

## 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).

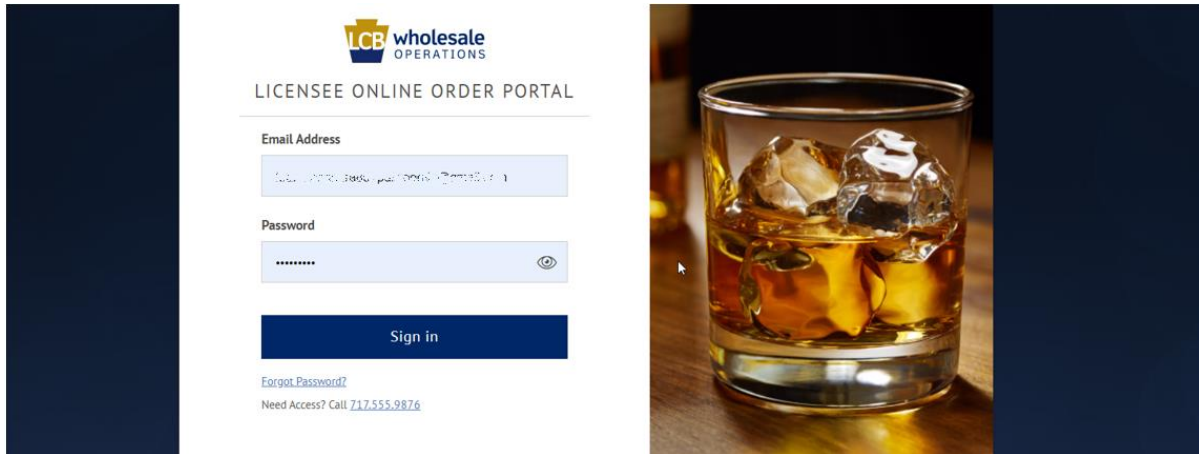
LOOP Function	Licensee Administrator	Licensee Approver	Licensee Buyer *
View/Edit Profile	X	X	X
Update Account Information	X		
Delete Members	X		
Manage Contacts/Members	X		
Add/Delete Payment Methods	X		
Add/Delete Authorized Vendors	X		
Add/Delete Authorized Agents	X		
Submit Orders	X	X	X
Approve Orders	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.

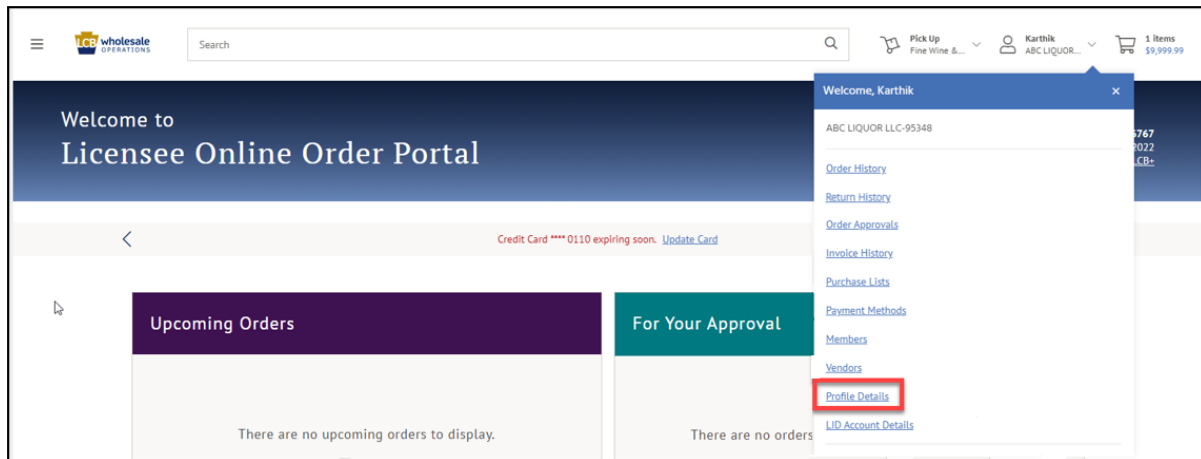
## View Profile (LOOP)

Link to eLearning video: [Licensee Maintenance – View and Update Profile Information](#)  
(\* see [updated eLearning](#) effective Jan. 8 \*)

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



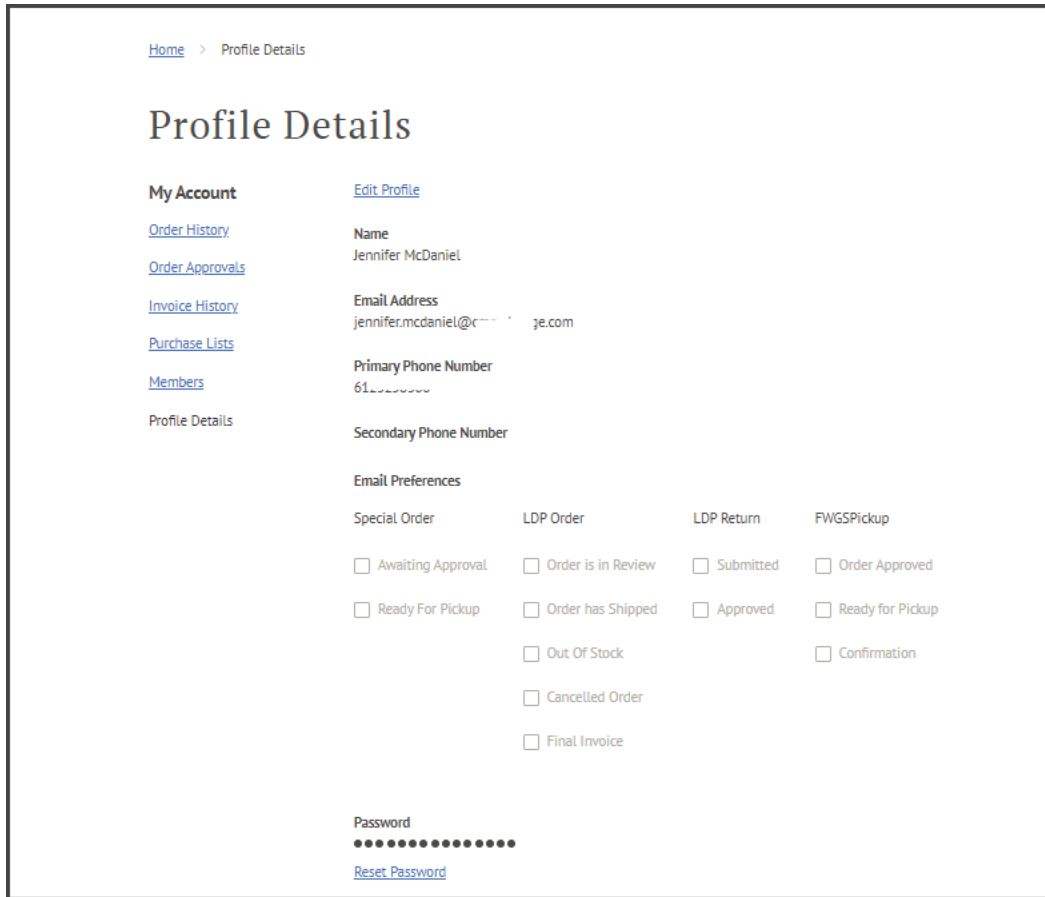
2. Select **Profile Details** from the dropdown menu next to the Shopping Cart.



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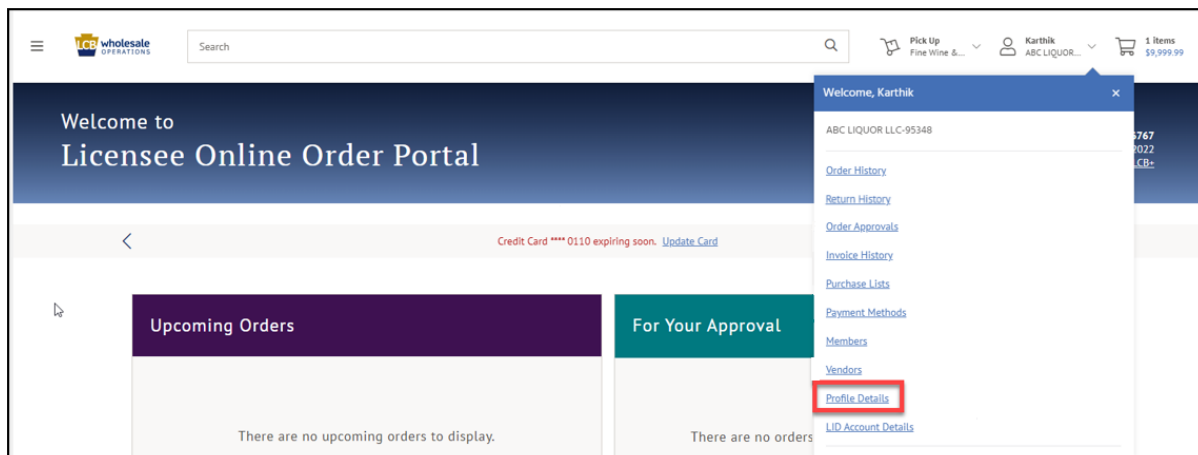


The Profile Details will populate.

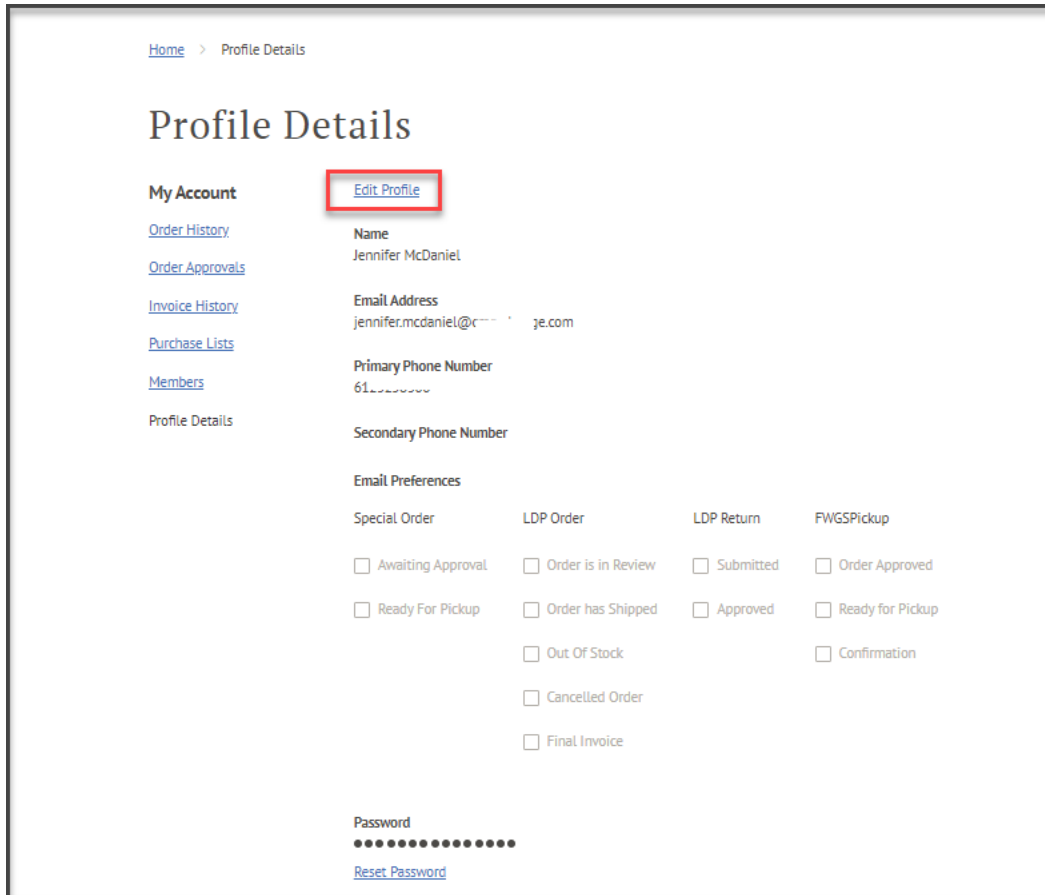


## Update Account Information (LOOP)

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



2. Click **Edit Profile**.



**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.

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

**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.