

# Licensee Maintenance – View and Update Profile Information 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**

This training session will focus on viewing and editing licensee profile data.

#### 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.





## View Profile (LOOP)

Link to eLearning video: Licensee Maintenance – View and Update Profile Information (\* see <u>updated eLearning</u> effective Jan. 8 \*)

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

LICENSEE ONLINE ORDER PORTAL	
Email Address	
Successories ausses partoness s⊕months en a	
Sign in	
Eorgot Password? Need Access? Call <u>717.555.9876</u>	

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

	olesale Search		Q 2 Pick Up Fine Wine & Y ASC LiQUOR Y	1 items \$9,999.99
Welcome to Licensee Online Order Portal			Welcome, Karthik ABC LIQUOR LLC-95348 Under History Beturn History	<b>5767</b> 2022 <u>CB+</u>
	Credit Card **** 011	0 expiring soon. <u>Update Card</u>	Pedulin Producy Order Approvals Involce History Purchase Lists	
ß	Upcoming Orders	For Your Approval	Payment Methods Members Vendors	
	There are no upcoming orders to display.	There are no orde	Profile Details	



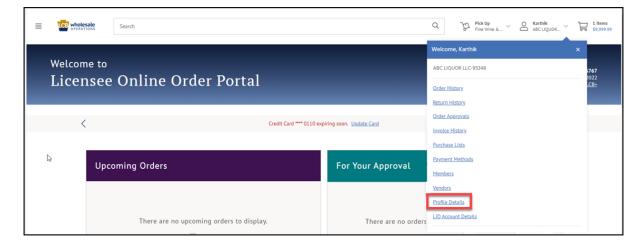


The <u>Profile Details</u> will populate.

Home > Profile Deta	Home > Profile Details							
Profile I	Profile Details							
My Account	Edit Profile							
<u>Order History</u> <u>Order Approvals</u>	Name Jennifer McDaniel							
Invoice History Purchase Lists	Email Address jennifer.mcdaniel@c	' je.com						
Members	Primary Phone Number							
Profile Details	Secondary Phone Numbe							
	Email Preferences							
	Special Order	LDP Order	LDP Return	FWGSPickup				
	Awaiting Approval	Order is in Review	Submitted	Order Approved				
	Ready For Pickup	Order has Shipped	Approved	Ready for Pickup				
		Out Of Stock		Confirmation				
		Cancelled Order						
		Final Invoice						
	Password	•						
	Reset Password							

# **Update Account Information (LOOP)**

1. Select Profile Details from the dropdown menu next to the Shopping Cart.







2. Click Edit Profile.

Home > Profile Details								
Profile Details								
My Account Order History Order Approvals Invoice History Purchase Lists Members Profile Details	Edit Profile Name Jennifer McDaniel Email Address jennifer.mcdaniel@c Primary Phone Number 61 Secondary Phone Number	Name Jennifer McDaniel Email Address jennifer.mcdaniel@c						
	Email Preferences Special Order Awaiting Approval Ready For Pickup	LDP Order Order is in Review Order has Shipped Out Of Stock Cancelled Order Final Invoice	LDP Return Submitted Approved	FWGSPickup  Order Approved Ready for Pickup Confirmation				
	Password Reset Password	•						

**Note**: Passwords cannot be edited. To reset a password, select the Reset Password link. An email will be sent with password reset instructions.

Fields that can be updated are as follows:

Field Name	Field Type	
First Name	Text	Enter name.
Last Name	Text	Enter name.
Primary Phone Number	Text	Enter phone number.
Secondary Phone Number	Text	Enter phone number.
Email Preference	Text	Check boxes.

**Note**: Licensees can choose how many and which notifications they want to receive. Notification preferences can be adjusted at any time.





3. Update fields as needed, then click **Save**.

My Account	First Name				Last Name		
Order History	Jennifer				McDaniel		1
Order Approvals	Email Address						-
Purch Lists	Primary Phone Number						
Members	61						1
Profile Details							
	Secondary Phone Numbe	r					• I
	Email Preferences						_
	Special Order	LDP Order	LDP Return	FWGSPickup			
	Awaiting Approval	Order is in Review	Submitted	Order Appr	roved		
	Ready For Pickup	Order has Shipped	Approved	Ready for F	Pickup		
		Out Of Stock		Confirmati	ion		
		Cancelled Order					
		Final Invoice					
	Password	•					
	Reset Password						
						Cancel	

**Note**: Click "Save" to be redirected back to the View Profile Screen. Email addresses cannot be edited since they are directly tied to the user's login credentials. If an email needs to be changed, the profile must be deleted and reentered with the corrected email address.

