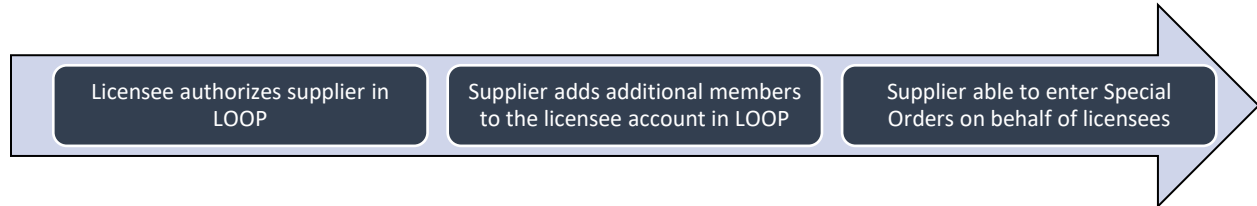
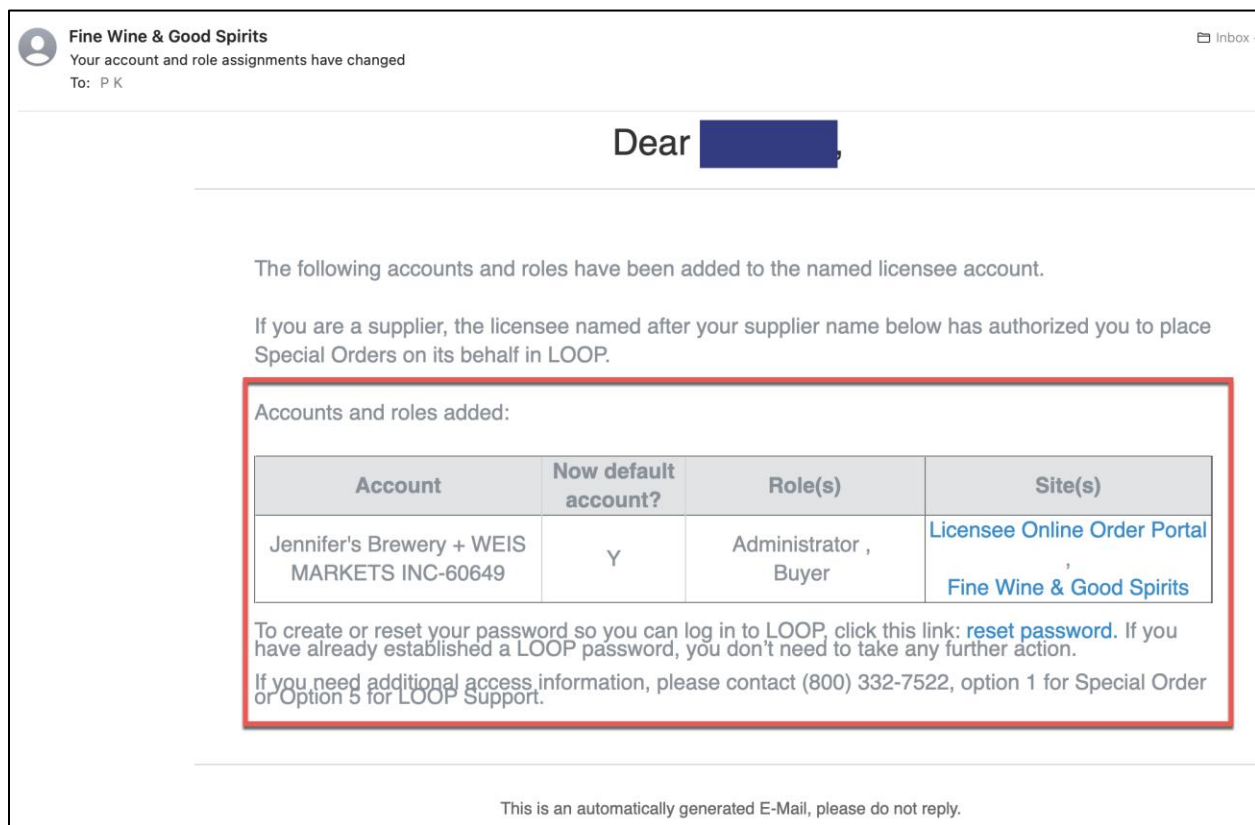


Supplier – Supplier Special Order – Adding (Supplier) Members in LOOP Quick Reference Guide

Introduction



- The licensee authorizes a supplier representative to place Special Orders (SOs) on behalf of the licensee. The licensee will only have to “authorize” a single supplier contact from each supplier organization. The supplier that is authorized will receive an “administrator” role allowing them to setup access for other supplier contacts within the supplier organization.
- The supplier receives an email informing them that their account and role assignments have changed. The email will look like the image below.



- The supplier can use the link in the email to reset their Licensee Online Order Portal (LOOP) password and log in to LOOP.
- Once in LOOP, the supplier has the ability to add additional “members” from their organization who will be supporting the licensee. Members must be added separately to each of the license identification numbers (LIDs) they have been authorized to support.
 - Only a user with an assigned role of “Administrator” can update contact details, referred to as “member information” within LOOP. The “Members” area within LOOP is used to provide access and assign roles that determine what tasks and data can be performed/viewed by individuals within a licensee's organization.
 - A member’s email address is used as the login ID for LOOP. Once a new member has been set up, they will receive an email to log in to LOOP and reset their password.
 - Because the email address is the login ID, an email address cannot be changed for a member. If an email address changes, the original member must be deleted, and a new member added with the desired email address. Once deleted, the member will receive an email confirming they have been deleted from the account.

Note: Initially, the “authorized” supplier can use the list of LIDs that display when they login and add additional members to the licensee list of members. On an ongoing basis, it may be easier to do this based on receiving the account setup email.

Table of Contents

Glossary	4
Supplier Special Order Adding Members in LOOP	5
LOOP Role Matrix Reference Guide.....	5
Change LID	6
Adding a Member	8
Add Member	9
Add New Member.....	11
Update Member.....	14
Delete Member.....	15

Glossary

Acronym	Meaning
LID	License Identification Number
LOOP	Licensee Online Order Portal
SO	Special Order
PLCB	Pennsylvania Liquor Control Board

Supplier Special Order Adding Members in LOOP

Link to eLearning video: [Supplier - Supplier Special Order - Adding \(Supplier\) Members in LOOP](#)

LOOP Role Matrix Reference Guide

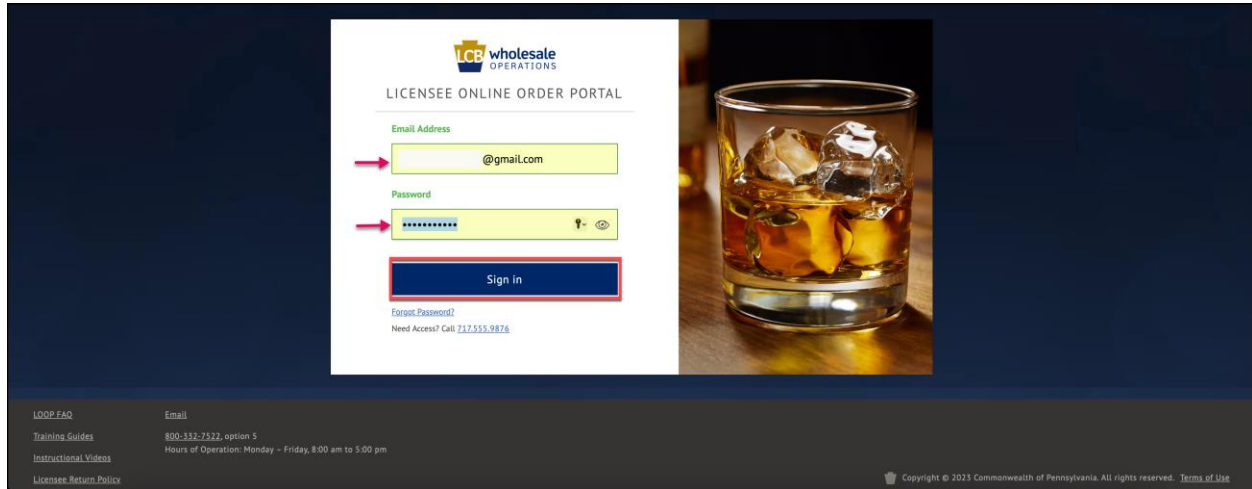
This matrix displays the functions and associated roles (those highlighted are covered in this training) that are available to suppliers that have been authorized by licensees to place SOs.

LOOP Function	(Supplier) Administrator	(Supplier) Buyer *
View/Edit Profile	X	X
Update Account Information		
Delete Members	X	
Manage Contacts/Members	X	
Add/Delete Payment Methods		
Add/Delete Authorized Vendors		
Add/Delete Authorized Agents		
Submit Orders	X	X
Approve Orders		
Approve Special Orders		
Create Purchase Lists	X	X
Delete Purchase Lists	X	X
Manage Purchase Lists	X	X
View Placed Orders	X	X
View Order Details	X	X
Copy to Cart Function	X	X
Cancel Approved Orders **		
Create Return Requests		
View Return Orders		
View Return Order Details		

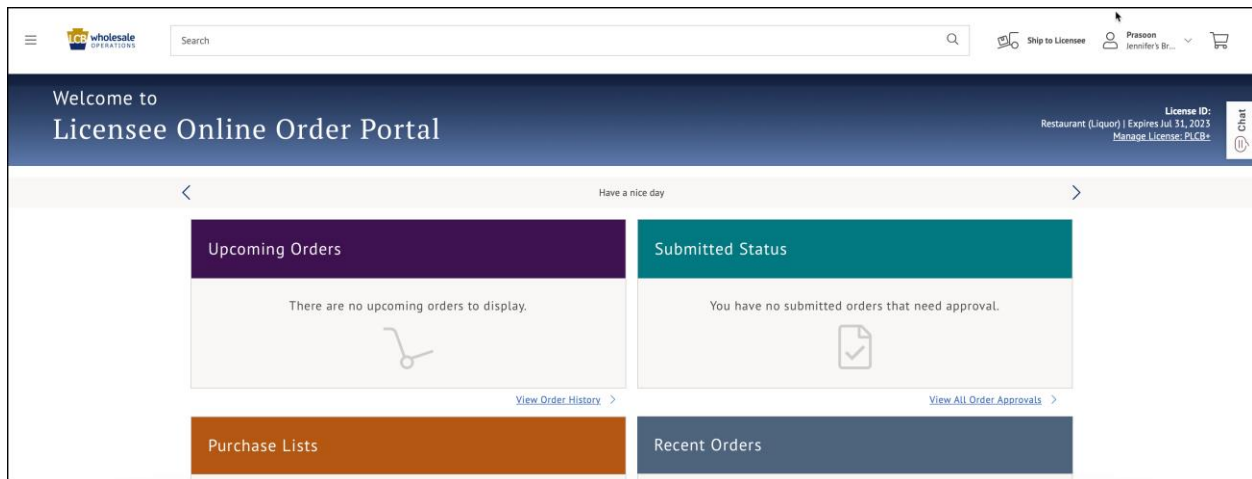
Note: An asterisk (*) indicates this role is assigned to all users by default. A double asterisk (**) indicates approved orders can only be canceled in LOOP prior to order cutoff or selection.

Change LID

1. Log in to the Licensee Online Order Portal (LOOP).
2. Enter registered **Email Address** and **Password**, then click **Sign In**.

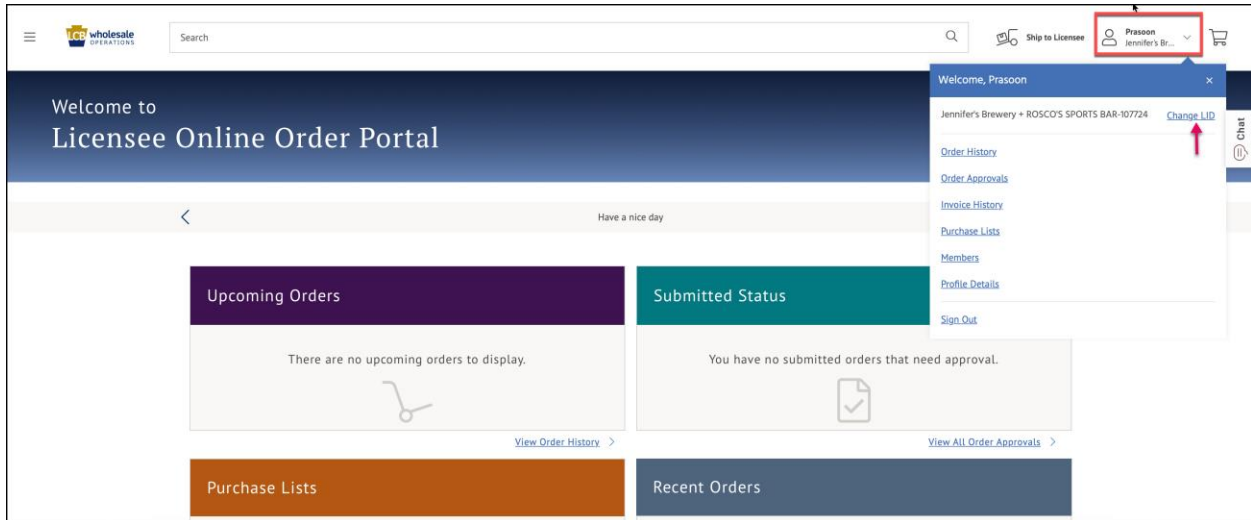


User is routed to the LOOP Dashboard.



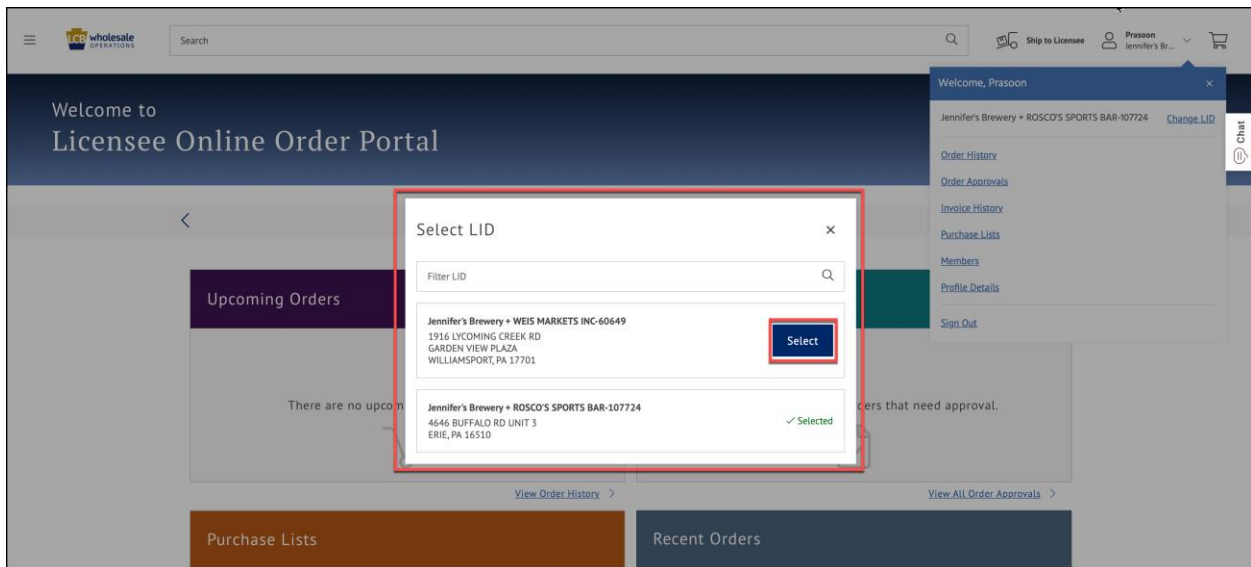
3. Click the **User Icon**, then click on **Change LID** to see the licensees that have been authorized the user to place orders on their behalf.

Note: Vendor buyers may be associated with multiple licensees, each with a LID.



Select LID pop up window appears.

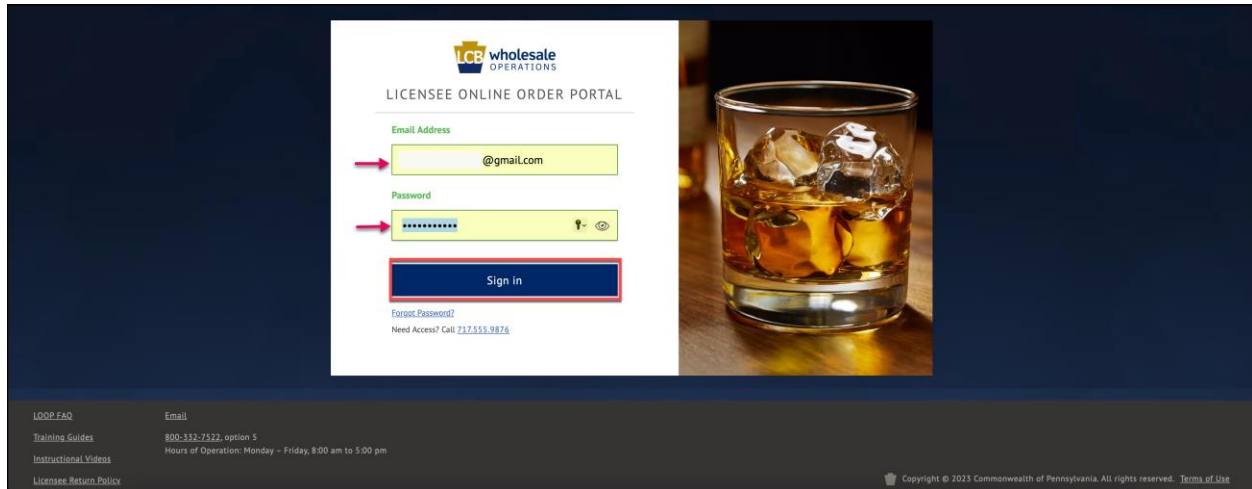
4. Click the **Select Button** to choose the LID from the list.



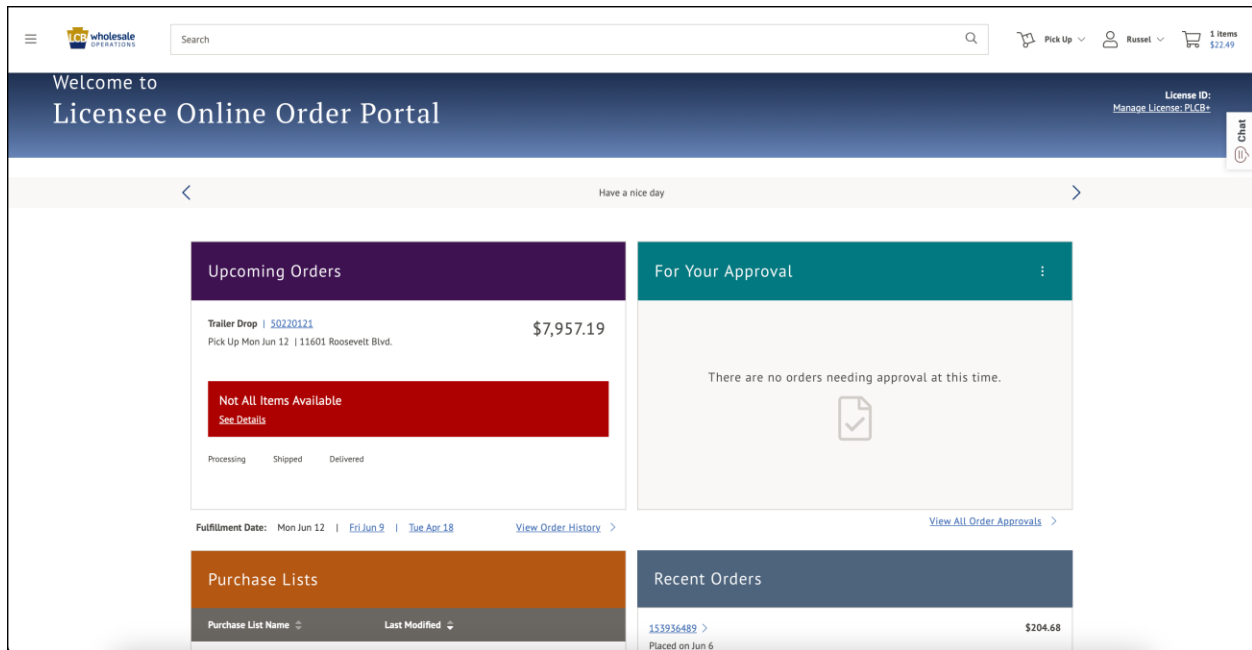
Note: Filter LID in the search bar or scroll through the list to select a licensee. Only licensees that have authorized the supplier to place Special Orders on their behalf are available to select.

Adding a Member

1. Log in to the Licensee Online Order Portal (LOOP).
2. Enter registered **Email Address** and **Password**, then click **Sign In**.

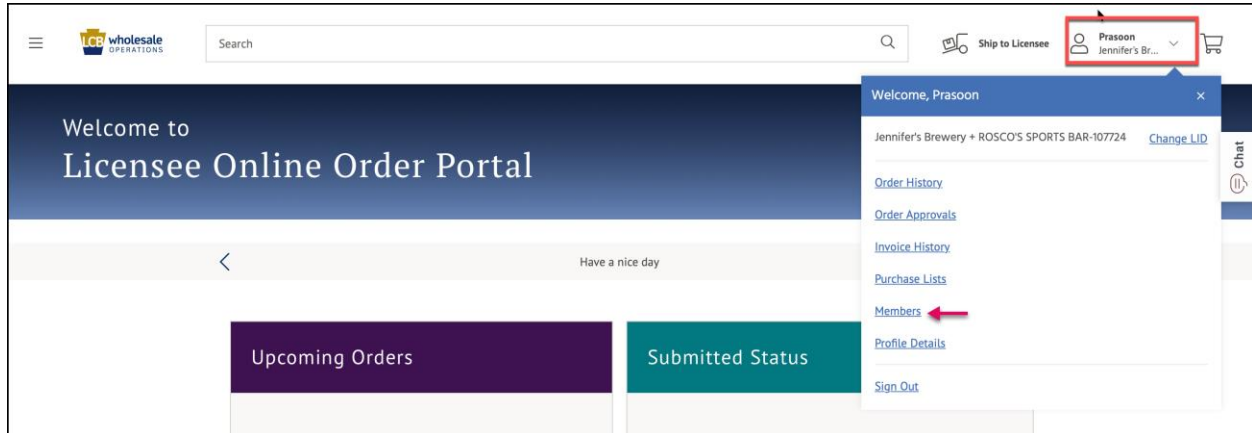


User is routed to the LOOP Dashboard.



Add Member

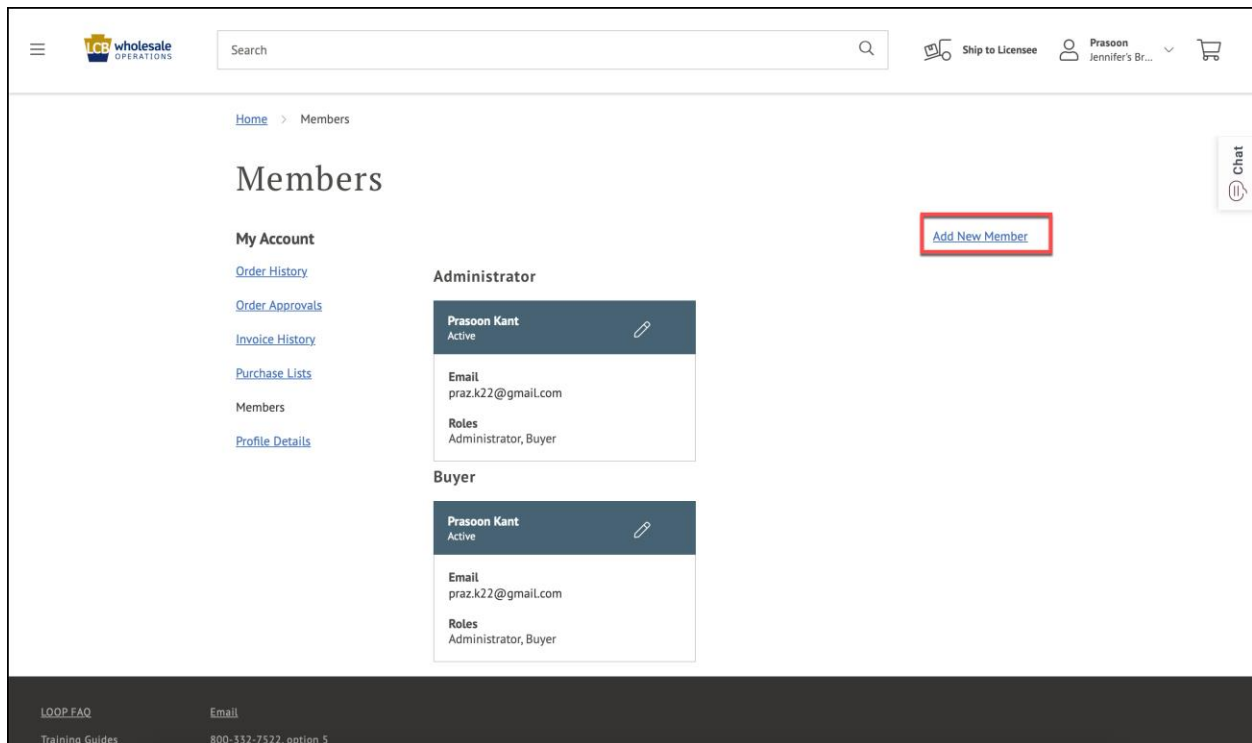
1. Click the **User Icon**, then click on **Members** from the dropdown list.



User is routed to the Members Page. All existing Administrator and Buyer information will be displayed.

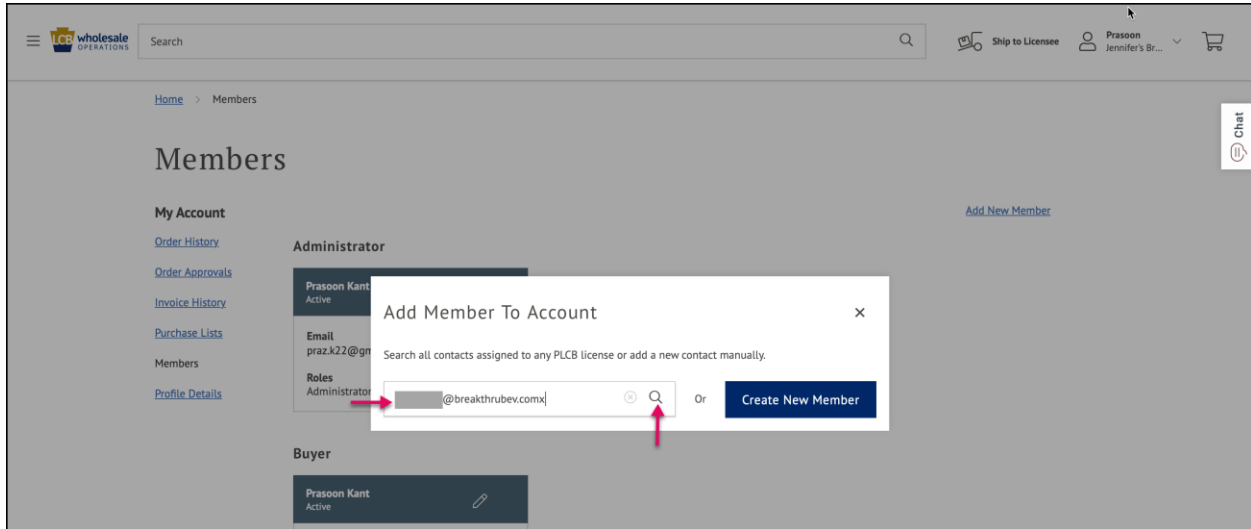
Note: The Member page displays members by role. If a person has been provisioned multiple roles, then the name will be displayed under respective roles.

2. Click **Add New Member** Link to add new buyer.



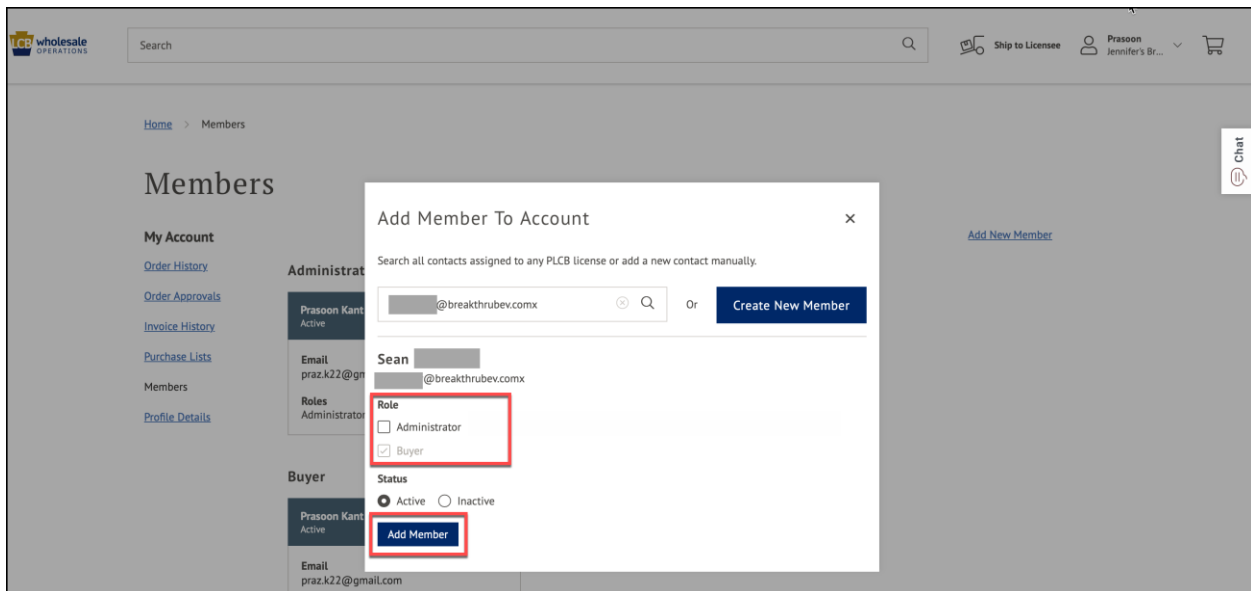
Add Member To Account pop-up window will appear.

3. Enter **Member's email address** or **name** in the Search Field, then click the **Magnifying Glass Icon** to locate the member.



Matching Name will appear in the Add Member To Account pop-up window.

4. Enable the **Role Checkbox(s)** to be provisioned, then click **Add Member Button**.



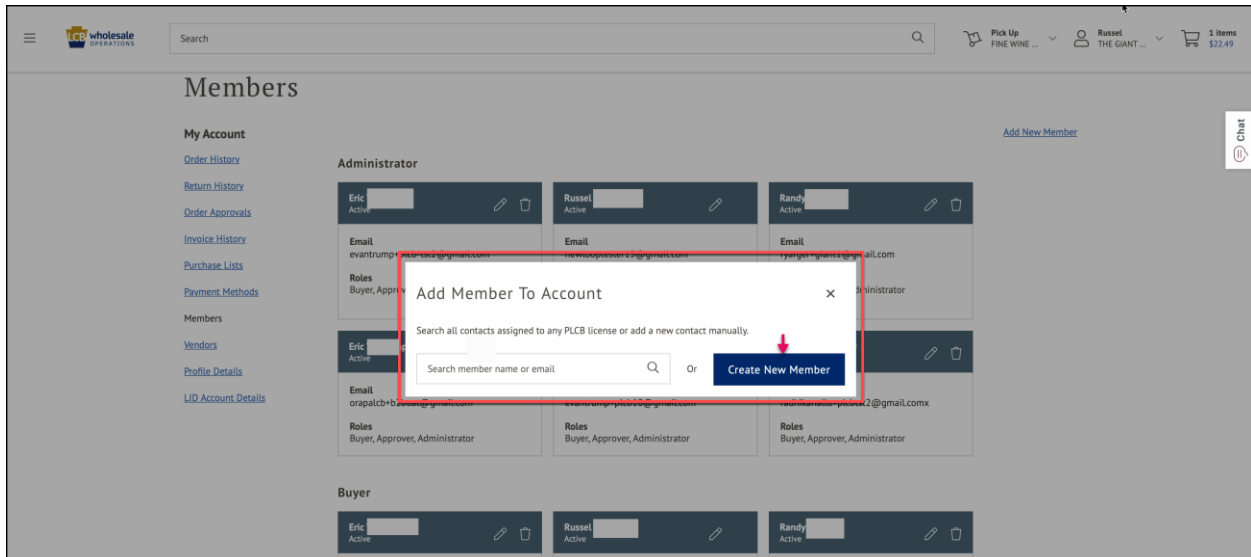
Selected member will be added to the account.

Note: Suppliers will only have “Buyer” or “Administrator” roles. The Buyer role defaults when a new member is added. Only 1 or 2 supplier members should be granted Administrator access.

Add New Member

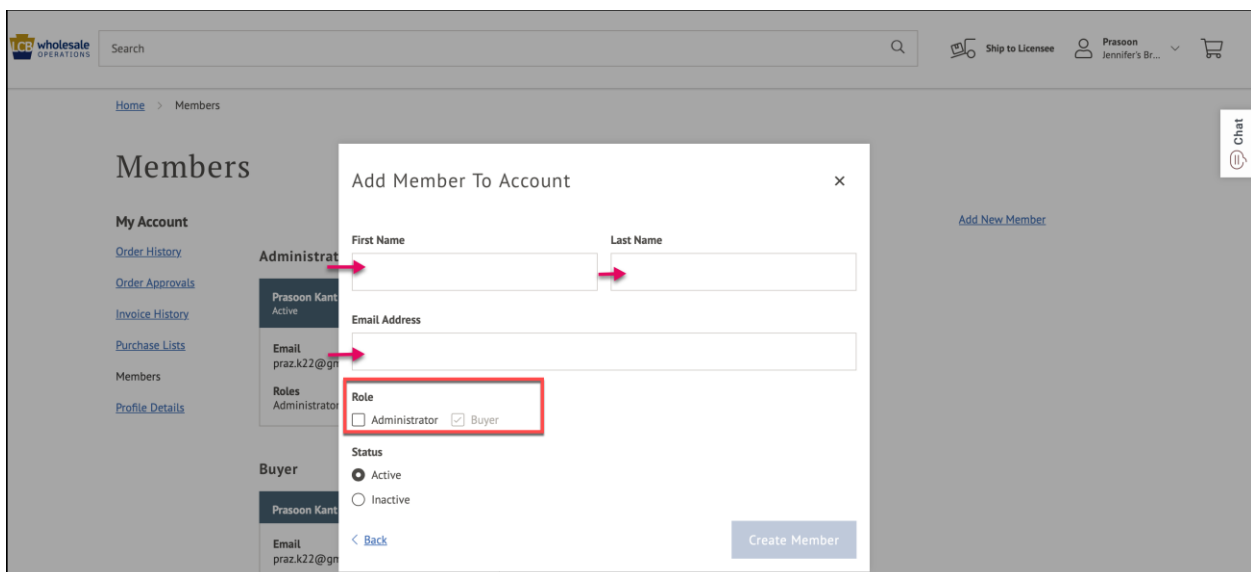
Follow these steps if the member does not appear in Search; a new member can be created:

1. Click **Create New Member Button** to add a new member.



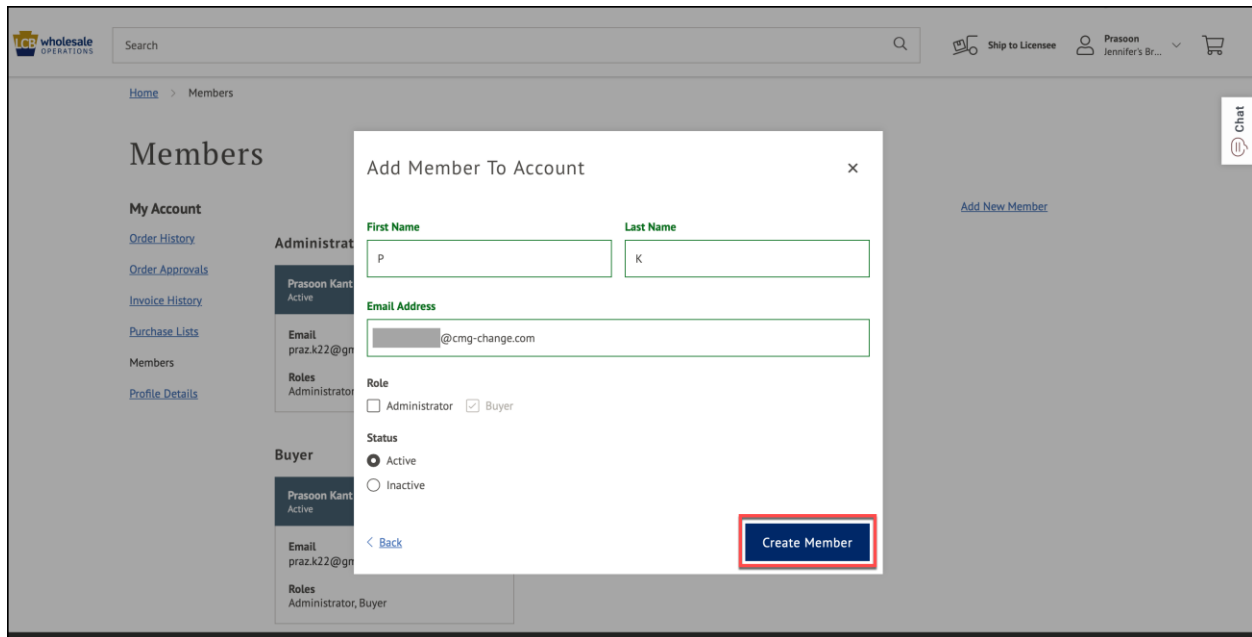
Add Member To Account pop-up window will open.

2. Enter [First Name], [Last Name], [Email Address], then enable the **Role Checkbox(s)** to provision the required role(s).

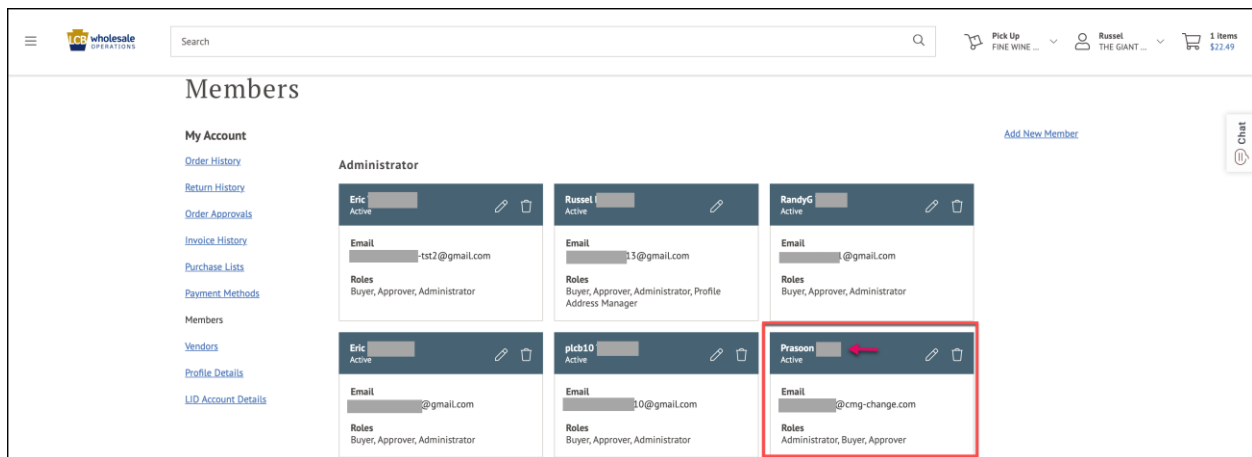


Upon populating the member's information Create Member Button will be highlighted.

3. Click **Create Member**.



New member is added.




Note: All new members will receive the Buyer role. Suppliers may also assign the Administrator role to members which allows them to add additional team members to the LID.

Supplier – Supplier Special Order – Adding (Supplier) Members in LOOP Quick Reference Guide



A member will be notified by an email when role assignments change with instructions on creating a password and logging in.

 **Fine Wine & Good Spirits**
Your account and role assignments have changed
To: P K Inbox

Dear [REDACTED],

The following accounts and roles have been added to the named licensee account.

If you are a supplier, the licensee named after your supplier name below has authorized you to place Special Orders on its behalf in LOOP.

Accounts and roles added:

Account	Now default account?	Role(s)	Site(s)
Jennifer's Brewery + WEIS MARKETS INC-60649	Y	Administrator , Buyer	Licensee Online Order Portal Fine Wine & Good Spirits

To create or reset your password so you can log in to LOOP, click this link: [reset password](#). If you have already established a LOOP password, you don't need to take any further action.

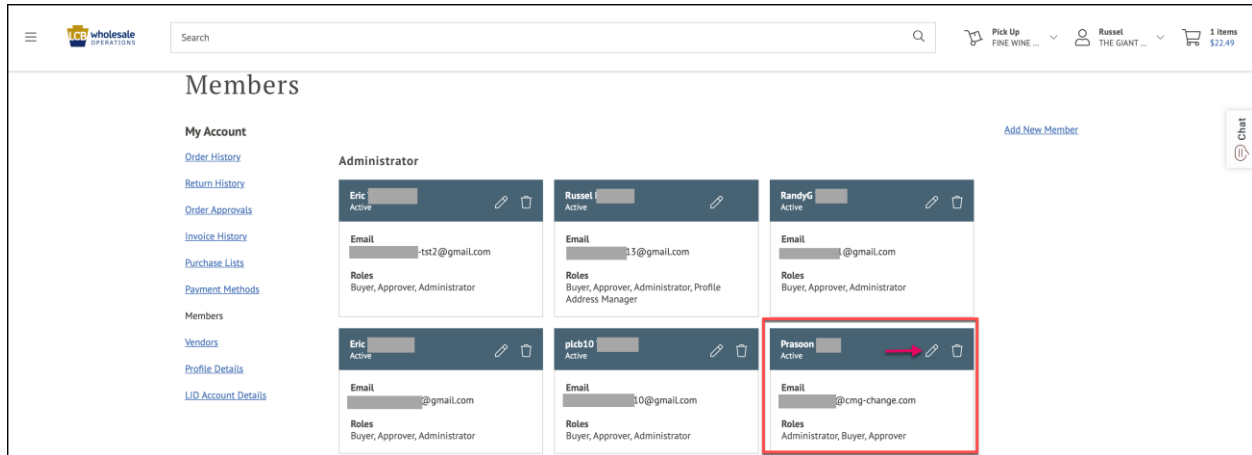
If you need additional access information, please contact (800) 332-7522, option 1 for Special Order or Option 5 for LOOP Support.

This is an automatically generated E-Mail, please do not reply.

Update Member

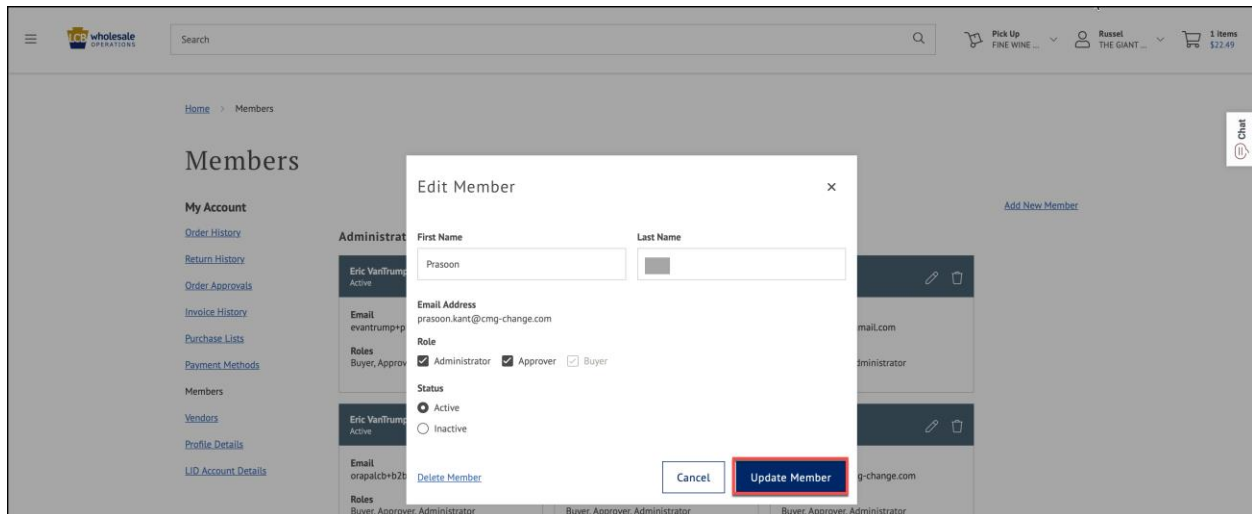
Follow these steps to update the member's access.

1. Click the **Pencil Icon** to make changes to the Member's access.



Note: Each name is listed according to the role(s) assigned. If a user is assigned multiple roles, they will be listed multiple times.

2. Click **Update Member** upon making the change(s).

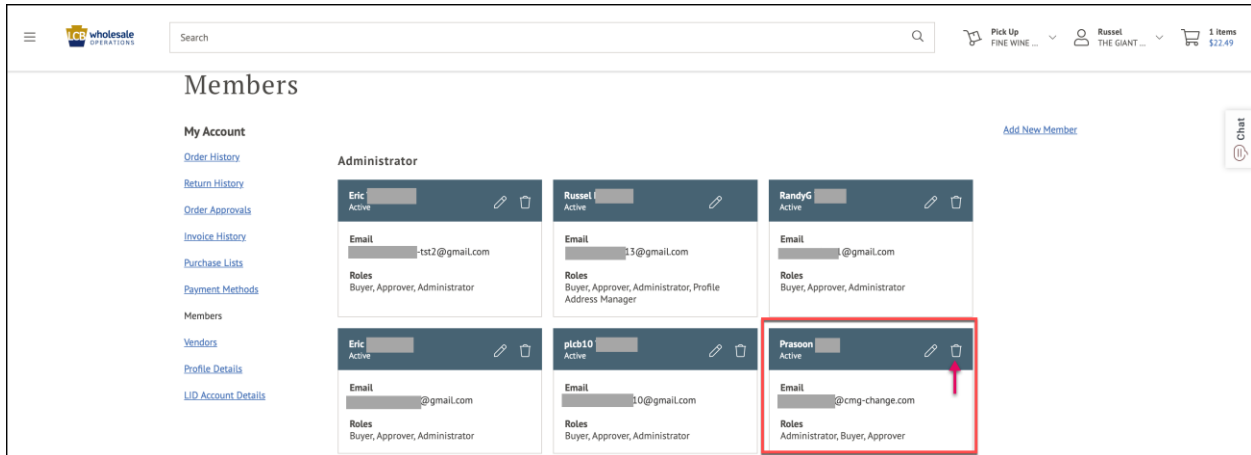


Note: The email address cannot be edited since it is directly tied to login credentials. If an email address is entered incorrectly, the user must be deleted and entered as a new member to correct the error.

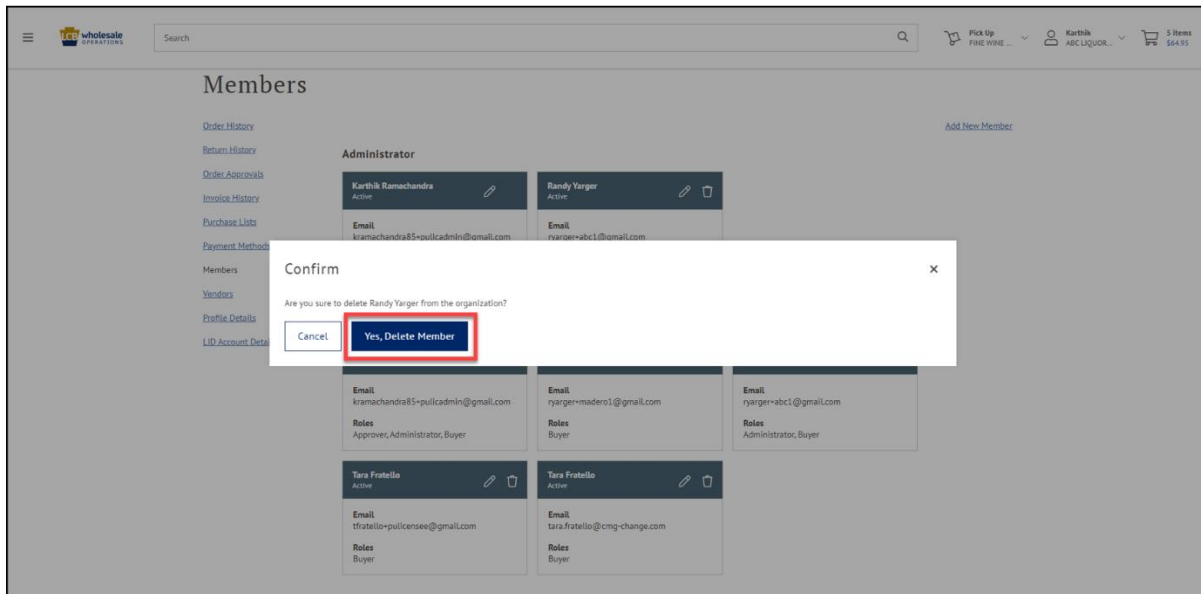
Delete Member

Follow these steps to remove a member from a LID.

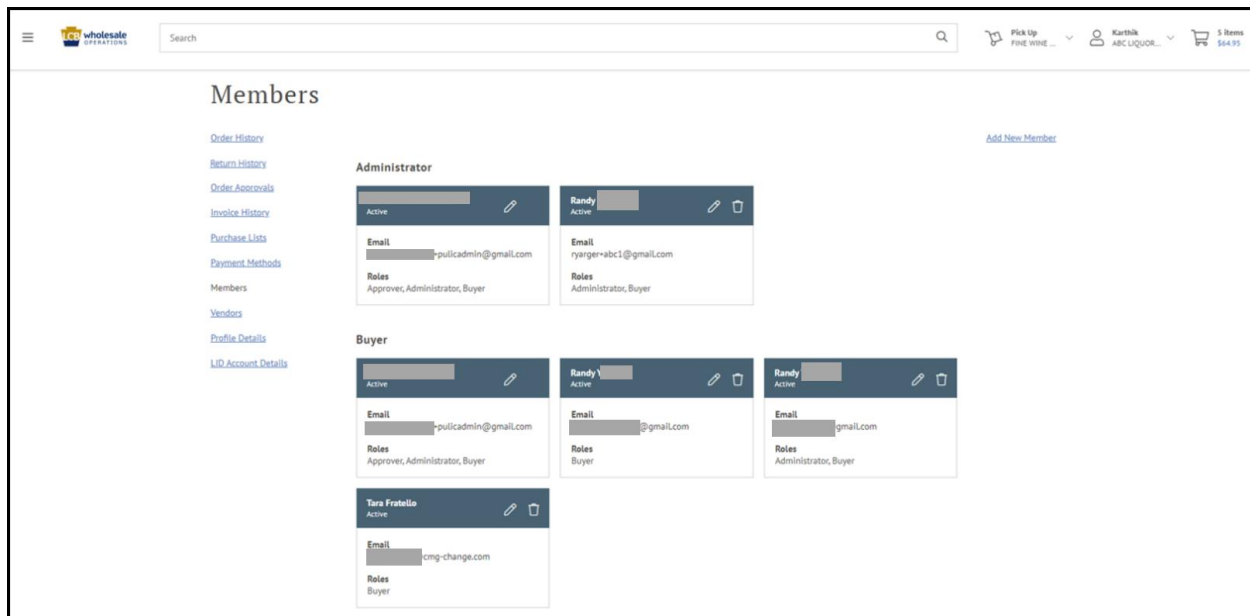
1. Click on the **Trash Can Icon** to remove the member's access.



2. Click **Yes, Delete Member**.



The Member Information is deleted.



Note: A deleted member will receive an email advising that they are no longer associated with this account. A member may not delete their own account, so Administrators must have another member within their organization delete their account. There should be one Administrator role for each supplier/licensee relationship.