

Licensee Maintenance – Manage Purchase Lists Quick Reference Guide

Introduction:

Purchase lists can be used to easily enter an order for items that are reordered on a regular basis. A purchase list is essentially a list of items and order quantities saved to a specified name. Any user assigned a Licensee Buyer, Approver or Admin role will be able to create and maintain or delete purchase lists.

The Licensee Online Order Portal (LOOP) provides several ways to create purchase lists. When creating any purchase list, users can add or delete items and adjust quantities.

Purchase Lists can also be shared with others using the Share List link to share with all of the buyers tied to your license, or to select specific email addresses to share the list with.

Note: Purchase lists created in LOOP are fulfillment-type specific. For example, a purchase list created from a Fine Wine & Good Spirits (FW&GS) store pickup order cannot be used to place a Licensee Delivery Program (LDP) order.

Users will also be able to set the Periodic Automatic Replenishment (PAR) level for each line. This is the planned/suggested order quantity for each item within a respective purchase list. All users will be able to create, manage or delete purchase lists.

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Glossary

Acronym	Meaning
FW&GS	Fine Wine & Good Spirits
LDP	Licensee Delivery Program
LOOP	Licensee Online Order Portal
PAR	Periodic Automatic Replenishment
PLCB	Pennsylvania Liquor Control Board
PO	Purchase Order

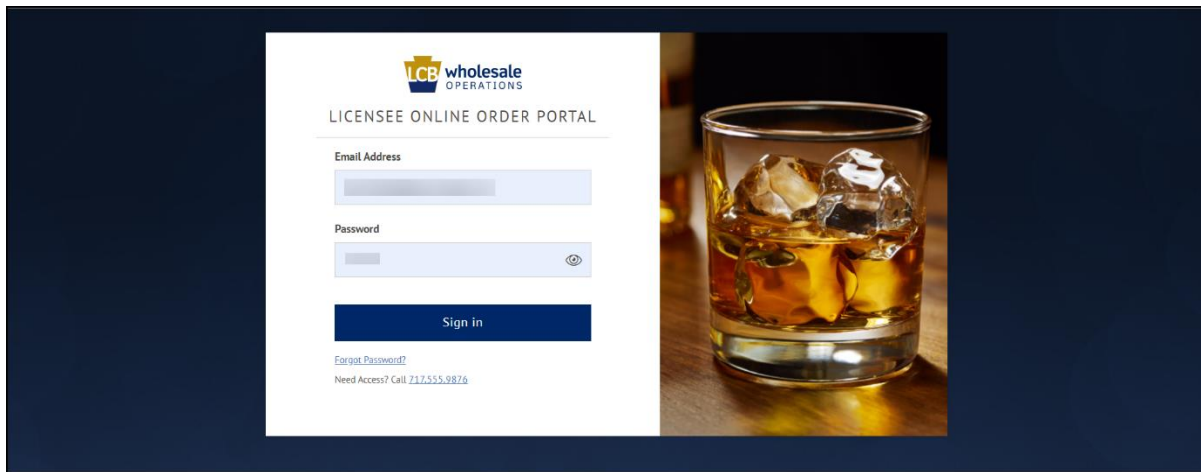
Licensee Maintenance – Manage Purchase List

Licensees can create purchase lists to quickly order items they commonly purchase.

Link to eLearning video: [Licensee Maintenance - Manage Purchase Lists](#)

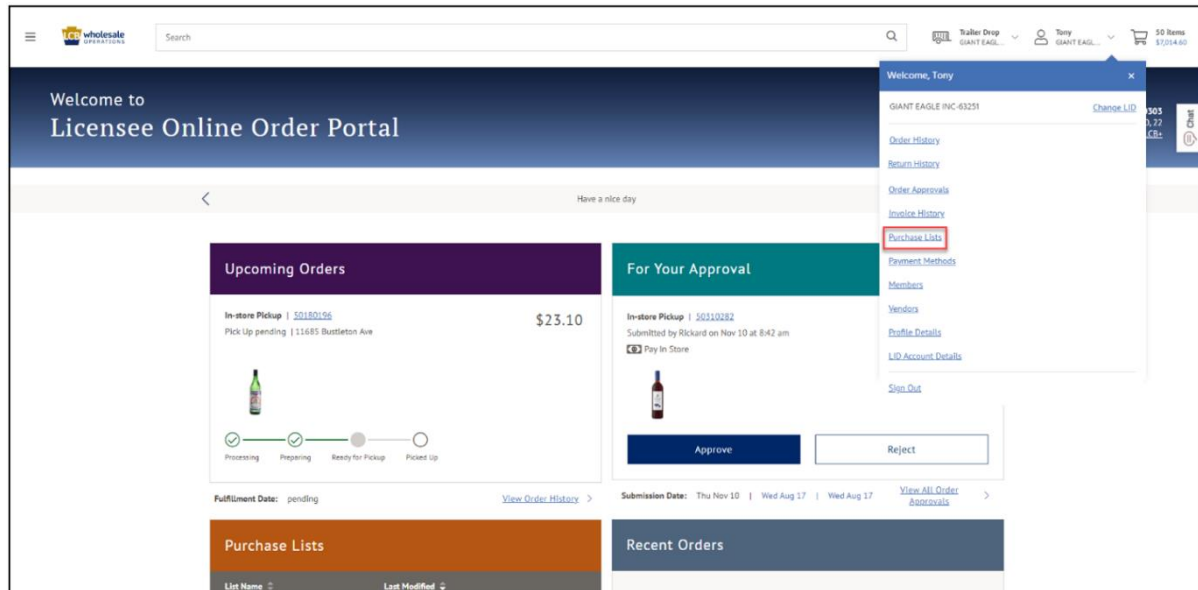
Create a Purchase List

1. Navigate to LOOP, then **Sign In**.

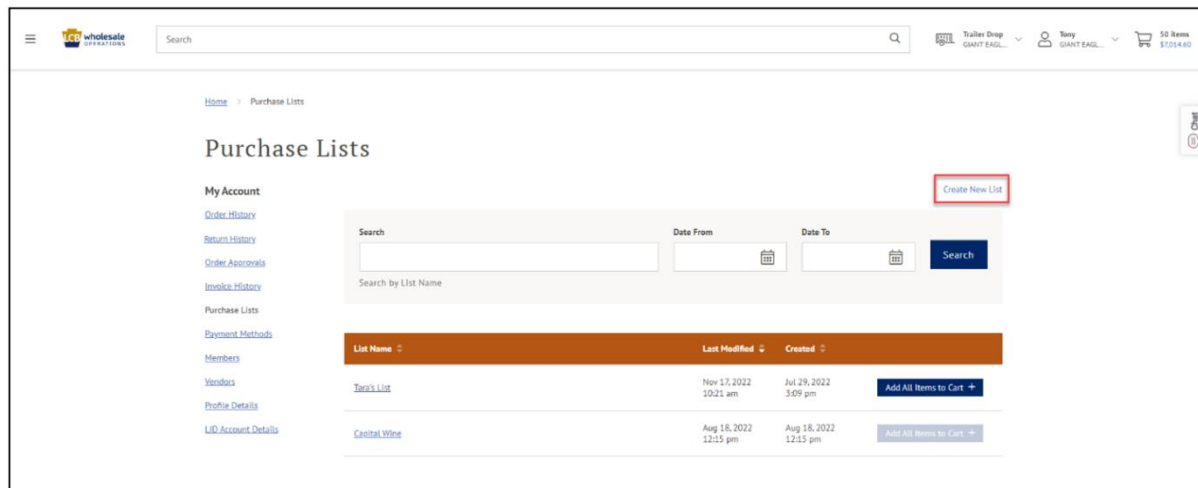


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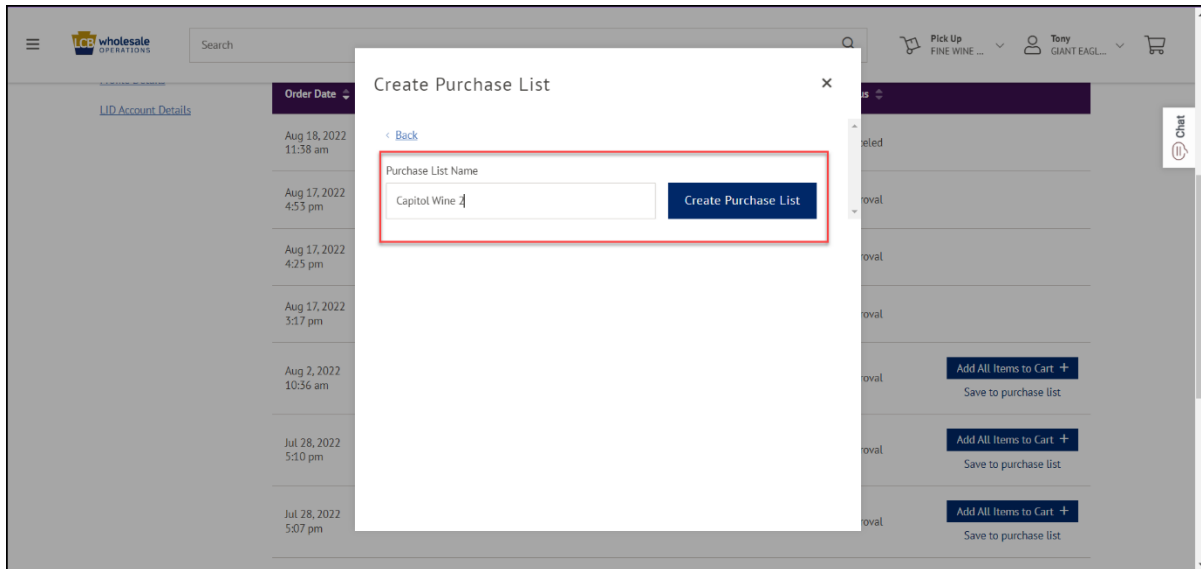
2. Click the dropdown menu next to the Shopping Cart, then click **Purchase Lists**.



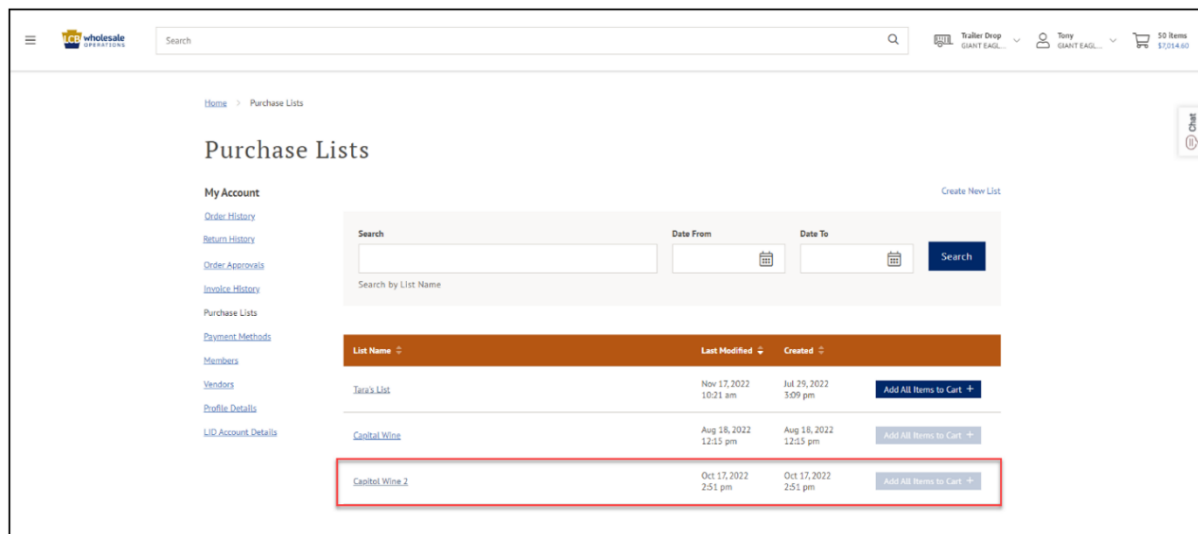
3. Click **Create New List**.



4. Enter [Purchase List Name], then click **Create Purchase List**.



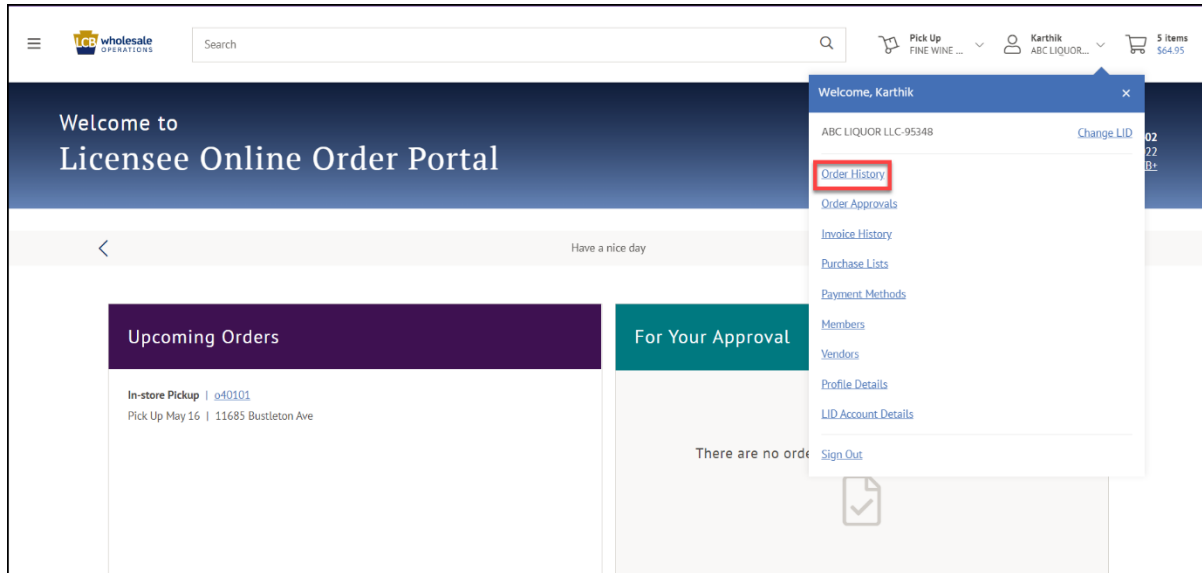
Newly Created List is available.



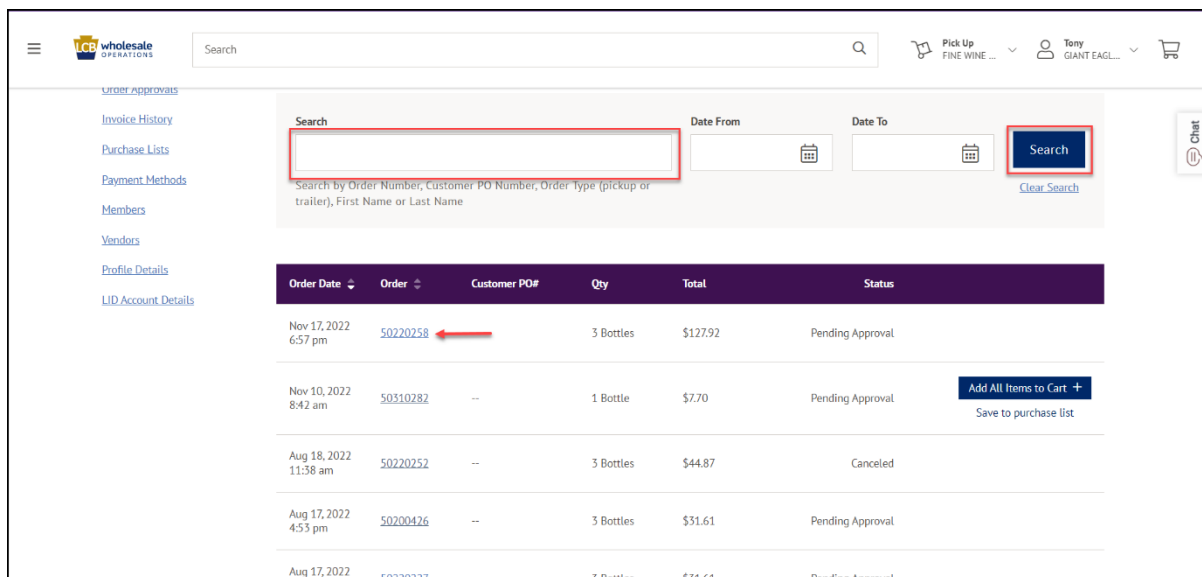
Note: The “Add All Items to Cart” button is not available until you add items to your list. Any list that is created must contain either only Shipping Container Codes (SCCs) or PLCB Codes. If a list is created with both SCCs and PLCB Codes on the same list, items will only be added to the cart based on the fulfillment type selected.

Save a Purchase List from an Existing Order

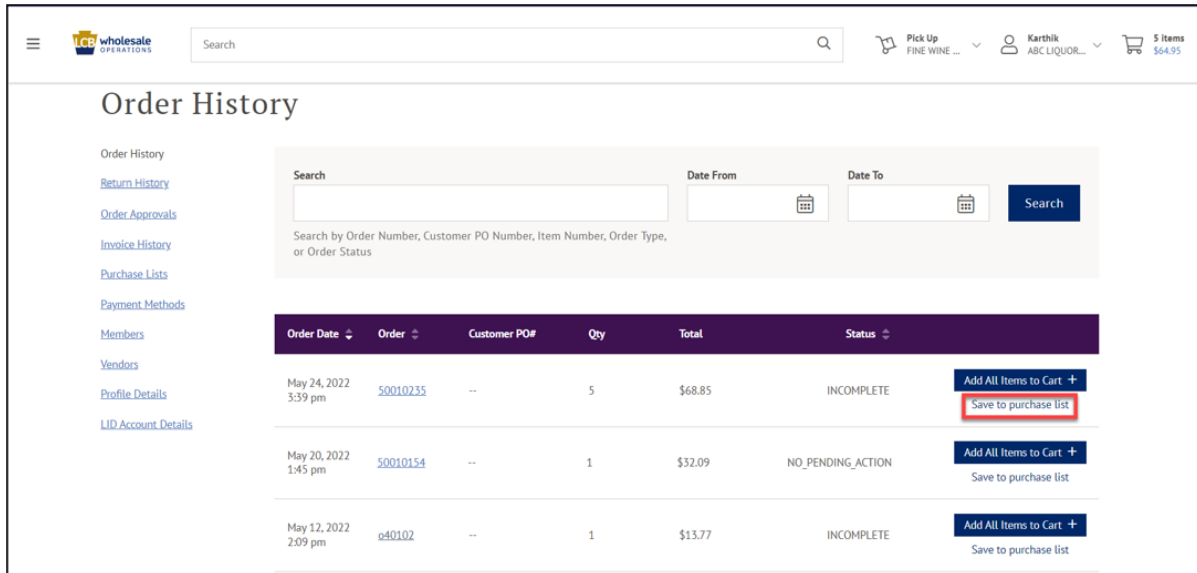
1. Click the dropdown menu next to the Shopping Cart, then click **Order History**.



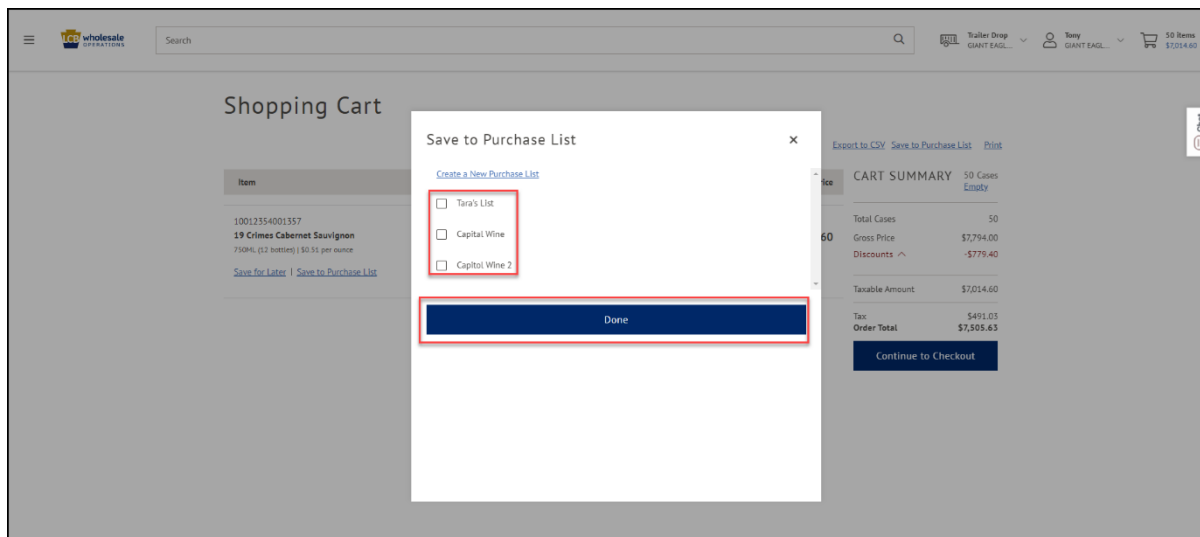
Note: The lower portion of the window will automatically populate with your recent order history. To determine which order to save as a purchase list, click an order number to view the details of that order. Alternatively, search for a specific order by entering an order number in the upper search bar, then click Search. Once the order appears, click the order number to view the details.



2. Click **Save to Purchase List**.



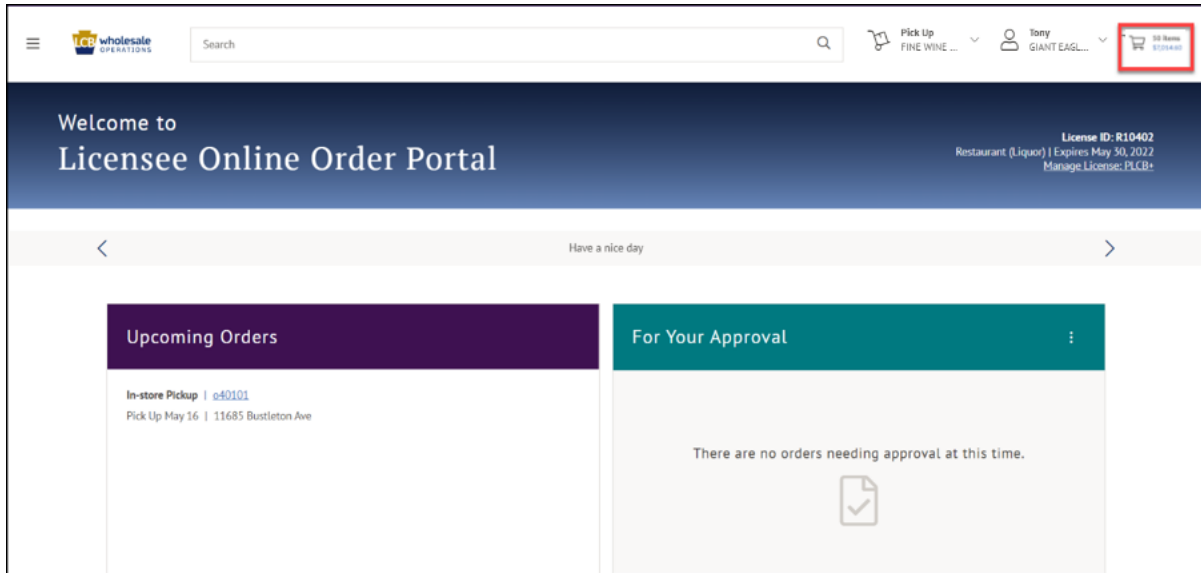
3. Select the Purchase List to add to by checking the appropriate list box, then click **Done**.



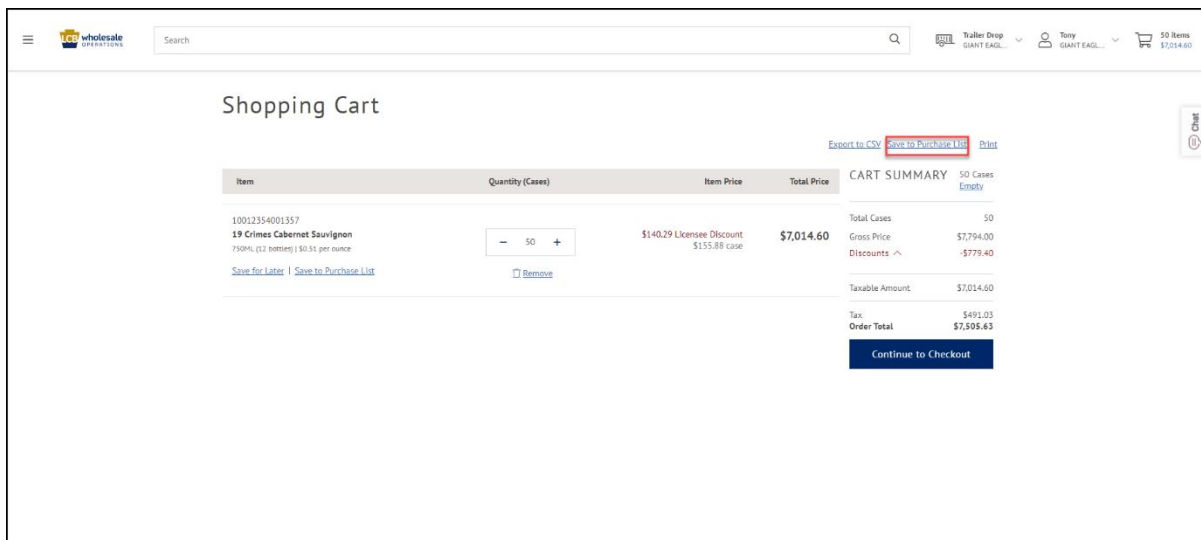
Note: If you want to use a new purchase list, you must create it first by clicking Create a New Purchase List.

Save Items to a Purchase List from the Shopping Cart

1. Click the **Shopping Cart** if it contains items to be saved as a purchase list.

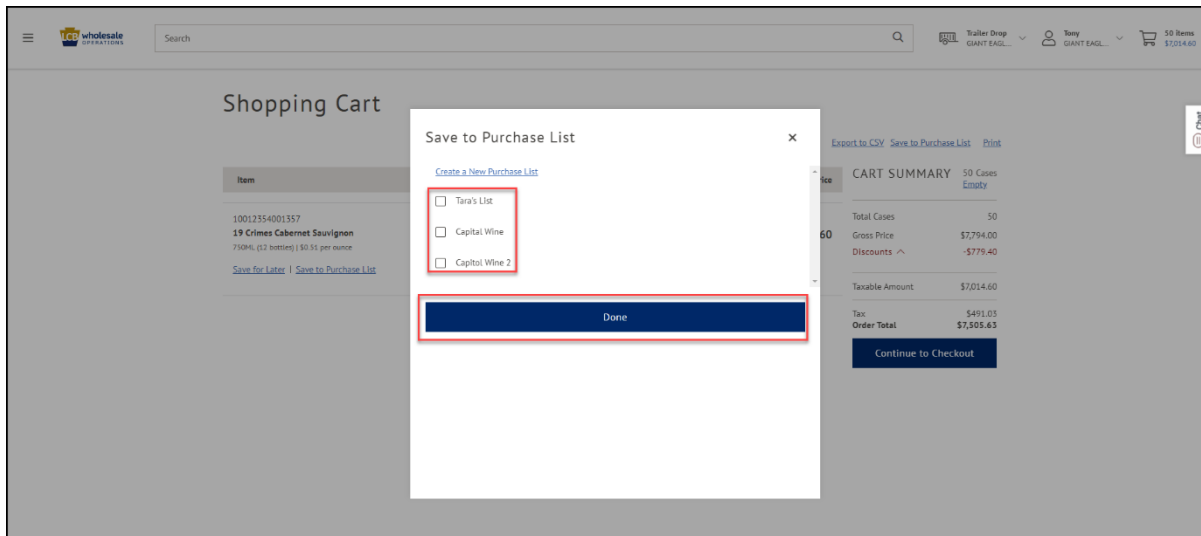


2. Click **Save to Purchase List**.



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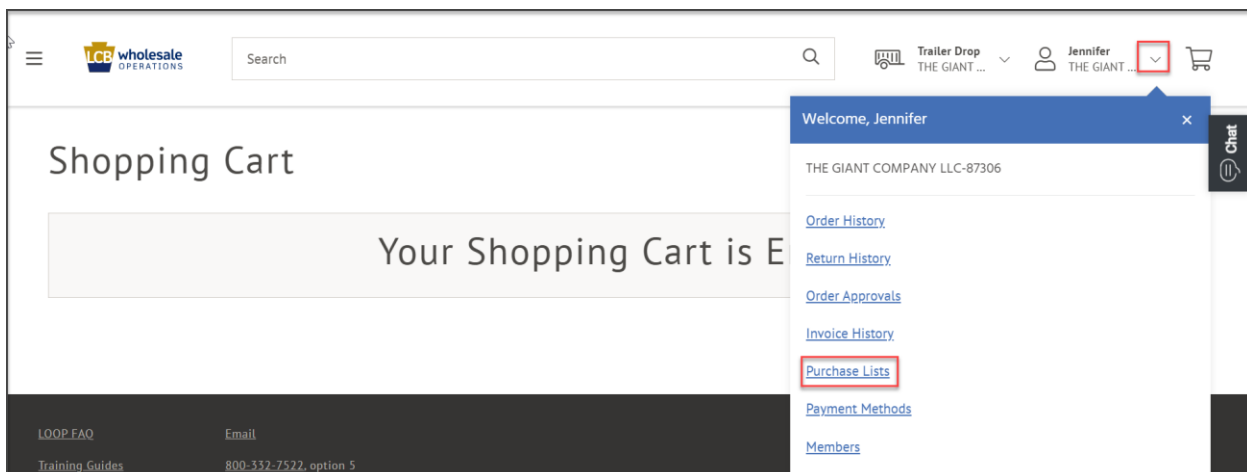
3. Select the Purchase List to add to by checking the appropriate list box, then click **Done**.



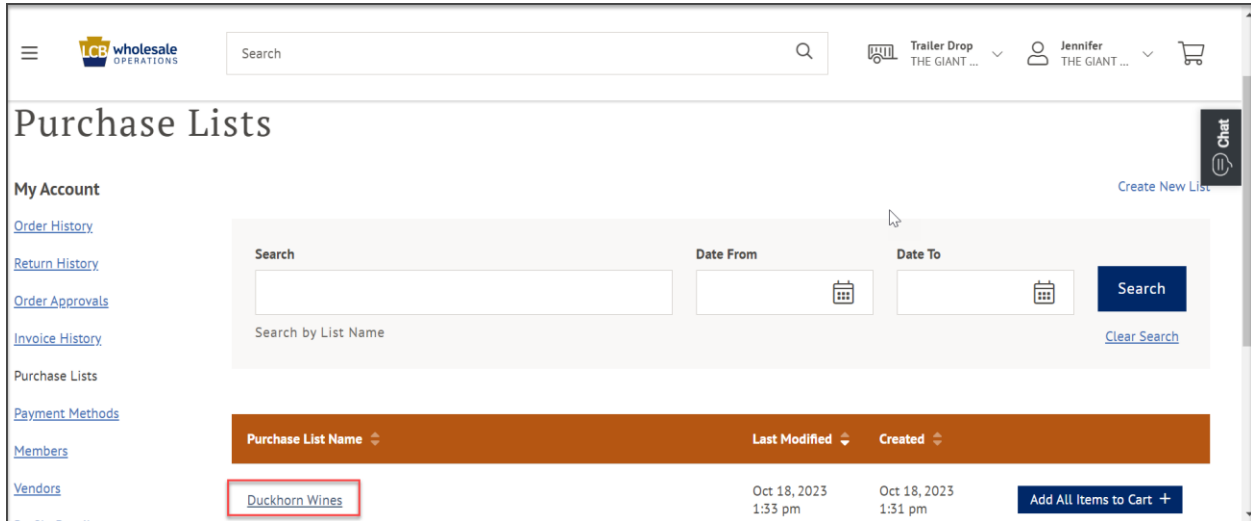
Note: If you do not wish to add the items to an existing purchase list, you may create a new list by clicking Create a New Purchase List.

Share a Purchase List

1. Click the dropdown menu next to the Shopping Cart, then click **Purchase Lists**.

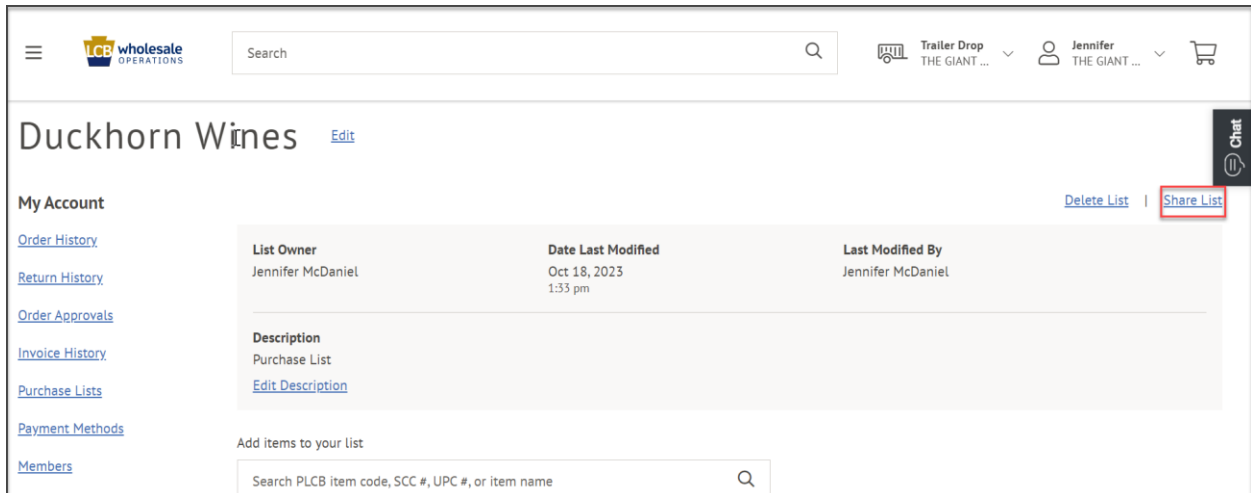


2. Select a purchase list from the list by clicking on the **Purchase List** link.



The details of the selected purchase list will display.

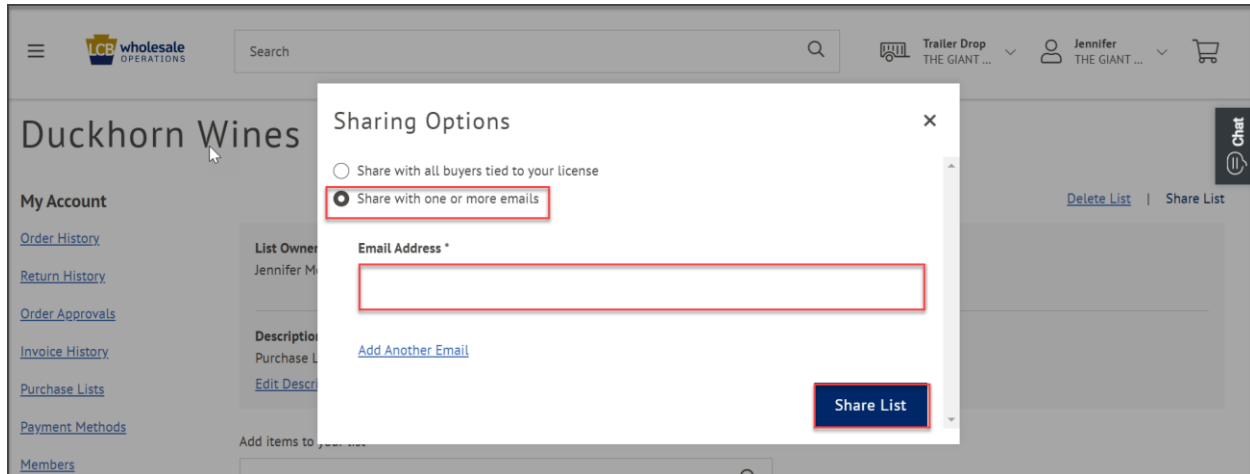
3. Click **Share List**.



A sharing options screen will display.

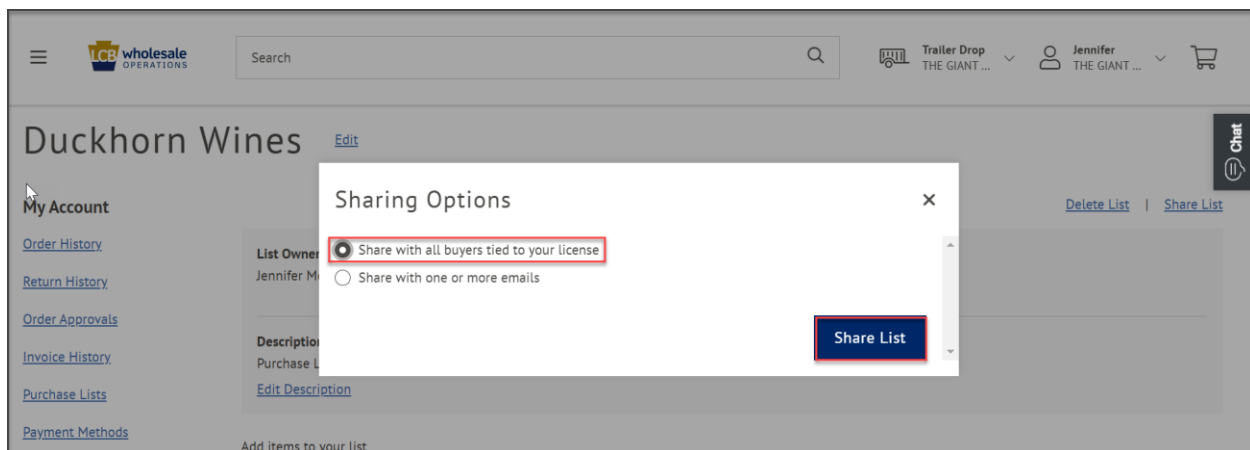
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4. Select a button. To share with a specific person click **Share with one or more emails button** and enter the email address of the person you would like to share the list with. Click **Add Another Email** link to add another email. When finished, click **Share List**.



The list will be shared with the selected party/parties.

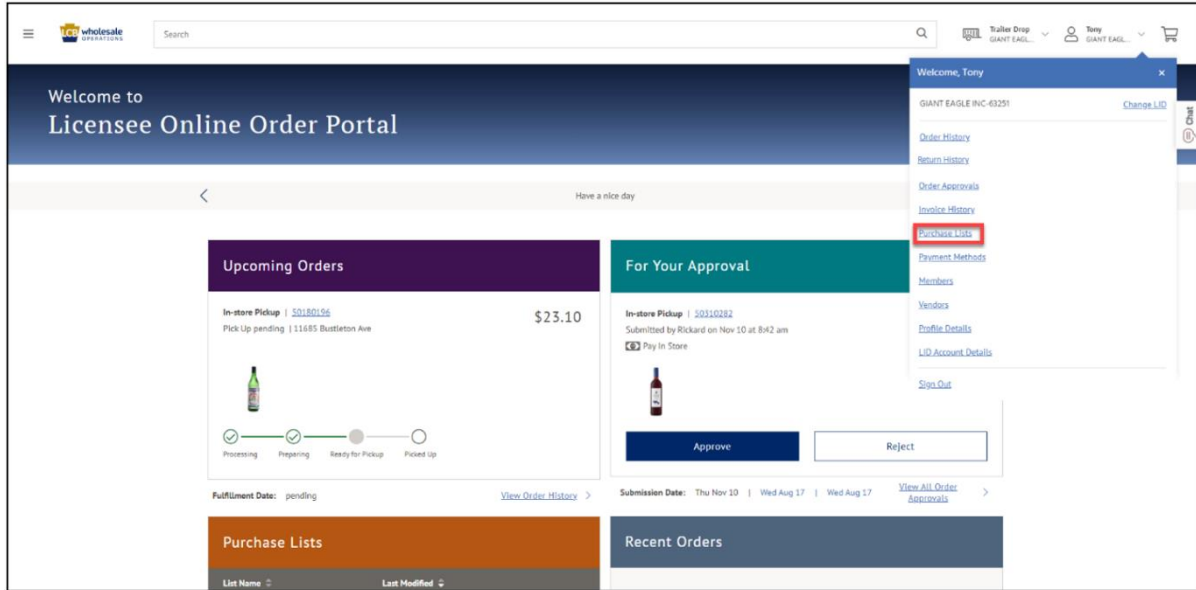
5. Click **Share with all buyers tied to your license** if you want all buyers tied to your license to be able to see the list. Click **Share List**.



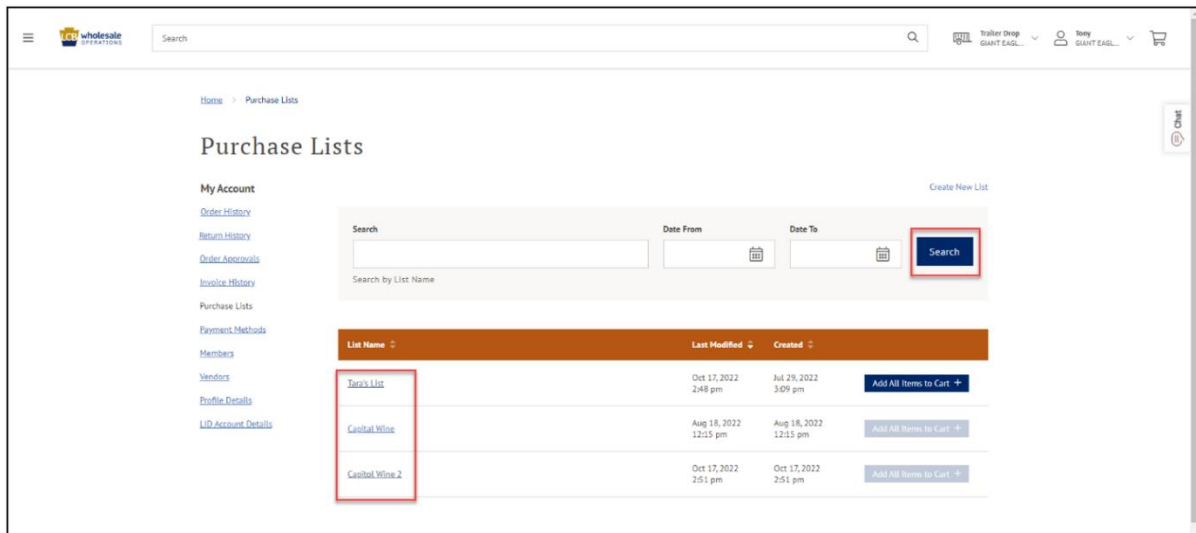
The purchase list will be shared with all buyers tied to your license.

Edit a Purchase List

1. Click the dropdown menu next to the Shopping Cart, then click **Purchase Lists**.

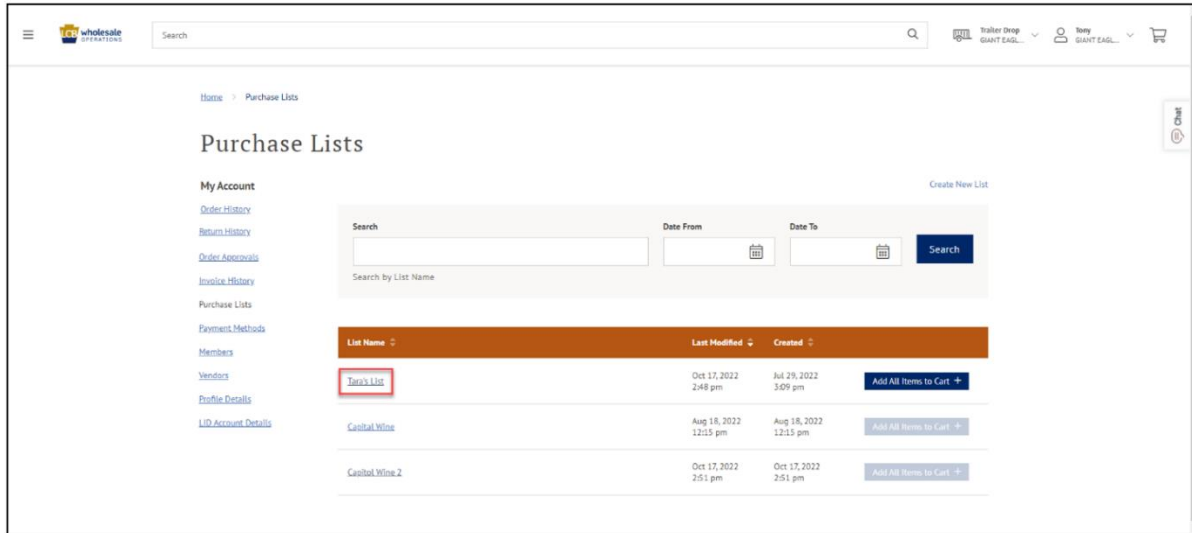


2. Enter search criteria for an existing purchase list, then click **Search**.

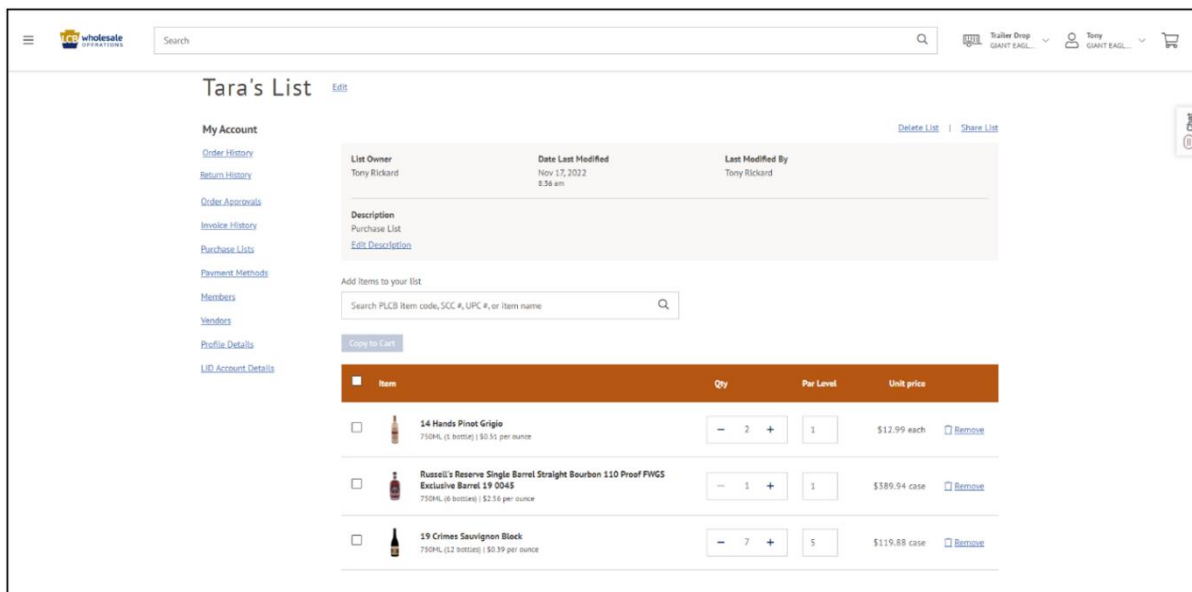


Note: The lower portion of the window will automatically populate with some of your existing lists. Alternatively, search for a specific list by entering a list name in the upper search bar, then click Search.

3. Click a **Purchase List** to view details.



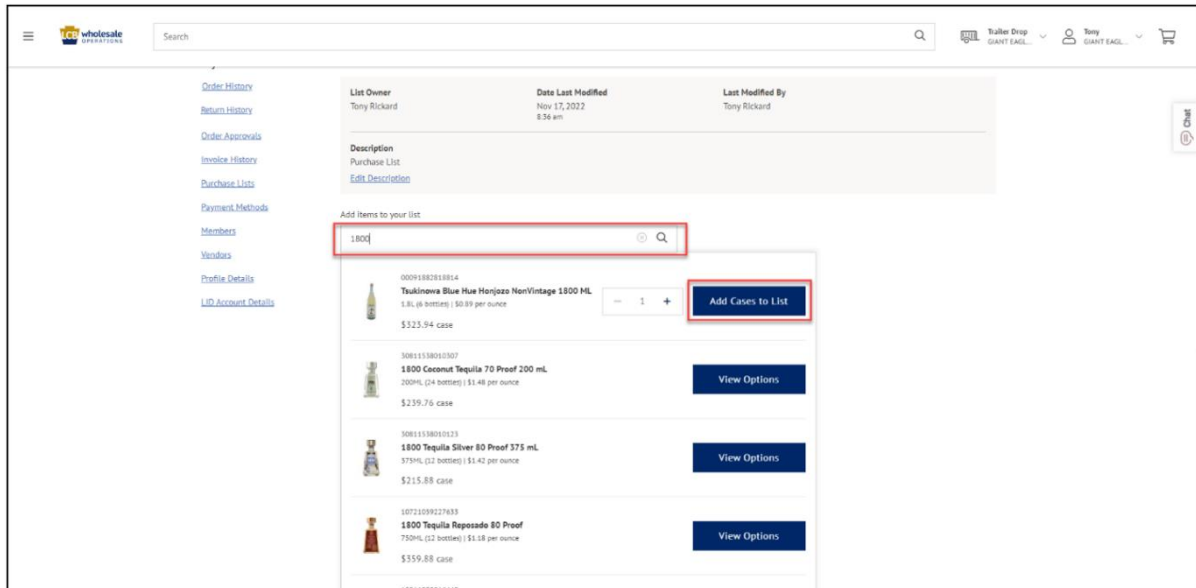
The Purchase List Details will populate.



Note: You can set and view your default order quantity and PAR level for each item. You can also remove items from a purchase list.

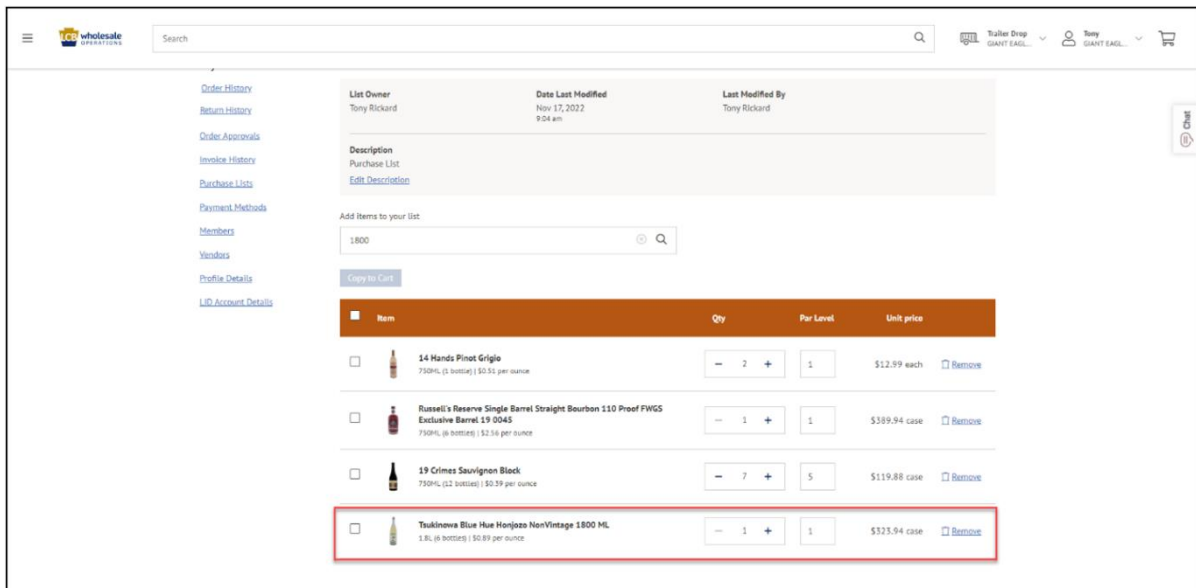
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4. Search using Add Items to your list, then click **Add Bottles to List** or **Add Cases to List** to add items to the list.



Note: The search box is predictive and will offer multiple options to choose from.

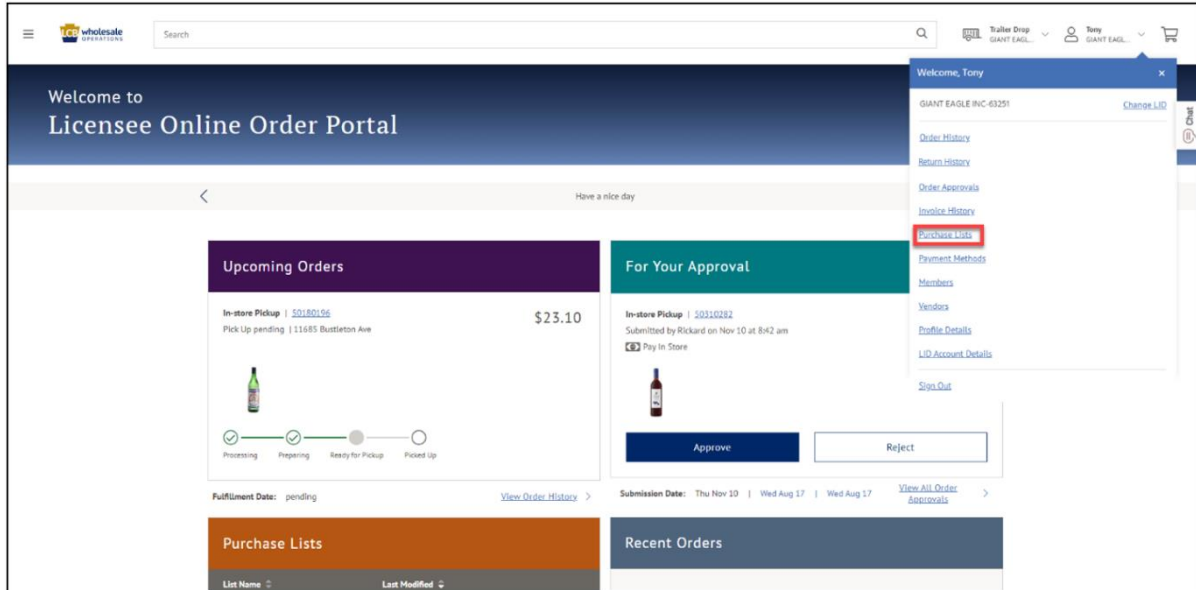
New item is populated in the Purchase List.



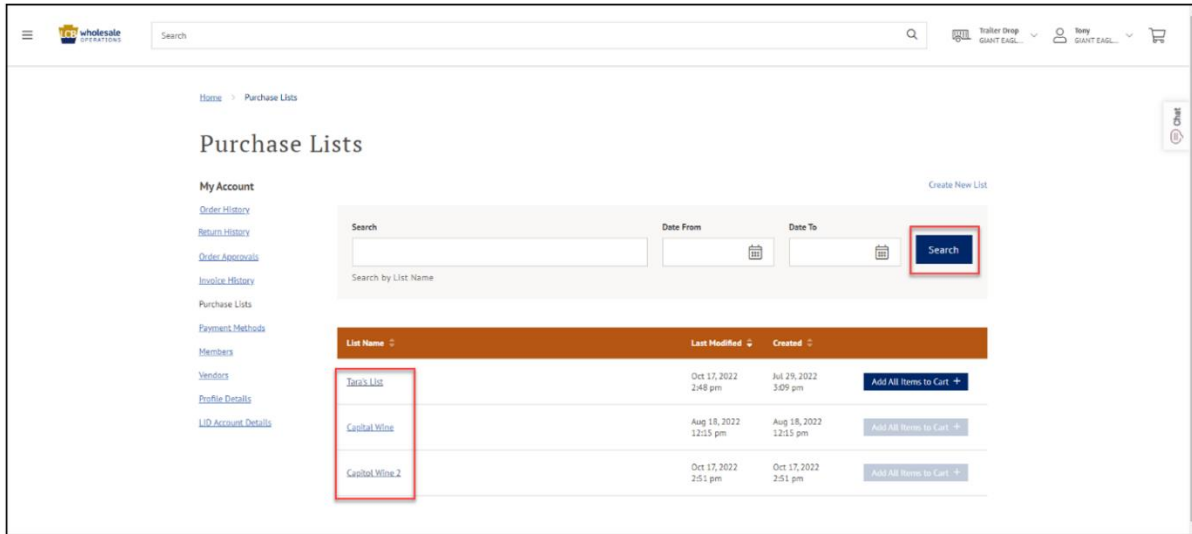
Note: All changes to a purchase list are automatically saved when you exit the screen.

Place an Order Using a Purchase List

1. Click the dropdown menu next to the Shopping Cart, then click **Purchase Lists**.

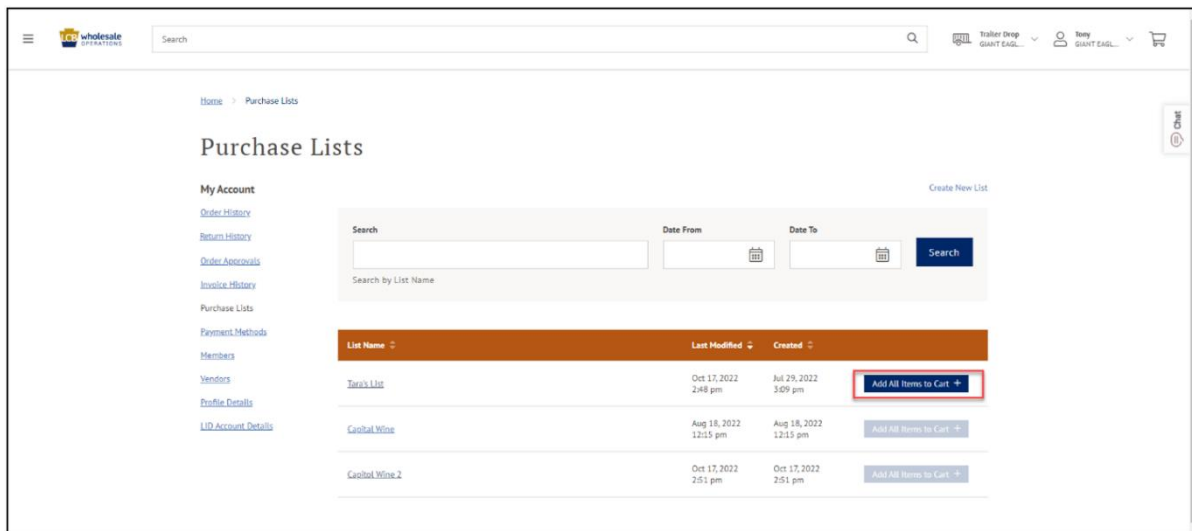


2. Enter search criteria for a previous purchase list, then click **Search**.

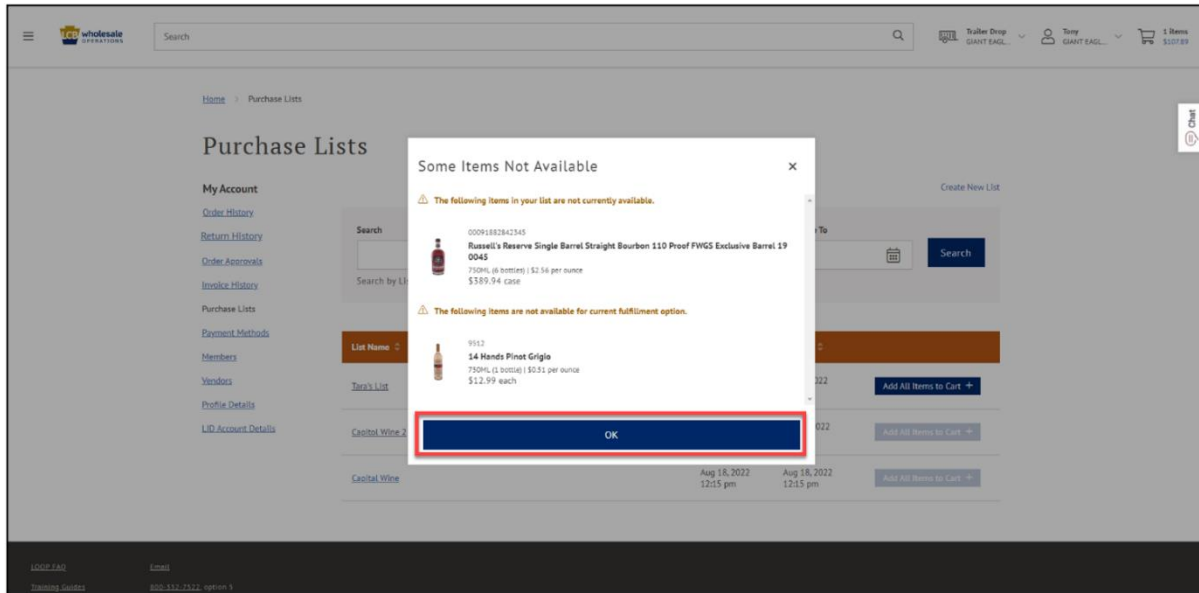


Note: The lower portion of the window will automatically populate with some of your existing lists. Alternatively, search for a specific list by entering a list name in the upper search bar, then click Search.

3. Click **Add All Items to Cart** to create an order using that purchase list.

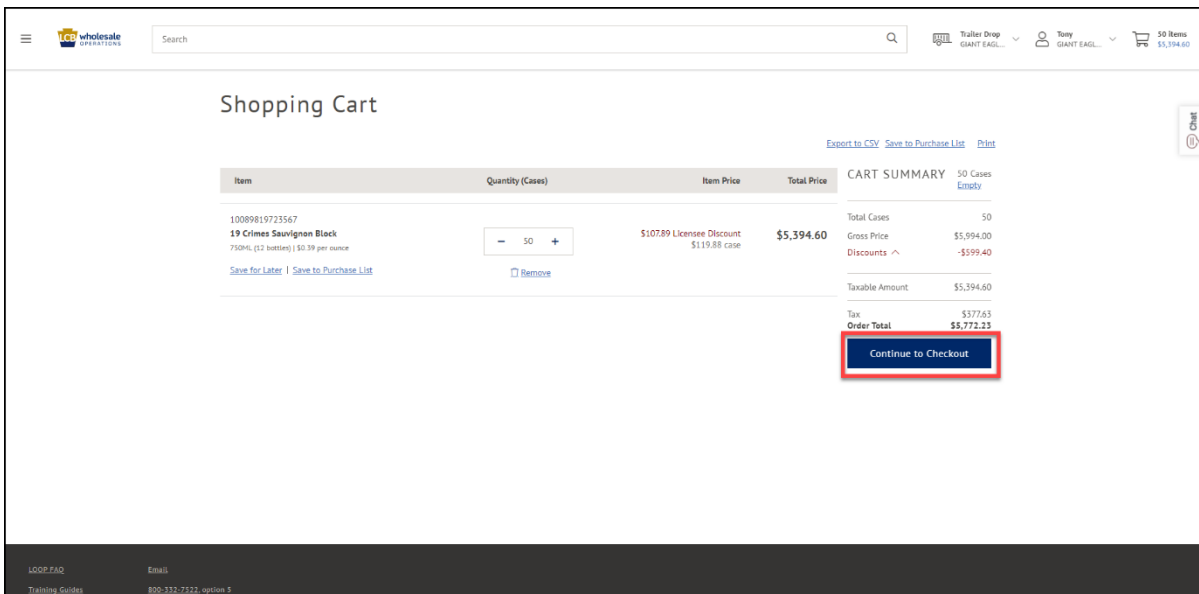


4. Click **OK**.



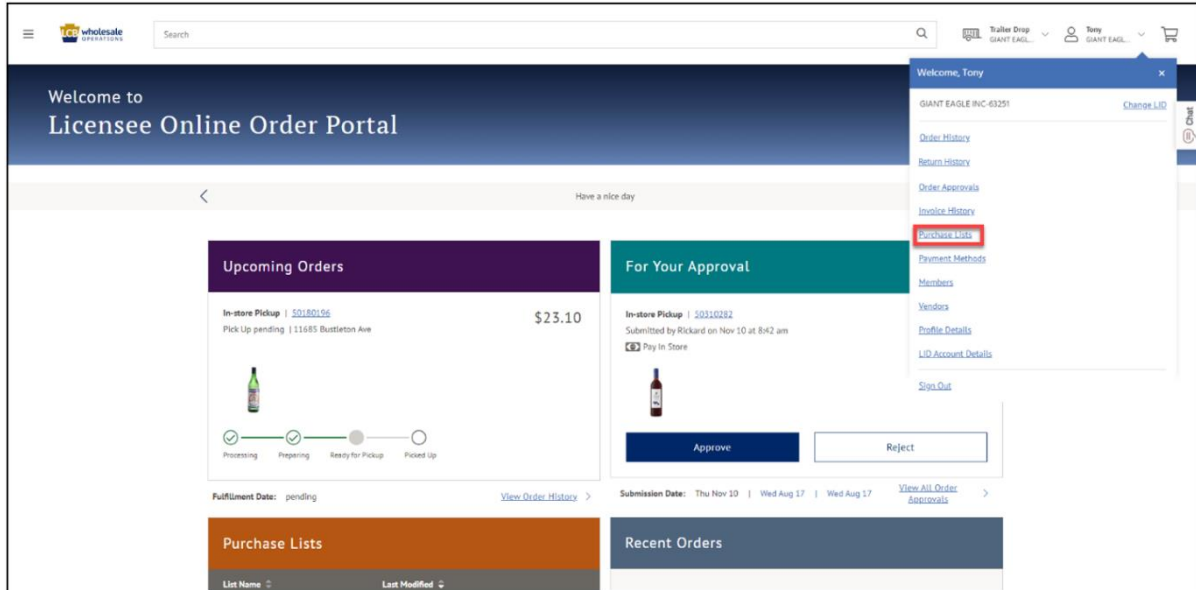
Note: The system will let you know if any items on the purchase list are not currently available and will not be added to the order. If all items are available, they will automatically be added to the cart.

5. Click **Continue to Checkout**.

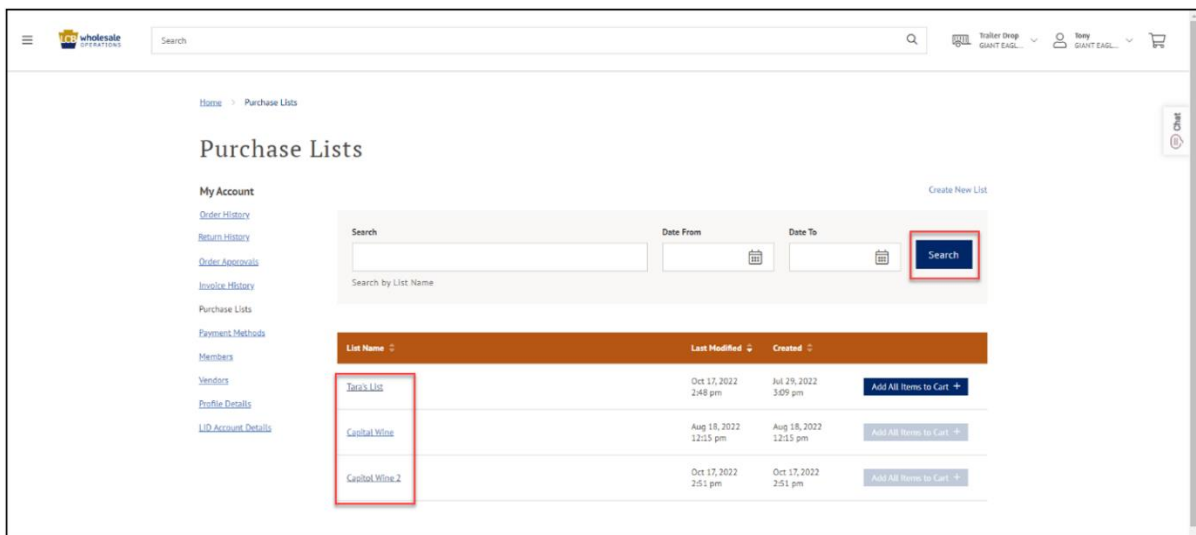


Place an Order Using a Partial Purchase List

1. Click the dropdown menu next to the Shopping Cart, then click **Purchase Lists**.

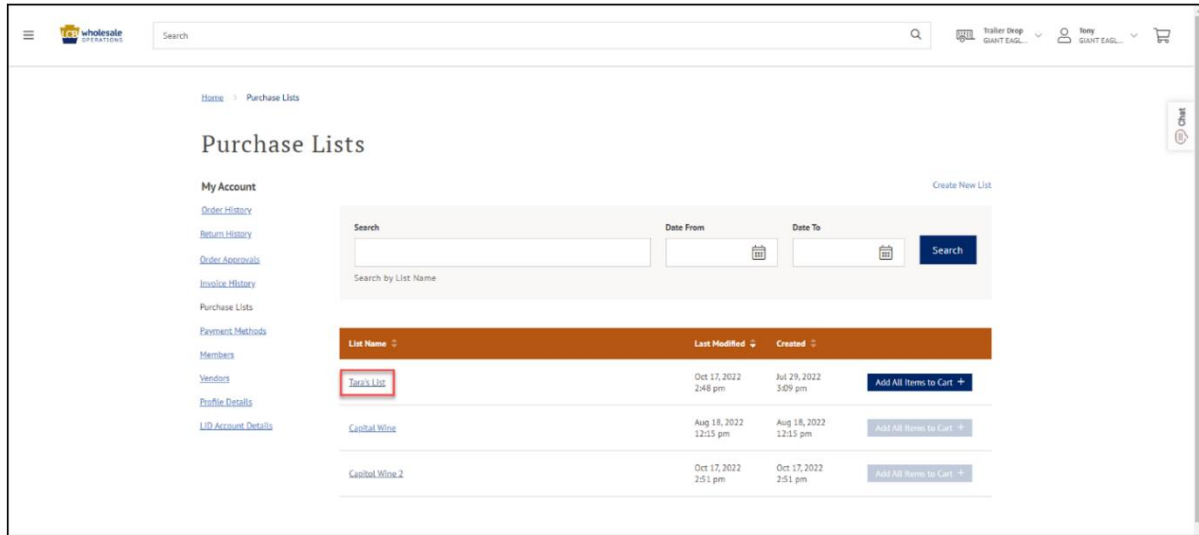


2. Enter search criteria for a previously created purchase list, then click **Search**.

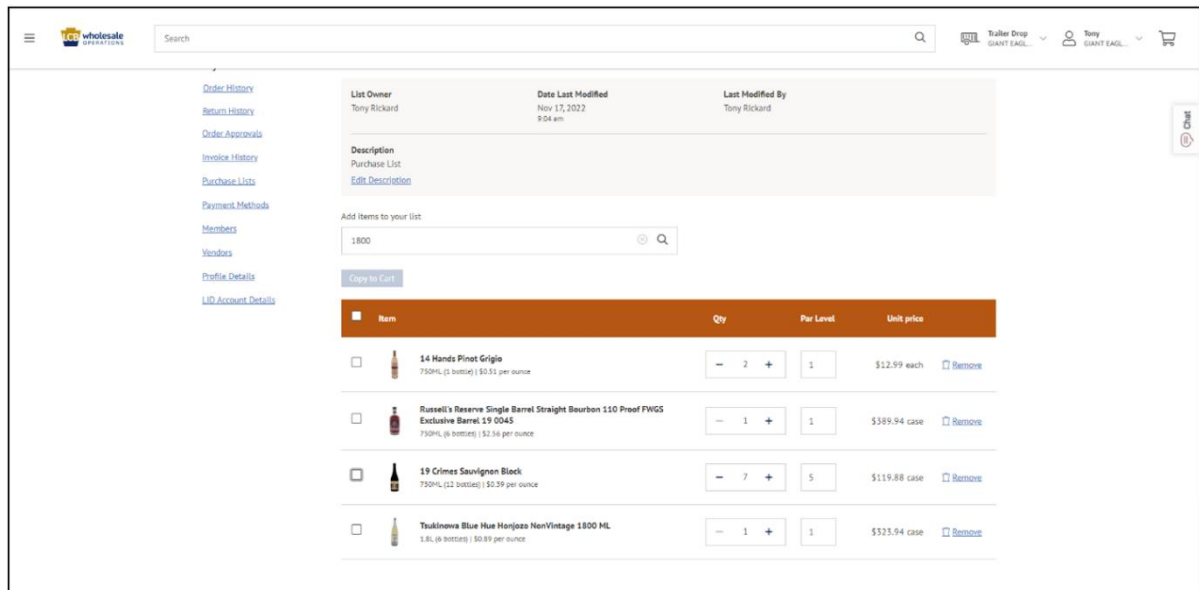


Note: The lower portion of the window will automatically populate with some of your existing lists. Alternatively, search for a specific list by entering a list name in the upper search bar, then click Search.

3. Click a purchase list to view details.

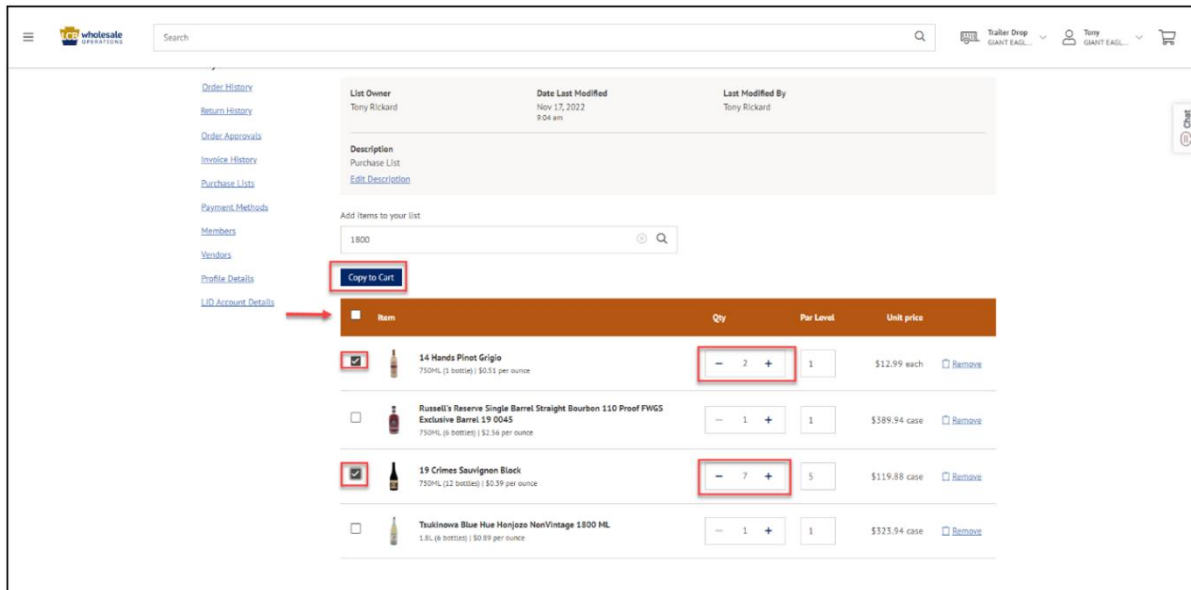


The Purchase List Details will populate.



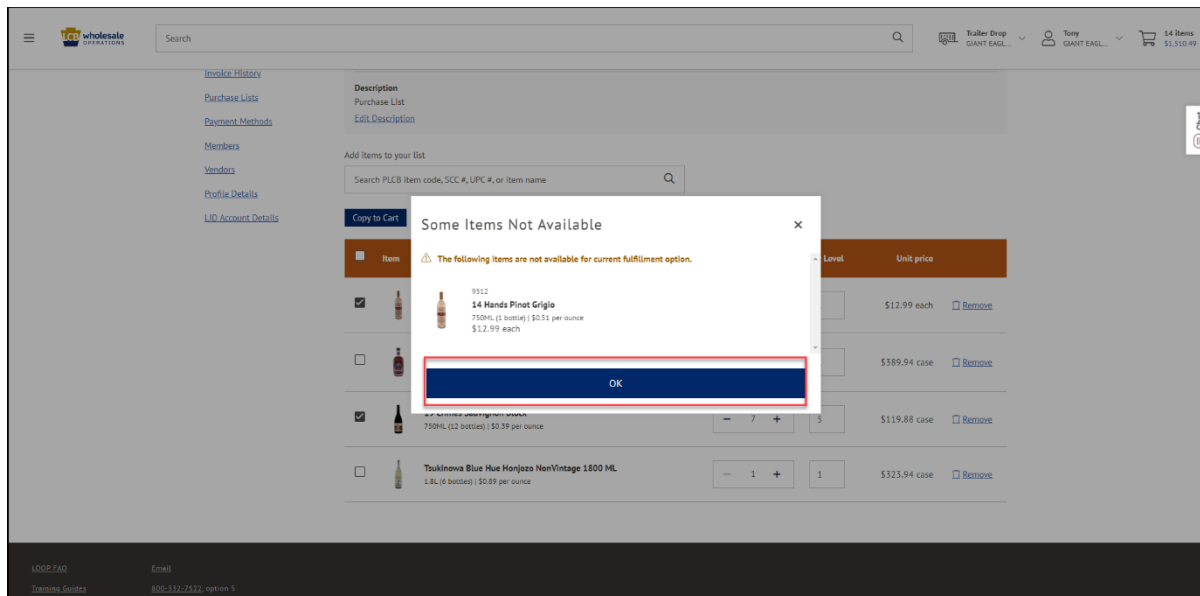
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- Select the Item Checkbox to add individual items and adjust the desired quantity, then click **Copy to Cart**.



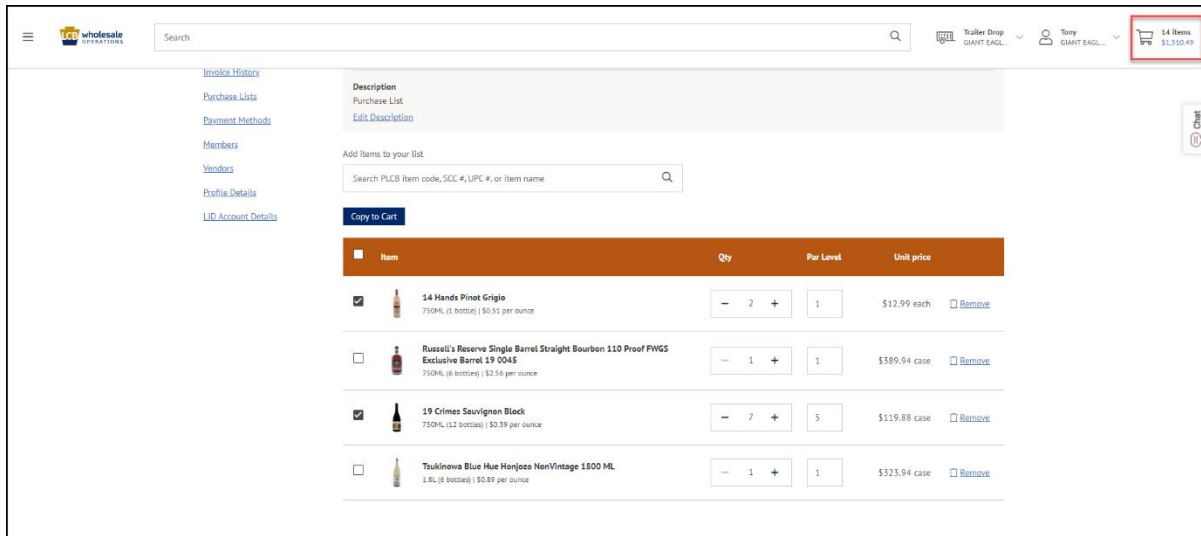
Note: You can also use the item checkbox to add all items.

- Click **OK**.

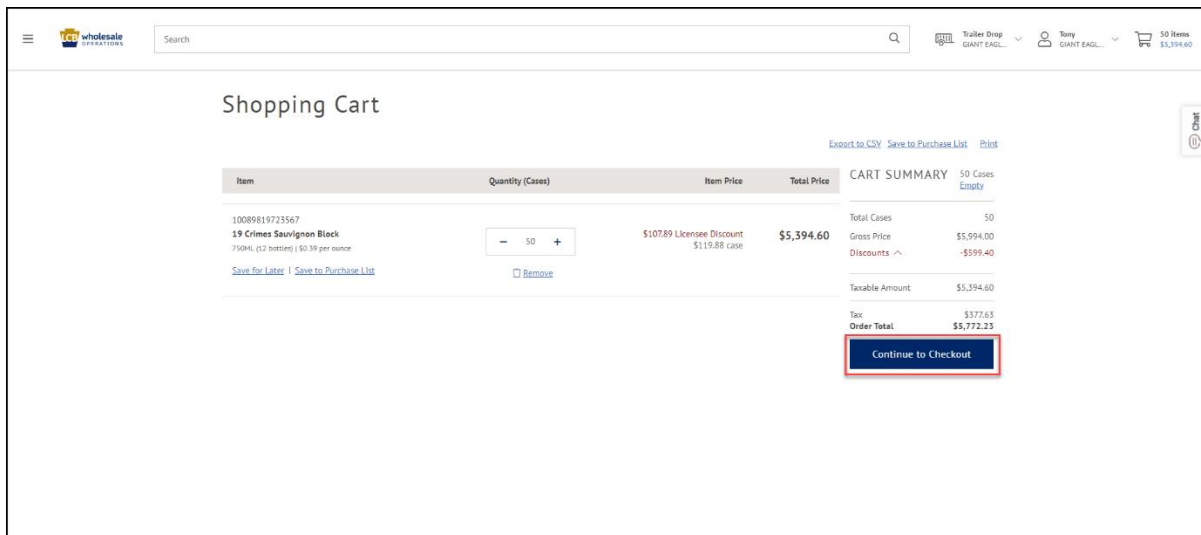


Note: The system will let you know if any items on the purchase list are not currently available and will not be added to the order. If all items are available, they will automatically be added to the cart.

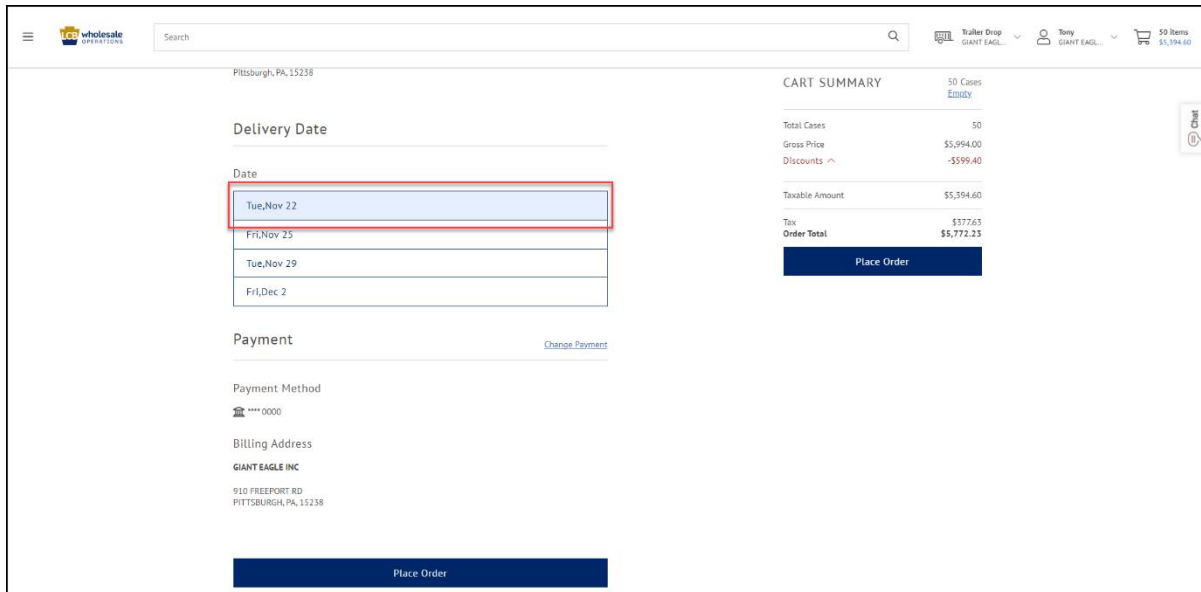
6. Click **Shopping Cart**.



7. Click **Continue to Checkout**.



8. Select the required date from the Delivery Date Tile.



Note: If scheduling a pickup order at a FW&GS store, select a date and time from the options presented. If scheduling a pickup order at an LSC, a payment method must also be selected. If LDP is the fulfillment method, only dates (no times) will appear. A date and payment method must be selected from the available options.

9. Click **Place Order**.

