Licensee Ordering Manual

Table of Contents

Support Contact Information	3
LCBO Customer Care	3
Introduction	3
Getting Started	4
Login to Ecommerce Platform	4
Using the Lefthand Navigation Bar	6
My Account	6
Account Information	
Company Profile	8
Company Structure	9
Alias Users	11
Company Users	11
Roles and Permissions	
Ordering	
Placing Your Order	
Search Function	16
Quick Order Function	
Pickup from LCBO Retail Stores/Depots	
Change Delivery to Pick up Option	20
Order History	23
Requisition Lists	25
Updating your Requisition List	28
Delete Requisition List	29
Order Pickup Details	29
Changing your Default Pickup from Retail Store	30
Checking Out	31
Payment Method	31
Delivery	
Returns Policy	
Resources	33

Support Contact Information

LCBO Customer Care

For enquiries regarding eCommerce site or order questions contact:

Live chat, submit help form, or call 1-800-668-5226 / 416-365-5900 8.30am – 6pm (Mon-Fri) or 9am – 6pm (Sat) email customer service

For enquiries regarding your fulfillment, delivery and business support e-mail us at licensee@lcbo.com We will respond within one (1) business day.

Introduction

This User Manual is a reference tool for Licensee's that provides a general overview of the ordering-process-through the LCBO's Ecommerce Platform Ecommerce Platform including fulfillment, shipping and returns.

To place an online order for eligible beverage alcohol products with the LCBO, you require access to our Ecommerce Platform.

If you obtained the Liquor Sales License from AGCO before May 17, 2024, your online account will be created by LCBO and log in instructions will be sent to you via an email before May 27, 2024.

If you obtained the Liquor Sales License from AGCO after May 17, 2024, LCBO would create the account on your behalf and a system welcome email will be sent to the email address registered with AGCO.

Access will be provided to you via email with a link to login. Use your Operator email and click forgot password to set up your account.

If you do not receive an e-mail with log-in instructions, contact Customer Care for information about your account.

Getting Started

Login to Ecommerce Platform

LCBO Congratulations on receiving your new licence! Hello Licensee Name. LCBO introduced a new online ordering site for wholesale establishments and you have been assigned as the Company Admin for Business Name Here at wholesale.lcbo.com. As a Company Admin, you can place orders, create and manage company users, manage permissions and update billing addresses. Visit wholesale.lcbo.com to sign in and start shopping! Additional online ordering information is available at LCBO Wholesale | Doing Business with LCBO. If you need assistance, contact LCBO Customer Care.

Online Order FAQ Terms & Conditions

This email was sent by the Liquor Control Board of Ontario (LCBO),
100 Queens Quay East, 9° Floor, Toronto, Ontario M5E 0C7.

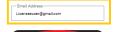
Please do not reply to this message - it was sent from an address that cannot

You will receive a welcome email to visit wholesale.lcbo.com.

LCBO

Password Reset

Please enter the email address associated with your LCBO.com account. We will send you an email within a few minutes with a link to reset your





Poing Business with LCBO
For all information related to working with the LCBO, visit Doing
Business with LCBO.



Need Heip?

For any website enquiries or issues, please reach out to our <u>Customer Care</u> team via phone, email or chat. You will be required to select **Forgot Password** to access the Ecommerce platform.

LCBO

Password Reset

Please enter the email address associated with your LCBO.com account. We will send you an email within a few minutes with a link to reset your password.







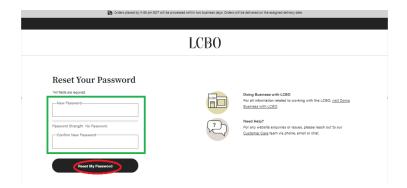
Doing Business with LCBO
For all information related to working with the LCBO, <u>visit Doing</u>
<u>Business with LCBO</u>.



Need Help?
For any website enquiries or issues, please reach out to our <u>Customer Care</u> team via phone, email or chat.

Please enter the email address associated with your Licensee account. Then click Reset my Password.

You will immediately receive an email to reset your account password. Click the link and follow the steps to change your password.



Once you have reset the password, you will be able to log in. You will not have to reset your password every time you log in, only on the very first time you are using the Ecommerce platform.

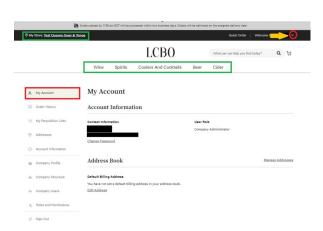
LCBO						
Account Sign In						
"Pecanish field	Doing Business with LCBO					
- Situl Addesir	For all information related to working with the LCSO, <u>placing</u> Subtreat with LCSO.					
	(PTS) Nor a Wholesele Common?					
- Pattern P	Visit LCO per to discover and shop our full assertment of products					
toract tout transports	For any uniquity empirical or insures, please result out to our					
and a second	Customer Care team via phone, arrest or street					

The password strength must be "green".

As a best practice we recommend that your password be at least 10 characters, 1 numerical value, 1 capital letter and 1 special character. Don't have an account? Contact Customer Care

⊕ My Store: <u>Test Queens Quay & Yonge</u>					Quick Order Welcome Back,		
			LCBO		What can we help you find today? Q		
	Wine	Spirits	Coolers And Cocktails	Beer	Cider		
	•						
		10			A DA		
Welcome to							
wholesale.lcbo.co	m!		P '				
Ordering inventory for your business ju	ist got easier.			No.			
						4	
				1			
Your new shopping experience features:							
You can quickly view up-to-date inventory,		order, view your	order history and make changes to yo	our account. Or	nce you've completed an order, email not	fications will ke	
you updated about the progress of your ord	der.						
Quick tips on how to start shopping:							
You may want to visit the My Account page	. Here, you ca	n add people to	your business account which allows	them to view o	r make orders on your behalf. You can als	o create a	
requisition list - which is a list of products		regularly and vie	w your order history.				

Once you have successfully logged in you will see the landing page.

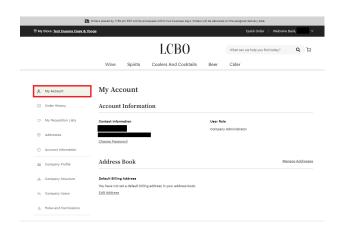


To navigate to your account click the **Welcome Back** carot in the righthand corner of your

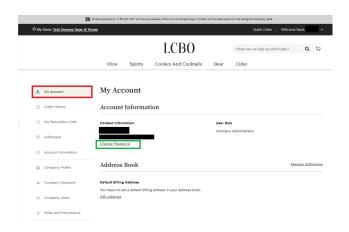
screen.

Using the Lefthand Navigation Bar

My Account

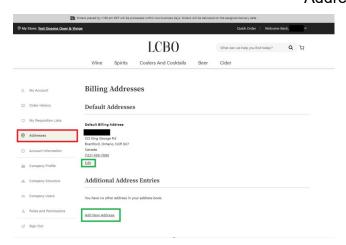


From the **My Account** page, you can review contact information and change your password. You may also edit the billing address section.



To change your Ecommerce Platform password, click the **Change Password** button under your name and contact email.

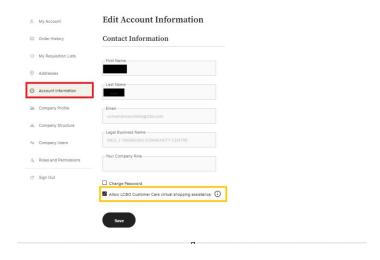
Addresses



This page does not affect your ordering or payment ability.

Your billing address must be consistent with the account used to place orders with. The name and billing address provided must match exactly with the name and address on your credit card statement. If you continue to experience problems, please contact your credit card issuer for assistance, or try another credit card.

Account Information

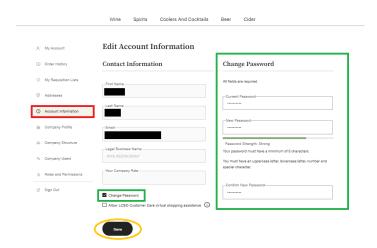


The **Contact Information** tab will showcase a summary of the account.

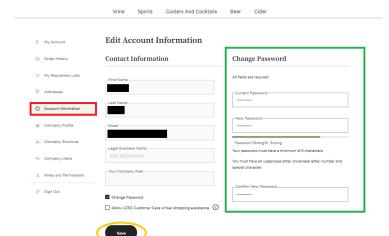
Please ensure that you have checked off the box that says Allow LCBO Customer Care virtual shopping assistance.

Should you have technical difficulties or become locked out of your account, an LCBO Customer Care agent can assist you.

From this page you can also change your Ecommerce Platform password.



To reset your password, simply enter a new one in the **New Password** field and then confirm it by reentering the same new password in the **Confirm New Password**.



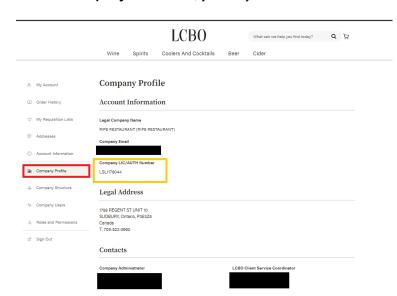
Once you click **Save**, you will be redirected to the Login screen.



Enter you email and password and click Sign In

Company Profile

From the Company Profile tab, you may review basic information for your account.



Account information will showcase your business name and the email address your company is linked to in Ecommerce Platform.

The **Legal Address** refers to the legal address reflected on your AGCO license.

The Contacts information will showcase your role as the Licensee holder and again, show the email address linked to your account. This section also shows your Client Service Coordinators name and email address.

Please note this page will remain static throughout your authorization period; the information shown is for transparency and cannot be changed.

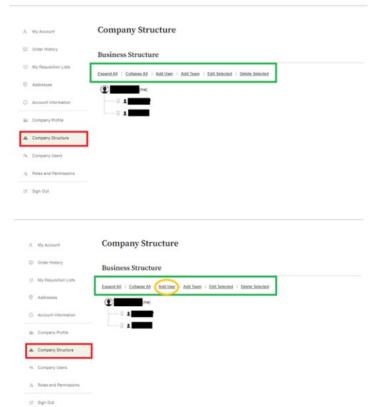
The Legal Address refers to your business premises location reflected on your AGCO license.

A note on Shipping Information: Orders will be placed as full pallets and may be split for truck loading purposes and noted in the instructions.

Company Structure

You may set up an internal company structure on your Ecommerce Platform account for your Licensee. Licensees with appointed managers, can create rules by which to delineate their access from yours, more on this topic in **the Roles and Permissions** section.

To view your company structure at any time, click the **Company Structure** tab from the lefthand navigation tab.



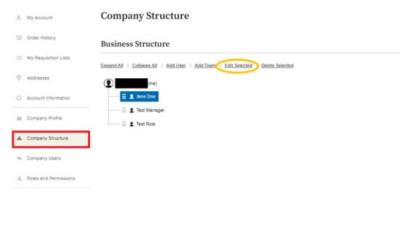
You can add to this structure, this will differ from Licensee to Licensee depending on their business needs and circumstances.

We recommend that you create roles for people who will be creating orders on your behalf, for example, bar managers/ restaurant managers.

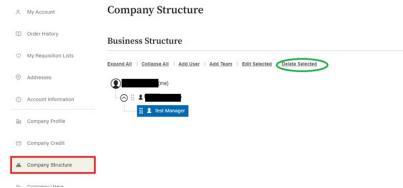
To add a user click Add User.



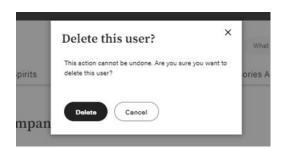
Fill in the pop –up as required. Then click the **Save** button.



To edit a user's name, role, or status, click on the role you wish to modify, then click **Edit Selected**.

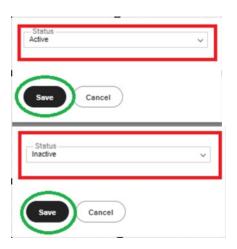


To delete a role, simply select the role and click **Delete Selected**.



Then click the **Delete** button.

Once you delete a role it will not appear on the structure tree.



If you wish to keep the role, but block someone's access to Ecommerce Platform, you can select the person/s name/ role and click **Edit User**.

At the bottom of the pop-up, in the Status field, toggle from **Active** to **Inactive**.

Alias Users

Please note that for all email confirmations to be received to your primary email account you must create an alias to retain visibility on what's being ordered on your account and what you will be charged for. To create an alias email, use your primary email then add "+1" as per the example below.



To ensure you receive email notifications of your orders, use an alias email account (i.e. john.smith+1@gmail.com) that is linked to your email (ex. john.smith@gmail.com).

Company Users

To add a **Company User**, click the **Company Users** Tab from the left-hand navigation, then select **Add New User**.



Once you click **Add New User** a pop-up panel will appear and you can input their name, role, etc.

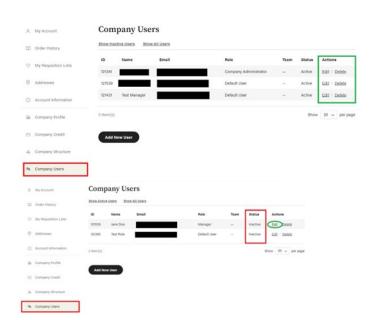


You can edit their status at any time by toggling the status options.

For example, if the Licensee goes on vacation, they can set their manager to **Active**.

Then when the Licensee returns from vacation and resumes the responsibility for ordering, they may set the manager's status back to **Inactive**.

You may inactivate a user by clicking the **Edit** button next to their name.



If you must reactivate a user, click the **Show Inactive Users** button at the top of the list.

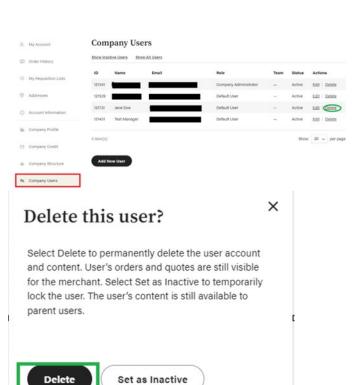
Which will enable you to access a user who you've previously set to **Inactive**, so you may set them back to **Active**.

Then toggle their **Status** to **Active**.



They will then appear on your list of **Active**

Should you decide to delete a user, for example, if your manager leaves their employment at your Licensee location. You can delete them from the account altogether by selecting the **Delete** button under the **Actions** column.



Cancel

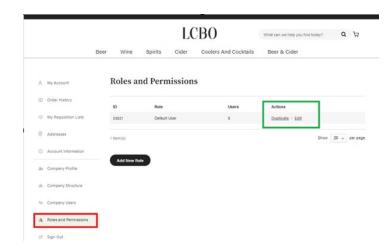
PLEASE NOTE: that when you inactivate and delete a user, they will not be able to log into Ecommerce Platform.

We recommend as a best practice to only set up your manager as an alternative for placing orders for the Licensee location.

Click Delete.

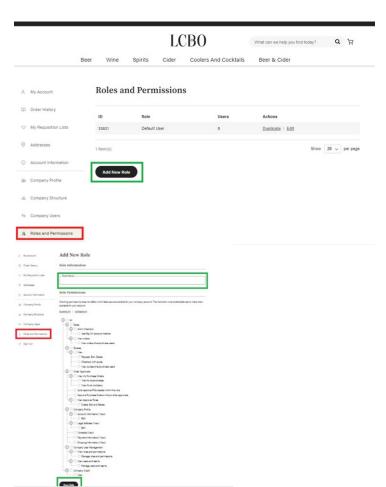
Roles and Permissions

If you create an internal business structure for your Ecommerce Platform ordering account or decide to add a manager role to place orders on your behalf. You can enable and restrict what that role/ user has access to do within the account.



You may **Duplicate**/ **Edit** or **Delete** these roles from this page as well.

Licensee holders will be set up initially as the **Default User.**

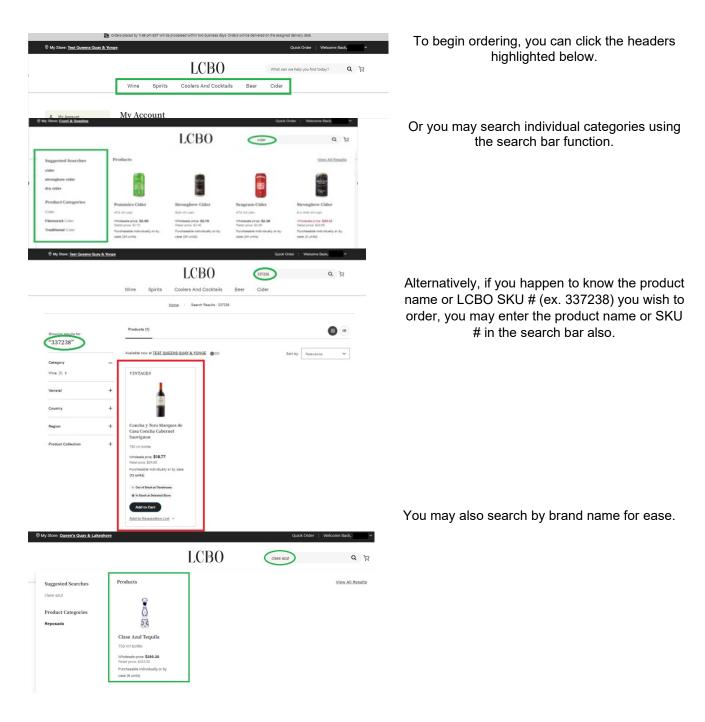


To duplicate a role, click the **Duplicate** button in the Actions column. This option automatically duplicates your role exactly, and if you create this role for someone else, they will have access to everything in the Ecommerce Platform account.

To add a new role and modify their permissions, click **Add New Role**.

Check off the permissions you wish this role to have. These permissions will affect what the role can do on your account.

Once you are happy with the selection, click **Save Role**.

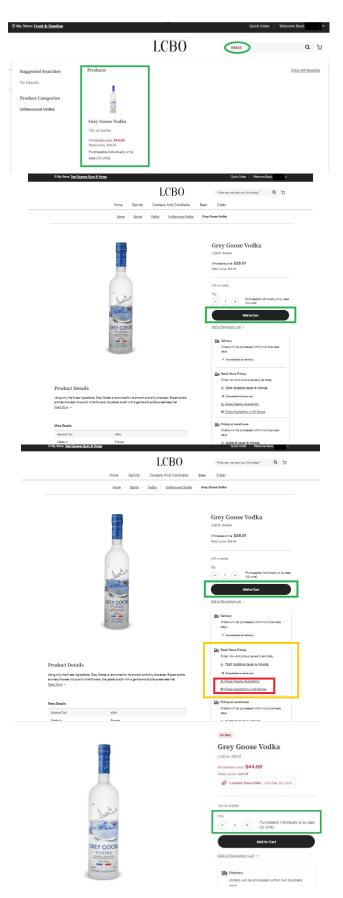


Placing Your Order

The system will reset and products in your cart will be removed if there is no activity for more than 30 minutes. Please allow adequate time to build the cart or create a requisition list for fast and efficient ordering.

Licensees will be able to shop for any product available online, the inventory is updated in real time and will show quantities available at the LCBO locations.

Search Function



Using the **Search** function, located at the top right, type in a product's brand name or LCBO item number and a list of products will appear.

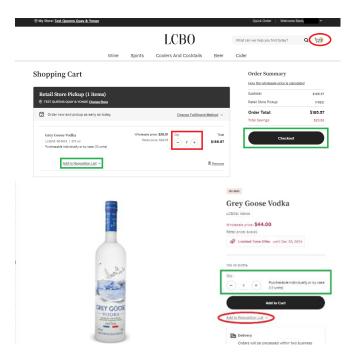
Alternatively, you can also type individual LCBO SKUs in the Search bar in the top right-hand corner of the screen.

To add the item(s) to your cart, click the **Add to Cart** button.

You will also be able to view whether your default pick up store has inventory in the selected product. If not, you do have the option to check other store locations. Please note that only LCBO Pick-up stores will be an option, not every LCBO retail store will be listed as a result. You may change your default store if required.

Please note that your default LCBO retail store will be determined based on your business premise postal code. Should you decide to change the default store, you can at any time.

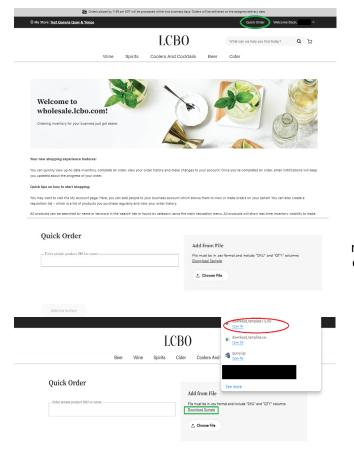
Once you click **Add to Cart** the cart icon in the top right-hand corner of the screen will update in case quantity. To verify the correct quantity you require, you can adjust the quantity on the page prior to adding it to your cart. Or you may click the cart icon and adjust the case quantities you need by using the "-"and "+" icons from there.



Once you are happy with the quantities amount, you can click the **Checkout** button to place your order.

If this is a standard order for you, you may want to consider adding it to your requisition list by clicking the **Add to Requisition List** under the product.

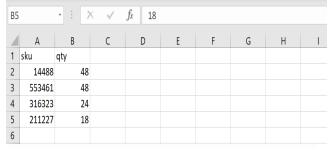
Quick Order Function



Quick order allows for fast ordering and is accessed by clicking on **Quick Order** at the top right of the screen.

The user can type in the product name or LCBO item number and a list of products will appear. This is more efficient than separately pulling up the full item screen for each product.

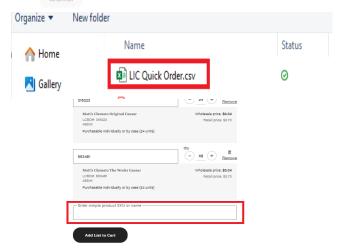
You may create a quick order by downloading a sample template in excel, simply click **Download Template.**



Then open the downloaded file and populate with desired SKU's and quantities.

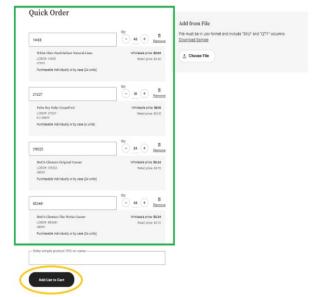


Then save the excel file on your desktop, or in a folder you can easily access. Then click **Choose File**.



Then upload the file for your order.

Or you may type in the LCBO SKU numbers individually.

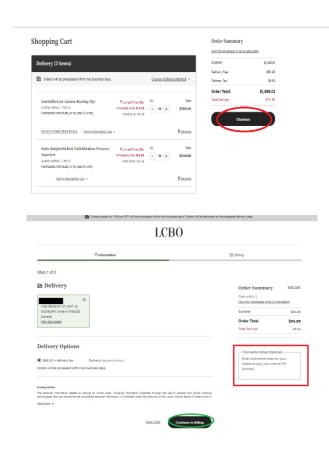


Once you are happy with the order, click **Add List to Cart** and the items will be added to your shopping
cart.

Proceed to Checkout.

Please note that it may take a few moments to update your cart for larger orders.





To preview your order at any time, click the cart icon in the top righthand corner of the screen.

Please note that the comments section does not appear on your order or invoicing so please do not use this feature as a means of communication.

This section also does not allow special characters. Your order will be blocked if you attempt to use the following: !@#\$%^&*.

Pickup from LCBO Retail Stores/Depots

Licensees can also shop from any of the 680 LCBO retail stores, with 530 represented online from LCBO Retail locations and depots where orders will be packed and ready for pickup within two business days – all through wholesale.lcbo.com.

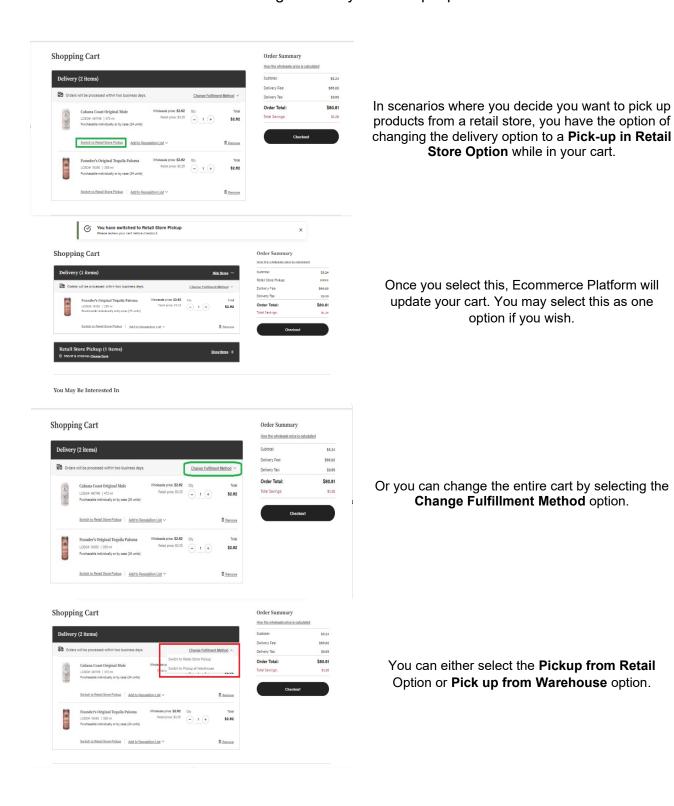
The depots offer both pick-up and delivery options for your convenience. All completed orders must be picked up within 3 days otherwise they will be returned to stock.

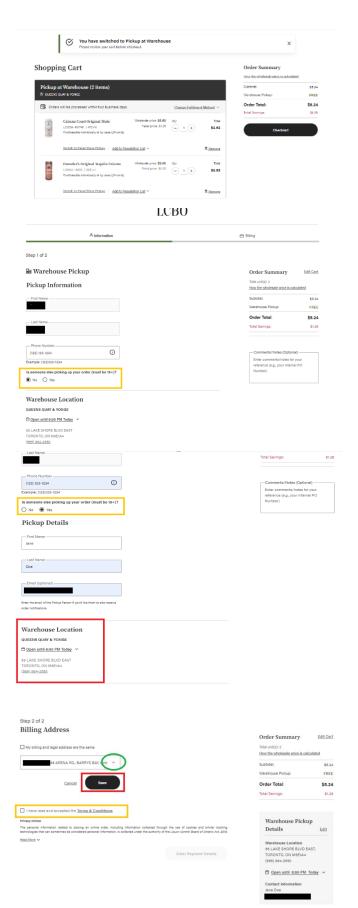
Licensees can have a designate pick up their order as needed. It is the responsibility of the Licensee holder and/ or their designated pick-up person to verify the order invoice matches the products in their physical order. Please ensure the order is correct prior to leaving the depot/ retail store premises.

The designate information must be provided to the Depot with the order submission and will show on your invoice. Upon pick-up a copy of the invoice and valid government issued ID must be presented to the depot attendant.

You will receive notifications at each stage of the ordering fulfillment process.

Change Delivery to Pick up Option





If you select the **Pickup from Warehouse** Option, a green confirmation message will appear. You will notice the **Order Summary** value change.

Click Checkout to proceed.

You as the Licensee holder, will appear as the default pick up person. Should you wish to appoint a designated pick-up person to pick up the products on your behalf. Click Yes in the "Is someone else picking up your order (must be 19+) field.

Enter in their contact information in the spaces required.

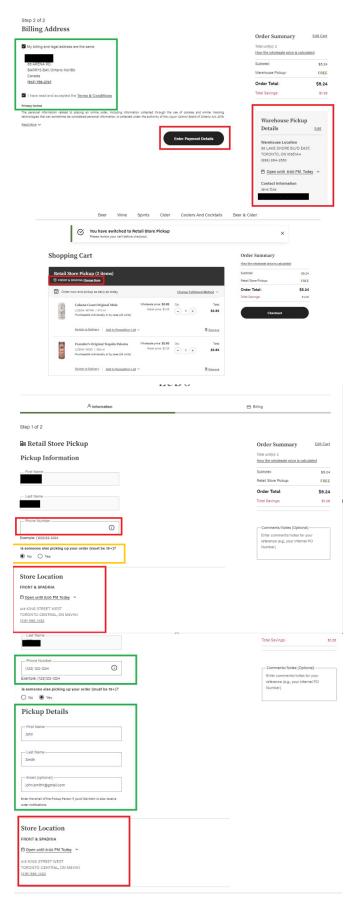
Please be advised that your designated pick-up person must be 19 years of age or older and be able to provide a valid Government Issued ID upon pick up. Click **Proceed to Billing**.

The account logged-in will and the designate (if selected) will receive the ready for pick-up e-mail.

If you wish to update your billing address, click the down arrow beside your default billing address.

Then click **Save** to update the order.

If your billing address does not require editing, click the My billing and legal address are the same checkbox. Please review the Terms and Conditions and confirm that you have read them by clicking the Terms and Conditions checkbox.



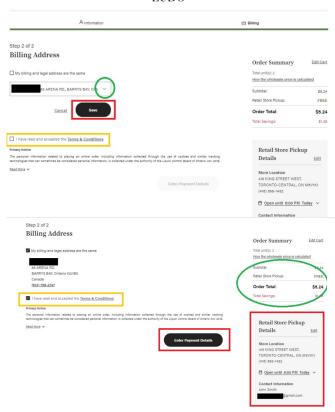
Click **Enter Payment Details** to proceed. Once you have paid you will receive the order confirmation email. Your designated pick-up person will receive the Pickup email confirmation when the order is received and ready for pick up.

When you select **Pickup from Retail Store**, your default store will appear as the pickup site. Then click Checkout to proceed.

You will notice that you (the Licensee holder) will appear as the default pick up person. If you do intend to pick up the product yourself from the LCBO retail, simply add your preferred phone number in the format given (ex. (123)123-1234).

If you wish to have a trusted designate pick up the product on your behalf, click "Yes" in the Is someone else picking up your order (must be 19+) field. Your chosen designated pickup person must be 19yrs of age or older, and they must provide a valid form of Government Issued ID upon pickup.

LCBO



Confirm that your **Billing Address** is correct, if not, you can edit the billing address from this page by clicking the **Edit** button under your default billing address.

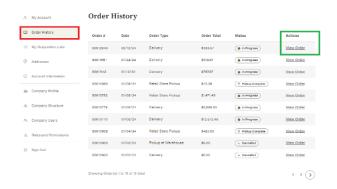
Click the down arrow beside your default billing address and click edit.

Then click **Save**.

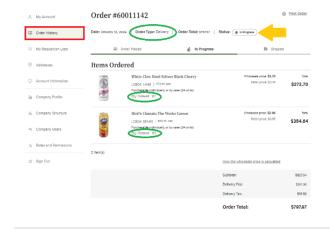
If your billing address does not require editing, please review the **Terms and Conditions**, click the checkbox to confirm you have reviewed them. Then click **Enter Payment Details**. Once you have paid you will receive the order confirmation email. Your designated pick-up person will receive the Pickup email confirmation when the order is received and ready for pick up.

Order History

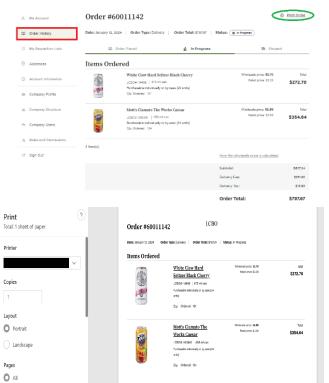
There is functionality in the Ecommerce Platform to assist you in tracking orders and it is accessed by going to **My Account.**



In the lefthand navigation bar, select **Order History**. The order history screen itemizes all orders placed and allows for searching and filtering.



Once you select an order to view, a list of items, delivery type and the quantity ordered appears

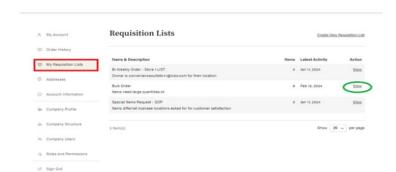


To print off an order confirmation, click **Print Order** on the right-hand side of the screen.

It will be available to print off on your computer.

Requisition Lists

From the **Requisition List** tab, you can easily access all requisition lists that your and/or your company users have created.

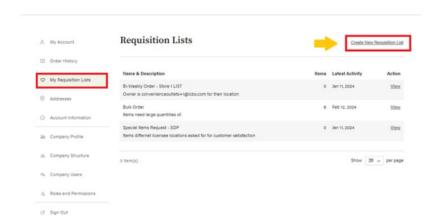


Click on the **View** button in the **Action** column on the right-hand side of the pane.

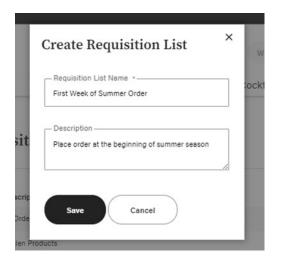
A **Requisition List** functions like a wish list. You can create product lists in advance and save that list of items that are frequently ordered. This is the most efficient way to order items, especially those you purchase on a regular basis.

Requisition lists can be saved and recalled at the time of ordering. Multiple requisition lists can be created to satisfy ordering requirements and customer needs.

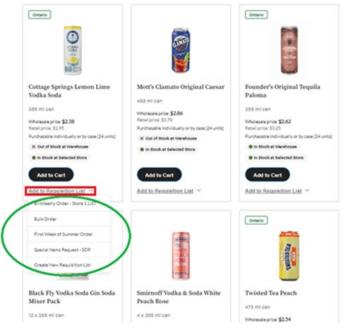
Please note requisition lists are designed to help make your ordering more seamless. Please be advised that adding a SKU to your requisition list does not mean you will be able to order that product, as product availability at your supplying source may vary.



To create a list, click **Create New Requisition List.**

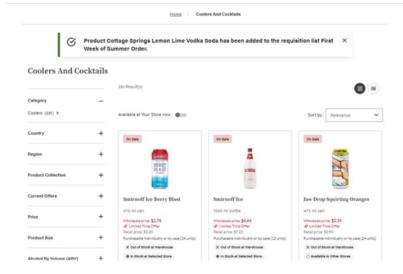


Type in the name of the list (i.e. Summer Order) and click **Save**.

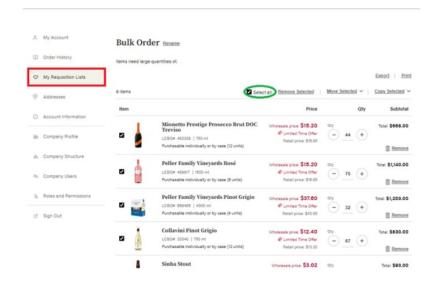


As you are browsing product selection, you have the option of adding products to your requisition list. By clicking the **Add to Requisition List** drop down menu

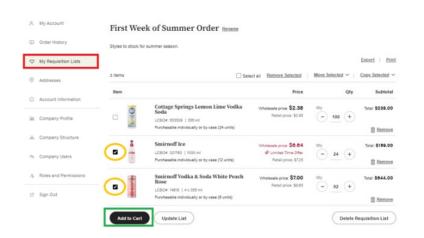
Click **Add to Requisition List** to add the item to the list and repeat process to add additional items. You will receive confirmation that the selected item has been added to the confirmation list.



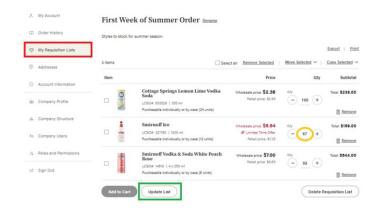
To add items to the newly saved Requisition List, you can navigate to the product section or category of interest and add accordingly. Or type in the product name or LCBO item number in the search bar if you are looking to add a specific item.



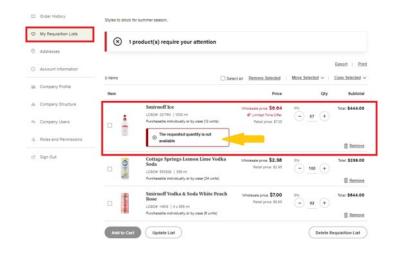
To add the requisition list to your order, click the checkbox next to the products (or all) that you would like to add to your order. Click **Add to Cart.**



If you do not wish to add the whole requisition list to your order, you can uncheck boxes next to the products you don't want. Then click **Add to Cart**.



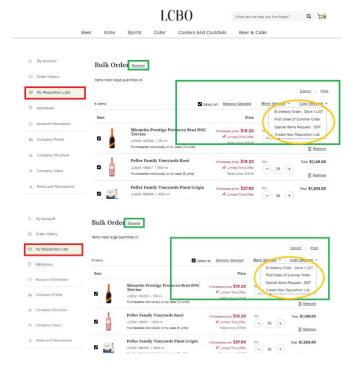
If you need to edit the quantities, simply type in the desired quantity or use the "-" and "+" icons. Then click **Update List**.



Please note that the live quantities will always affect your product selection, if you attempt to order more than quantities allow, the Ecommerce Platform will notify you with an error message and you will not be able to order the product in that quantity.

If you still wish to order the product, then you must lower your quantity or place a partial order for that SKU as inventory levels allow.

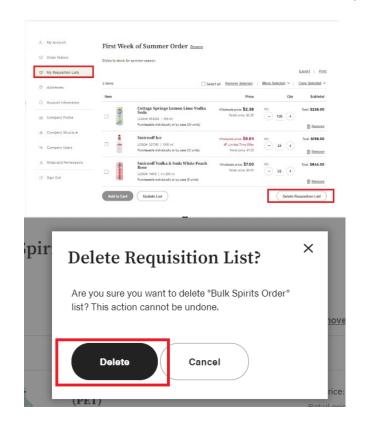
Updating your Requisition List



You can individually select products and copy or move them to an existing requisition list or create a new one for convenience.

You can also remove a specific SKU by clicking the **Remove** button.

Delete Requisition List



To delete a requisition list, click on the list that is no longer representative of your ordering needs.

Click Delete Requisition List.

Then click **Delete**.

Order Pickup Details

How am I notified that my Order is ready?

You will receive an e-mail notification when your order is ready for pickup. If you've designated an alternate person to pick up your order and provided their email address, then they will also receive the email.

To complete your pickup, please bring the following:

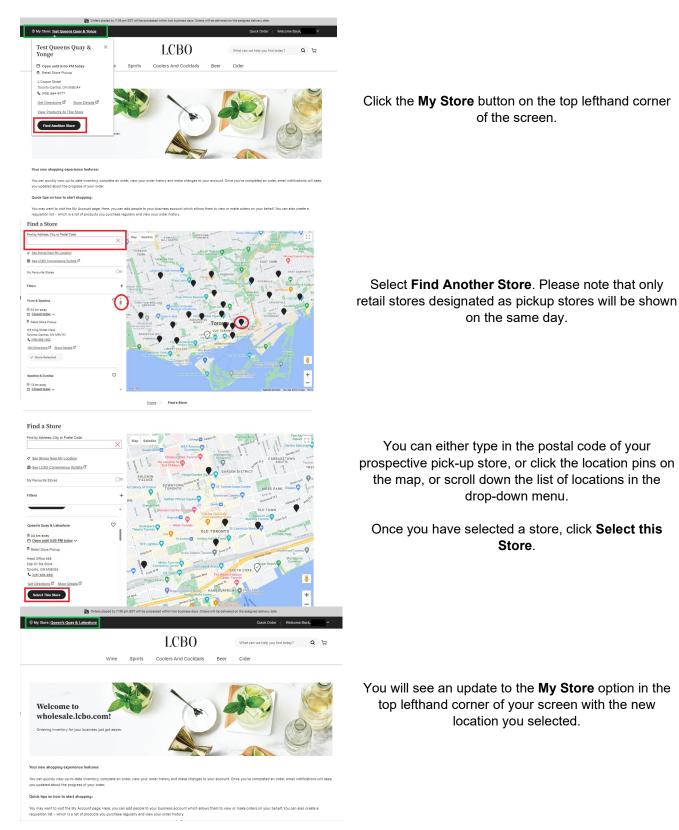
- Ready for Pickup Notification email
- Government-issued photo ID to your selected LCBO store. Your identification will be verified against the
 name on the order and is required as proof of legal drinking age. Acceptable proof includes a valid
 driver's licence, passport, citizenship card and BYID photo identification card.
- Order must be picked-up within 3 business days or your order will be cancelled. (Refer to FAQ)

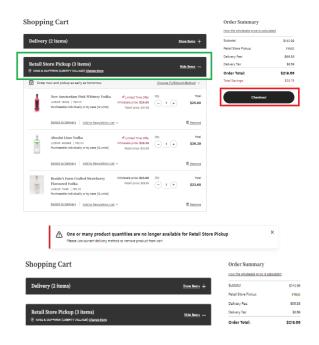
How long will they hold my purchase?

 Pickup orders not claimed within 3 days of the Ready for Pickup Notification email are subject to cancellation and refund without further notice.

Changing your Default Pickup from Retail Store

As your business needs evolve, you have the flexibility to change your Pickup retail location should you require it.

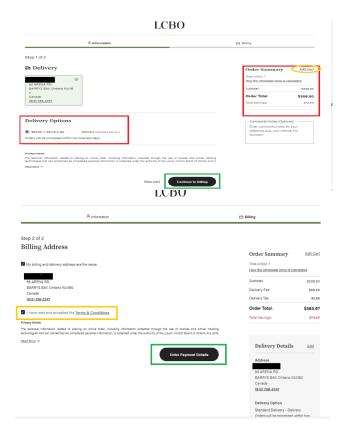




Please be mindful that when you are choosing another pickup store, please ensure you select the correct store location that you wish to pick up from. Before you order, verify that the store is your intended pick-up location.

Some of the items in your order may not be available at the newly selected store. If that is the case, you will see an error message. Once you proceed to check out, you cannot change the retail location.

Checking Out



Once you have reviewed your order, click **Checkout**.

Proceed by clicking Continue to Billing.

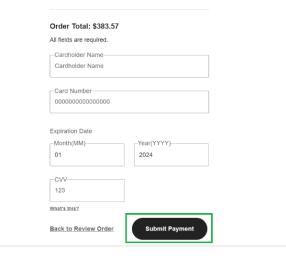
Please review the **Terms and Conditions** and click the checkbox to confirm that you have read it. Then you may proceed to **Enter Payment Details**. The order confirmation will be sent to the primary email within 30 minutes.

Payment Method

Payment is accepted only via credit card: VISA, Mastercard, or American Express. When the order is placed, an authorized hold is placed on your credit card to ensure there are available funds for your purchase. Please ensure you are using the credit card associated with the business to place orders.

Your credit card will be charged in full once your order has been completed by the warehouse.

LCBO



If the payment is declined your order will not be shipped. Delivery charges are on a per case basis and will be calculated at checkout for each order.

To place the order, click Submit Payment.

Once the order is placed you will receive a confirmation order number.

Thank you for your online order

You order number is: #86002849

We will email you an order confirmation with details.

You may click **Continue Shopping** if you have other orders to place.

Note: Once an order has been placed, you cannot cancel it.

An order confirmation and an invoice will be sent to your primary email address when the order ships.

Upon submitting your order, you will receive the following emails:

- Order Confirmation: When your order is received.
- Shipment Confirmation: When your order has been processed for fulfillment and delivery.

Once you receive an order confirmation, your order will be processed within 2 business days and shipping will occur on your assigned delivery date. If you have a split cart (some items coming from a depot and some from an LCBO retail store), you will receive separate updates on the delivery status for each part of the order.

Each order placed online is recognized as an individual order, regardless of who is placing the order or when it is being delivered. Each order delivered by the LCBO will have a delivery fee calculated based on the number of cases in the order.

Order deadlines and delivery dates may change from time to time due to long weekends or seasonal adjustments which will be communicated via email.

Licensees are required to be available on the delivery date to sign for the received order.

Licensees should verify the number of cases stated on the invoice and report any discrepancies, such as shortages, in-transit breakages, over shipments, or incorrect products, to their designated LCBO supplying source within 48 hours.

Delivery

If you choose delivery, delivery will be fulfilled by our LCBO contracted carriers. If delivery is not an option when you shop online, please reach out to licensee@lcbo.com.

A delivery day will be assigned for your order, and a confirmation email will be sent prior to your delivery. Products will be delivered to the business address on your AGCO Liquor Sales License by LCBO's contracted carrier.

Once the carrier has dropped off your order, please count your case quantity and sign the route sheet. You have 48 hours to report any discrepancies with your order via the B2B Claim App.

Note: Claims reported after this 48-hour period will not be accepted.

You have a default delivery window period that has been assigned to your business based on past history that is either in the AM or PM. If you want to change you have to contact licensee@lcbo.com

For Delivery orders, our carriers will only hold on to your order up to 1 business day. Delivery will be reattempted the following day. Unsuccessful deliveries will return to the LCBO and will be refunded to your credit card excluding shipping charges and applicable taxes. Refunds are generally issued within 10 business days of when the return is dropped off at our warehouse by the carrier. It may take an additional 3-5 business days for your credit card issuer to apply the refund.

Large Event Call-out

Customers should provide at least 4 weeks notice to licensee@lcbo.com in advance of the event.

Returns Policy

If you are not completely satisfied with a product, you may return it to point of purchase (Retail Store or Depot) for a refund equal to the purchase price (excluding the amount of the delivery charge (if any) for such product), subject to the following conditions:

- (i) the product must be in saleable condition
- (ii) the product must be returned within thirty (30) days after purchase.
- (iii) the product must be accompanied by the original invoice.

Returns will not be accepted without your invoice as proof of purchase. Customers returning product must also show valid, government-issued photo ID to verify their identity. The LCBO will issue you a refund by a credit to the credit card used for the original purchase. Please note that delivery charges are non-refundable. For more information on returning products to the LCBO, e-mail us at licensee@lcbo.com.

Resources

Claims Manual Link: <u>Claims and Returns | Doing Business with LCBO</u>
Doing Business with the LCBO Link: <u>Licensee | Doing Business with LCBO</u>