

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	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	Х	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.





Manage Members (LOOP)

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

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



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

E Corrections Search		Q 7 Pick Up Sine & V S Karthik SIQUOR V				
		Welcome, Karthik X				
Welcome to	Welcome to					
Licensee Online Order Port	tal	Order History				
		Return History				
,	Here exists here	Order Approvals				
X	K Have a nice day					
		Purchase Lists				
Uncoming Orders	For Your Approval	Payment Methods				
opcoming orders	For four Approvat	Members				
		Vendors				
		Profile Details				
There are no upcoming orders to disp	blav.	LID Account Details				
		Sign Out				
0						

Members will populate.





Add a New Member

1. Click Add New Member.

Home > Members						
Members						
Order History						Add New Member
Return History	Administrator					
Order Approvals	Karthik Ramachandra	Randy Yarger				
Invoice History	Active	Active	0			
Purchase Lists	Email	Email				
Payment Methods	Roles	Roles				
Members	Approver, Administrator, Buyer	Administrator, Buyer				
Vendors						
Profile Details	Buyer					
LID Account Details	Karthik Ramachandra Active	Randy Yarger Active	0 Ū	Randy Yarger Active	Ø Ū	
	Email kramachandra85+pulicadmin@gmail.com	Email ryarger+madero1@gmail.com		Email ryarger+abc1@gmail.com		
	Roles Approver, Administrator, Buyer	Roles Buyer		Roles Administrator, Buyer		
	Tara Fratello Active	Tara Fratello Active	00			
	Email tfratello+pulicensee@gmail.com	Email tara.fratello@cmg-change.com				
	Roles Buyer	Roles Buyer				
	Approver					
	Karthik Ramachandra Active					
	Email kramachandra85+pulicadmin@gmail.com					
	Roles Approver, Administrator, Buyer					





2. Click Create New Member.

E Corrections Sear	ch		Q 7	Pick Up Fine Wine δ ∨ A ABC LIQUOR ∨ →
Home Members	3			
Order History Return History Order Approvals Invoice History Purchase Lists Payment Methods Members Vendors Profile Details	Administrate Administrate Marchink Remark Arrew Email Kramachandra80s-putcedminggmail.com Roles Approver, Administrator, Buyer	to any PLCB license or add a new contact manue email Q Or r nyarger+abc1@gmail.com Roles Administrator, Buyer	X ally: reate New Member	Add New Member
LID Account Details	Karthik Ramachandra Active Email	Randy Yarger 🖉 🕻 Active Email	C Randy Yarger Active Email	10

3. Add [First Name], [Last Name], [Email Address] and [Role], then click Create Member.

=	wholesale organions	Search					Q B Pick Up	SIANT EAGL Y D
		Home > Membe	s are					Chat
		My Account	215	Add Member To	Account Last Name	*	Add New Member	
		Order History Return History Order Approvals	Administrate Tony Rickard Active	Tara Email Address	Fratello			
		Involce History Purchase Lists Payment Methods	Email tonyulckard@n Roles Administrator,	tara.fratello@cmg-change.c	com			
		Members <u>Vendors</u>	Buyer	Administrator Appro	zver 🗹 Buyer			
		Profile Details	Tony Rickard Active	C Inactive		reate Member	00	
			Roles Administrator,	Approver, Buyer	Roles Administrator, Approver, Buyer	Roles Buyer	gerain	
			Mario Chelli Active Email mariano.chelli	P 🛈	Mandy Nitowski Active D 1 Email mandy:bennis@glanteagle.comx	Laurie Misera Active Email Laurie.misera@glanteagle.com/	00	

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**.

Home > Members						
Members						
Order History						Add New Member
Return History	Administrator					
Order Approvals	Karthik Ramachandra	Randy Yarger	<u>م</u> م			
Invoice History	Active	Active	0			
Purchase Lists	Email kramachandra85+pulicadmin@gmail.com	Email				
Payment Methods	Roles	Roles				
Members	Approver, Administrator, Buyer	Administrator, Buyer				
Vendors						
Profile Details	Buyer					
LID Account Details	Karthik Ramachandra Rative	Randy Yarger Active	00	Randy Yarger Active	00	
	Email kramachandra85+pulicadmin@gmail.com	Email ryarger+madero1@gmail.com		Email ryarger+abc1@gmail.com		
	Roles Approver, Administrator, Buyer	Roles Buyer		Roles Administrator, Buyer		
	Tara Fratello Active	Tara Fratello Active	00			
	Email tfratello+pulicensee@gmail.com	Email tara.fratello@cmg-change.com				
	Roles Buyer	Roles Buyer				
	Approver					
	Karthik Ramachandra Retive					
	Email kramachandra85+pulicadmin@gmail.com					
	Roles Approver, Administrator, Buyer					

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**.

E Componentions Search			Q ZI Pick Up FINE WINE	V C Tony GIANT EAGL V Do
Members	Edit Member		×	Chat
My Account Order History Admir	First Name Chinmaya	Last Name Bapu	1	Add New Member
Context Approvals Context Approvals Context Approvals Context Approvals Context Approvals Context Approvals Context Approval Conte	Rickard Email Address chinmayabapu@gianteagle.com ickard@ Role inistrator. Approver @ Buyer			
Members <u>Vendors</u> Buyer	Status C Active Inactive			
Profile Details Tony LID Account Details Email	Rickard Delete Member	Cancel Update Member	10	
tonya Roles Admi	ickard@cmg-change.com chinmayaba nistrator, Approver, Buyer Administrat	pu@glanteagle.com myeishia.ku or, Approver, Buyer Buyer	night-archie@gianteagle.comx	

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.

Search			٩	B Pick Up Sitems ABC LIQUOR V B Sitems
Members Order History Beturn History Order Accernation Involve History Durchase Lists Roment Methods Members Vandors	Administrator Korok Ramachandra Acros Beala Kramachandra85-pulicadmin@gmail.com Roise Approver.Administrator, Buyer	Rundy'Yanger		Add New Member
Profile Details LID Account Details	Buyer Karthik Ramachandra	Randy Yarger	Randy Yarger P 🛈	
	Email. Kramachandrað 5-pullcaðmin@gmail.com Reise Approver, Administrator, Buyer Tæra Fratelio Active	Email ryage+madero1@gmal.com Reles Boyer Tans fratella Attre	Email ryager-abc1@gnail.com Reles Administrato; Boyer	
	Email tfratello-pulicensee@gmail.com Reles Buyer	Email tarafrateilo@crng-change.com Roles Buyer		

2. Click Yes, Delete Member.

=	wholesale	Search			۵	Prick Up C Karthik S items Fine wine C All CLIQUOR S items
		Membe	ers			
		Order History Beham History Other Asservatis Inssise History Parchase Lists Parment Hethod Members Yatodos Protite Details Lill Account Patal	Administrator Earthik Ramachandra Enail Confirm Are you sure to detete Randy Varger from the organization? Cancel Yes, Delete Member	Randy Yanger / C		Add New Member
			Ensil kranachandraßs-pullcadmin@gmail.com Roles Approver, Administrator, Buyer Itars Fratello Actor Ensil Itratello-pullcansee@gmail.com Roles Buyer	Email narger-maderol@gnal.com Rose Boyer Taro fratelog Auso Taro fratelog Cong-banga.com Roles Boyer	Email nyargeraabci @gnail.com Roise Administrator, Buyer	

The <u>Member Information</u> has been deleted.





E Search			Q	Ø Pick Up Pine wore ∨ ♀ Karthik → ♂ ♂ Sitems Sitems
Members				
Onder, History Betwein History Onder Adversaria Invelor, History Purchase, Lists Pavement, Methods Members Vindors Portice Denaitie	Administrator Katoli Ramachandra Xoze Email Varanachandra 85-pulicadmin@gmail.com Ragorover, Administrator, Buyer	Randy Yanger P 🗘 🗅		Add New Member
LID.Account Details	Konse Enail Kanachandra 5-pulicadenin@gmail.com Reis Approver, Administrator, Buyer Tars Franciso Actor Imail Lans.fraitello@cong-change.com Reis Buyer	Randy Yanger Anton Email ryarger-maderol@gmail.com Roles Buyer	Randy Yanger / C	

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.

