

## Supplier – Manage Payment Method in LOOP Quick Reference Guide

### Introduction

Suppliers can manage their own customer profile data in the Licensee Online Order Portal (LOOP). Some of the data is restricted and can only be managed based on the role assigned.

### Key Functions

A supplier with an assigned role of Administrator can manage the following payment methods:

- Credit cards
- Automated Clearing House (ACH – Bank Account on file)

Credit card information and ACH banking information will be entered in LOOP.

### LOOP Role Matrix Reference Guide

This matrix displays functions and associated roles (those highlighted are covered in this training).

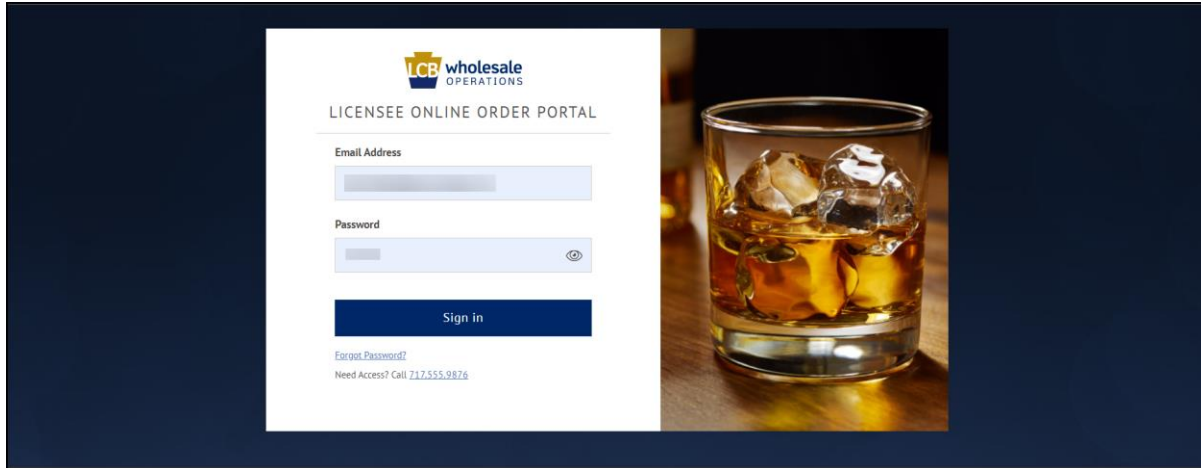
LOOP Function	Licensee Administrator	Licensee Approver	Licensee Buyer *
View/Edit Profile	X	X	X
Update Account Information	X		
Delete Members	X		
Manage Contacts/Members	X		
Add/Delete Payment Methods	X		
Add/Delete Authorized Vendors	X		
Add/Delete Authorized Agents	X		
Submit Orders	X	X	X
Approve Orders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

## Manage Payment Methods (LOOP)

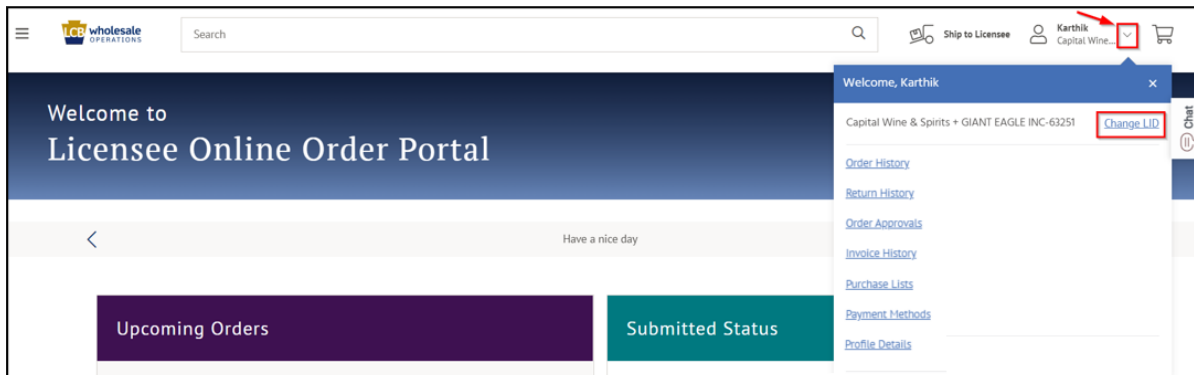
Link to eLearning video: [Manage Payment Methods in LOOP](#)

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



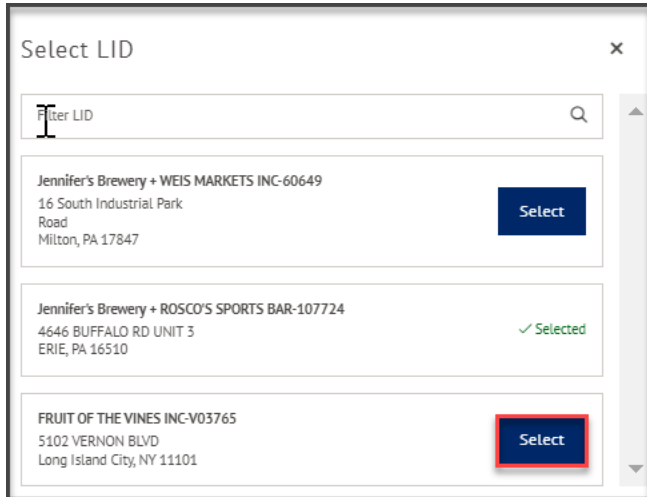
2. Click **Change LID** in Profile to select the supplier license identification number (LID) for which the order is being placed.

*For sample order entry, the supplier must select the supplier LID for which they are creating the sample order.*

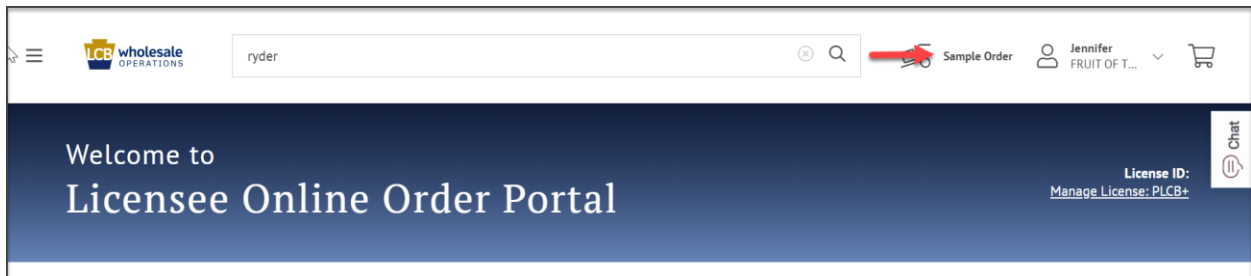


*A small pop-up window will appear.*

3. Click **Select**.

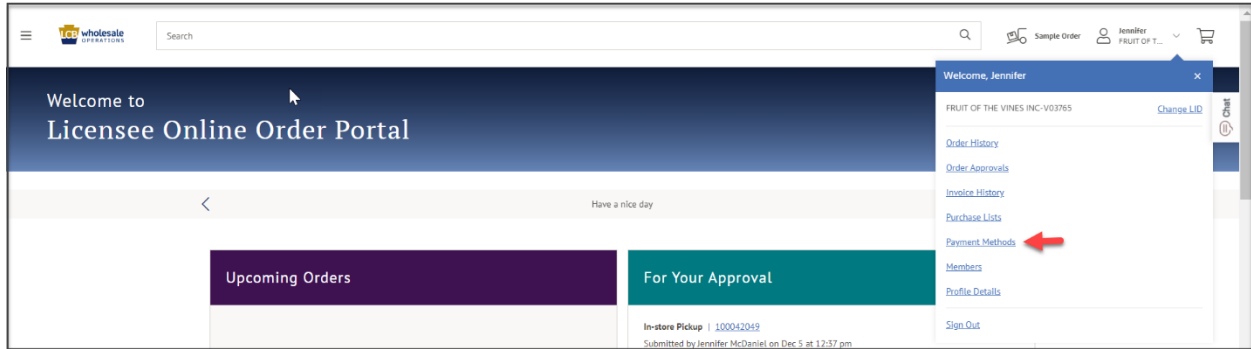


**Note:** Filter LID in the search bar or scroll through the list to select the supplier LID.



*Once the supplier LID is selected the Delivery Location will change to Sample Order.*

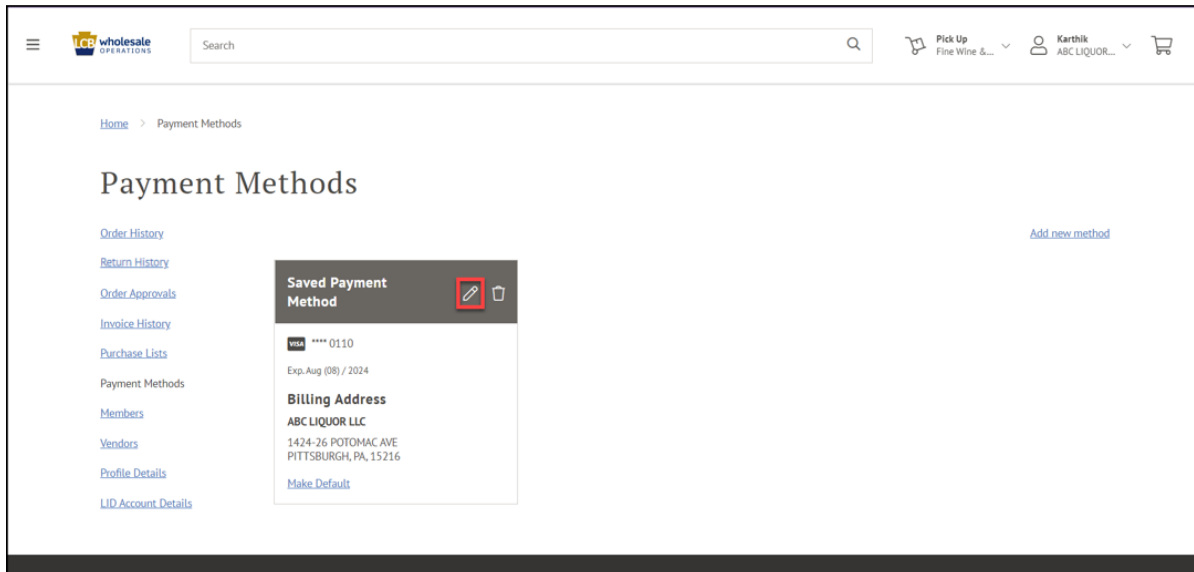
4. Select **Payment Methods** from the dropdown menu next to the Shopping Cart.



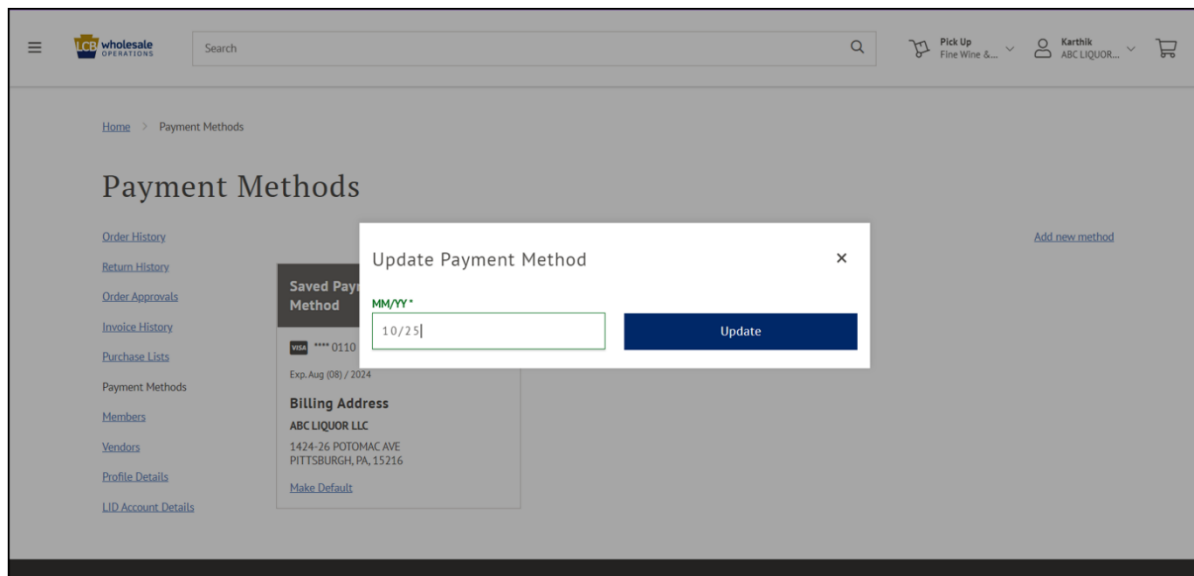
The Payment Methods window will display.

## Update Payment Method

1. Click the **Pencil Icon** on the Saved Payment Method Tile.



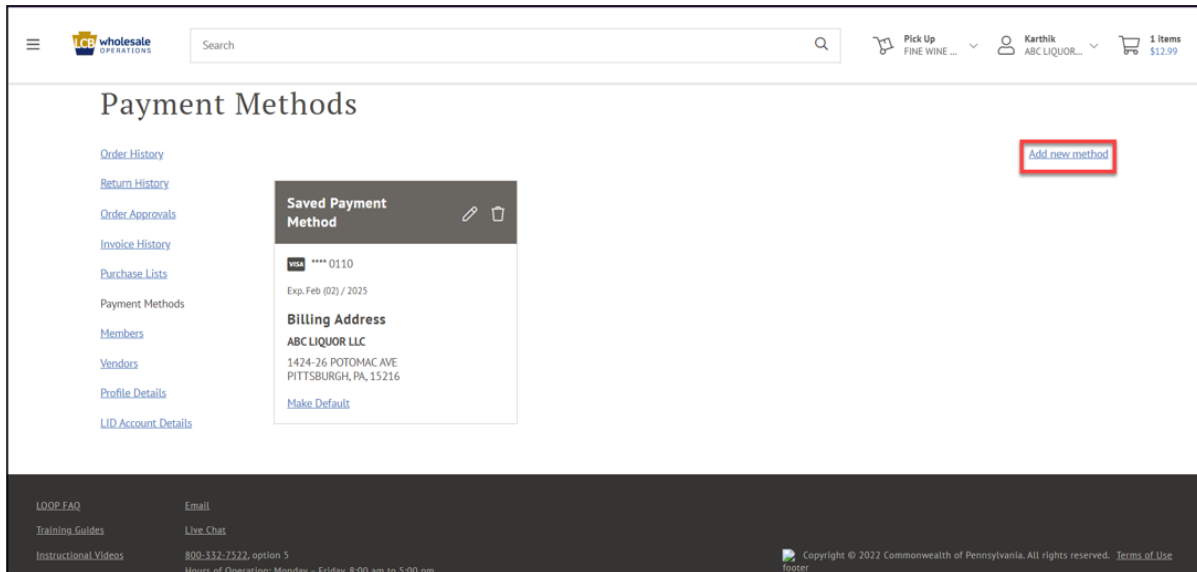
2. Update the expiration date, then click **Update**.



**Note:** The expiration date is the only thing that can be edited in LOOP. A card verification value (CVV) or cardholder name or number must be updated by deleting the existing card and re-entering the new information.

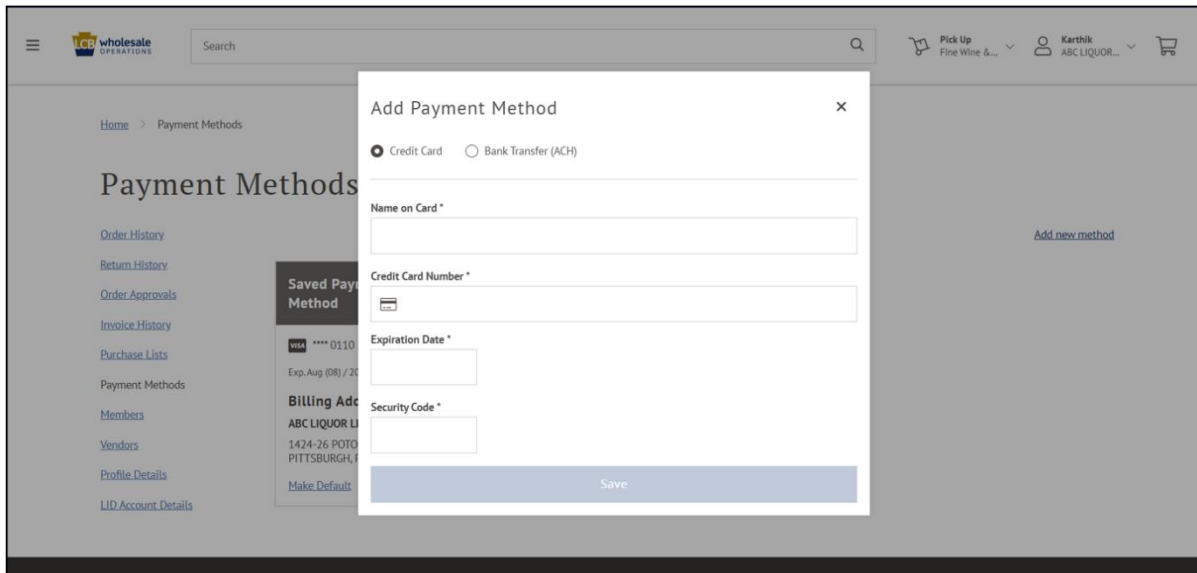
## Add New Payment Method — Credit Card

1. Click **Add New Method**.



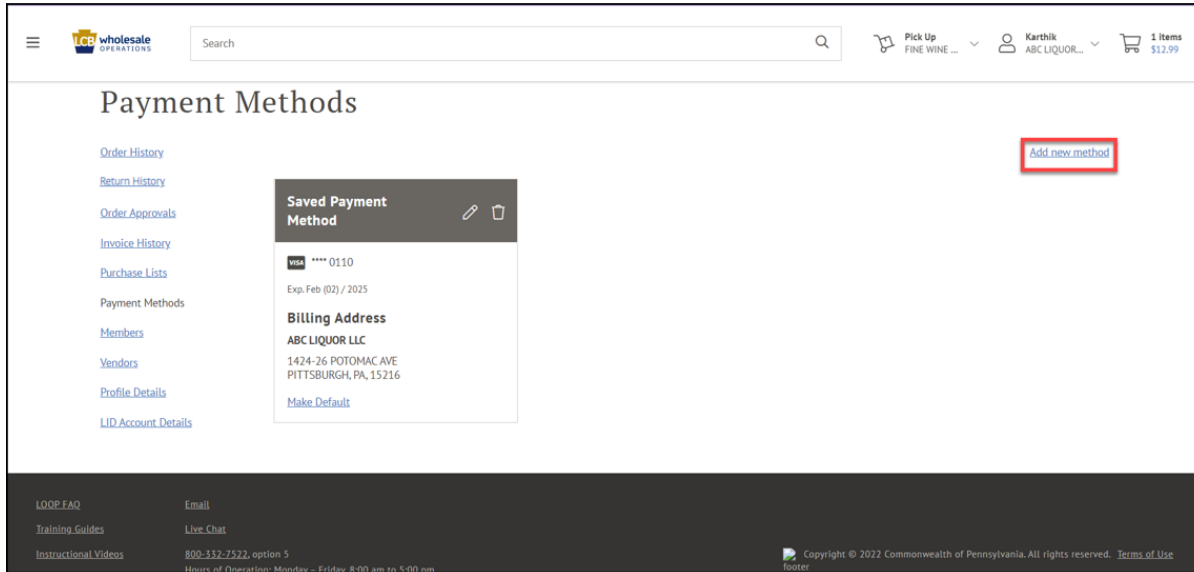
*Credit Card is the default selection at the top of the Add Payment Method Pop-up Box.*

2. Enter the required information for a credit card, then click **Save**.

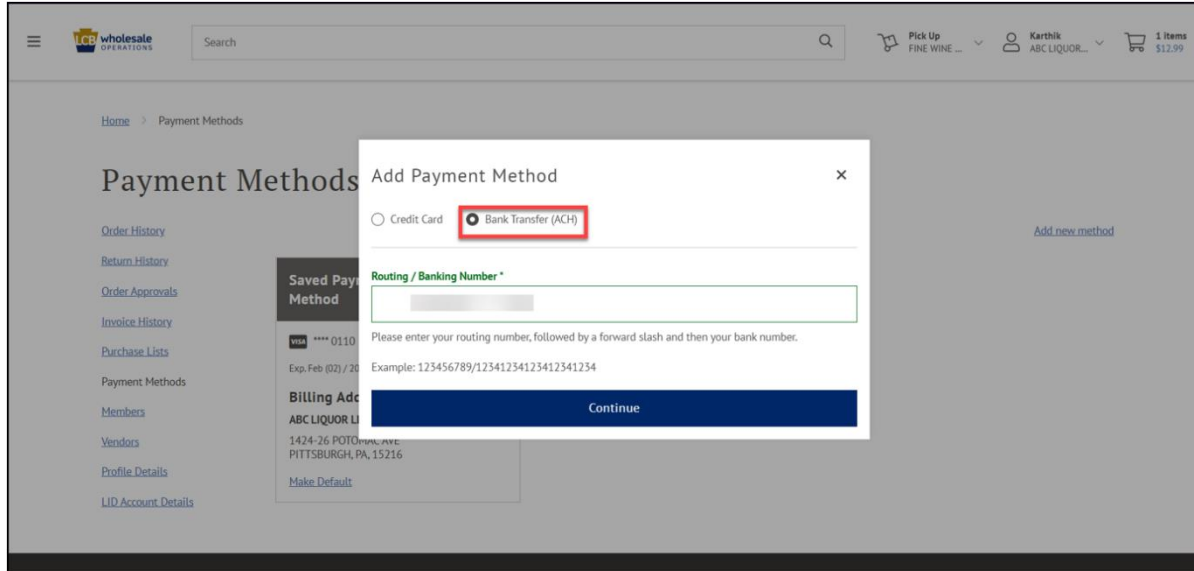


## Add New Payment Method – Bank Transfer via ACH

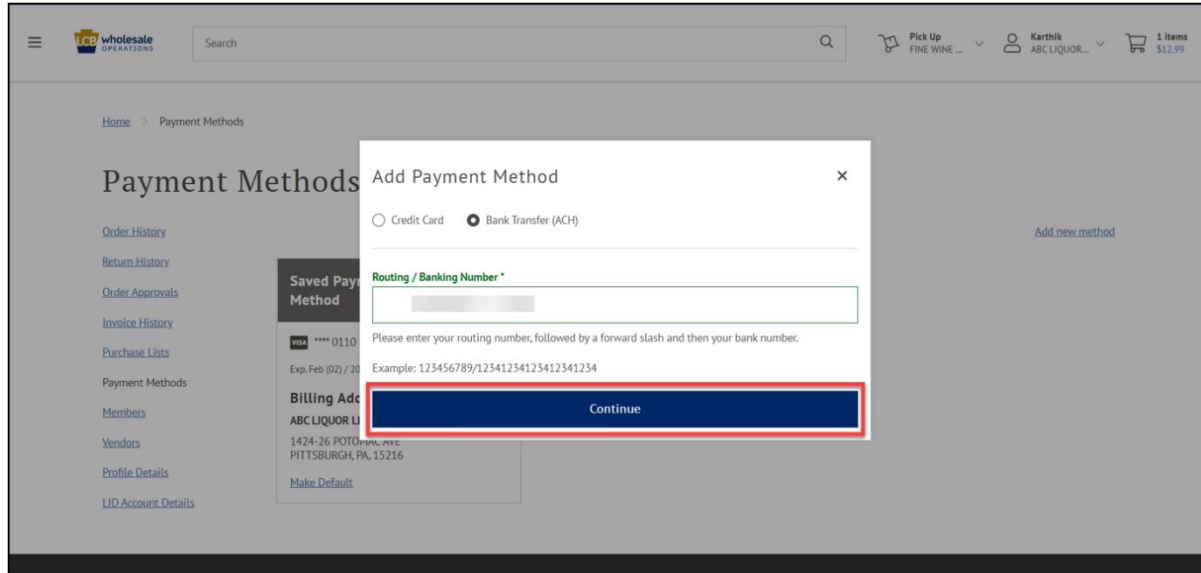
1. Click **Add new method**.



2. Select the **Bank Transfer (ACH) Radio Button** at the top of the Add Payment Method Pop-up Box.



3. Enter the required information for a Bank Transfer (ACH), then click **Continue**.



**Notes:** For payment on file security purposes:

For credit card and ACH management, enter credit card or banking information into the First Data interface embedded within LOOP. First Data will provide a token number associated with the payment method to LOOP. LOOP will save the token number to the Account profile.

The default payment method can be changed by clicking the Make Default link for the desired payment method.

Accounts with the Insufficient Funds (NSF) flag assigned will have a message indicating that ACH payments are unavailable for LOOP purchases. Credit cards will still be supported for NSF suppliers for LOOP payment and all supported in-store payment methods for in-store pickups.