

## 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

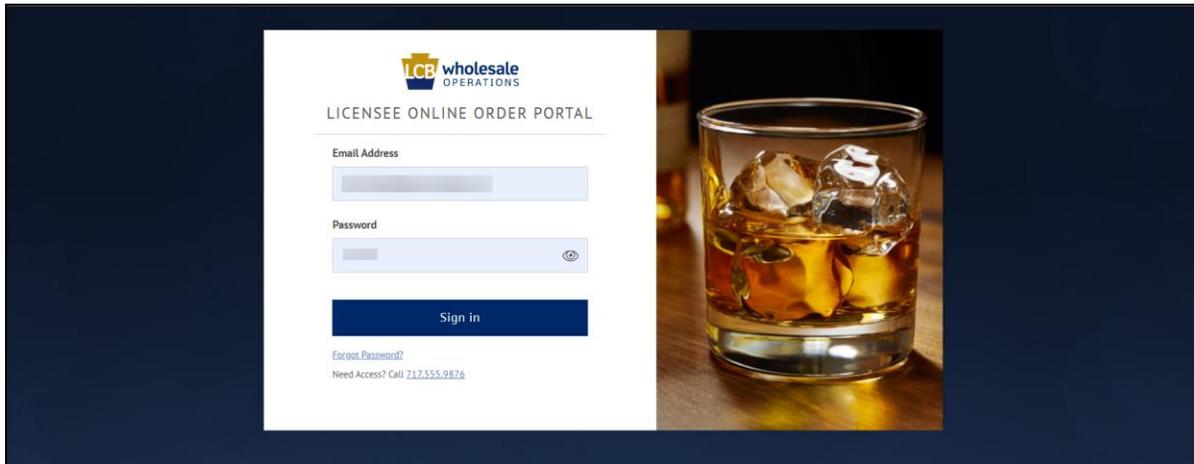
**Notes:** An asterisk (\*) indicates this role is assigned to all users by default.

A double asterisk (\*\*) indicates approved orders can only be canceled in LOOP prior to order cutoff or selection.

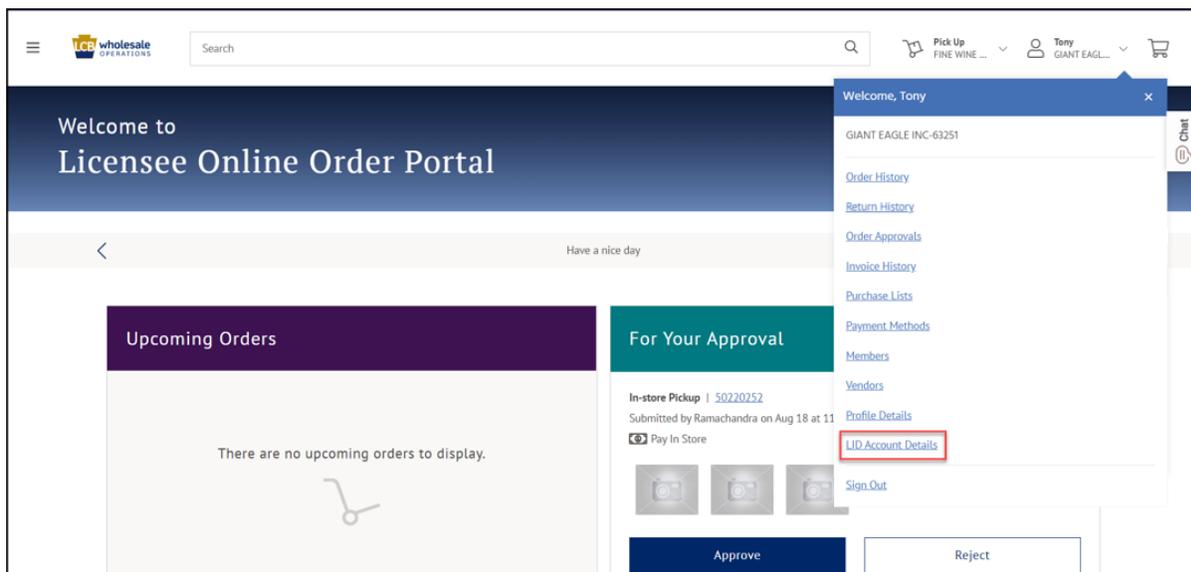
## Add an Authorized Agent (LOOP)

Link to eLearning video: [Licensee Maintenance – Add Authorized Agent](#)

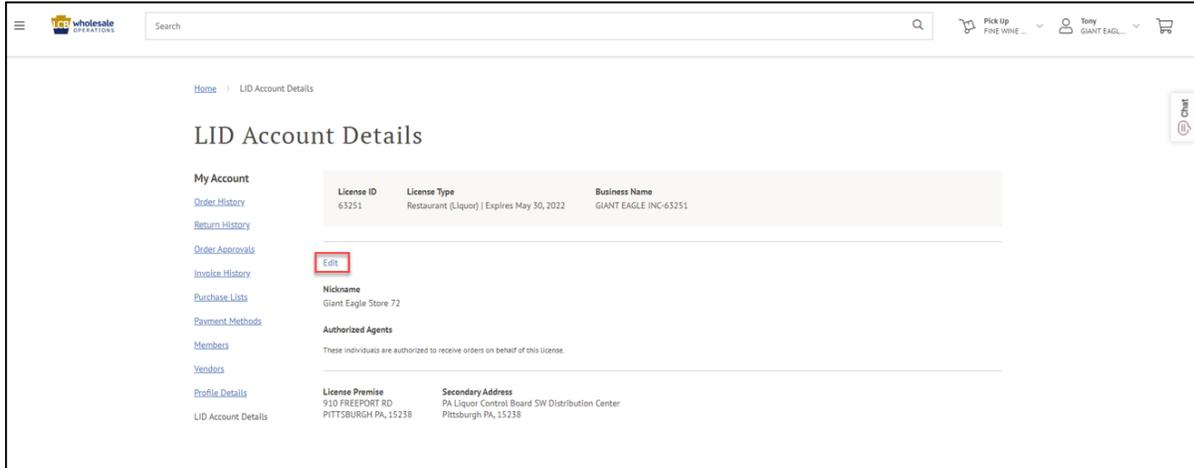
1. Navigate to LOOP, then **sign in**.



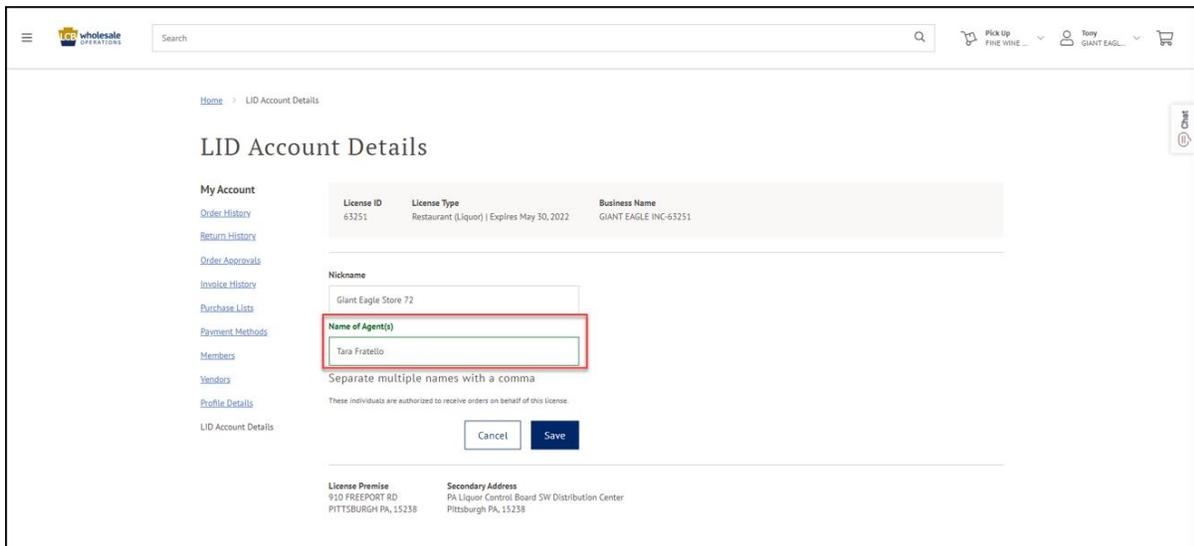
2. Select **LID Account Details** from the dropdown menu next to the Shopping Cart.



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 screenshot shows the 'LID Account Details' page. On the left is a 'My Account' sidebar with links: Order History, Return History, Order Approvals, Invoice History, Purchase Lists, Payment Methods, Members, Vendors, Profile Details, and LID Account Details. The main content area has a table with columns 'License ID', 'License Type', and 'Business Name'. Below this is a 'Nickname' field with 'Giant Eagle Store 72'. A 'Name of Agent(s)' field contains 'Tara Fratello'. Below the field is the text 'Separate multiple names with a comma' and 'These individuals are authorized to receive orders on behalf of this license.' At the bottom of the form are 'Cancel' and 'Save' buttons, with the 'Save' button highlighted by a red box.

The Authorized Agents have been added or removed.

This screenshot shows the same 'LID Account Details' page, but the 'Authorized Agents' section is highlighted with a red box. The 'Name of Agent(s)' field now contains 'Tara Fratello' and is labeled 'Authorized Agents'. The 'Save' button is no longer visible, indicating the changes have been saved.