

Licensee - Special Order Approval Quick Reference Guide

Introduction

After a licensee authorizes a vendor to place Special Orders (SOs) on its behalf in LOOP, a supplier will place an order for review and approval by the licensee.

Steps for a licensee (Licensee Admin role) to add a vendor who may enter orders on their behalf are covered in the Licensee Maintenance – Add Special Order Supplier(s) as Authorized Vendor(s) QRG.

Licensee LOOP users with the Licensee Approver role have the ability to approve vendorplaced SOs.

Background

- 1. A vendor authorized by the licensee to create SOs enters orders on behalf of the licensee.
- 2. During the order creation process, the vendor selects the items, quantities and delivery location (direct delivery to licensee or store pickup) for an order, as well as any supplier-imposed delivery fee it may impose for direct delivery.
- 3. After the supplier creates the order, LOOP sends a notification to the Licensee Approver to review and approve or reject the order.
- 4. The Licensee Approver will approve or reject the order. For approved orders, the licensee may optionally update the payment method, releasing it for processing.

This lesson demonstrates how Licensee Approvers review and approve SOs in LOOP.

Note: Steps for a licensee to view order details are covered in the <u>Licensee - View Placed</u> <u>Orders and Details in LOOP QRG</u>.





Licensee – Special Order Approval

Link to eLearning video: Licensee - Special Order Approval

1. Log in to <u>LOOP</u> as Licensee Approver with registered licensee credentials.

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LICENSEE ONLINE ORDER P	ORTAL		
Email Address		A ANG	2
Password			
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Sign in			
Forgot Password?			12
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2. Navigate to <u>Licensee Profile</u>, then click the **Down Arrow Button**. Click **Order Approvals.**

	Search		Q P Fine Wine & Y ABC LIQUOR BO
Walsome to			Welcome, Karthik ×
License	e Online Order Portal	ABC LIQUOR LLC-95348	
			Order History Return History
<	Credit Card ***	*0110 expiring soon. Update Card	Order Approvals
			Purchase Lists
	Upcoming Orders	For Your Approval	Payment Methods Members
			Vendors
	There are no upcoming orders to display.	There are no orders needing ap	Profile Details UD Account Details
	2		Sign.Out





3. Enter [Order Number] (alternatively, enter date range) in the <u>Search</u> parameter. **Click Search**.

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	Return History		50210778			i		i	Search		
	Order Approvals		Search by Order Number, I	First Name or Last Name.					Clear Search		
	Invoice History										- 1

4. Click **Approve** to approve the Order.

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	Payment Methods Members		Apr 21, 2023 3:05 pm	50210778	1 Bottle	\$296.22	宜 **** 0603 🕜	Tony Rickard		Reject	Approve		

Note: If the payment method needs to be updated, click the pencil icon under payment and follow the instructions covered in the <u>Licensee Maintenance – Manage Payment Method QRG</u>.





5. Click **Reject** to reject the order.

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A small pop-up window will open.

6. Enter Rejection Comments, then click Reject Order.

Rejection Comments	×
Add optional comments to this order for the requestor to see.	
Comment	optional
Unable to fulfil	
16/300 characters	
	Reject Order

Note: Order rejection comments are reported back to the Vendor Buyer within LOOP.

