

Direct Wine Shipping Quarterly Reporting Instructions: Utilizing the Excel Templates to Upload Data

In response to requests by DWS licensees, the PLCB has developed excel templates to simplify quarterly reporting for DWS licensees. The following instructions will assist DWS licensees in completing the PLCB-provided templates and uploading them to PLCB+. **Note that data validation parameters are built into the templates and the data upload process, so only the PLCB-provided templates may be uploaded to PLCB+.**

Before You Begin:

- If you are reporting no sales for a quarter, zero quantities must be reported utilizing the PLCB+ item-by-item reporting function; the excel template will not allow zero entries.
- Note that the “Sales by Product” report must be completed for each calendar year quarter.
- DWS licensees are encouraged to report each quarter on its own spreadsheet.

Step 1: Log into PLCB+ and Select “Submit Report.”

<p><u>EXISTING LICENSES</u></p> <ul style="list-style-type: none"> ➔ Transfer a License to a new Owner <small>(New Owner or New Owner with a New Location)</small> ➔ Add a Permit <small>(Amusement Permit, Off Premises Catering Permit, Extended Hours Food, Farmer’s Market, Wine Expanded Permit, Sunday Sales)</small> ➔ Apply for Events / Functions <small>(Off Premises Catering Events or Exposition Permits(G, AG, AL, LK))</small> ➔ Other License Changes / Amendments <small>(Board Approved Locations, Change of Manager or Officers, Exchange (C/CC, D/ID, E/R), Extension of Premises, Extension of / Surrender or Release from Safekeeping, Misc Inquiries, Place to Place Transfers, Supplemental Storage)</small> 	<p><u>OTHER</u></p> <ul style="list-style-type: none"> ➔ Search for Licenses ➔ Search for Registered Brands ➔ File a Protest or Petition to Intervene ➔ Notify the PLCB of a bad check ➔ Submit Report <small>(Submit monthly, quarterly, or yearly reports for your license if required)</small>
--	---

Step 2: Download the Template. Scroll down the DWS reporting page until you see “Download Excel Template.” Select the template you wish to download from the drop-down menu and open the file to begin inputting data.

Editing Reports:

DWS licensees are able to edit entries for a prior quarter until the last day of the month following the close of that quarter, which is also the traditional quarterly reporting deadline. Any DWS licensee needing to update a quarter no longer accessible through PLCB+ will need to contact the PLCB at 844-707-5475 or RA-LBLICENSINGMOD@pa.gov

(Select) ▼

Download Excel Template

SALES BY PRODUCT REPORT

Add 1 Line
Add 10 Lines

* Product Name	* Year	* Quarter	* Size (mL)	* Units Sold	* Total Sales	UPC	Varietal	Vintage	
	(Select) ▼	(Select) ▼							✖ Remove

**For assistance with the DWS reporting tool,
please call 844-707-5475 or email RA-LBLICENSINGMOD@pa.gov.**

Step 3: Complete the Spreadsheets.

Below are field names and associated attributes and reporting tips for each spreadsheet template. Fields noted with an asterisk (*) are mandatory.

NOTE: If these guidelines are not followed when entering data, data upload will fail for the entire spreadsheet until such errors are corrected. Duplicate entries will also cause data upload to fail, so be sure to abide by the data entry guidelines below and avoid duplicate entries.

Field Name	Character Limit	Validation(s)
Product Name*	250	Enter the product name with sufficient detail to distinguish the product sold. Letters and numbers allowed. All characters are allowed.
Year*	4	Enter a four-digit year. No letters, commas or dashes are allowed.
Quarter*	9	To avoid data formatting errors, DWS licensees are discouraged from copying and pasting into this field from another document. Instead, since all entries in this column will be the same for the entire document, select the appropriate quarter from the drop-down in the first cell, then copy (Ctrl-C), select as many cells within the column as necessary to report all the data for the period, and paste (Ctrl-V) the first entry into all the cells selected. For help: https://support.office.com/en-us/article/move-or-copy-cells-and-cell-contents-803d65eb-6a3e-4534-8c6f-ff12d1c4139e
Size (ml) *	14	Enter, in digits, the size of the bottle in milliliters (for example, 200, 375, 500, 1,000, etc.). No letters, commas, decimal points or dashes are allowed.
Units Sold*	14	Enter, in digits, the total number of units (bottles, not cases or shipments) of the product sold and direct shipped to all Pennsylvania addresses during the designated quarter. No letters, \$ sign, commas or dashes allowed. Do NOT enter negative numbers or zeros.
Total Sales*	14	Enter, in digits (dollars and cents), the total dollar amount of gross sales for the UPC/product direct shipped to all Pennsylvania addresses during the quarter designated, not including wine excise tax or shipping charges. No letters, \$ sign, commas or dashes allowed. Do NOT enter negative numbers or zeros.

Your file will now show under the “Import files” section along with a new “Validate & Import” button.

IMPORT FILES

[+ New Import File](#)

Uploaded Date	File Size (KB)	File Name	
May 7, 2018	10.90	TST-1.xlsx	Validate & Import ✕ Remove

Click the “Validate & Import” button.

If the document is accepted, data from the excel document will automatically populate into the PLCB+ online report. (example mock data listed below). The first line will automatically be blank; no action is required to remove it. You may also download the Excel document you submitted by selecting “Download Imported Document.”

SALES BY PRODUCT REPORT

[Add 1 Line](#) [Add 10 Lines](#)

* Product Name* Year	* Quarter	* Size (mL)	* Units Sold	* Total Sales	UPC	Varietal	Vintage	
<input type="text"/>	(Select)	(Select)	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	✕ Remove
ADSGSGD	2017	Jan - Mar	750	55	\$5,454.00	1231	Cabernet	adsg Download Imported Document ✕ Remove
ASDGDSAG	2017	Jul - Sep	1,500	45	\$5,454.00	654654	Merlot	Download Imported Document ✕ Remove

Selecting “Save” at the bottom of the report will save your work. Your report is not submitted until you click the “Submit” button and receive a message like follows.

Your report has been submitted. Please use the menu to return to the licensing main page or use the buttons [Save](#) [Submit](#) above to add additional lines.

If you are submitting for a time period that is older than the most recently completed quarter, all of the entries may look like they disappear, but if you see the above message the information has been submitted.

Editing Entries:

Once data is imported from an excel template into the PLCB+ reporting system, another excel template reflecting the same data for the same quarter cannot be uploaded, even if the new file contains additional reporting details.

If additional items need to be reported, the DWS may do so in one of two ways:

- Utilize the “Add 1 Line” or “Add 10 Lines” functionality within the online report, per below (sample mock data shown); or
- Create a new excel document including only the new product(s), then upload and submit. Before submitting, only the data from the new upload will show. Once submitted, all entries for the quarter – from all uploads – will show under “View or Update Submissions.”

SALES BY PRODUCT REPORT

* Product Name*	Year	* Quarter	* Size (mL)	* Units Sold	* Total Sales	UPC	Varietal	Vintage	
(Select)	(Select)	(Select)							Remove
BAD WINE	2018	Jan - Mar	750	1	\$1,500.00				Download Imported Document Remove

IMPORT FILES

Uploaded Date	File Size (KB)	File Name

VIEW OR UPDATE SUBMISSIONS

Product Reports listed in this grid are for the current quarter. Reports for the previous quarter are also shown up to one month after the quarter ends. To download all reports for the previous quarter, click on the "Export Previous Quarter to Excel" button.

* Product Name*	Year	* Quarter	* Size (mL)	* Units Sold	* Total Sales	UPC	Varietal	Vintage	
GOOD WINE	2018	Jan - Mar	1,500	45	\$5,454.00	654654	Merlot		Download Imported Document Remove
GREAT WINE	2018	Jan - Mar	750	654	\$654,654.				Download Imported Document Remove
YUMMY WINE	2018	Jan - Mar	750	55	\$5,454.00	1231	Cabernet	adsg	Download Imported Document Remove

DWS licensees are able to edit entries for a prior quarter until the last day of the month following the close of that quarter, which is also the traditional quarterly reporting deadline.

Any DWS licensee needing to update a quarter no longer accessible through PLCB+ will need to contact the PLCB per below.

For assistance with the DWS reporting tool,
 please call 844-707-5475 or email RA-LBLICENSINGMOD@pa.gov.