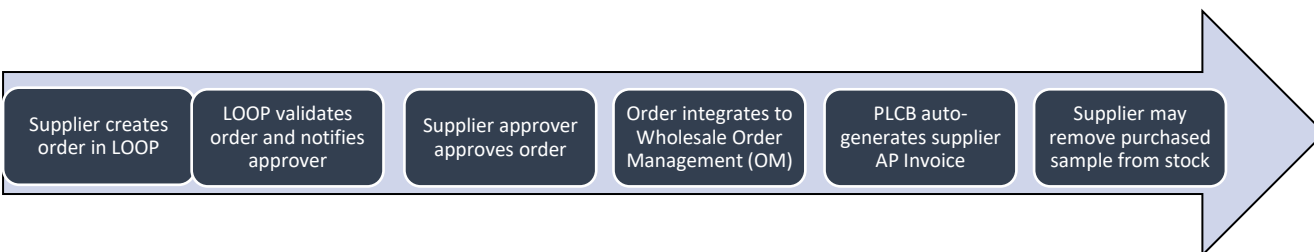# Supplier – Sample Order Entry in LOOP Quick Reference Guide

Introduction

- Prior to entering a sample order in the Pennsylvania Liquor Control Board's (PLCB) Licensee Online Order Portal (LOOP), suppliers need to set up a payment method. Please refer to the Supplier - Manage Payment Method in LOOP QRG for instructions on adding a payment method to your account. Once a payment method has been set up and verified (with automated clearing house [ACH] on file), you may begin entering sample orders.

- The sample order entry process is similar to entering a Special Order (SO) with the addition of a couple of steps:
    - After logging in, use the Change License Identification Number (LID) menu and select your own Supplier LID from the list of LIDs you are assigned.
    - After items have been added to an order, the supplier needs to select a payment method rather than entering a delivery method for the order.
    - Delivery method is defaulted to Sample Order.
    - The supplier will need to look for an approval notice for the order and approve the order in LOOP before the order can be fulfilled.
    - Sample order fulfillment will follow the same process as an SO:

| Supplier creates order in LOOP | LOOP validates order and notifies approver | Supplier approver approves order | Order integrates to Wholesale Order Management (OM) | PLCB auto-generates supplier AP Invoice | Supplier may remove purchased sample from stock |

- The supplier will enter the following details for a sample order:
    - Select the supplier LID from the list of accounts
    - Delivery method is Sample Order
    - Item(s)
    - Customer purchase order (PO) number
    - Payment method

- LOOP will calculate pricing and update the Cart Summary with totals.

- Once the order has been created, LOOP will send a notification to the (supplier) order approver. The supplier approver will review and approve or reject the order and optionally update the payment method, releasing it for processing.

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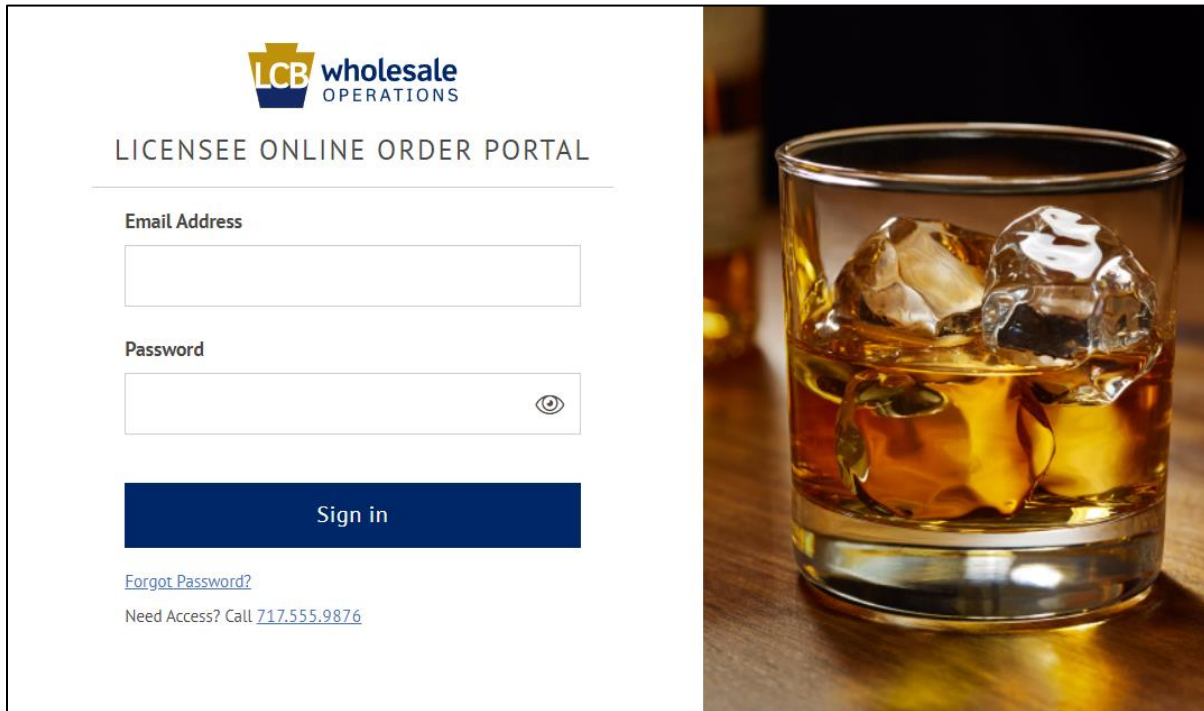
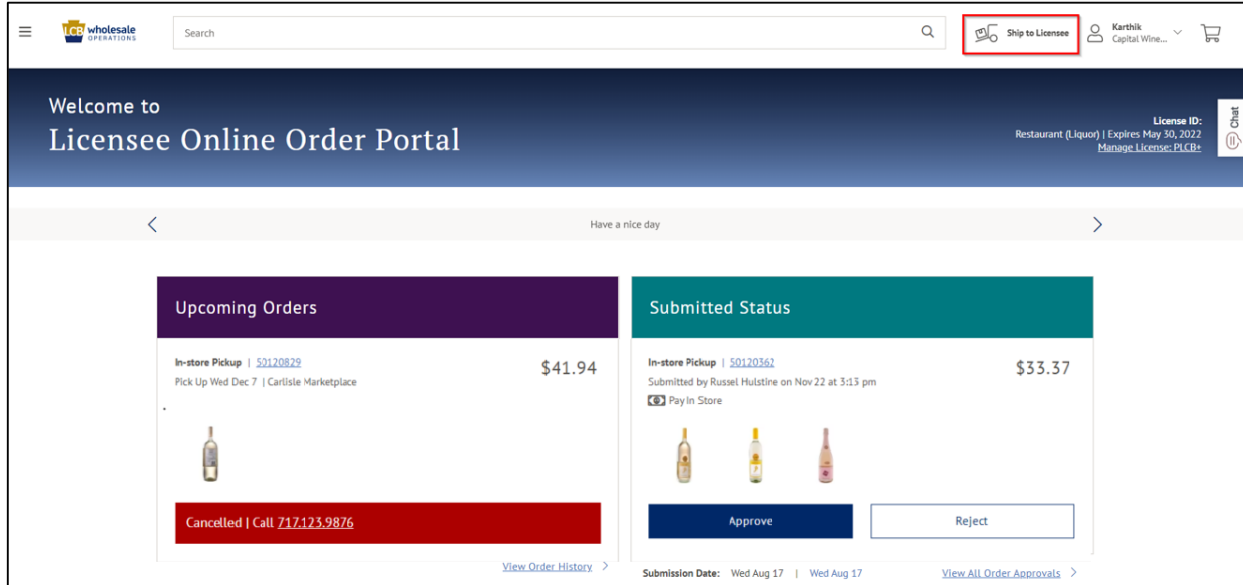| Acronym	Meaning
LID	License Identification Number
LOOP	Licensee Online Order Portal
LTMF	Logistics, Transportation & Merchandising Factor
PLCB	Pennsylvania Liquor Control Board
PO	Purchase Order
SO	Special Order

Supplier Sample Order Entry in LOOP

Link to eLearning video: Supplier - Sample Order Entry in LOOP

Create Sample Order

1. Log in to the Licensee Online Order Portal (LOOP) with registered credentials.

The LOOP Dashboard is displayed after log in.

2. Click **Change LID** in <u>Profile</u> to select the supplier 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.
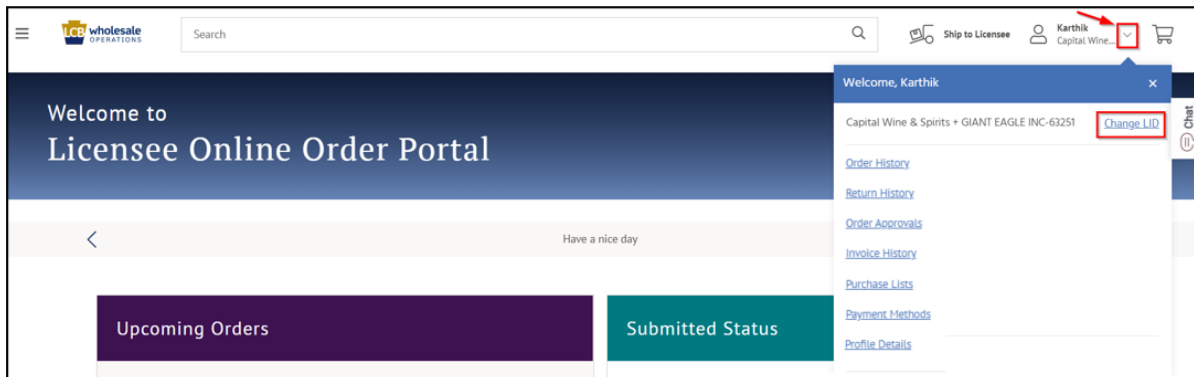
A small pop-up window will appear.

3. Click **Select**.
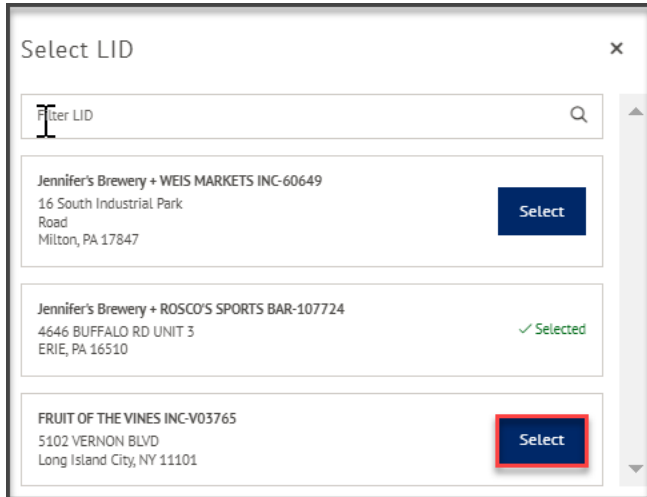
Note: Filter LID in the search bar or scroll through the list to select the supplier LID.
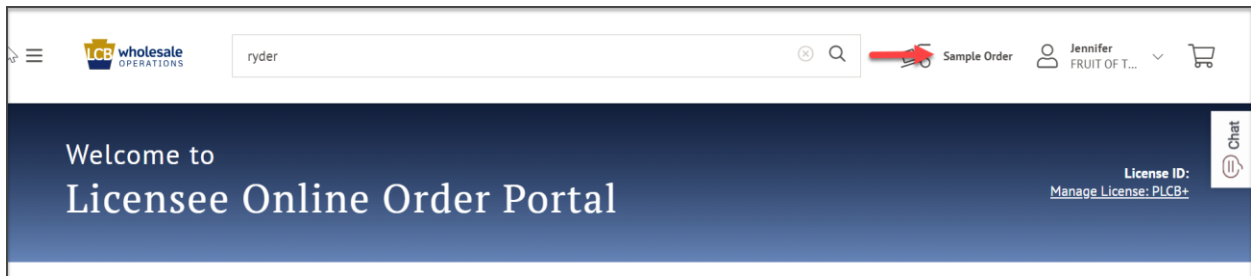
Once the supplier LID is selected the Delivery Location will change to Sample Order.

4. Search an item by using the browse option. Click the **Menu Icon** on the top left corner.
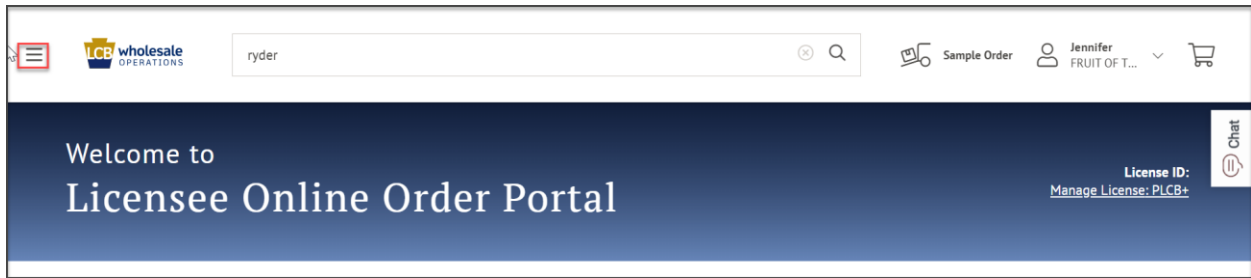
Note: The menu icon is available in the upper left corner of the screen, where users can access product navigation information.

5. Select an item by navigating through the Item Catalog.
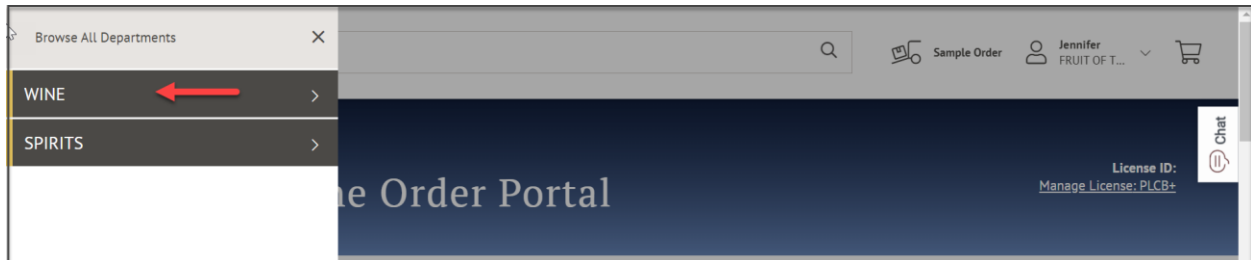
6. Alternatively, search for a particular item using the Search Bar.
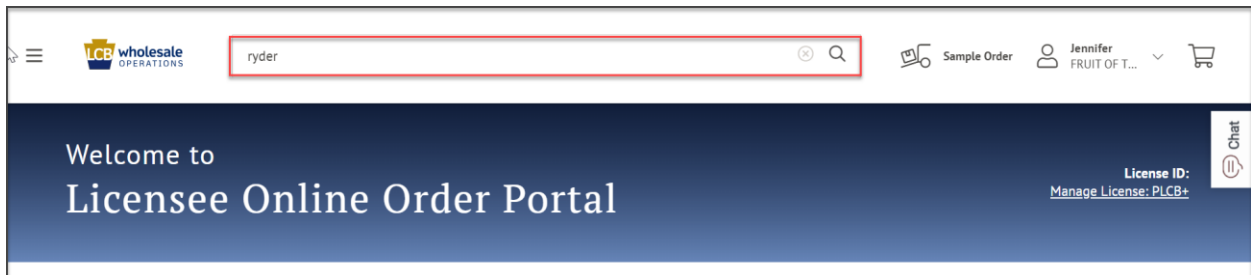
7. Click the **"+" Icon** to increase or the **"–" Icon** to decrease the quantity of a selected item. Then click **Add Bottles**.
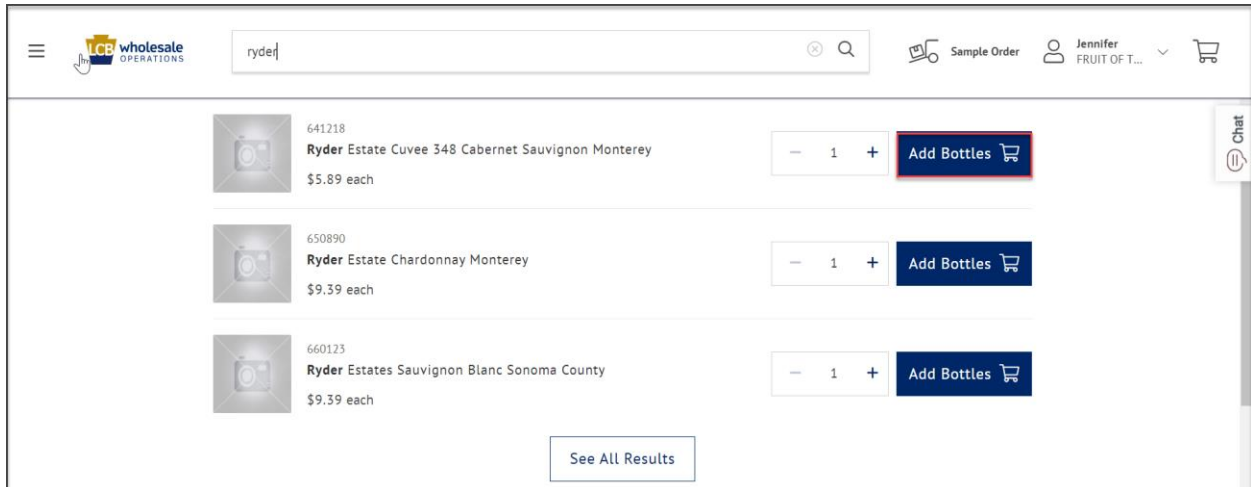
Add additional items as needed. Items can also be added using the Bulk Upload function, or manual item entry from the Landing Page.

8. When finished adding items, click the **Shopping Cart Icon**.
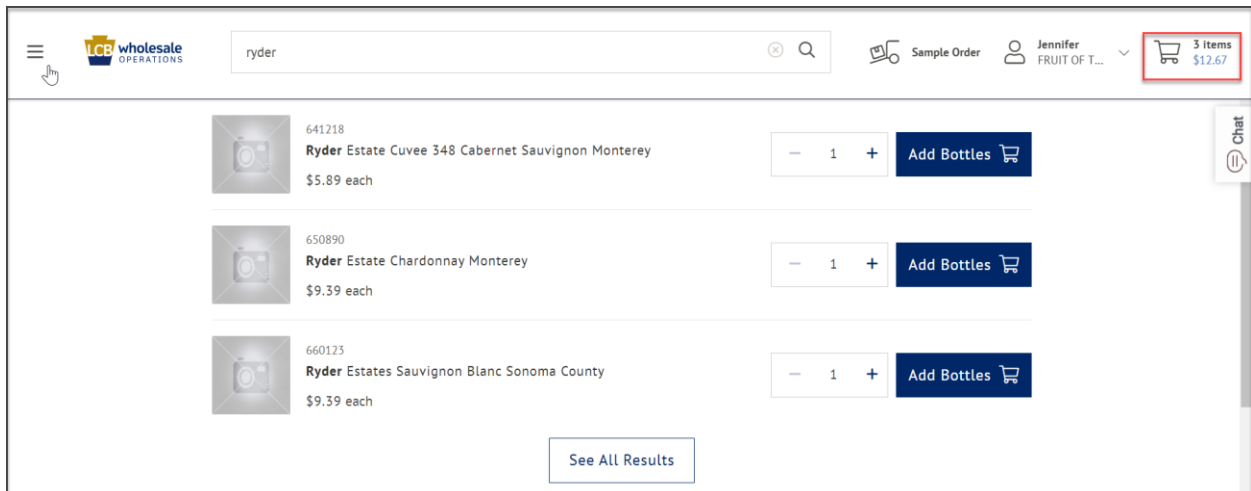
9. Validate the Shopping Cart.

Notes: A shopping cart can be modified by increasing or decreasing the item quantity.
Click **Remove** to delete an item from the cart.

10.   Click **Continue to Checkout**.

11. On the Checkout Screen, review the contact information and optionally add a PO number. Confirm the payment method, then click **Place Order**.
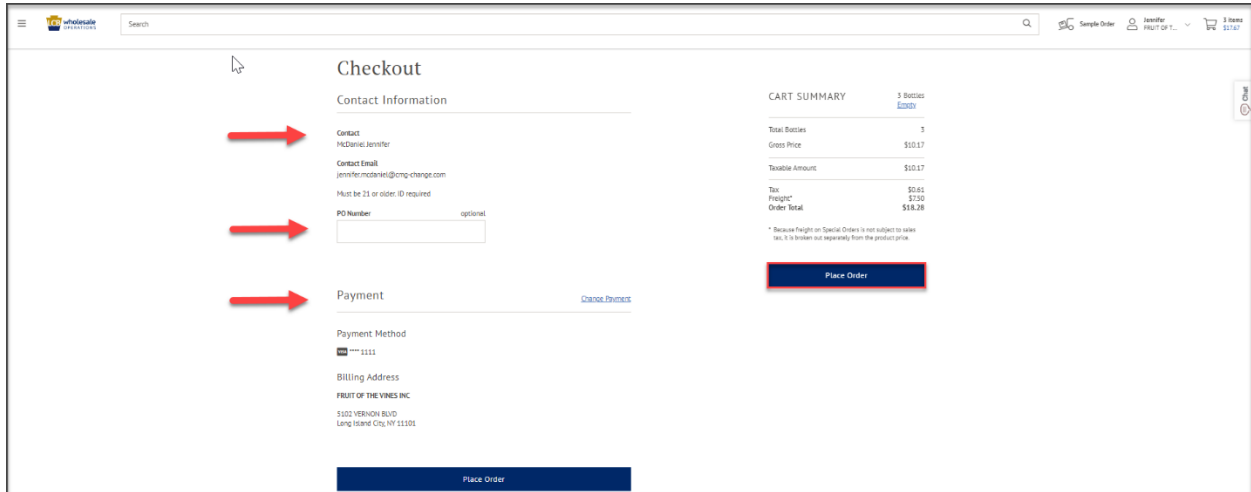
12. View the Order Confirmation Page.
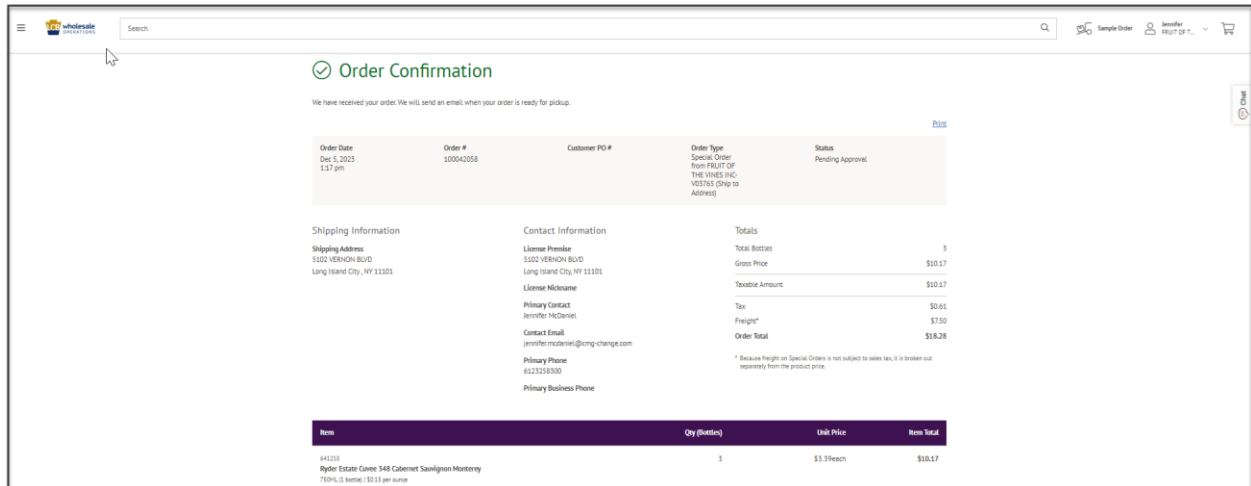
The supplier approver is then notified of the order ready for review.

13. Click the **PLCB Logo** to return to the homepage.
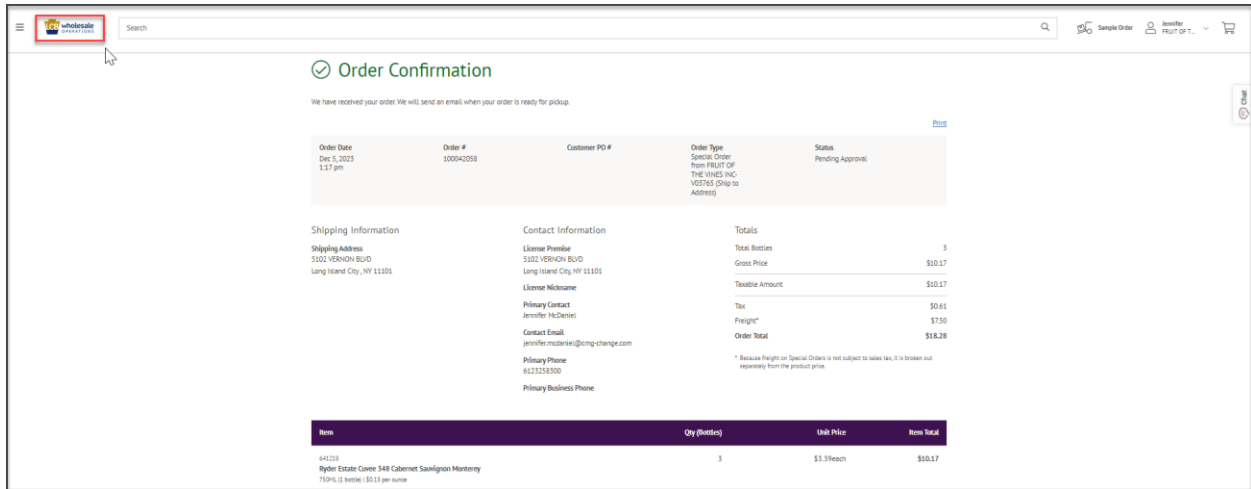
Approve a Sample Order

Once a sample order is submitted, it will be routed for approval. A supplier must have an Approver or Administrative role in order to approve sample orders.

1. Review the list of Sample Orders for approval on the <u>For Your Approval</u> dashboard on the <u>Landing Page</u>, and use the <u>View All Order Approvals link</u> to see the list of orders waiting for approval.
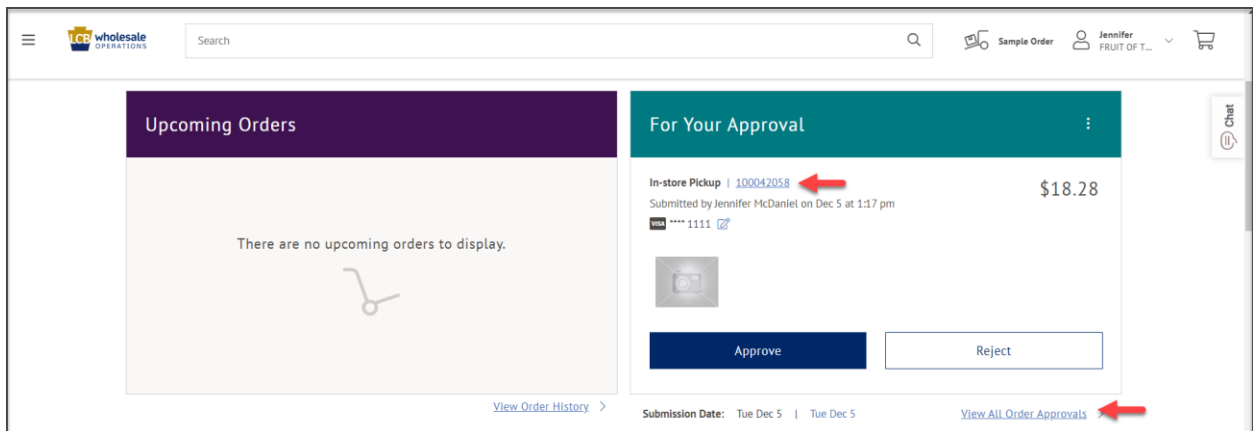
An order can be approved or rejected directly on the Landing Page, but before approving, review the details of the order by clicking the Order Number link in the <u>For your Approval</u> dashboard.

2. Alternatively click the **Down Arrow Button** by the Profile at the top right of the screen. Click **Order Approvals.**
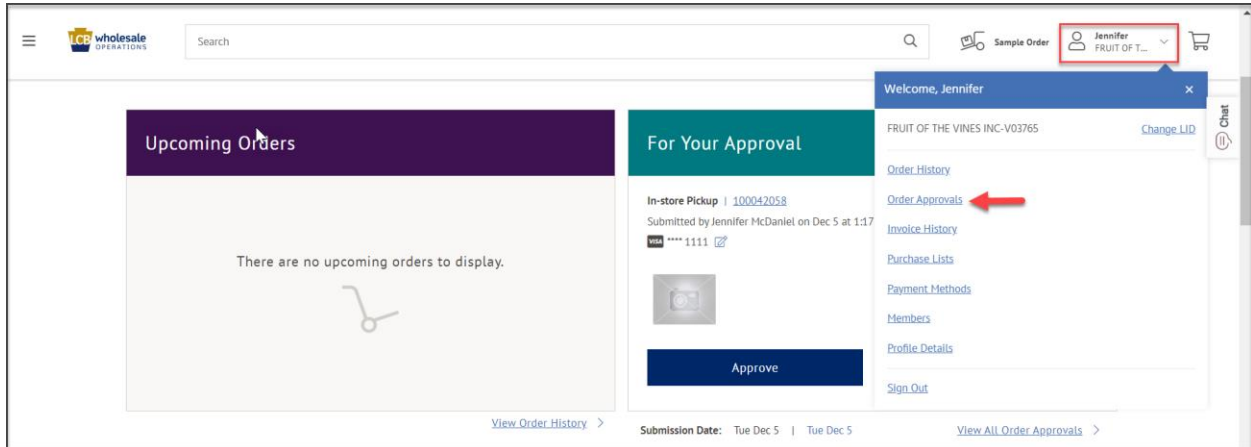
The search window for orders ready for approval will display.

3. Click the **Order Number** link to view an order waiting for approval or enter [Order Number] (alternatively, enter date range) in the Search parameter. Click **Search**.
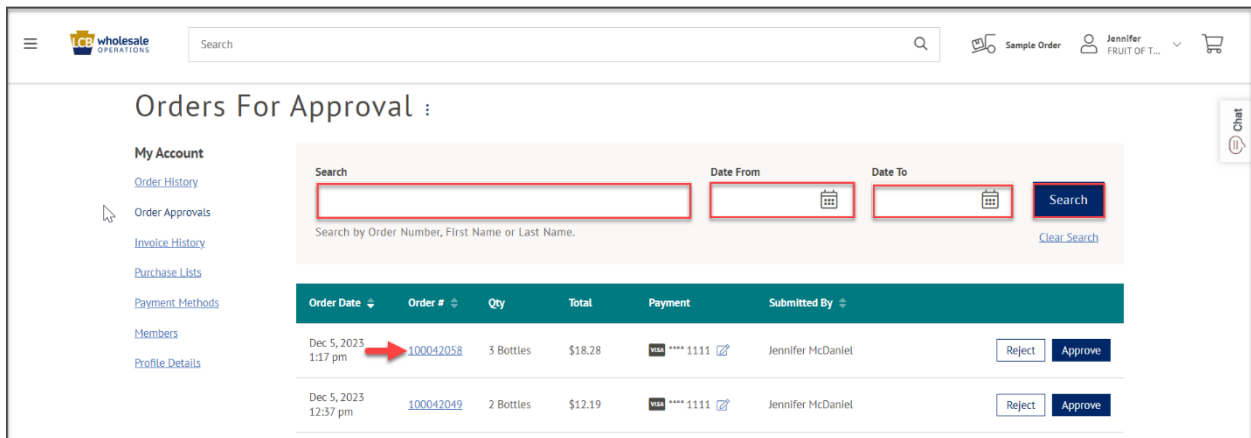
4. View the details of the selected order. Scroll down to view item details.

5. Click **Approve**.

Once the order is approved, you will return to the list of orders waiting for approval.
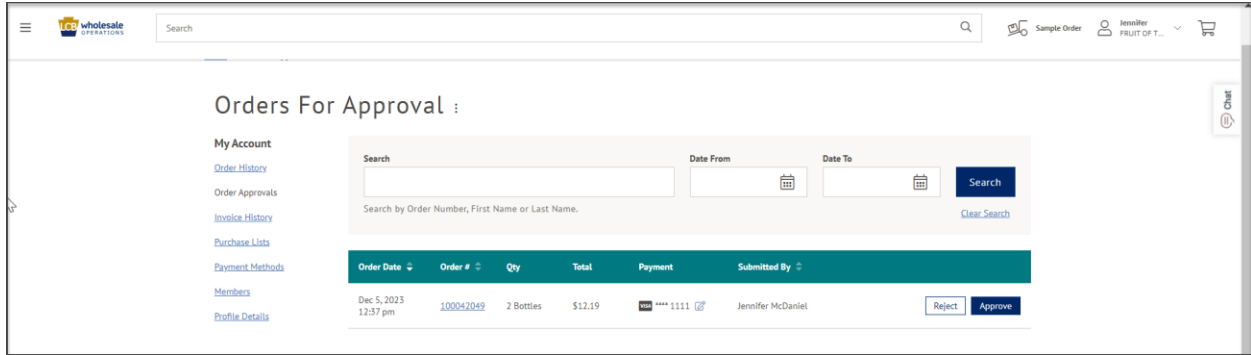
6. To reject an order, click **Reject**.
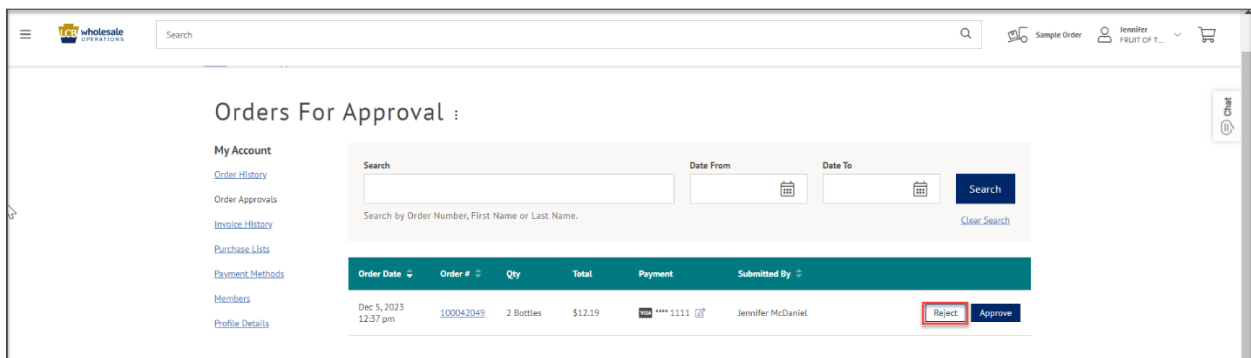
A rejection comments window will display.

7. Enter a Comment. Click **Reject Order**.
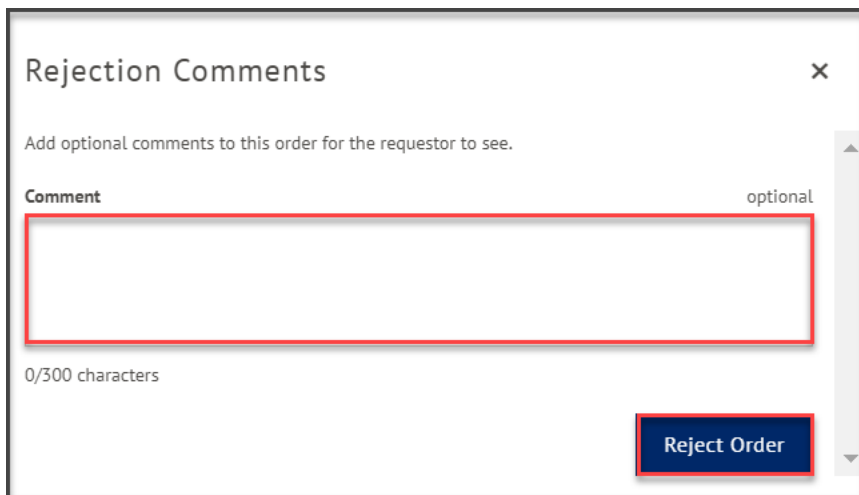
**Note**: Order rejection comments are reported back to the buyer within LOOP.

View Sample Order Details

1. From the <u>Landing Page</u>, click **Order History** from the dropdown menu, or click **View Order History** beneath the Upcoming Orders dashboard to view Sample Order history.
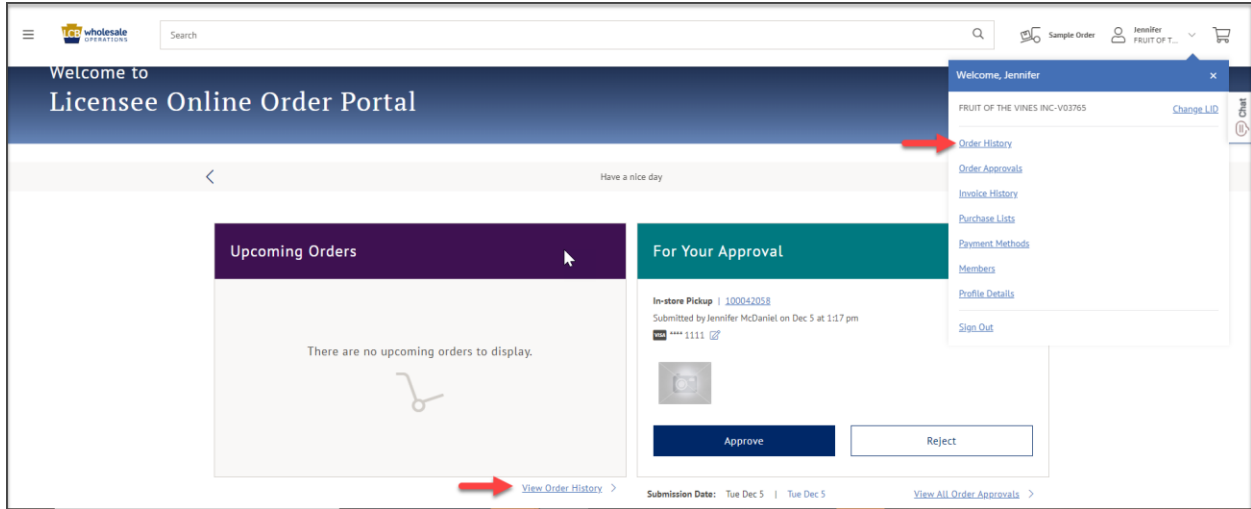
The Order History search window will display.

2. Click the <u>Order Number link</u> to view details of the order.
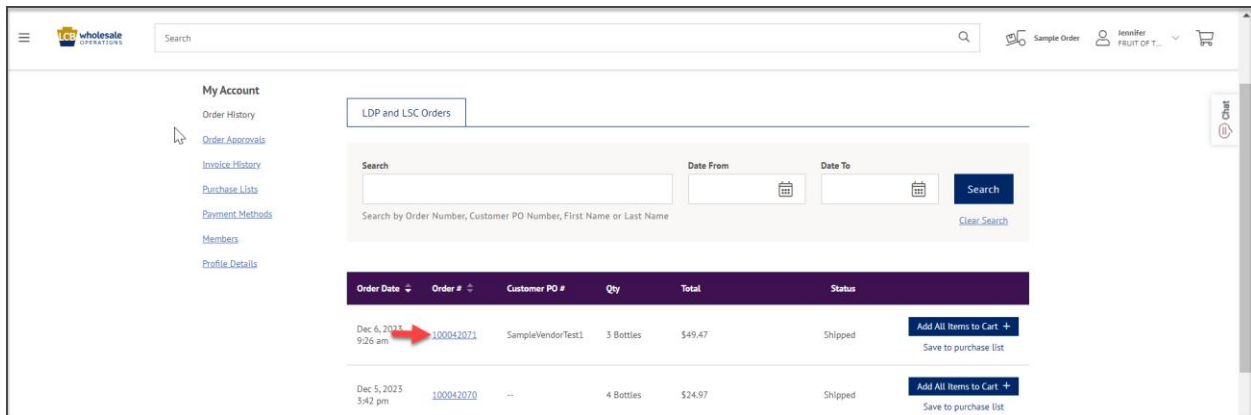
3. Review the order details. Scroll down to see item details.

4. Click the PLCB logo to return to the Landing Page.