

Licensee Maintenance – Add Special Order Supplier(s) as Authorized Vendor(s) 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 vendor for purposes of having Special Orders (SOs) placed for licensees to approve in LOOP.

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	X	X	X
View Return Orders	Х	Х	Х
View Return Order Details	X	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 Vendor (LOOP)

Link to eLearning video: Licensee Maintenance – Add Special Order Supplier(s) as Authorized Vendor(s)

1. Navigate to <u>LOOP</u>, then **Sign In**.

LICENSEE ONLINE ORDER PORTAL
Email Address
Password
Sign in
Earges Password? Need Access? Gall <u>717555.9876</u>

2. Select Vendors from the dropdown menu next to the Shopping Cart.







3. Click Add New Vendor.

≡	CE wholesale Search				Q	FINE WINE Y	GIANT EAGL ~	Ĩ
	Home > Vendors							Chat
	Vendors My Account					1	Add New Vendor	
	Order History Return History Order Approvals Invoice History	Search Search by Vendor Name, Add	iress, or Contact information				Search	
	<u>Purchase Lists</u> <u>Payment Methods</u> <u>Members</u>	Vendor 🌲	Address \$	Contacts 💠	Status 🍦			
	Vendors <u>Profile Details</u> LID Account Details	Capital Wine & Spirits + GIANT EAGLE INC-63251 Edit Vendor		Karthik Ramachandra kramachandra85+pulicadmin@g	Active <u>mail.com</u>	View Require	Approvals	

4. Enter [Vendor Name], [Email Address] or [Contact information] in the <u>Search Bar</u>, then click **Search**.

Note: Licensees can search by any portion of the first name, last name or email address.

	Search Q 37 Pick Up
Vend	DTS
Order History Return History Order Approvals Invoice History Purchase Lists Payment Metho Members Vendors	Search Search Search Search Cat Carlod O Q C
Profile Details LID Account Det	Try entering in a different search term.

Note: This functionality allows the licensee to designate the vendor representative(s) that may access LOOP to create and manage Special Orders (SO) for the specified License Identification Number (LID).





5. Choose the correct vendor, then click **Add Vendor**.

venuors		Add Vendor to Account		×	Add New Vandor
Order History	_	Carlos			THAT FULLAN
Return History	Search	Carlos Vazquez	Status		
Order Approvals	Cart	carlos-classicwines.us@yarger.net	• Active O Inactive	Add Vendor	Search
Invoice History Purchase Lists	Search by Ve	Carlos Gamboa prna.bot01-pernod-ricard.com@yarger.n	Status Active Inactive 	Add Vendor	
Payment. Methods Members	No Res	Carlos Gamboa prna.bot01@pernod-ricard.comx	Status Active Inactive 	Add Vendor	
Vendors Profile Details	Try entering in	Carlos H Arteta carlos-vinoslibres.com@yarger.net	Status Active Inactive 	Add Vendor	

The added vendor will show up in the list of vendors.

=	wholesale	Search				Q	12	ck Up NE WINE	C Terry CANTERS	a v	뒥	
	Vendor My Account Order History	rs							Add New Vendor		(iii) Chat	man C
	Return History Order Approvals Invoice History Purchase Lists Payment Methods		Search Search by Vendor Name, Ad	dress, or Contact Information					Search			
	Members Vendors Profile Details LID Account Details		Vendor 🕈 Capital Wine & Spirits + GIANT EAGLE INC-63251 EGR Vendor	Address 3	Contexts © Kambik Ramachandra kramachandraBS-puticadmin@omail	Status © Active Leom		View Requir	ed Approvais			
			CLASSIC WINES INC + GIANT EAGLE INC-63251 Edit Vendor		tara fratello Infratelo-vendor@gmail.com	Active						



Edit an Authorized Vendor (LOOP)

1. Click Edit Vendor.

Vendors				
My Account				Add New Vendor
Order History				
Return History	Search			
Order Approvals				Search
Invoice History	Search by Vendor Name, Addres	ss, or Contact information		
Purchase Lists				
Payment Methods				
Members	Vendor 🖨	Contacts 🗘	Status 🗘	
Vendors				
Profile Details	Capital Wine & Spirits + GIANT	Karthik Ramachandra	Active	View Required Approvals
LID Account Details	Edit Vendor	Klamachanorao 2* pulicaumini grgmaili		
	CLASSIC WINES INC + GIANT EAGLE INC-63251 Edit Vendor	tara fratello Imfratello-vendor @gmail.com	Active	

Note: You can also search for a vendor if you do not see them in the populated list.

2. Click the appropriate **Status Radio Button**, then click **Update vendor**.

Vendors		
My Account Order History Return History	Search	Add New Yendor
Order Approvals Invoice History	Search by Vendor Name, Address, or Contact information	Search
Payment Methods Members	Vendor *	
Vendors Profile Details LID Account Details	Capital Wine & Edit Venteron Edit Vendor Capital Wine & Spirits + GIANT EAGLE INC-63251 Kramachandra85+pulicadmin@gmail.com	View Required Approvals
	CLASSIC WIRES EAGLE INC-632 Edit Vendor Cancel Update vendor	

