

LCBO

Grocery
Management
System

VENDOR PORTAL USER'S MANUAL FOR SUPPLYING SOURCES



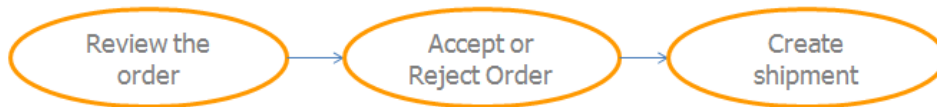
Version 1.12
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INTRODUCTION

This User's Manual is a reference tool that provides a general tutorial on the most commonly used features and options currently available in the LCBO Grocery Management System – Vendor Portal.

PROCESS OVERVIEW

Below are the key action items that the vendor is required to do for every order in their account:

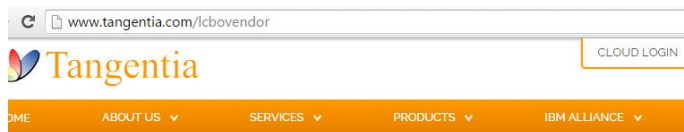


GETTING STARTED

Logging In

Open your web browser and type in the following URL: <http://www.tangentia.com/lcbovendor> on the address line, then press enter.

This will take you to the following screen:



LCBO VENDOR LOGIN



Login by entering your Username and Password, then click the Login button.

Desktop Page

The main Desktop page is the first screen displayed once you log in to your account. The following is visible on this screen:

- **Explorer menu** – which you will use to navigate the website.
- **Partner Filter** – used to filter your data by customer.
- **Quick Tasks menu** – used to access most common tasks used in LCBO GMS.
- **Logout button** – used when you are finished working and wish to conclude your session.
- **Order to Accept area** – which shows you what new orders have come in.
- **News & Notices section** – where information about new features is listed from time to time.
- **Recent Reports listing** – which shows you a list of the reports that have come in recently.

The screenshot displays the LCBO Desktop interface. On the left is the Explorer menu with options like My Commerce Desktop, Orders, Shipments, Invoices, Reports, Activity, Products, and Preferences. Below this is the Partner Filter and Quick Tasks section. The main Desktop area is divided into three columns: Orders to Accept (listing orders from LCBO-Longo's, LCBO-Sobeys, and LCBO-Loblaws), News & Notices (showing 'No News or Notices'), and Recent Reports (showing 'No Reports'). A user status bar at the bottom left indicates the user is logged in as TG02173Y and provides a Logout button. The Tangentia logo and support contact information are also present at the bottom left.

PROCESSING ORDERS

Accepting Orders

1) On the **Desktop**, under **Orders to Accept**, open the order by clicking the icon next to it.

The screenshot shows the 'Desktop' view of the vendor portal. On the left is an 'Explorer' sidebar with categories like 'Orders', 'Shipments', 'Invoices', etc. The main area is titled 'Orders to Accept' and lists several orders under 'LCBO-Other Grocers'. The first order, 'Order 45004_0001 received January 5, 2016', has a play button icon circled in red. To the right, there are sections for 'News & Notices' (showing 'No News or Notices') and 'Recent Reports' (showing 'No Reports').

2) Enter the Delivery Date and then click Apply.

The screenshot shows the details for 'Order 45008_0001'. At the top right, there are 'Tasks' and 'Reports' tabs. Under 'Tasks', the 'Apply' button is circled in red. The 'Delivery Date' field is also circled in red. Below the date field, the status is set to 'Accept'. The 'Ship To Location' is listed as '123 FRESH MARKET STREET, TORONTO, ON, L5T 3F4'. At the bottom, there is a table of items with columns for UPC, LCBO Item No., Size, Description, Qty. in Cases, and Quoted Price.

UPC	LCBO Item No.	Size	Description	Qty. in Cases	Quoted Price
4823005000174	0248138	500 mL	[Image]	27	\$17.47
	0006668	500 mL	[Image]	40	\$23.33
	0191874	473 mL	[Image]	25	\$27.30
Totals:				92	

Rejecting Orders

1) On the **Desktop**, under **Orders to Accept**, open the order by clicking the icon next to it.

The screenshot shows the 'Desktop' view of the vendor portal. On the left is an 'Explorer' sidebar with categories like 'Orders', 'Shipments', 'Invoices', etc. The main area is divided into 'Orders to Accept' and 'News & Notices'. Under 'Orders to Accept', there is a list of orders under the heading 'LCBO-Other Grocers'. The first order, 'Order 45004_0001 received January 5, 2016', has a small icon next to it circled in red. Other orders in the list include 'Order 45008_0001', 'Order 45009_0001', 'Order 46001_0001', 'Order 49010_0001', 'Order 49025_0001', 'Order 53018_0001', 'Order 53028_0001', and 'Order 53048_0001'.

2) Change the quantity of all the items to zero.

The screenshot shows the details for 'Order 45008_0001'. It includes fields for 'GMS Order No.', 'PO No.', 'Order Date', 'Delivery Date', 'Status', and 'Ship To Location'. Below this is a table with columns for 'UPC', 'LCBO Item No.', 'Size', 'Description', 'Qty. In Cases', and 'Quoted Price'. The 'Qty. In Cases' column is circled in red, showing values of 27, 40, and 25 for the three items. A 'Totals' row shows a total of 92 cases.

UPC	LCBO Item No.	Size	Description	Qty. In Cases	Quoted Price
4823005000174	0248138	500 mL	[Redacted]	27	\$17.47
	0006668	500 mL	[Redacted]	40	\$23.33
	0191874	473 mL	[Redacted]	25	\$27.30
Totals:				92	

- 3) To do this, click the item quantity value under **Qty in Cases**, type in "0", then click the check mark next to it to save the new value.

Order 45008_0001

Tasks Reports
Apply Close

GMS Order No. 45008_0001
PO No. COP-42
Order Date January 5, 2016
Delivery Date

Ship To Location
123 FRESH MARKET STREET
TORONTO, ON
L5T 3F4

Status Accept

Delivery Date
GMS Order No. 45008_0001
Order Status
Messages

UPC	LCBO Item No.	Size	Description	Qty. in Cases	Quoted Price
4823005000174	0248138	500 mL	<input type="text"/>	27	\$17.47
				<input type="text" value="0"/>	
	0006668	500 mL	<input type="text"/>	40	\$23.33
	0191874	473 mL	<input type="text"/>	25	\$27.30
Totals:				92	

- 4) Once done, type in any **Delivery Date** (as this is a required field), then click Apply. There is no need to create a shipment for this order as you acknowledged zero items.

Order 45008_0001

Tasks Reports
Apply Close

GMS Order No. 45008_0001
PO No. COP-42
Order Date January 5, 2016
Delivery Date

Ship To Location
123 FRESH MARKET STREET
TORONTO, ON
L5T 3F4

Status Accept

Delivery Date
GMS Order No. 45008_0001
Order Status
Messages

UPC	LCBO Item No.	Size	Description	Qty. in Cases	Quoted Price
4823005000174	0248138	500 mL	<input type="text"/> To Be Accepted	<input type="text" value="0"/>	\$17.47
	0006668	500 mL	<input type="text"/> To Be Accepted	<input type="text" value="0"/>	\$23.33
	0191874	473 mL	<input type="text"/> To Be Accepted	<input type="text" value="0"/>	\$27.30
Totals:				92	

Undershipping Orders

- 1) On the **Desktop**, under **Orders to Accept**, open the order by clicking the icon next to it.

The screenshot shows the 'Desktop' view of the Vendor Portal. On the left is the 'Explorer' sidebar with categories like 'My Commerce Desktop', 'Orders', 'Shipments', 'Invoices', 'Reports', 'Activity', 'Products', and 'Preferences'. The main area is titled 'Orders to Accept' and lists several orders under 'LCBO-Other Grocers'. The first order, 'Order 45004_0001 received January 5, 2016', has a red circle around its expand icon. To the right, there are sections for 'News & Notices' (showing 'No News or Notices') and 'Recent Reports' (showing 'No Reports').

- 2) Change the quantity of the items that you need to undership.

The screenshot shows the details for 'Order 45008_0001'. At the top, there are 'Tasks' (Apply, Close) and 'Reports' buttons. Below this, order details are listed: 'GMS Order No. 45008_0001', 'PO No. COP-42', 'Order Date January 5, 2016', 'Delivery Date' (with a calendar icon), 'Status Accept', and 'Ship To Location 123 FRESH MARKET STREET, TORONTO, ON, L5T 3F4'. A table below shows the items to be shipped:

UPC	LCBO Item No.	Size	Description	Qty. in Cases	Quoted Price
4823005000174	0248138	500 mL	[Image]	27	\$17.47
	0006668	500 mL	[Image]	40	\$23.33
	0191874	473 mL	[Image]	25	\$27.30
Totals:				92	

The value '27' in the 'Qty. in Cases' column for the first item is circled in red.

- 3) To do this, click the item quantity value under **Qty in Cases**, type in the new quantity, then click the check mark next to it to save the new value.

Order 45008_0001

Tasks Apply Close Reports

GMS Order No. 45008_0001
 PO No. COP-42
 Order Date January 5, 2016
 Delivery Date
 Status Accept

Ship To Location 123 FRESH MARKET STREET
 TORONTO, ON
 L5T 3F4

UPC	LCBO Item No.	Size	Description	Qty. in Cases	Quoted Price
4823005000174	0248138	500 mL		27	\$17.47
				<input type="text" value="0"/>	
	0006668	500 mL		40	\$23.33
	0191874	473 mL		25	\$27.30
Totals:				92	

- 4) Once done, type in the **Delivery Date** (as this is a required field), then click Apply.

Order 45004_0001

Tasks Apply Close Reports

GMS Order No. 45004_0001
 PO No. COP-41
 Order Date January 5, 2016
 Delivery Date

Ship To Location 123 COPPA'S STREET
 TORONTO, ON
 L5T 3F4

UPC	LCBO Item No.	Size	Description	Qty. in Cases	Quoted Price
	0000018	1980 mL		20	\$25.91
			To Be Accepted	0	
3080210008253	0006106	1980 mL		20	\$25.53
	0006668	500 mL		10	\$23.33
Totals:				50	

PROCESSING SHIPMENTS

- 1) To view all orders, click **Orders** and then **All** under the **Explorer Menu**. You will see the **Ac** and **Sh** columns on the right hand corner of the screen. **Ac** stands for Acknowledged. **Sh** stands for Shipped. All orders that have been **acknowledged** will have a green status under **Ac**. All orders that have been **shipped** will have a green status under **Sh**. Any blank circles indicate that such orders are pending processing. Open the order that you are ready to ship.

Explorer	List Orders						
My Commerce Desktop	Order Date	Ship Date	PO No.	Filter	Tasks	Reports	
▼ Orders	<input type="text"/>	<input type="text"/>	Begins	Apply	<input type="text"/>		
Activity	<input type="text"/>	<input type="text"/>		Clear			
Pending	Customer	Store No.	PO Number	GMS Order No.	Order Date	Delivery Date	Ac Sh
Cancelled	LCBO-		Orderack	54027_0001	02 Mar 2016	02 Mar 2016	▲ ●
Unprinted	LCBO-		feb24price	54010_0001	24 Feb 2016	24 Feb 2016	● ●
Unshipped	LCBO-		sce3feb23	54006_0001	23 Feb 2016	24 Feb 2016	● ●
Today	LCBO-		tes2feb19	53055_0001	19 Feb 2016	20 Feb 2016	● ●
All	LCBO-		newor19	53054_0001	19 Feb 2016	20 Feb 2016	● ●
► Shipments	LCBO-		sobeys17	53049_0001	17 Feb 2016	18 Feb 2016	● ○
► Invoices	LCBO-		SOB-28-D11	53038_0001	16 Feb 2016	17 Feb 2016	● ●
► Reports	LCBO-		Pricecha3	53034_0001	12 Feb 2016	16 Feb 2016	● ○
► Activity	LCBO-		Revoke2	53021_0001	11 Feb 2016	11 Feb 2016	● ●
Products							
Preferences							

- 2) Click **Prepare Shipment**.

Order **53049_0001**

Tasks		Reports	
<input style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 10px;" type="button" value="Prepare Shipment"/> <input style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 10px;" type="button" value="Apply"/> <input style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 10px;" type="button" value="Close"/>		<input type="text"/>	

GMS Order No. 53049_0001
 PO No. [REDACTED]
 Order Date February 17, 2016 Ship To Location [REDACTED] 3
 Delivery Date February 18, 2016 1 KING STREET
 Toronto, ON
 GMS Order No. 53049_0001 M4M 4M4

Order Status .
 Messages

UPC	LCBO Item No.	Size	Description	Qty. in Cases	Quoted Price
9028800751428	0032359	500 mL	[REDACTED]	25	\$7.91
Totals:				25	

3) Fill in the **Delivery Date**, **Carrier**, **Bill of Lading No.**, and **Probill No.**, then click **Apply**.

List Orders					
Ship Date	Delivery Date	Carrier	BOL No.	Probill No.	Tasks
03/04/2016	02/18/2016				Apply Close
Product Code	Partner Code	Description		Qty.	Selected
<i>Ship To : 05028</i>					
0032359	0032359	500 mL		25	<input checked="" type="checkbox"/>
TOTAL:				25	

4) The order processing is now complete.

HELPDESK & SUPPORT CONTACT INFORMATION

For Technical Support Assistance, please contact:

LCBO GMS Helpdesk

1-888-826-4334

lcbohelp@tangentia.com

For Account-related Assistance (including product listing & additional user requests), please contact:

LCBO Wholesale Operations Group

(416) 365-5842

wholesaleservice@lcbo.com

LCBO GMS (Grocery Management system) is powered by

