Licensee Maintenance – Add Authorized Agent Quick Reference Guide

Introduction

A licensee can manage customer profile data in the Licensee Online Order Portal (LOOP). Some of the data is restricted and can only be managed based on the role assigned.

Key Functions

This training session will focus on adding an Authorized Agent. Authorized Agents are personnel who can pick up products on behalf of a licensee. This is an administrator only function.

LOOP Role Matrix Reference Guide

This matrix displays the functions and associated roles (those highlighted are covered in this training).

LOOP Function	Licensee Administrator	Licensee Approver	Licensee Buyer *
View/Edit Profile	X	X	X
Update Account Information	X		
Delete Members	X		
Manage Contacts/Members	X		
Add/Delete Payment Methods	X		
Add/Delete Authorized Vendors	X		
Add/Delete Authorized Agents	X		
Submit Orders	X	X	X
Approve Orders	X	X	
Approve Special Orders	X	X	
Create Purchase Lists	X	X	X
Delete Purchase Lists	X	X	X
Manage Purchase Lists	X	X	X
View Placed Orders	X	X	X
View Order Details	X	X	X
Copy to Cart Function	X	X	X
Cancel Approved Orders **	X	X	
Create Return Requests	X	X	X
View Return Orders	X	X	X
View Return Order Details	X	X	X

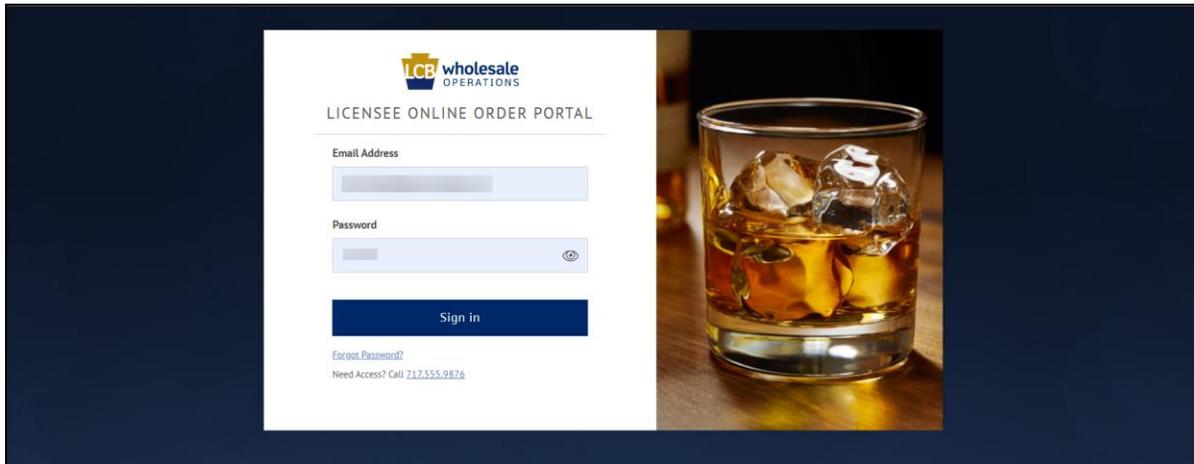**Notes**: An asterisk (*) indicates this role is assigned to all users by default.
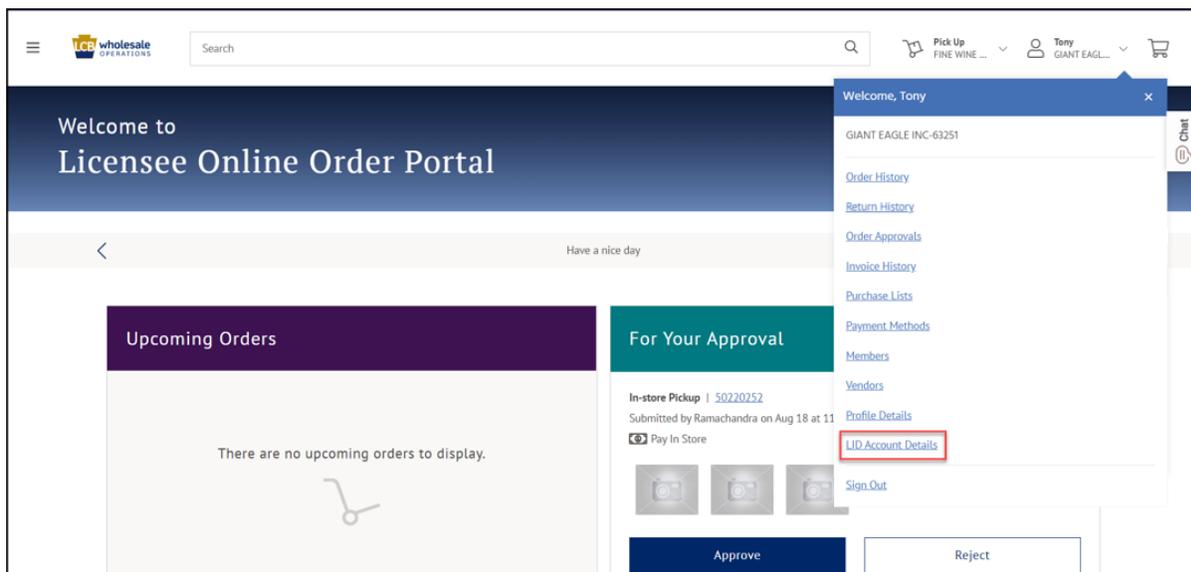A double asterisk (**) indicates approved orders can only be canceled in LOOP prior to order cutoff or selection.

Add an Authorized Agent (LOOP)

Link to eLearning video: Licensee Maintenance – Add Authorized Agent
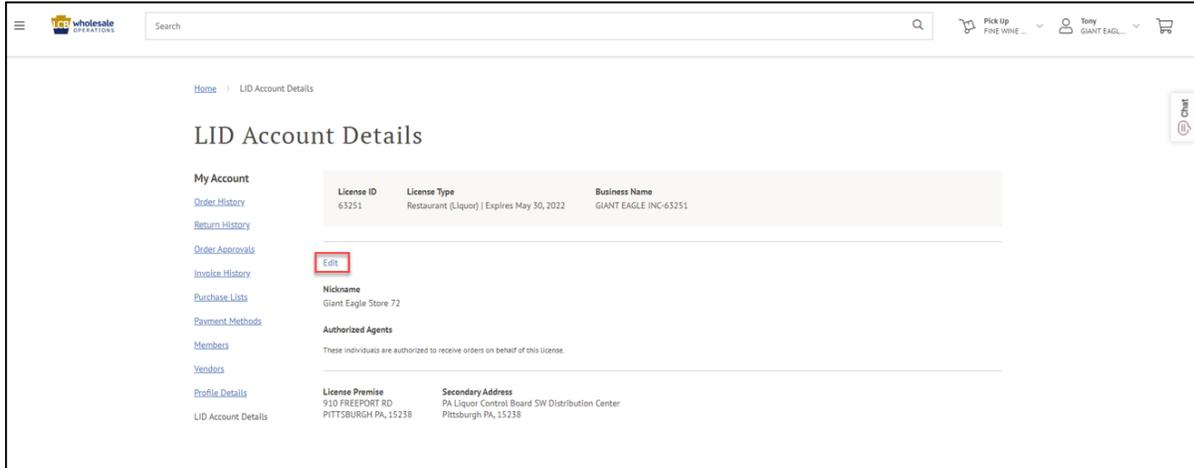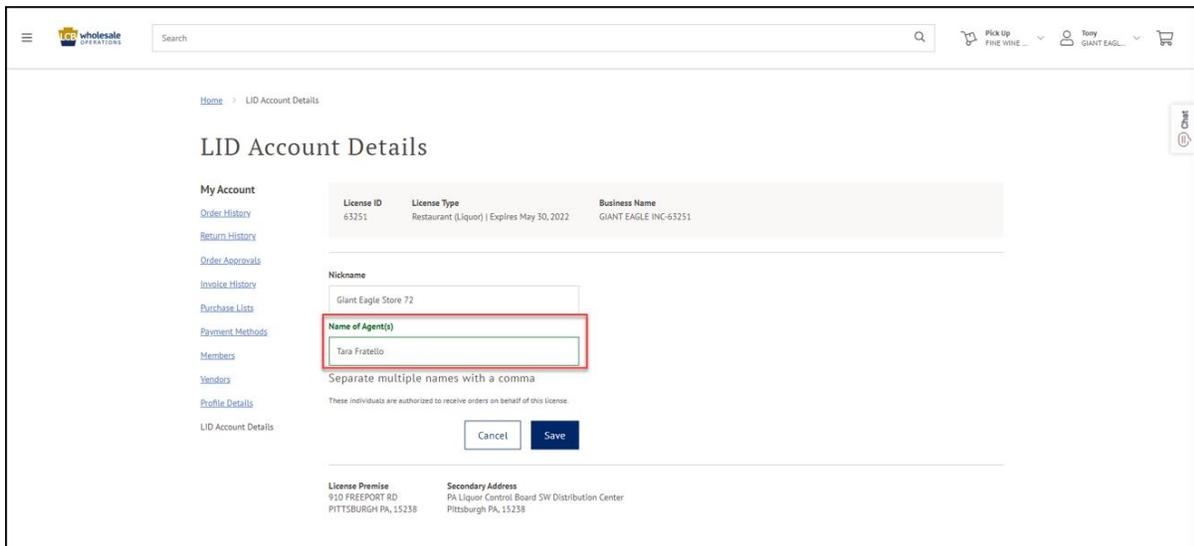
1. Navigate to LOOP, then **sign in**.

2. Select **LID Account Details** from the dropdown menu next to the Shopping Cart.

3. Click **Edit**.

4. Enter the [Name of the Authorized Agent(s)].

Note: Multiple names can be added by separating names with a comma. To remove an Authorized Agent, simply remove their name from the list.

5. Click **Save**.

The Authorized Agents have been added or removed.