

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

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 <u>LOOP</u>, then **sign in**.



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

Search	Q B PICK Up FINE WINE _ V B TONY FAGL. V D
Welcome to Licensee Online Order Portal	Welcome, Tony × GIANT EAGLE INC-63251
Have a	Return History Order Approvals Invoice History Purchase Lists Rayment Methods
Upcoming Orders	For Your Approval Members In-store Pickup 50220252 Yendors Submitted by Ramachandra on Aug 18 at 11 Profile Details Image: State of the part





3. Click Edit.

=	CE wholesale	Search				Q ZI Pic	k Up ∨ IE WINE	GIANT EAGL ~	đ
		Home > LID Account Detail	nt Details						Chat
		My Account Order History Return History	License ID Licen 63251 Rest	nse Type aurant (Liquor) Expires May 30, 2022	Business Name GIANT EAGLE INC-63251				
		Order Approvals Invoice History Purchase Lists	Edit Nickname Giant Eagle Store 72						
		Payment Methods Members Vendors	Authorized Agents These individuals are authorize	ed to receive orders on behalf of this license.					
		Profile Details	License Premise 910 FREEPORT RD PITTSBURGH PA, 15238	Secondary Address PA Liquor Control Board SW Distributi Pittsburgh PA, 15238	on Center				

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

Ш	CCB wholesale	Search	Q	D PICK UP FINE WINE	O TONY GIANT EAGL V
		LID Account LID Account My Account Oxfor History Beturn History Defen Asservats Involve History Parchase Lists Parchase Lists LiD Account Details	License ID License 7yse Business Name Guart Eagle Store 72 Name of Agent(s) Tars Fratello Separate multiple names with a comma These individuals are authorized to rescribe outers on behalf of this license. License License Store 72 License May 30, 2022 Store	b" rate wate "	
			License Premise Secondary Address 9:10 PREPORT RD PA Ligaur Control Board SW Distribution Center PHTDBURKIN PA, 15:238 Phttbburgh PA, 15:238		

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.

=	Wholesale	Search	Q JJ Pleakip ~~~	GIANT EAGL V
		Hame > UD Account Det LID Account My Account Order History Bruter History	Uternee ID Uternee Type Business Name 63351 Restaurant (Liqueo) I Expires May 30, 2022 Guart EAGLE INC-63251	 Otat
		Order Approvals Invoice History Purchase Lista Payment Methods	Nickname Gant Eagle Store 72 Name of Agent(s)	
		Members Yenders Profile Details LID Account Details	Tara Fratelio Separate multiple names with a comma Thee individuals are authorized to receive orden on behalf of this locense. Cancel Sove	
			License Premier Secondary Address 910 TREEPORT RD PA Liquor Control Board SW Distribution Center PTTSBURGH PA, 15238 Pittsburgh PA, 15238	

The <u>Authorized Agents</u> have been added or removed.

=	CCP wholesale	Search		Q	77 Pick Up FINE WINE V C GUN	TEAGL V 🕁
			unt Details			Chat
		My Account Order History Return History	License ID License Type Business Name 65251 Restaurant (j.l.quori) Expires May 30, 2022 GUNYT EAGLE INC-63251			
		Onder Aberzweis Invelice History Purchase Lists Reyment Methods Members Vendors	Edit Nickname Giant Exple Store 72 Authorized Agents Tara Fratelio These individuals are authorized to receive orders on behalf of this license.			
		Profile Details	License Premise Secondary Address 9/10 FREPORT RD PA Liquer Control Board SW Distribution Center PrTTSBURGH PA, 15238 Pittsburgh PA, 15238			

