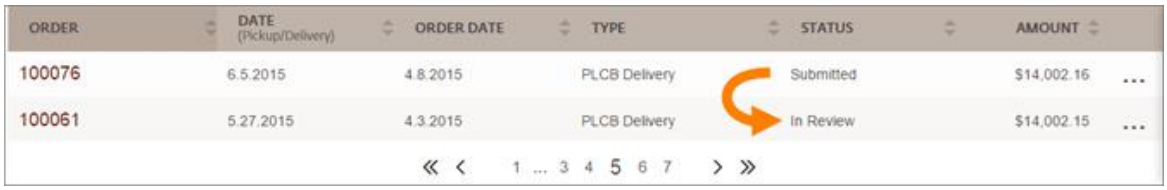
18. Click ***Submit Order*** to send your order to the PLCB for review.



19. Click ***Ok*** in the confirmation window.



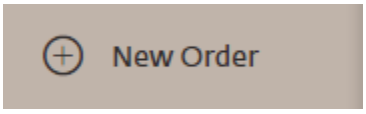
Note: *Your order can still be edited up until the point where the status moves from Submitted to In Review, which can be seen on the* ***My Orders*** screen.



Creating a New PLCB Order from a Template

Navigate to the New Order Screen:

1. Click the ***New Order*** link on the left side of your screen.



2. Verify that the correct LID is displayed at the top of the ***New Order*** screen. If you only have one LID registered, it will display by default. If you have multiple LIDs registered, you can select the correct LID from the dropdown menu if it is not already displayed.

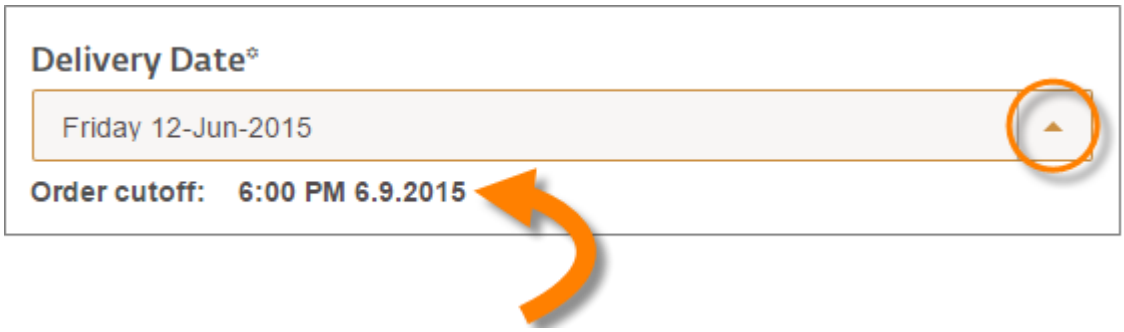
3. Next, select your order type either ***Store Pickup*** *or* ***PLCB Delivery***.

You are enabled for store pickup orders when you register for LOOP. PLCB delivery orders require an administrator of the account to take additional registration steps on the Manage LID screen. If you do not see the option for PLCB delivery, please check with your account administrator.

In the following example, we will create a PLCB Delivery Order.

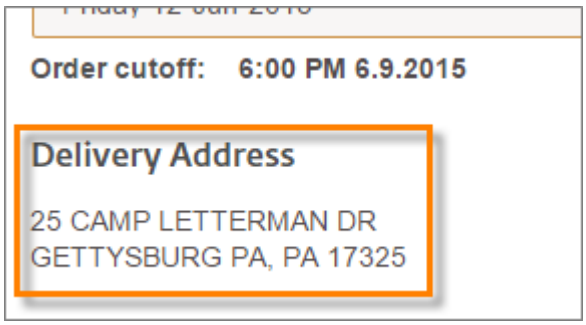
Filling out the Order Settings

4. Select a Delivery Date from the dropdown menu. Make note of the Order Cutoff. You may save, submit, edit and cancel orders up until this time. After 6:00 PM on your cutoff day, you will need to contact a PLCB customer service representative to change or cancel an order.

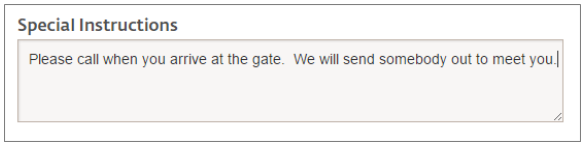


Note: *Delivery dates are based on when the PLCB is able to deliver in your area and are determined when you register for PLCB Delivery.*

6. Confirm your ***Delivery Address***.

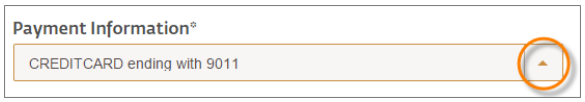


7. Enter any ***Special Instructions*** you may have for the Fine Wine & Good Spirits staff.



Note: *If you are an administrator of the LID you can set default special instructions on the Manage LID screen. This feature saves you from entering the message every time you place an order if the message always stays the same.*

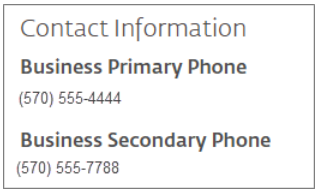
8. Select your payment method from the ***Payment Information*** dropdown menu.



Note: *You can register one ACH account and as many credit cards as you like to use as payment methods. To change your payment method, you must contact the PLCB Cash Management Office on Monday to Friday from 9 AM to 5 PM at 717.783.7562.*

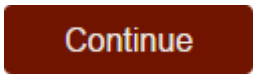
9. Enter an ***Order Name*** for the order. The order will be assigned an order number, but it may be easier for you to give it a name you will recognize.

10. Confirm the ***Contact Information***.



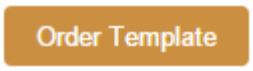
Note: *Contact information can be updated by an account administrator. If the contact information only needs to be updated for one order, you may want to consider making note of the contact information in the Special Instructions field instead of changing the contact information..*

11. Click ***Continue***.

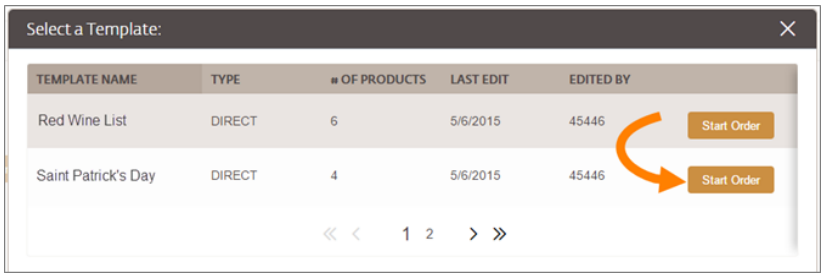


Selecting Products

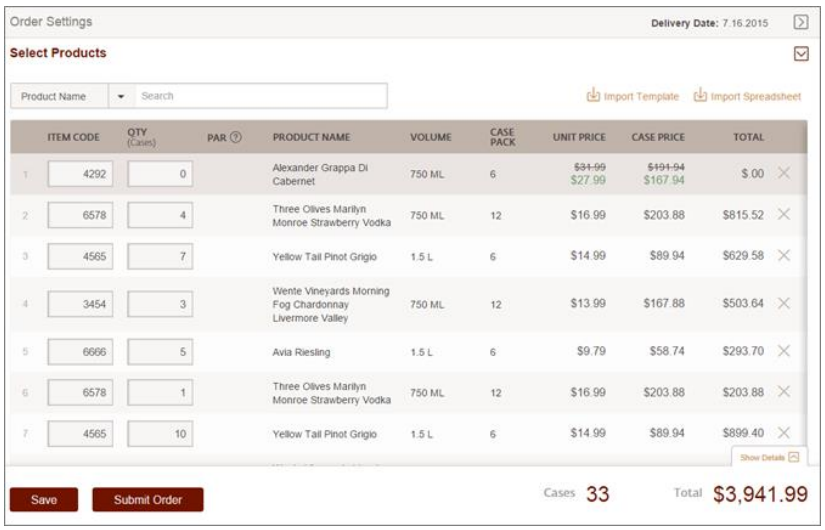
12. Click ***Order Template***.



13. Click ***Start Order*** for the template you would like to use.



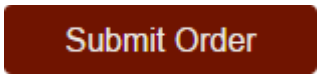
14. Review the order to make sure it contains all the items you wish to order. Add and remove items as necessary and update the quantities for any items in your order.



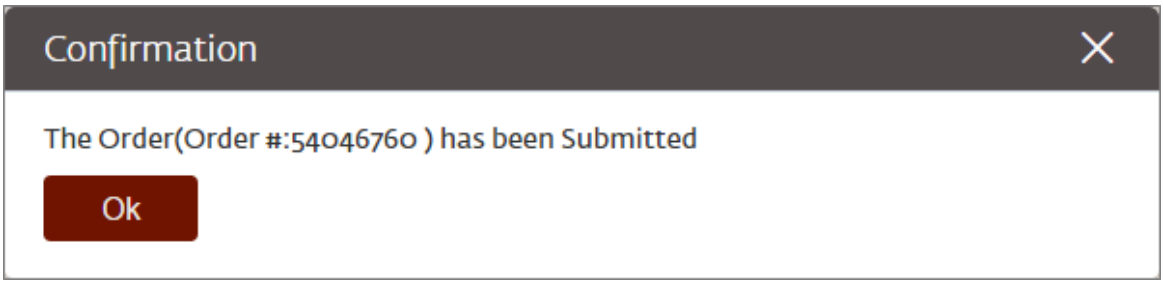
Note: You can add multiple templates to an order by clicking ***Import Template***.

15. Click ***Save*** if you wish to come back and make changes. You can come back and update the order at any time, but it will not be sent to the PLCB to be picked for delivery until you click ***Submit Order***.

16. Click ***Submit Order*** to send your order to the PLCB for review.



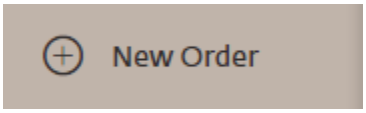
17. Click ***Ok*** in the confirmation window.



Note: *Your order can still be edited up until the point where the status moves from Submitted to In Review, which can be seen on the* ***My Orders*** *screen.*

Creating a New Order by Importing a Spreadsheet:

1. Click the ***New Order*** link on the left side of your screen.

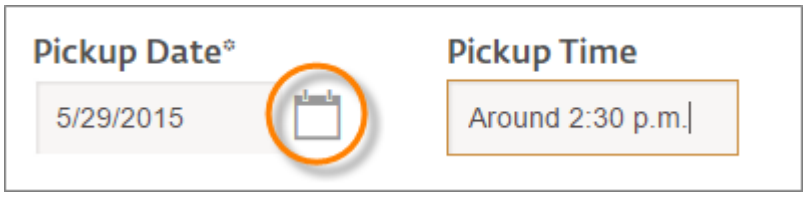


2. Verify that the correct LID is displayed at the top of the ***New Order*** screen. If you only have one LID registered, it will display by default. If you have multiple LIDs registered, you can select the correct LID from the dropdown menu if it is not already displayed.

3. Next, click the ***Store Pickup*** button. (Note: If you are not registered for PLCB Delivery, you will be taken directly to step 4)

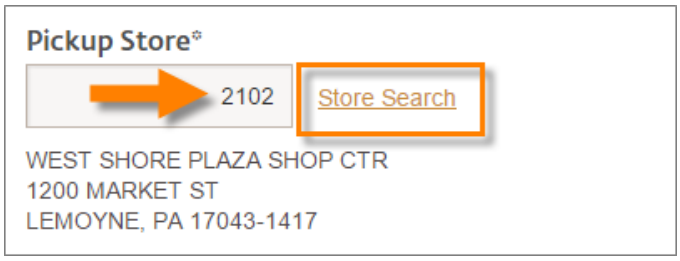
Filling Out the Order Settings

4. Click on the calendar button to select your desired ***Pickup Date***, press "Tab" on your keyboard, then enter an approximate ***Pickup Time***.



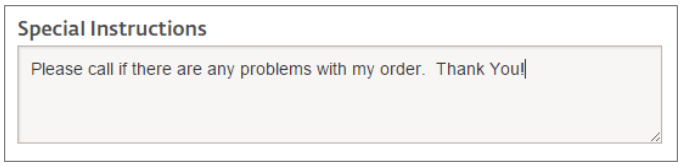
Note: *Pickup times are not guaranteed. Every effort will be made to fill your order by the requested time. Your order will not be available for pickup until you receive an email notification from the PLCB indicating your order is ready for pickup.*

6. Confirm your **Pickup Store** or use the ***Store Search*** link to locate a different store.



Note: *Your pickup store will default to the store set in the Manage LID screen. This can be changed on an order-by-order basis using the New Order screen. If you are an administrator of the LID, you can change the Default Store for Pickup at any time on the Manage LID page.*

7. Enter any ***Special Instructions*** you may have for the Fine Wine & Good Spirits staff.



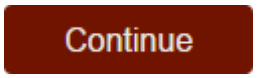
Note: *If you are an administrator of the LID, you can set default special instructions on the Manage LID screen. This feature saves you from entering the message every time you place an order if the message always stays the same.*

8. Enter an ***Order Name*** for the order (optional). The order will be assigned an order number, but it may be easier for you to give it a name you will recognize.

9. Confirm the ***Primary Contact Person***.

Note: *By default, this field will display with the name of the user who is logged in. You can select a different contact from the dropdown menu.*

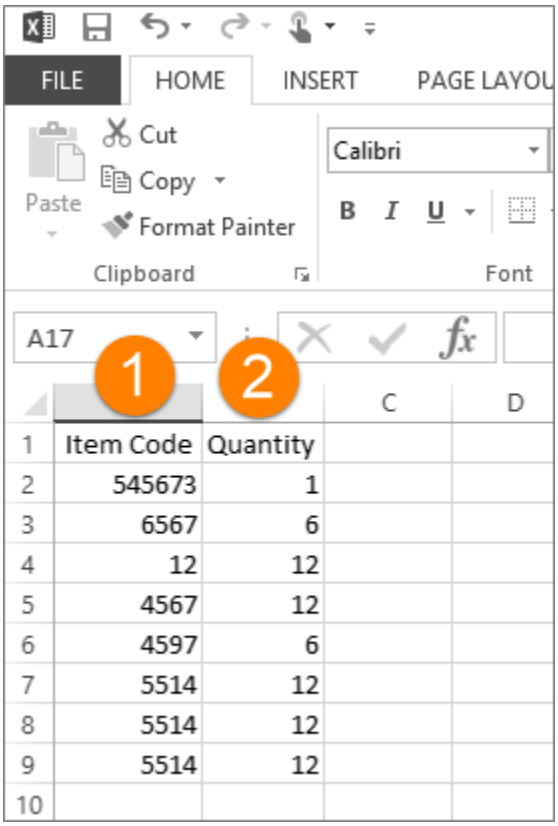
10. Click ***Continue***.



Selecting Products

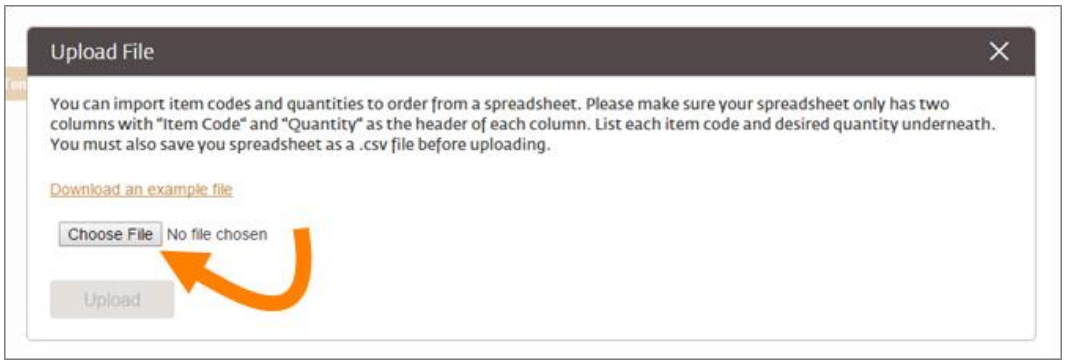
11. Click ***Import Spreadsheet***.

Note: Before importing your spreadsheet, you will need to make sure it is formatted correctly for LOOP. An uploadable spreadsheet file should be two columns with headers. Your spreadsheet format should match the example seen below. The first column should contain only the PLCB Item Codes you wish to order. The second column should contain only quantities of those items you are ordering.

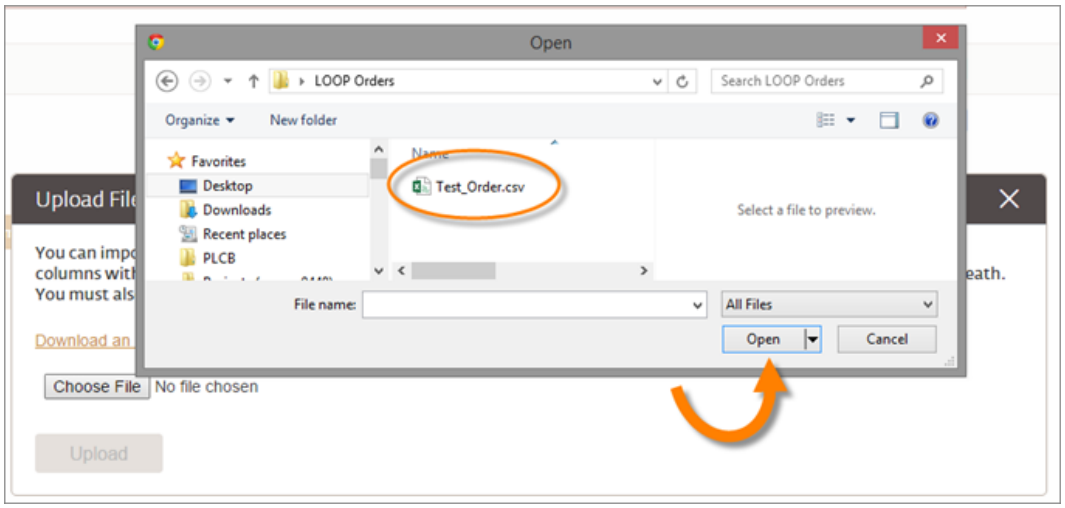


	Item Code	Quantity		
1				
2	545673	1		
3	6567	6		
4	12	12		
5	4567	12		
6	4597	6		
7	5514	12		
8	5514	12		
9	5514	12		
10				

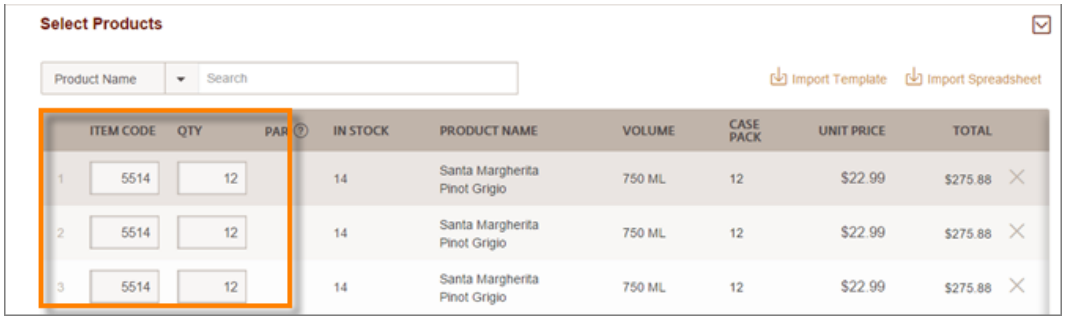
12. Click ***Choose File*** in the pop–up box.



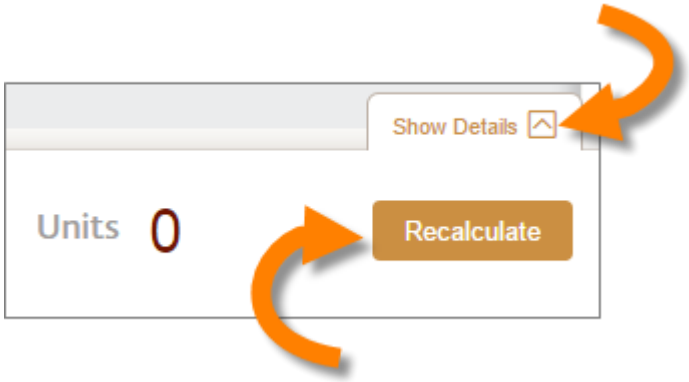
13. Open the file by selecting it with your mouse and clicking ***Open***.



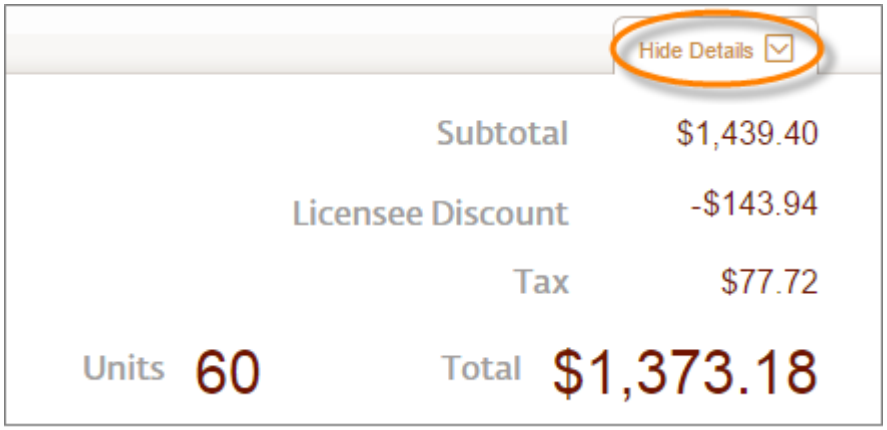
14. Confirm the items and the quantity of each in your order.



15. Click ***Recalculate*** to see your order total and total number of units being ordered. Click ***Show Details*** to view the total details.

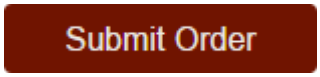


Note: Click ***Hide Details*** to collapse the total details.

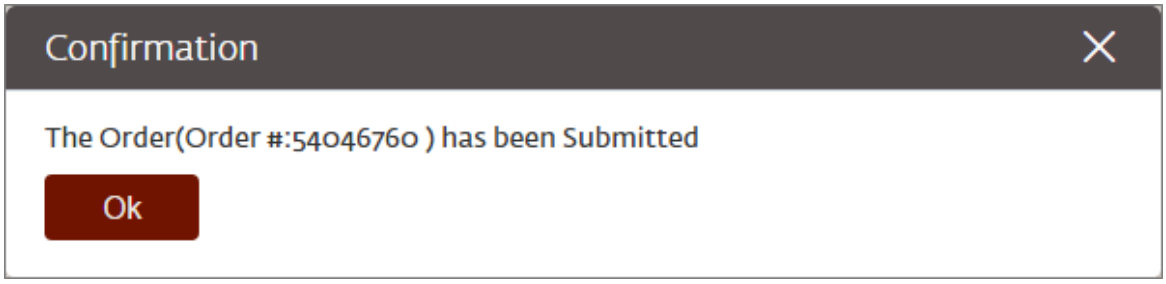


16. Click ***Save*** if you wish to come back and make changes. You can come back and update the order at any time, but it will not be sent to the PLCB to be prepared for pickup until you submit it.

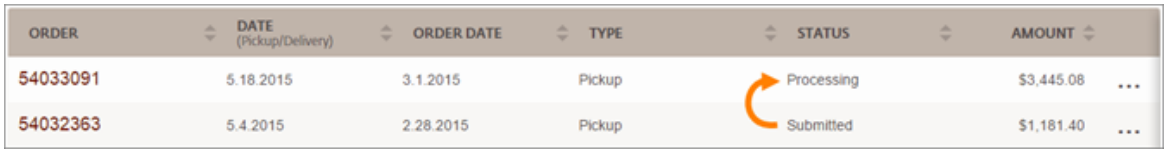
17. Click ***Submit Order*** to submit your order to your selected Fine Wine & Good Spirits store.



18. Click ***Ok*** in the confirmation window.



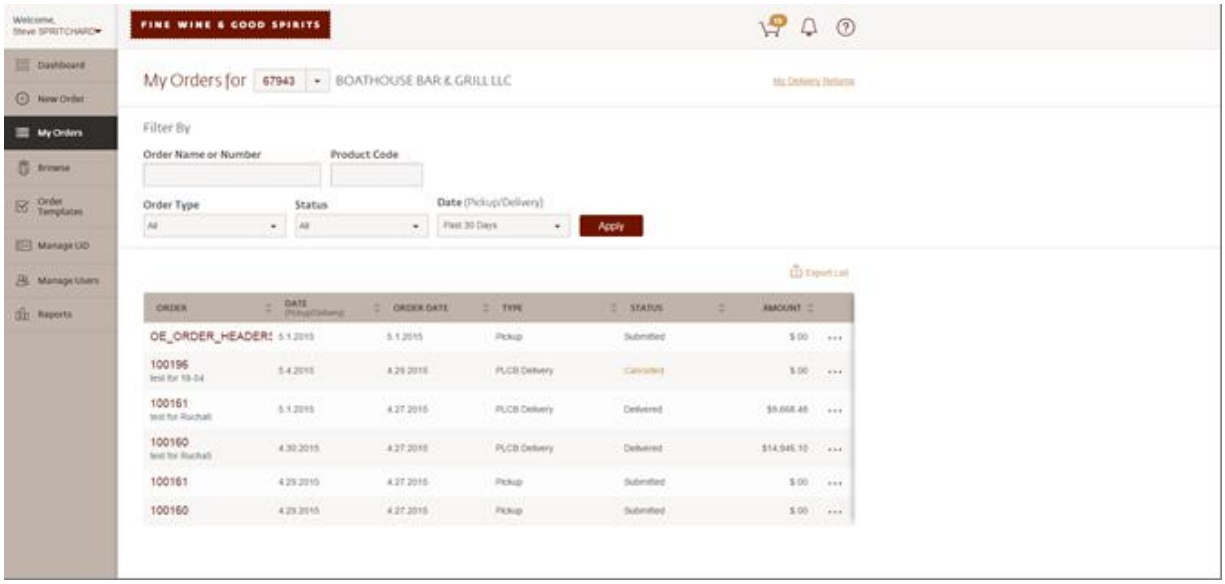
Note: *Your order can still be edited up until the point where the status moves from Submitted to Processing, which can be seen on the* ***Orders*** *screen.*



ORDER	DATE (Pickup/Delivery)	ORDER DATE	TYPE	STATUS	AMOUNT	
54033091	5.18.2015	3.1.2015	Pickup	Processing	$3,445.08	...
54032363	5.4.2015	2.28.2015	Pickup	Submitted	$1,181.40	...

My Orders

Order History



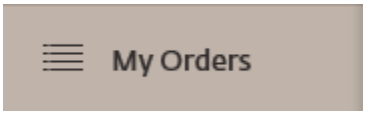
From the ***My Orders*** screen you can:

- View order history
- Filter order history
- Export order history
- Initiate PLCB Delivery returns
- View PLCB Delivery Return history
- View order details
- Create templates from previous orders
- Export order details
- Print order details
- Cancel orders

Export List

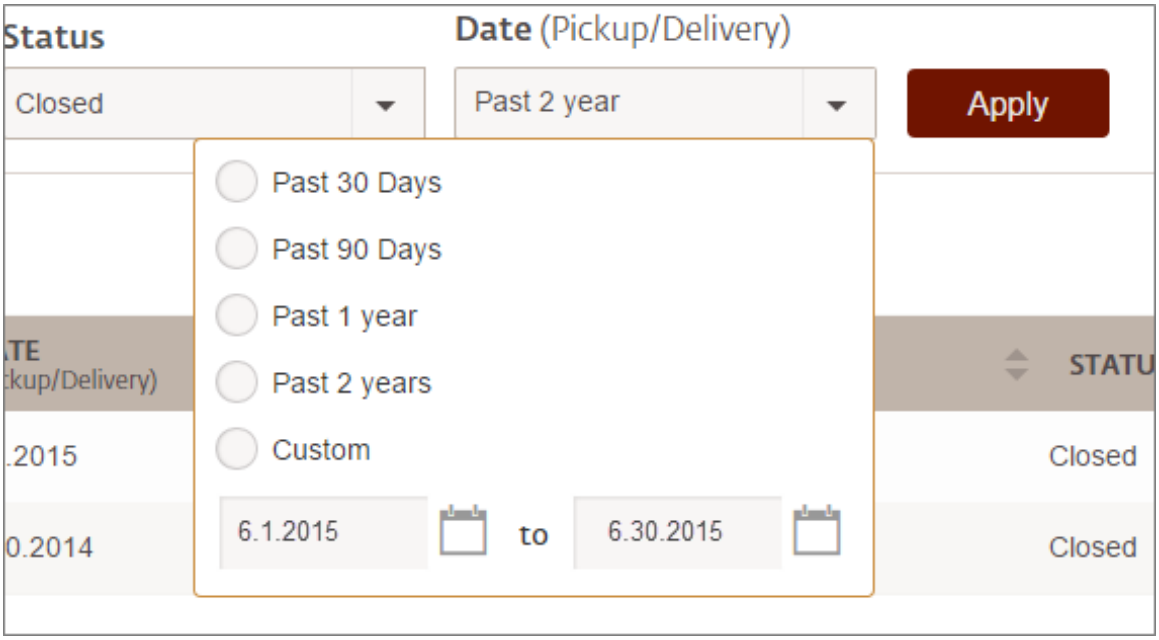
Use the Export List feature to export a list of all you recent orders. If you are trying to export order details, see the section titled Export Spreadsheet.

Click ***My Orders***.



Verify that the correct LID is displayed at the top of the ***New Order*** screen. If you only have one LID registered, it will display by default. If you have multiple LIDs registered, you can select the correct LID from the dropdown menu if it is not already displayed.

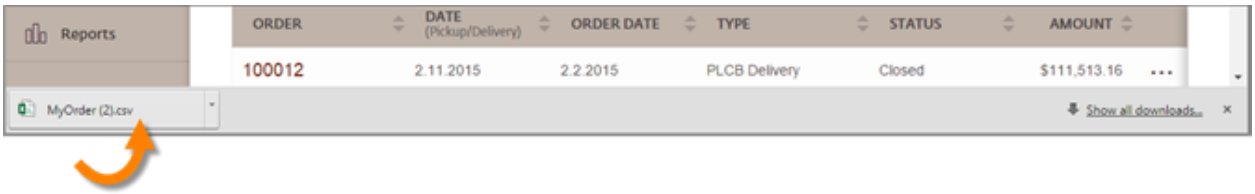
If necessary, filter the order information for a more refined list. For example, you may want to export just the orders placed in June. To do so, you could use the ***Date*** field and select ***Custom*** for the range.



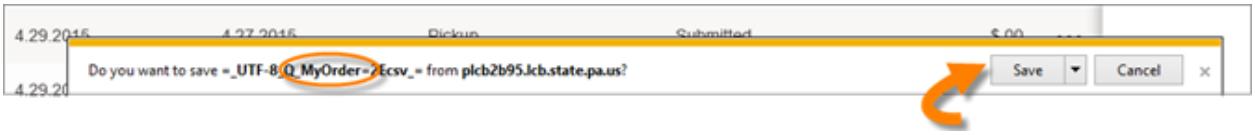
When you are satisfied with the list on your screen, click ***Export List***.

A file named MyOrder.cvs will be available for downloading onto your machine.

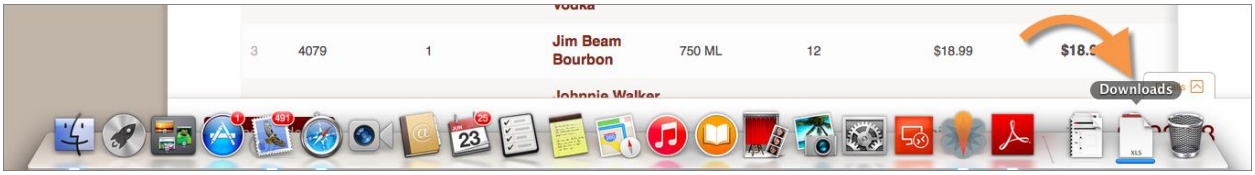
Google Chrome (Windows or OSX)



Internet Explorer (Windows)



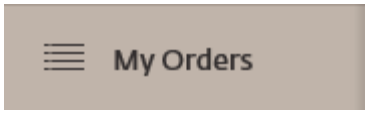
Safari (OSX)



How to Return a PLCB Delivery Item

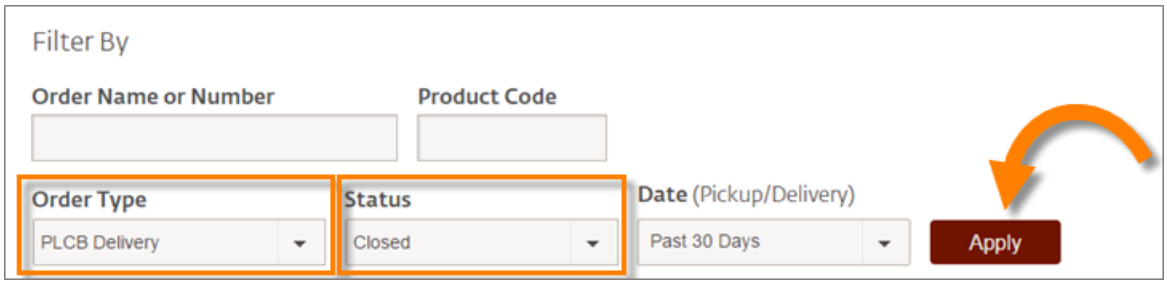
If you have an item or items from a PLCB Delivery order that you would like to return, use the following steps.

1. Click ***My Orders***.



2. Verify that the correct LID is displayed at the top of the ***My Orders*** screen. If you only have one LID registered, it will display by default. If you have multiple LIDs registered, you can select the correct LID from the dropdown menu if it is not already displayed.

3. Search for the order using by the Filter By section and clicking ***Apply***.



Note: Order must be PLCB Delivery Orders, so you may want to start by filtering on *Order Type* = *PLCB Delivery* and *Status* = *Closed*.

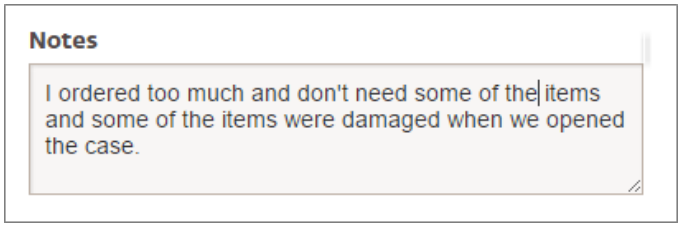
4. Click the ellipsis at the end of the row containing the order with the items you wish to return.

ORDER	DATE (Pickup/Delivery)	ORDER DATE	TYPE	STATUS	AMOUNT	
100012	2.11.2015	2.2.2015	PLCB Delivery	Closed	$111,513.16	...
100001	12.10.2014	12.4.2014	PLCB Delivery	Closed	$22,465.43	...

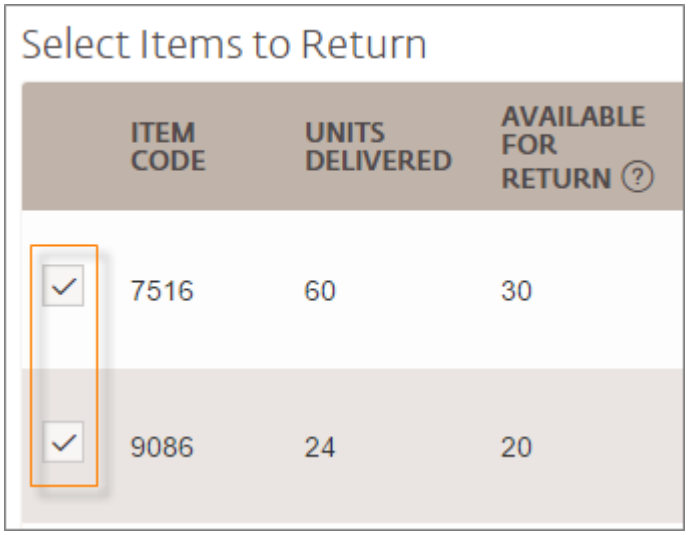
5. Select ***Return Request.***

6. Confirm the ***Return Store*** or use the ***Store Search*** link to locate a new store.

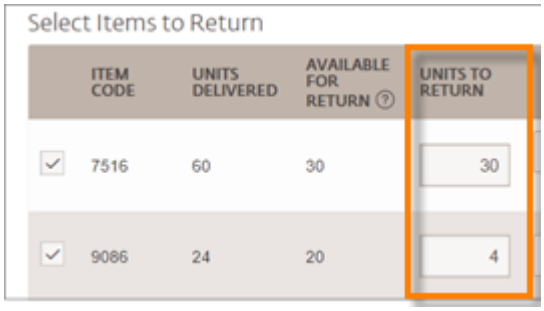
7. Enter any ***Notes*** you may have regarding the return.



8. Place a checkmark in the box at the beginning of the row(s) containing the item(s) you wish to return.

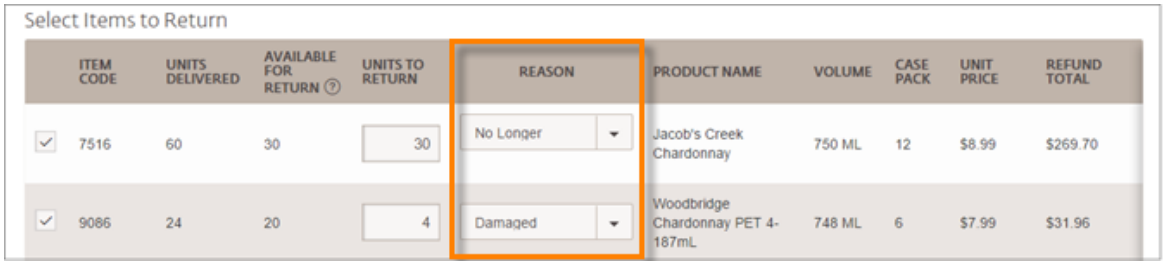


9. Enter the number of ***Units to Return.***



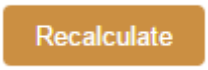
Note: The number of items *Available For Return* will decrease each time you return a portion of the amount originally purchased.

10. Select a ***Reason*** for returning items.

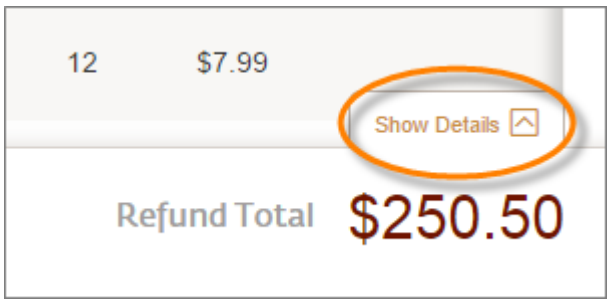


Note: If you choose to return an item simply because you no longer want it, **you will be charged a restocking fee**.

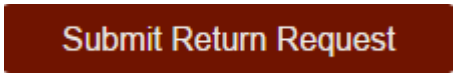
11. Click ***Recalculate*** to view the number of items you are returning and the dollar amount to be returned.



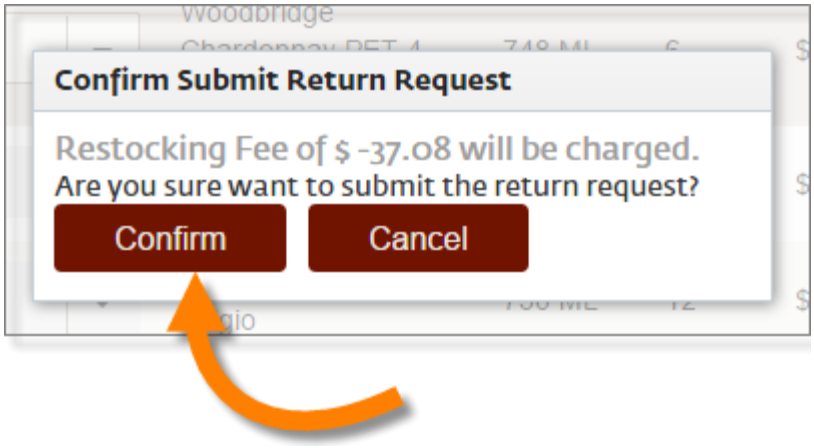
12. Click ***Show Details*** to view the details of the dollar amount to be returned, including any restocking fees.



12. Click ***Submit Return Request.***



13. Click ***Confirm*** to submit the return request in the pop-up window if you still want to return the items.



Advanced My Order Functionality

Click the ellipsis at the end of an order line to reveal more options.

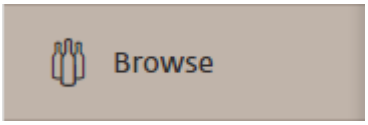
From here you are able to:

- View order details
- Create a template from previous orders
- Export order details to a spreadsheet
- Print order details
- Create a copy of a past order for future use

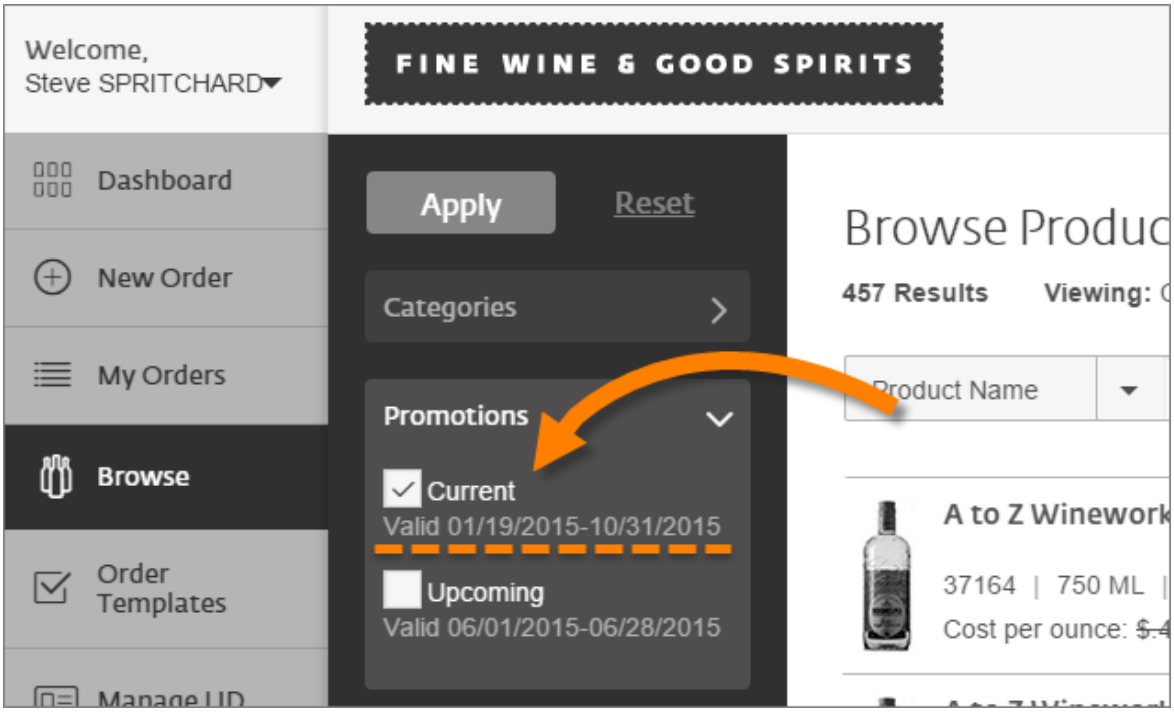
Browse

Searching for Products

To begin searching for products, click ***Browse*** on the left side of your screen.



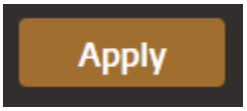
By default, the search results will automatically begin showing all products currently on promotion, in alphabetical order.



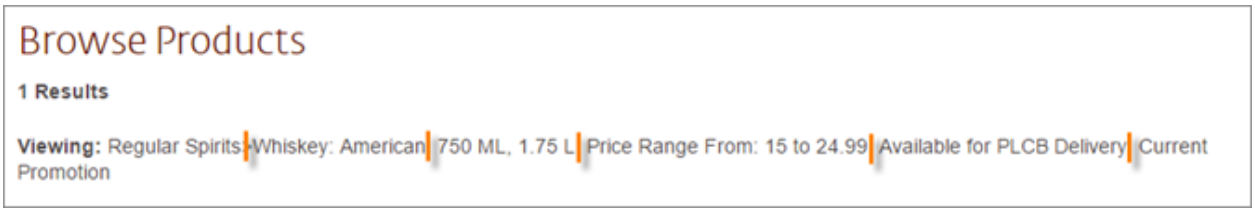
Use the check boxes to change which items are displayed.

To expand any of the search fields, click on the name of the category you wish to fitter by.

When you are done applying filters to your search, click ***Apply.***



A list of all the filters you have applied can be seen at the top of your search results.



Below is an example of how to interpret your search results.

1. Product name
2. PLCB Item Code
3. Number of units per case
4. Original price
5. Sales price
6. Promotional period
7. Add to shopping cart.

Order Templates

What is an Order Template?

Order templates are a convenient way for you to save individual orders that can be used once a year, once a month or for your regular weekly orders. With order templates, there is no need to recreate the same order over and over again. You can create an order from just one template or you can add multiple order templates to a single order.

For example, your wine manager is Julie and your spirits manager is John.

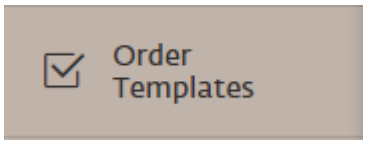
With templates, Julie can create an order template solely for wine, while John can create another template for spirits.

Orders can then be placed by uploading both the wine template and the spirits template with just a few clicks!

Templates also work great for holiday and special event orders.

Creating a New Template

1. Click ***Order Templates*** on the left side of your screen.

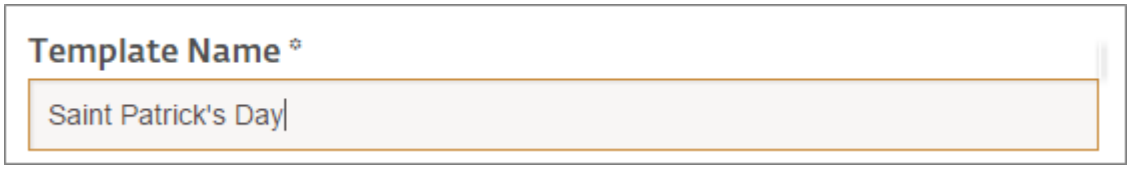


2. Click ***New Template***.

3. Verify that the correct LID is displayed at the top of the ***Order Templates*** screen. If you only have one LID registered, it will display by default. If you have multiple LIDs registered, you can select the correct LID from the dropdown menu if it is not already displayed.

Note: Templates are specific to an LID and order type. You may have two St. Patrick's Day templates – one template for store pickup and one template for PLCB Delivery. Each of them could be slightly different from the other, or they could be exactly the same.

4. Create a ***Template Name***.



5. Select the ***Type*** of template.

6. Click ***Start Template***.

7. Enter the ***PLCB Item Code*** for the first item.

8. Enter the ***Quantity*** you would typically order.

9. Enter the ***Par*** number for the item *(Optional)*.

Note: Par is the amount of a product you would typically keep on hand. Imagine creating an order from this template. Let's say you keep 10 of an item in stock, but an inventory shows that you already have 8 units on hand. Knowing this, you would adjust the order template amount to 2 units. Your 8 units on hand plus the 2 you are ordering would equal your par number of 10.

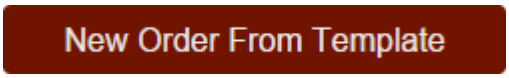
10. Enter a ***Custom SKU*** (Stock Keeping Unit) *(Optional)*.

Note: If you use SKUs that differ from PLCB Item Codes, you can enter them into the Customer SKU field as a reference point.

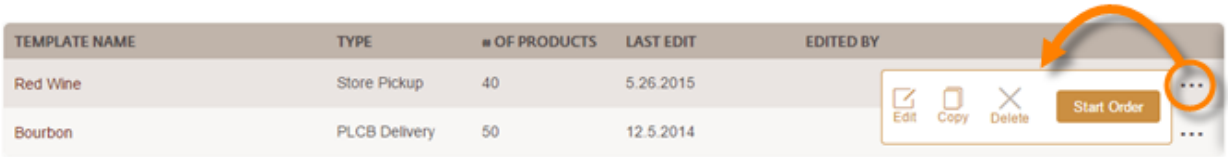
11. Add items until the template contains all the items you would like to order. If you need more rows, click ***Add More***.

12. Click ***Save*** to save the template.

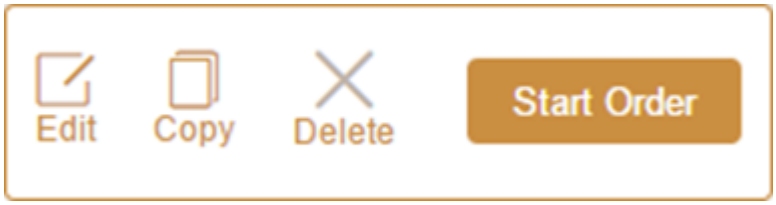
13. Click ***New Order From Template*** to save the template and place a new order using the template you just created.



Edit, Copy, Delete or Start an Order from a Template



To edit, copy or delete a template, click the ellipsis at the end of an order and click on the icon for the action you would like to take.



- Click the ***Edit*** icon or simply open the template and begin editing. Don't forget to click ***Save*** when you are finished.
- Use the ***Copy*** action to create a copy of a template for another LID or to create a copy of a Store Pickup template to use for PLCB Delivery.
- You can also ***Delete*** a template by opening it and clicking Delete this Template in the upper-right corner of the screen.

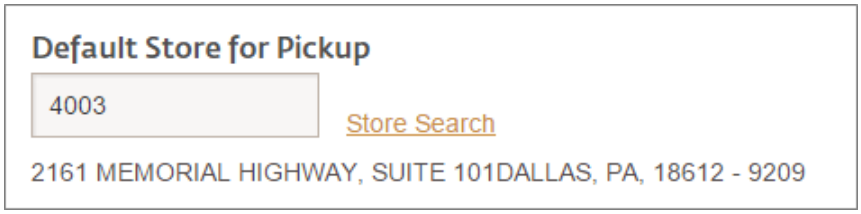
Manage LID

How to Manage Your LID

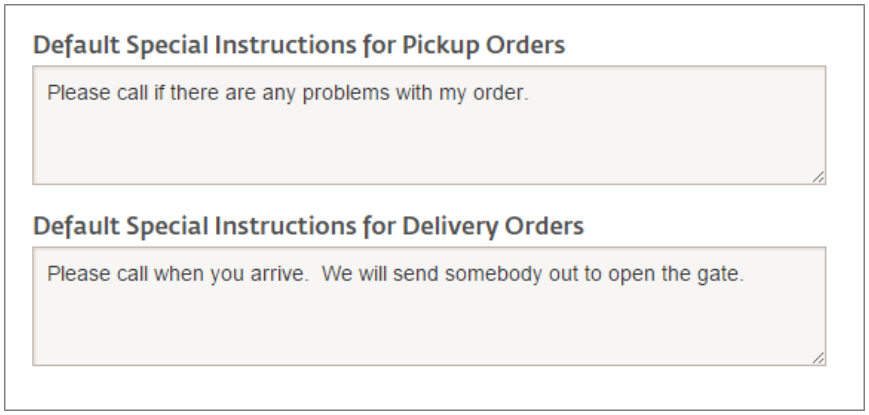
The ***Manage LID*** screen allows account administrators to:

- Update contact information

- Set a default Pickup Store



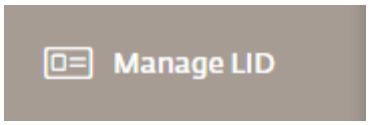
- Set Default Special Instructions for Store Pickup and for PLCB Delivery Orders



- Register for PLCB Delivery
- Create new delivery groups

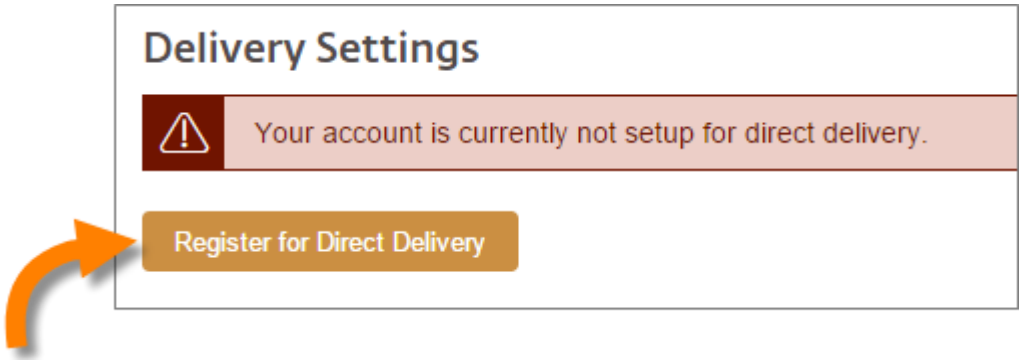
Register for PLCB Delivery

1. Click ***Manage LID*** on the left side of your screen.

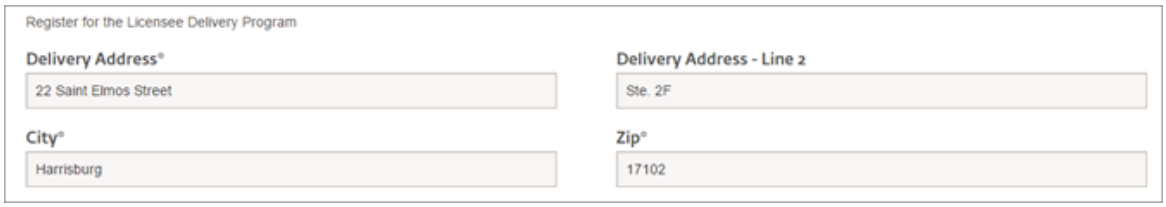


2. Select the LID you wish to manage.

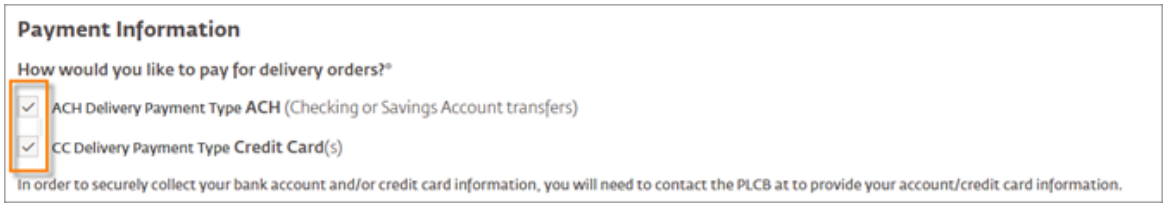
3. Click ***Register for Direct Delivery***.



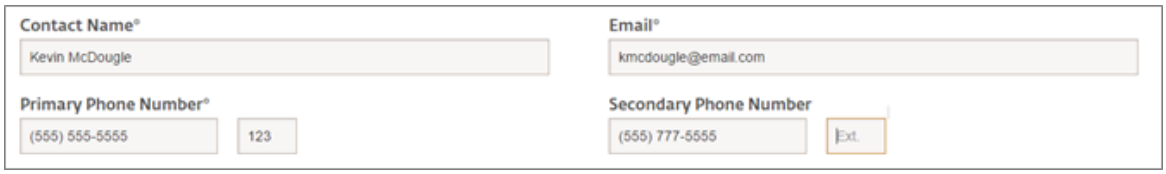
4. Enter your address information.



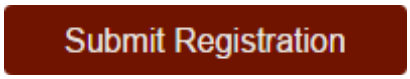
5. Enter the payment methods you would like to use.



6. Enter a ***Contact Name***, ***Email***, ***Primary Phone Number*** *and* ***Secondary Phone Number***.



7. Click ***Submit Registration***.



8. Click ***Save Settings***.

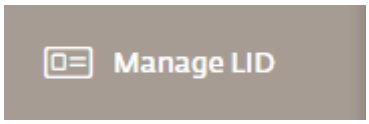
9. Call the PLCB Cash Management Office at 717.783.7562 from Monday to Friday from 9:00 AM to 5:00 PM to provide your ACH and/or credit card account numbers.

Create a New Delivery Group

Delivery groups allow multiple LIDs to combine their orders into one order and have it shipped to a central location. This is particularly useful when you have multiple LIDs at one location. For example, Licensee A places an order for 25 cases. Licensee B also places an order for 25 cases. Both order are shipped to Licensee A's premises.

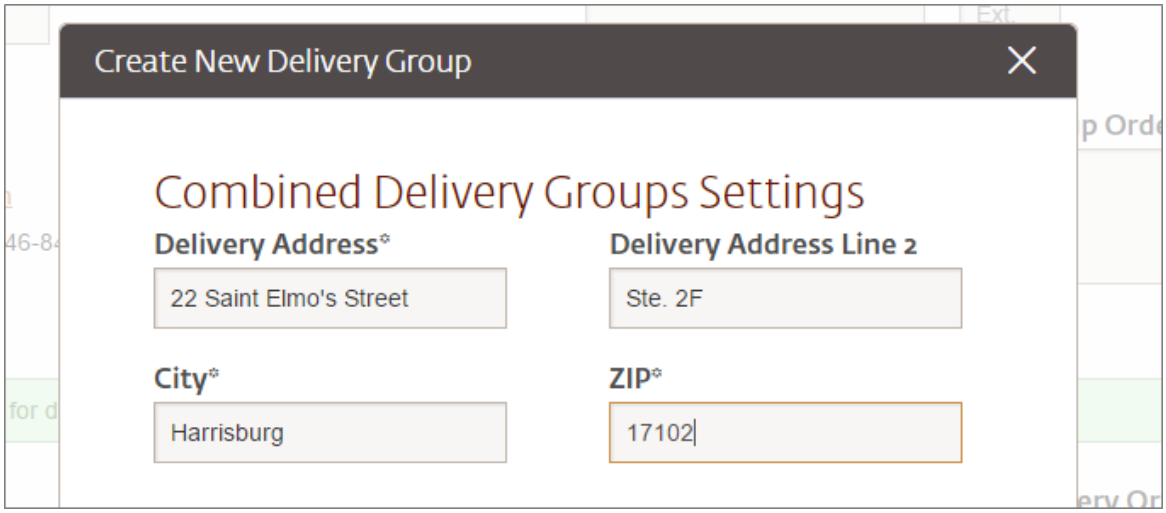
You must be registered for PLCB Delivery to take advantage of delivery groups. If you have not yet done so, register for PLCB Delivery. Once you have completed the steps below, your delivery group request is sent to the PLCB for review. You will receive an email confirmation once the delivery group has been approved.

1. Click ***Manage LID***.



2. Click ***Create New Delivery Group***.

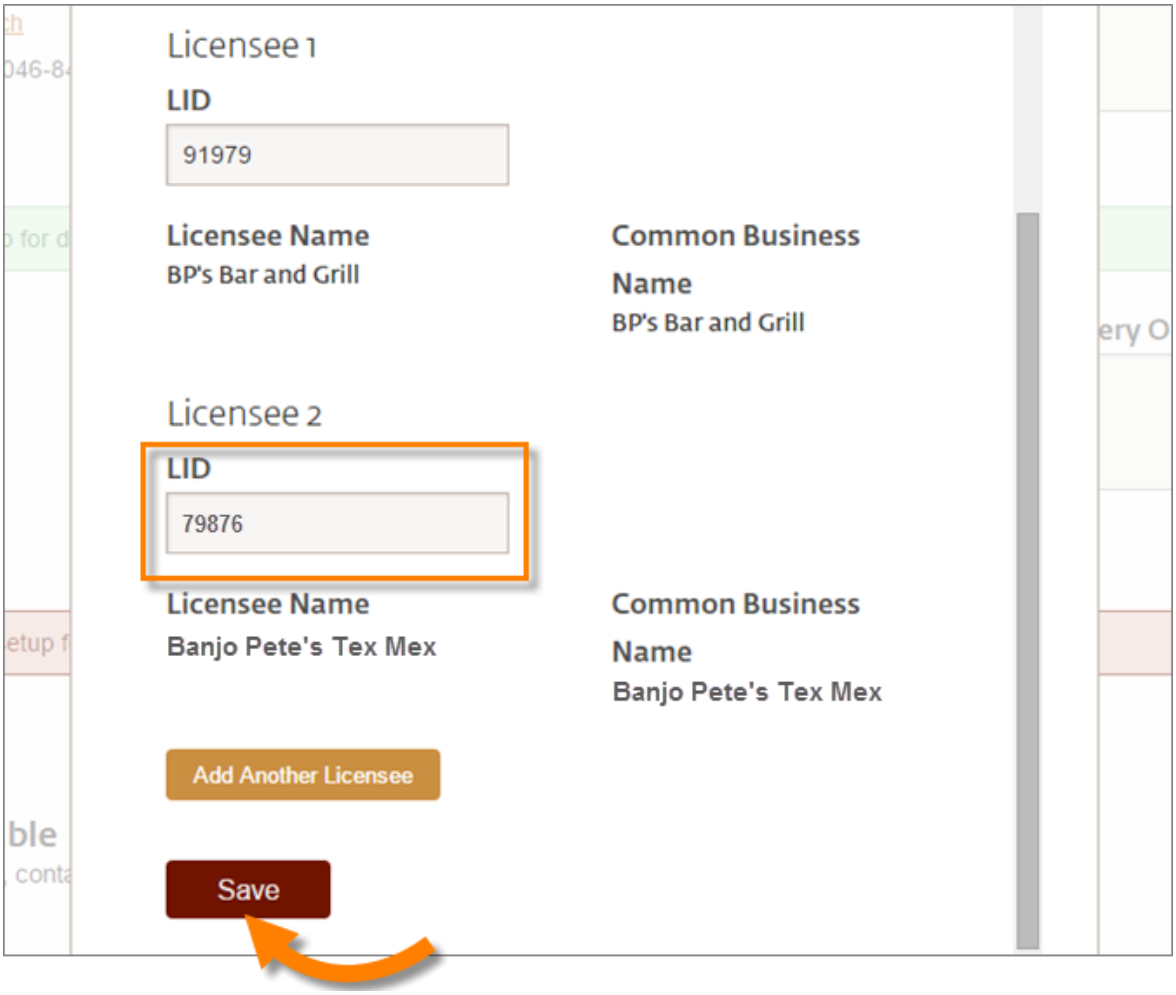
3. Enter the address where you would like to have the combined shipment delivered.



4. Enter the LID for ***Licensee 1***. Press “Tab” on your keyboard, then click ***Add Another Licensee***.

5. Enter the LID for ***Licensee 2***.

6. Click ***Save***.



Manage Users

Manage Users Options

Anybody who is performing an action in the portal using their login (email) and password is a LOOP user. The initial user of an account is set as an “Administrator” and is responsible for creating other users. Users are assigned one of four different roles when they are created. Some levels have only a limited number of functions in the portal, while others will have many.

The different types of users and there functions are as follows:

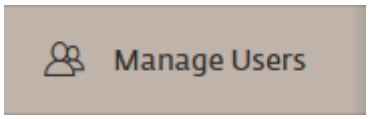
Administrator	Advanced User
• Manage LID account information • Add, edit or delete users and contacts • Create, submit and approve orders • Access all portal functionality	• Create and submit for approval • Approve orders • Browse and search for products • View order history
Basic User	**Notifications Only**
• Create orders and submit for approval • Browse and search for products • View order history	• No login access to the portal • Receive email notifications as determined by the LID administrator

Add, Remove and Update Users

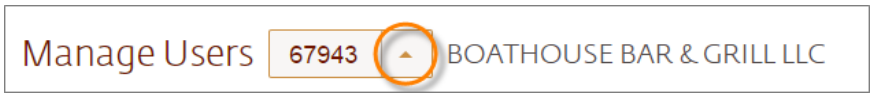
To add, remove or update user information, you must be a LOOP Administrator.

Add a New User

1. Click ***Manage Users*** on the left side of the screen.

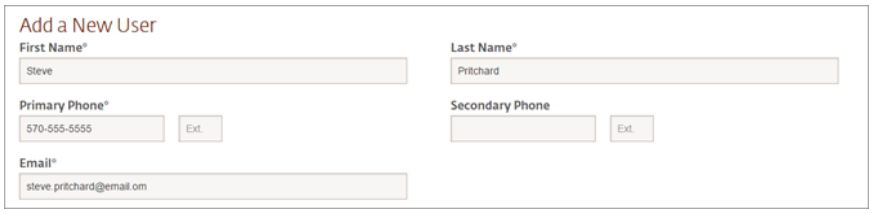


2. Verify that the correct LID is displayed at the top of the ***Manage Users*** screen. If you only have one LID registered, it will display by default. If you have multiple LIDs registered, you can select the correct LID from the dropdown menu if it is not already displayed.

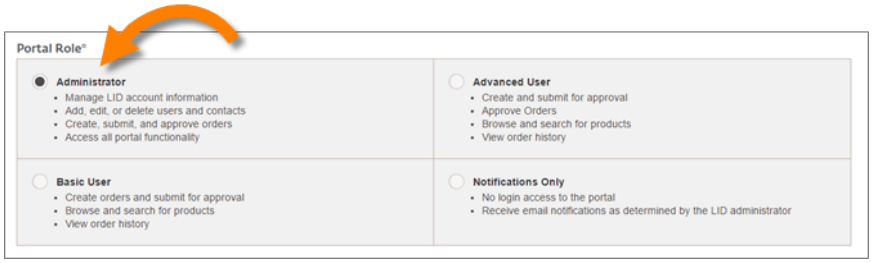


2. Click ***Add User***.

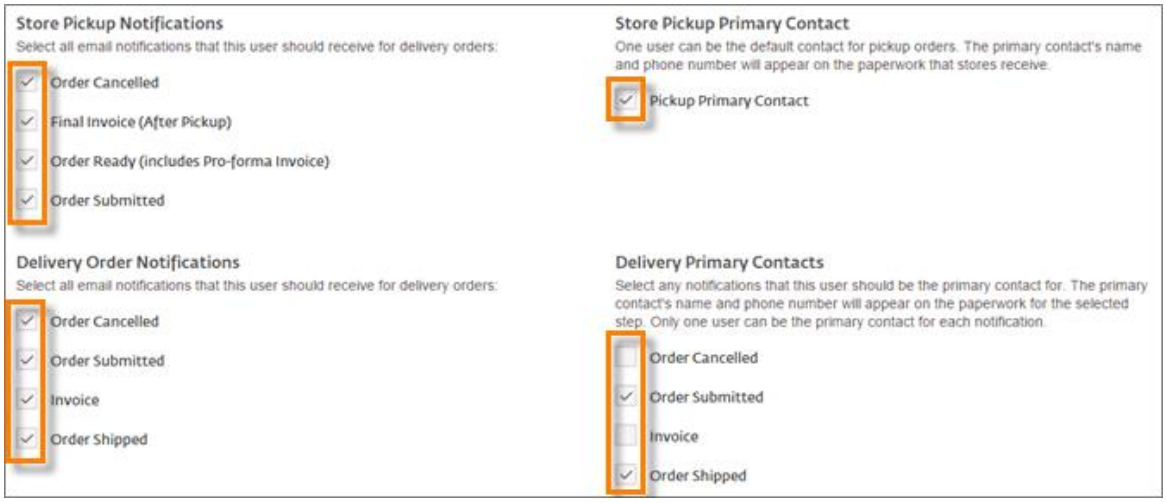
3. Enter the user contact information.



4. Choose a new role for the user.



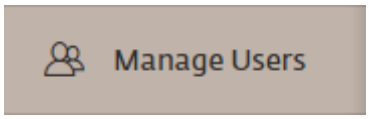
5. Select the notifications the user should receive.



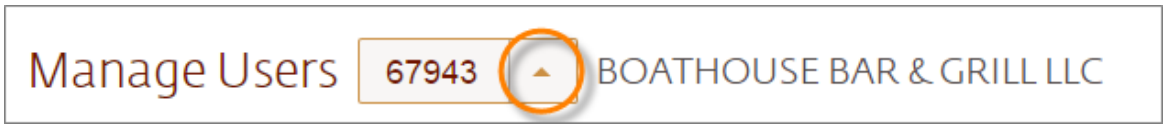
6. Click ***Save***.

Update a New User

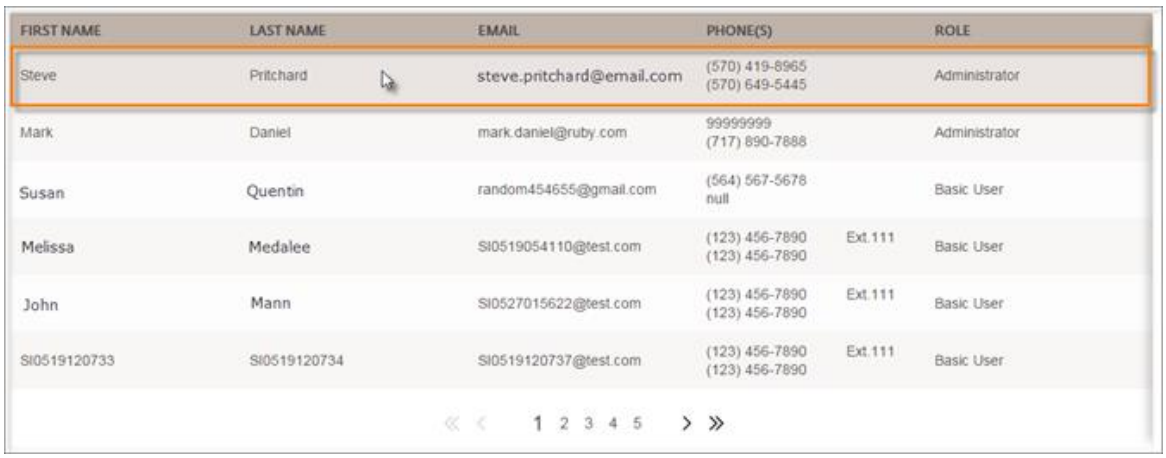
1. Click ***Manage Users*** on the left side of the screen.



2. Verify that the correct LID is displayed at the top of the ***Manage Users*** screen. If you only have one LID registered, it will display by default. If you have multiple LIDs registered, you can select the correct LID from the dropdown menu if it is not already displayed.



3. Click anywhere in the row containing the user you wish to update.



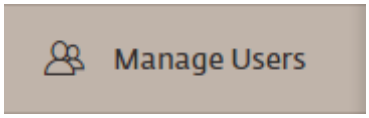
FIRST NAME	LAST NAME	EMAIL	PHONE(S)		ROLE
Steve	Pritchard	steve.pritchard@email.com	(570) 419-8965 (570) 649-5445		Administrator
Mark	Daniel	mark.daniel@ruby.com	99999999 (717) 890-7888		Administrator
Susan	Quentin	random454655@gmail.com	(564) 567-5678 null		Basic User
Melissa	Medalee	SI0519054110@test.com	(123) 456-7890 (123) 456-7890	Ext.111	Basic User
John	Mann	SI0527015622@test.com	(123) 456-7890 (123) 456-7890	Ext.111	Basic User
SI0519120733	SI0519120734	SI0519120737@test.com	(123) 456-7890 (123) 456-7890	Ext.111	Basic User

1 2 3 4 5

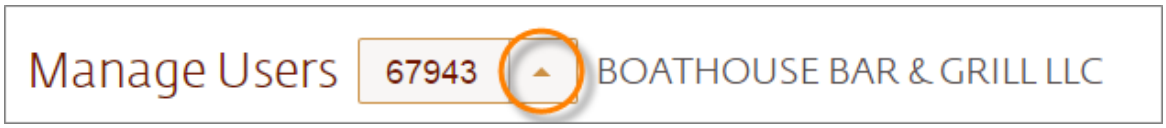
4. Update any fields that need updating and click ***Save***.

Delete a User

1. Click ***Manage Users*** on the left side of the screen.

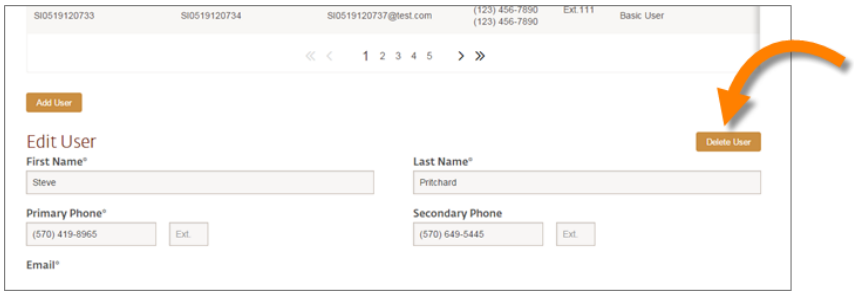


2. Verify that the correct LID is displayed at the top of the ***Manage Users*** screen. If you only have one LID registered, it will display by default. If you have multiple LIDs registered, you can select the correct LID from the dropdown menu if it is not already displayed.

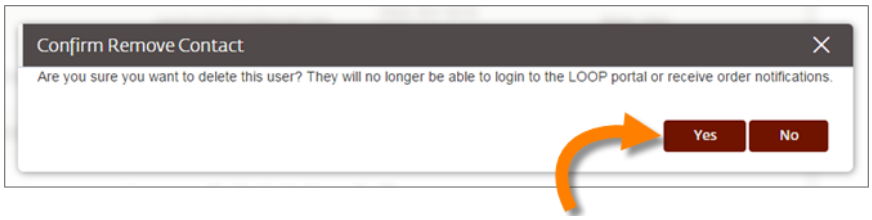


3. Click anywhere in the row containing the user you wish to update.

4. Click ***Delete User***.



5. Click ***Yes*** to confirm you want to delete the user.



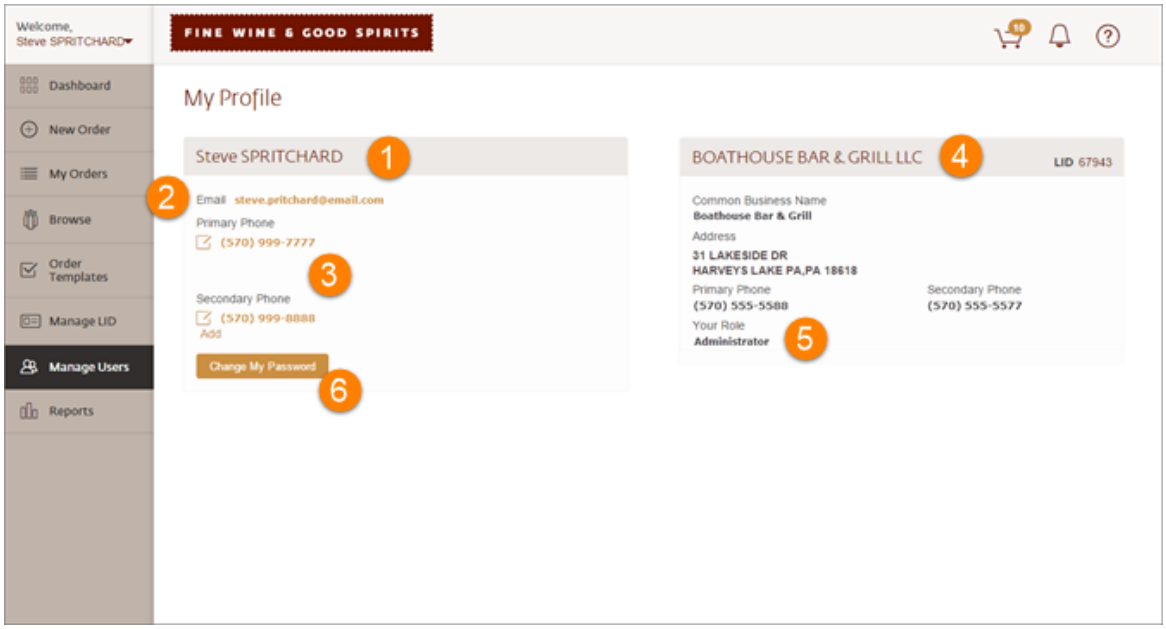
6. Click ***OK***.

My Profile

Understanding Your Profile

You can access your profile by clicking on your name in the upper-left corner of your screen.

The ***My Profile*** page allows a user to view or update his/her personal information, as well as view all of the LIDs registered under his/her name. You can also change your password.



1. Your name
2. Your email address
3. Your primary & secondary phone number
4. LID information for your LIDs
5. You role for a particular LID
6. Password change button