Licensee Maintenance – Manage Contacts (Members) Quick Reference Guide

Introduction

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

Key Functions

Only a licensee with an assigned role of "Administrator" can update contact details, referred to as "member information" within LOOP. The "Members" area within LOOP is used to provide access and assign roles that determine what tasks and data can be performed/viewed by individuals within a licensee's organization.

A member's email address is used as the login ID for LOOP. Once a new member has been set up, they will receive an email to log in to LOOP and reset their password.

Because the email address is the login ID, an email address cannot be changed for a member. If an email address changes, the original member must be deleted, and a new member added with the desired email address. Once deleted, the member will receive an email confirming they have been deleted from the account.

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.

Manage Members (LOOP)

Link to eLearning video: Licensee Maintenance – Manage Contacts - Members

1. Navigate to LOOP, then **Sign In**.
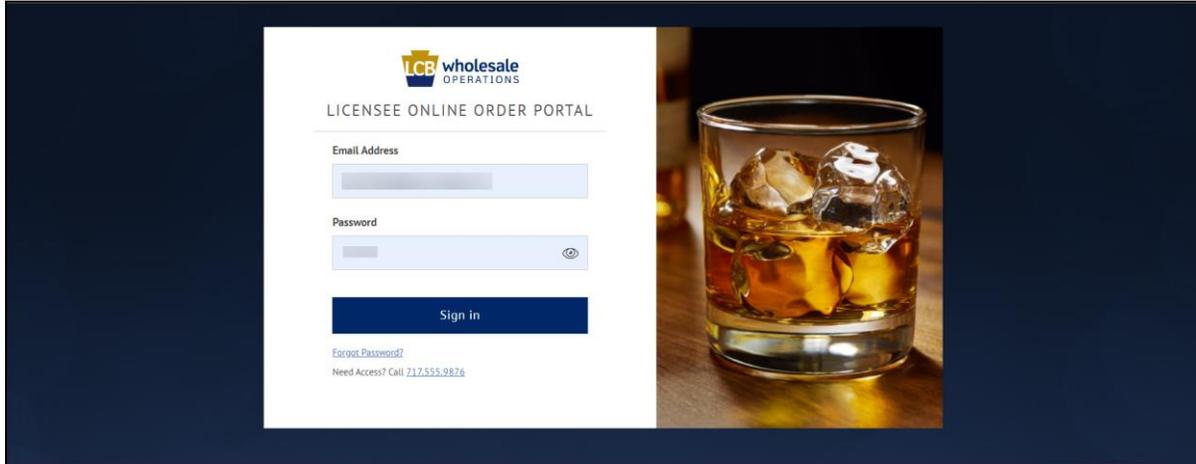
2. Select **Members** from the dropdown menu next to the Shopping Cart.
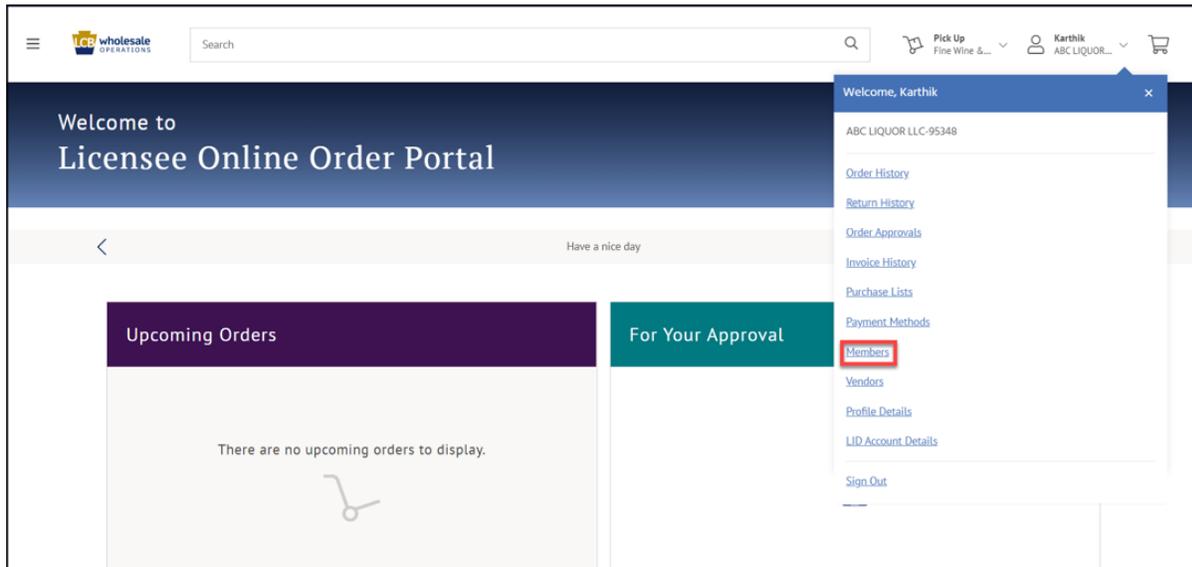
Members will populate.

Add a New Member

1. Click **Add New Member**.

2. Click **Create New Member**.
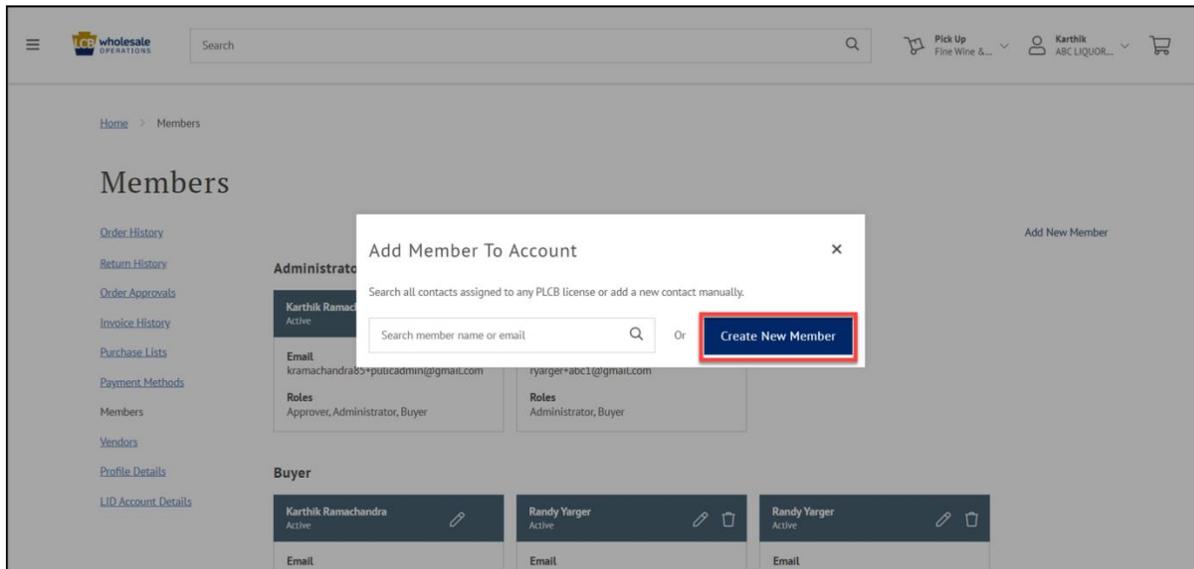
3. Add [First Name], [Last Name], [Email Address] and [Role], then click **Create Member**.
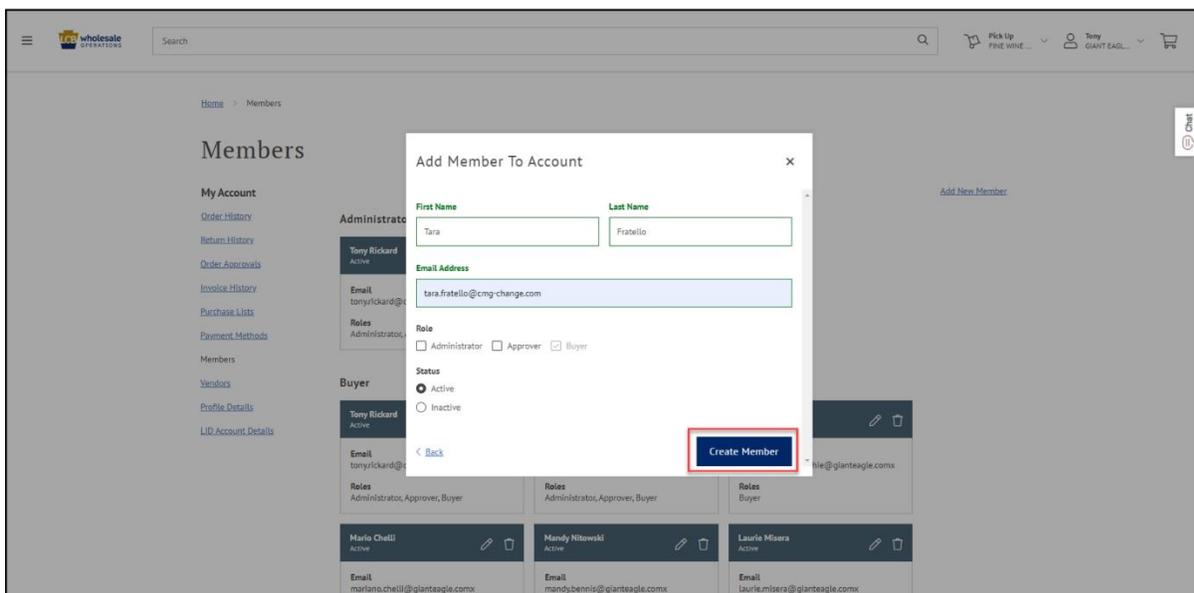
Note: A newly created member will receive an email with instructions on creating a password and logging in.

Update a Member

1. Click the **Pencil Icon**.

Note: Each name is listed according to the role(s) assigned. If a user is assigned multiple roles, they will be listed multiple times. Click the pencil for any given name to be taken to the user's profile.

2. Edit the information, then click **Update Member**.
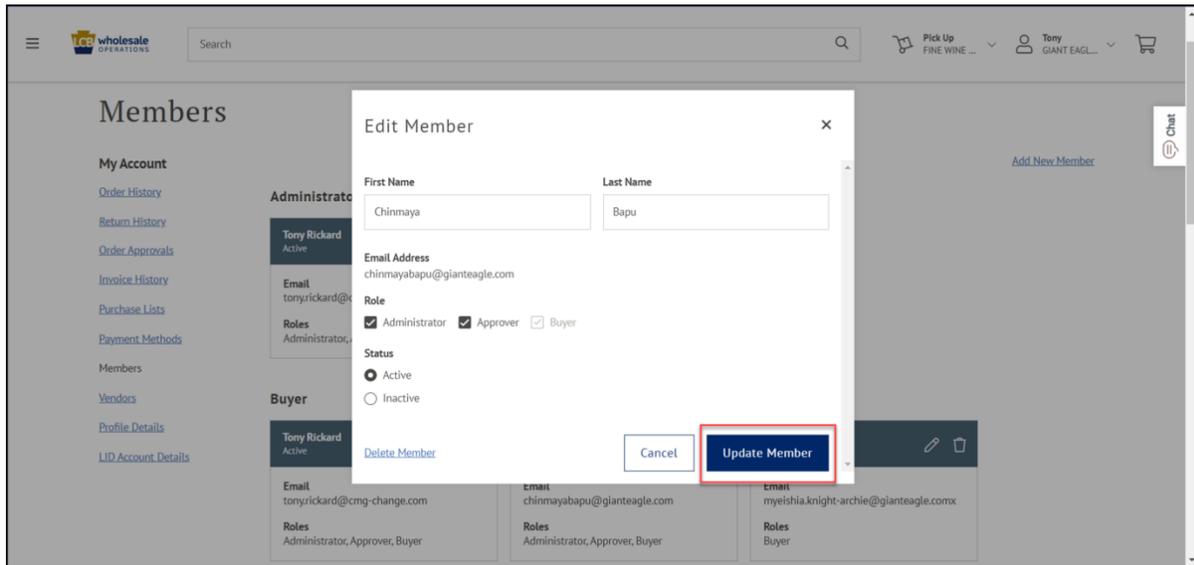
Note: The email address cannot be edited since it is directly tied to login credentials. If an email address is entered incorrectly, the user must be deleted and entered as a new member to correct the error.

Delete a Member

1. Click the **Trash Can Icon**.
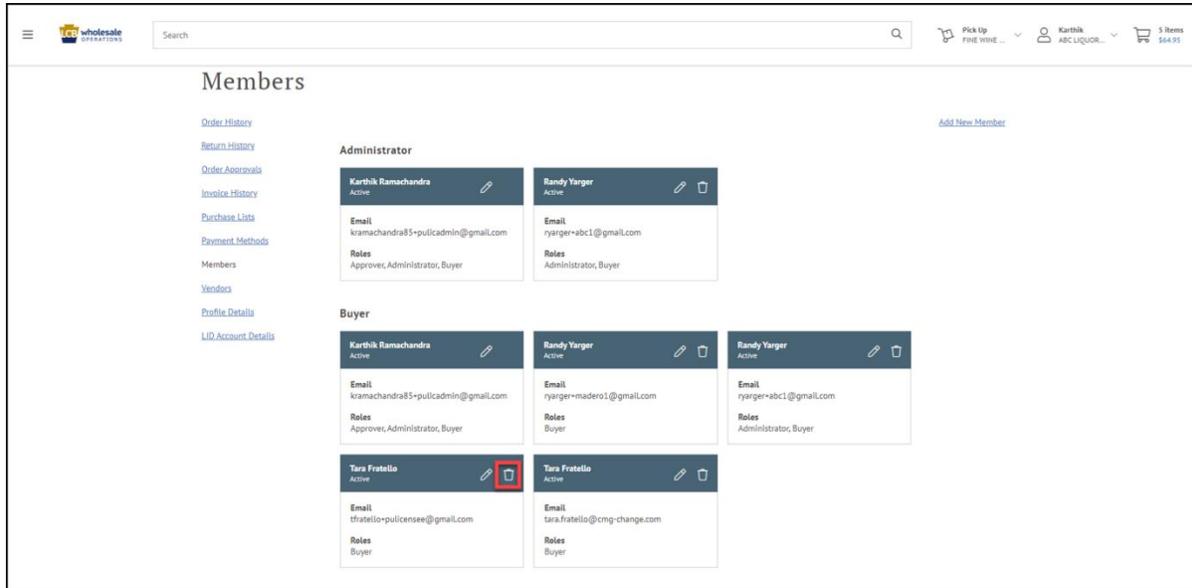
2. Click **Yes, Delete Member**.
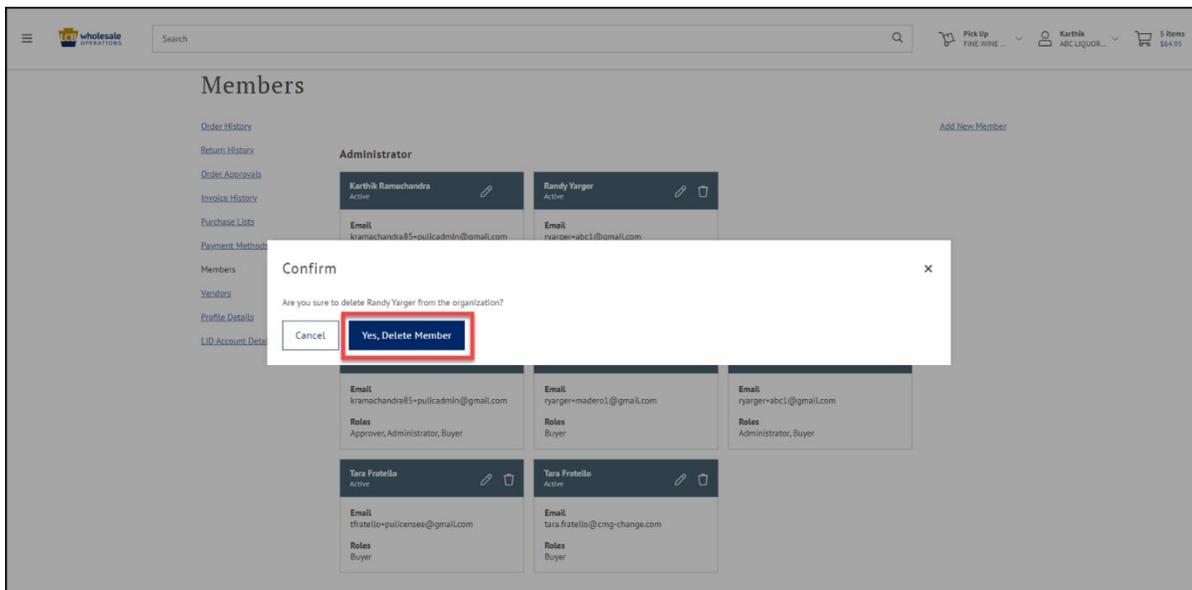
The Member Information has been deleted.

Note: A deleted member will receive an email advising that they are no longer associated with this account. A member may not delete their own account, so Administrators must contact LOOP Support to delete their account.