

# Liquor Customer Self Service

This training is intended for commercial customers using Liquor Customer Self-Service to view products, place orders, or view transaction history.

There are 7 modules outlining the most common functions you will perform.

## Table of Contents

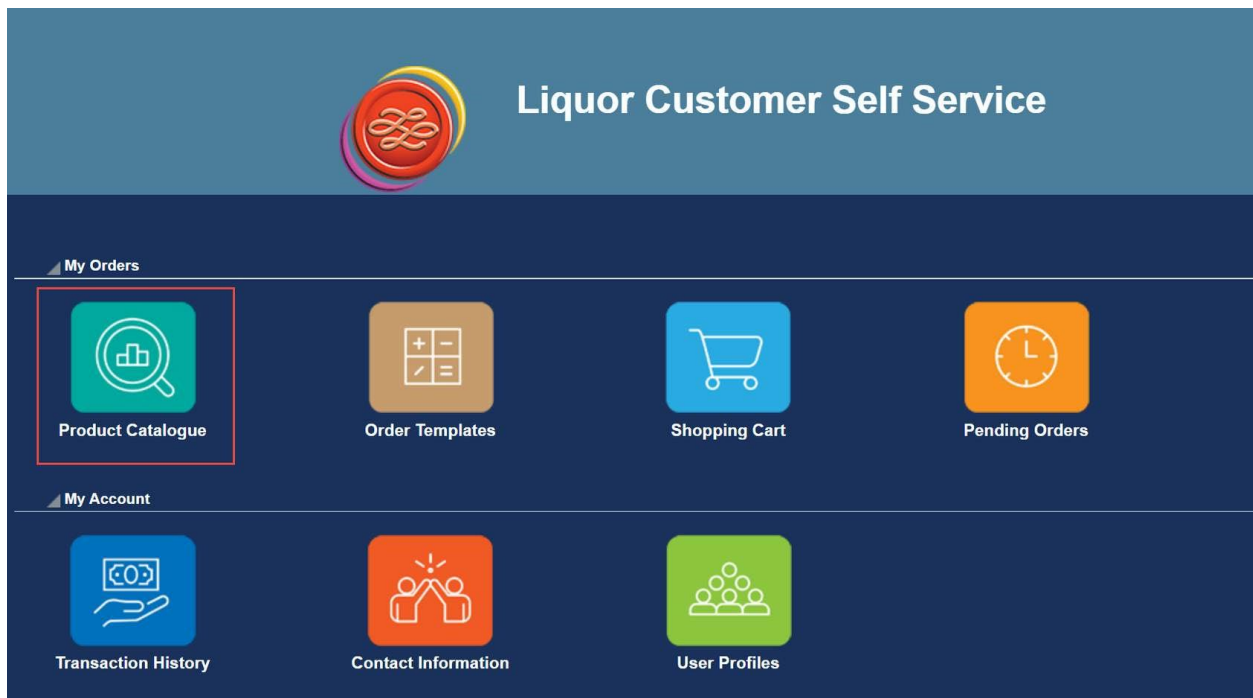
1. Product Catalogue .....	3
Accessing the Product Catalogue Screen .....	3
Searching for an Item .....	5
Ordering an Item.....	6
Resetting the Product Catalogue.....	9
Closing the Product Catalogue Screen.....	10
2. Order Templates.....	11
Accessing the Order Templates Screen.....	11
Creating a New Order Template .....	12
Using a Template to Place an Order .....	15
Editing an Existing Template.....	17
Copying a Template .....	19
Deleting a Template .....	21
Closing the Order Templates Screen .....	23
3. Shopping Cart.....	24
Accessing the Shopping Cart Screen .....	24
Adding Items to the Shopping Cart.....	26
Option 1 – Manually Enter Item Number and Order Quantity.....	26
Option 2 – Copy & Paste from an Excel Spreadsheet.....	28
Option 3 – Use the Product Search Function .....	31
Deleting an Item.....	35
Repricing an Order .....	36
Saving and Exiting .....	37

Placing an Order.....	38
Closing the Shopping Cart Screen .....	42
Exporting Order Details (Optional).....	43
4. Pending Orders .....	47
Accessing the Pending Orders Screen .....	47
Held Order Explanation .....	48
Closing the Pending Orders Screen .....	52
5. Transaction History .....	53
Accessing the Transaction History Screen .....	53
Exporting Data .....	55
Online Invoice .....	56
Payment Details.....	58
Closing the Transaction History Screen.....	59
6. Contact Information.....	60
Accessing the Contact Information Screen.....	60
Closing the Contact Information Screen .....	62
7. User Profiles.....	63
Accessing the User Profiles Screen.....	63
Types of Security Roles .....	65
Adding a User .....	66
Assigning a Security Role to New or Existing Users.....	70
Deleting a User .....	72
Resetting a User Password .....	73
Lock/Unlock a User.....	75
Close User Profiles Screen.....	77

# 1.Product Catalogue

## Accessing the Product Catalogue Screen

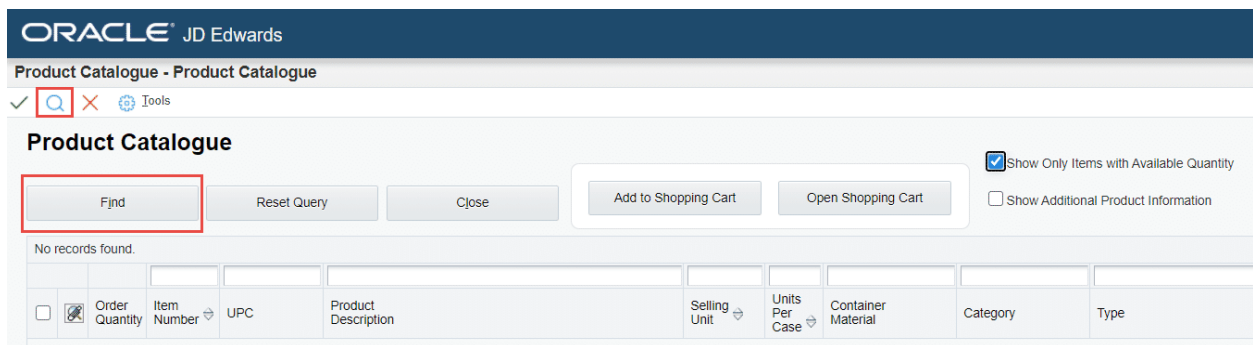
Click on the **Product Catalogue** icon located in the **My Orders** section to open.



There are two ways to populate the table:

1. Click on the **Magnifying Glass** icon located on the toolbar along the top, or
2. Click on the **Find** button

By default, the table is sorted by **Item Number** and will show only items with an available quantity.



**Customers can only see items that are available for them to order and will not see restricted items (same as ATLAS).**

If you would like to see/search all items, including those that do not have available stock, unselect the checkbox for **Show Only Items with Available Quantity**, located at the top of the page.

The table will re-populate and now show these additional items.

ORACLE® JD Edwards

Product Catalogue - Product Catalogue

✓ 🔍 ✕ ⚙️ Tools

**Product Catalogue**

☐ Show Only Items with Available Quantity

☐ Show Additional Product Information

Find Reset Query Close Add to Shopping Cart Open Shopping Cart

No records found.

	Order Quantity	Item Number	UPC	Product Description	Selling Unit	Units Per Case	Container Material	Category	Type
--	----------------	-------------	-----	---------------------	--------------	----------------	--------------------	----------	------

Selecting **Show Additional Product Information** at the top of the page will show additional information such as:

- Country of Origin
- Percent Alcohol
- List Status
- Tasting Notes

Product Catalogue - Product Catalogue

✓ 🔍 ✕ ⚙️ Tools

**Product Catalogue**

☒ Show Only Items with Available Quantity

☐ Show Additional Product Information

Find Reset Query Close Add to Shopping Cart Open Shopping Cart

No records found.

	Order Quantity	Item Number	UPC	Product Description	Selling Unit	Units Per Case	Container Material	Category	Type
--	----------------	-------------	-----	---------------------	--------------	----------------	--------------------	----------	------

## Searching for an Item

Items can be searched for by typing directly into the open fields along the top of the table and then hitting Enter (or clicking the **Find** button).

**Note:** The table will timeout if not used after a few minutes, you will need to refresh your search information.

The screenshot shows the 'Product Catalogue - Product Catalogue' header. Below it, there's a search bar with a 'Find' button highlighted by a red box and a blue '2'. To the right of the search bar are buttons for 'Reset Query', 'Close', 'Add to Shopping Cart', and 'Open Shopping Cart'. Below the search bar, there's a table with columns: Order Quantity, Item Number, UPC, Product Description, Selling Unit, Units Per Case, and Container Material. The first row of the table is highlighted with a red box and a blue '1'.

These fields are not case sensitive, but once you hit enter, the field will automatically update to show in all capitals with an asterisk (\*) on each side of the search text.

The screenshot shows the 'Product Catalogue - Product Catalogue' header. Below it, there's a search bar with 'Smirnoff' entered. A red box highlights the search bar, and a red arrow points to it from a text box that says 'Type in what you would like to search for and press Enter (or click Find)'. To the right of the search bar are buttons for 'Reset Query', 'Close', 'Add to Shopping Cart', and 'Only Item Addition:'. Below the search bar, there's a table with columns: Order Quantity, Item Number, UPC, Product Description, Selling Unit, Units Per Case, Container Material, and Category. The first row of the table is highlighted with a red box.

The screenshot shows the 'Product Catalogue - Product Catalogue' header. Below it, there's a search bar with '\*SMIRNOFF\*' entered. A red box highlights the search bar, and a red arrow points to it from a text box that says 'The text now shows as all capitals with an asterisk (\*) on either side'. To the right of the search bar are buttons for 'Reset Query', 'Close', 'Add to Shopping Cart', and 'Only Item Addition:'. Below the search bar, there's a table with columns: Order Quantity, Item Number, UPC, Product Description, Selling Unit, Units Per Case, Container Material, and Category. The first row of the table is highlighted with a red box.

Order Quantity	Item Number	UPC	Product Description	Selling Unit	Units Per Case	Container Material	Category
	67	776103000260	SMIRNOFF NO 21 VODKA	1 X 750 ML	12	GLASS BOTTLE	SPIRITS
	4921	5410316070690	SMIRNOFF NO 21 VODKA	1 X 3000 ML	4	GLASS BOTTLE	SPIRITS
	14867	082000762331	SMIRNOFF ICE CAESAR	1 X 330 ML	24	GLASS BOTTLE	REFRESHMENT BEV...

## Ordering an Item

You can add items to your Shopping Cart directly from the Product Catalogue.  
Click in the **Order Quantity** field and type in the quantity you would like to order.

The screenshot shows the Oracle JD Edwards Product Catalogue interface. At the top, there's a header with the Oracle logo and 'JD Edwards'. Below it, the title 'Product Catalogue - Product Catalogue' is displayed. A toolbar contains icons for search, delete, and tools. The main area is titled 'Product Catalogue' and includes buttons for 'Find', 'Reset Query', 'Close', 'Add to Shopping Cart', and 'Open Shopping Cart'. A checkbox for 'Show Only Items' is checked, and 'Show Additional' is unchecked. Below the buttons, it says 'Records 1 - 18'. A table lists items with columns: Order Quantity, Item Number, UPC, Product Description, Selling Unit, Units Per Case, Container Material, and Category. The first item, 'SMIRNOFF NO 21 VODKA', has its 'Order Quantity' field highlighted with a red box and contains the value '50'.

Order Quantity	Item Number	UPC	Product Description	Selling Unit	Units Per Case	Container Material	Category
50	67	776103000260	SMIRNOFF NO 21 VODKA	1 X 750 ML	12	GLASS BOTTLE	SPIRITS
	4811	082000763598	SMIRNOFF ICE VODKA 24/330B	24 X 330 ML	1	GLASS BOTTLE	REFRESHMENT BEV...
	14867	082000762331	SMIRNOFF ICE CAESAR	1 X 330 ML	24	GLASS BOTTLE	REFRESHMENT BEV...

**The quantity must be entered in single units, not by cases.**

Some items require you to order in case multiples.

The system will automatically round to the nearest order multiple.

Click **OK**.

**Note:** You can see what the Units Per Case are for each item by looking at this column in the Product Catalogue table.

The screenshot shows the Oracle JD Edwards Product Catalogue interface with a warning dialog box overlaid. The dialog box is titled 'Product Catalogue - Warning' and contains the text: 'This item must be ordered in multiples. Order quantity set to the nearest order multiple.' with an 'OK' button. In the background, the table from the previous screenshot is visible, but the 'Order Quantity' field for the first item now contains the value '60', which is highlighted with a red box.

Order Quantity	Item Number	UPC	Product Description	Selling Unit	Units Per Case	Container Material	Category
60	67	776103000260	SMIRNOFF NO 21 VODKA	1 X 750 ML	12	GLASS BOTTLE	SPIRITS
	4921	5410316070690	SMIRNOFF NO 21 VODKA	1 X 3000 ML	4	GLASS BOTTLE	SPIRITS

If the available quantity of the item is less than the Order Quantity you have entered, the system will automatically change the number to the amount that is currently available.

To add an item to your Shopping Cart from within the Product Catalogue, click on the **checkbox** on the far left of the row and then click on **Add to Shopping Cart**.

ORACLE® JD Edwards

Product Catalogue - Product Catalogue

✓ 🔍 ✕ ⚙️ Tools

### Product Catalogue

Find Reset Query Close Add to Shopping Cart Open Shopping Cart

Records 1 - 18

	Order Quantity	Item Number	UPC	Product Description	Selling Unit	Units Per Case	Container Material
<input type="checkbox"/>				*SMIRNOFF*			
<input checked="" type="checkbox"/>		67	776103000260	SMIRNOFF NO 21 VODKA	1 X 750 ML	12	GLASS BOTTLE
<input type="checkbox"/>		4921	5410316070690	SMIRNOFF NO 21 VODKA	1 X 3000 ML	4	GLASS BOTTLE

Must click the check box before selecting Add to Shopping Cart

If the order item was successfully added to the Shopping Cart the row will be highlighted in green.

ORACLE® JD Edwards

Product Catalogue - Product Catalogue

✓ 🔍 ✕ ⚙️ Tools

### Product Catalogue

Find Reset Query Close Add to Shopping Cart Open Shopping Cart

Records 1 - 18

	Order Quantity	Item Number	UPC	Product Description	Selling Unit	Units Per Case	Container Material
<input type="checkbox"/>				*SMIRNOFF*			
<input checked="" type="checkbox"/>		67	776103000260	SMIRNOFF NO 21 VODKA	1 X 750 ML	12	GLASS BOTTLE
<input type="checkbox"/>		4921	5410316070690	SMIRNOFF NO 21 VODKA	1 X 3000 ML	4	GLASS BOTTLE

You can view your current Shopping Cart at any time by clicking on **Open Shopping Cart** located along the top.

ORACLE® JD Edwards

Product Catalogue - Product Catalogue

✓
🔍
✗
⚙️
Tools

Product Catalogue

Find

Reset Query

Close

Add to Shopping Cart

Open Shopping Cart

Records 1 - 18

				*SMIRNOFF*				
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Order Quantity	Item Number ↕	UPC	Product Description	Selling Unit ↕	Units Per Case ↕	Container Material
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		67	776103000260	SMIRNOFF NO 21 VODKA	1 X 750 ML	12	GLASS BOTTLE
<input type="checkbox"/>	<input type="checkbox"/>		4921	5410316070690	SMIRNOFF NO 21 VODKA	1 X 3000 ML	4	GLASS BOTTLE

If Items and Order Quantities are entered in the table and “Add to Shopping Cart” is not selected and another search is started, it will erase the information that was entered.



## Resetting the Product Catalogue

To reset the Product Catalogue, click on **Reset Query** located along the top. This will clear all search text entered but it will not refresh the table itself.

To refresh the table, either click on the **Magnifying Glass** located on the top toolbar, click the **Find** button or click in one of the search fields and hit **Enter**.

**ORACLE** JD Edwards

Product Catalogue - Product Catalogue

Tools

### Product Catalogue

Find

Reset Query

Close

Add to Shopping Cart

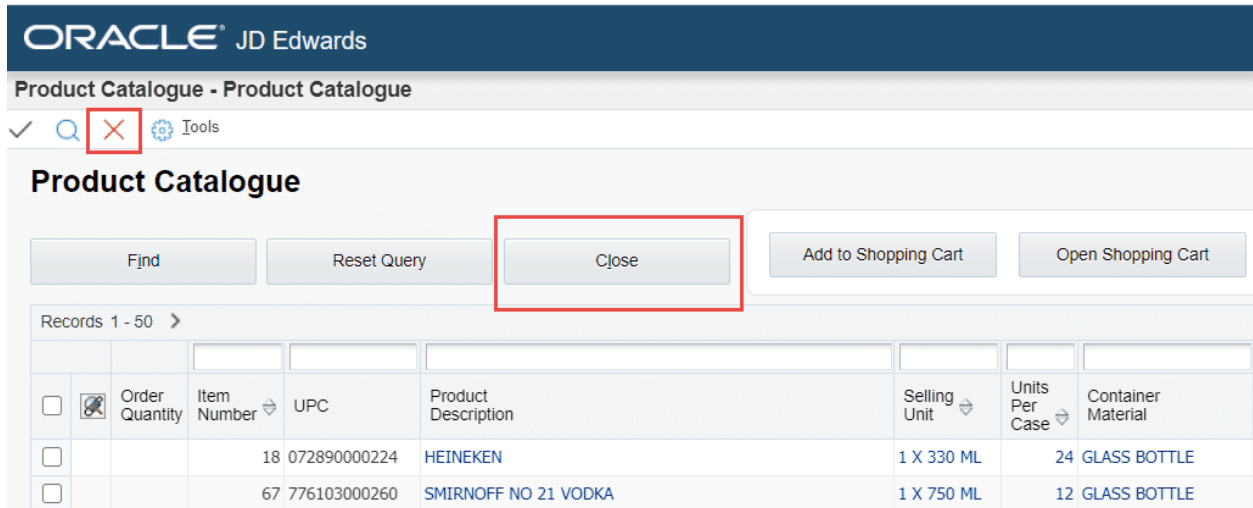
Open Shopping Cart

Records 1 - 18

<input type="checkbox"/>	<input checked="" type="checkbox"/>	Order Quantity	Item Number ↕	UPC	Product Description	Selling Unit ↕	Units Per Case ↕	Container Material
<input type="checkbox"/>	<input checked="" type="checkbox"/>		67	776103000260	SMIRNOFF NO 21 VODKA	1 X 750 ML	12	GLASS BOTTLE
<input type="checkbox"/>	<input type="checkbox"/>		4921	5410316070690	SMIRNOFF NO 21 VODKA	1 X 3000 ML	4	GLASS BOTTLE

## Closing the Product Catalogue Screen

To navigate back to the **Main Menu**, click on the red **X** located in the toolbar along the top left or click the **Close** button.



ORACLE® JD Edwards

Product Catalogue - Product Catalogue

✓ 🔍 **X** ⚙️ Tools

**Product Catalogue**

Find Reset Query **Close** Add to Shopping Cart Open Shopping Cart

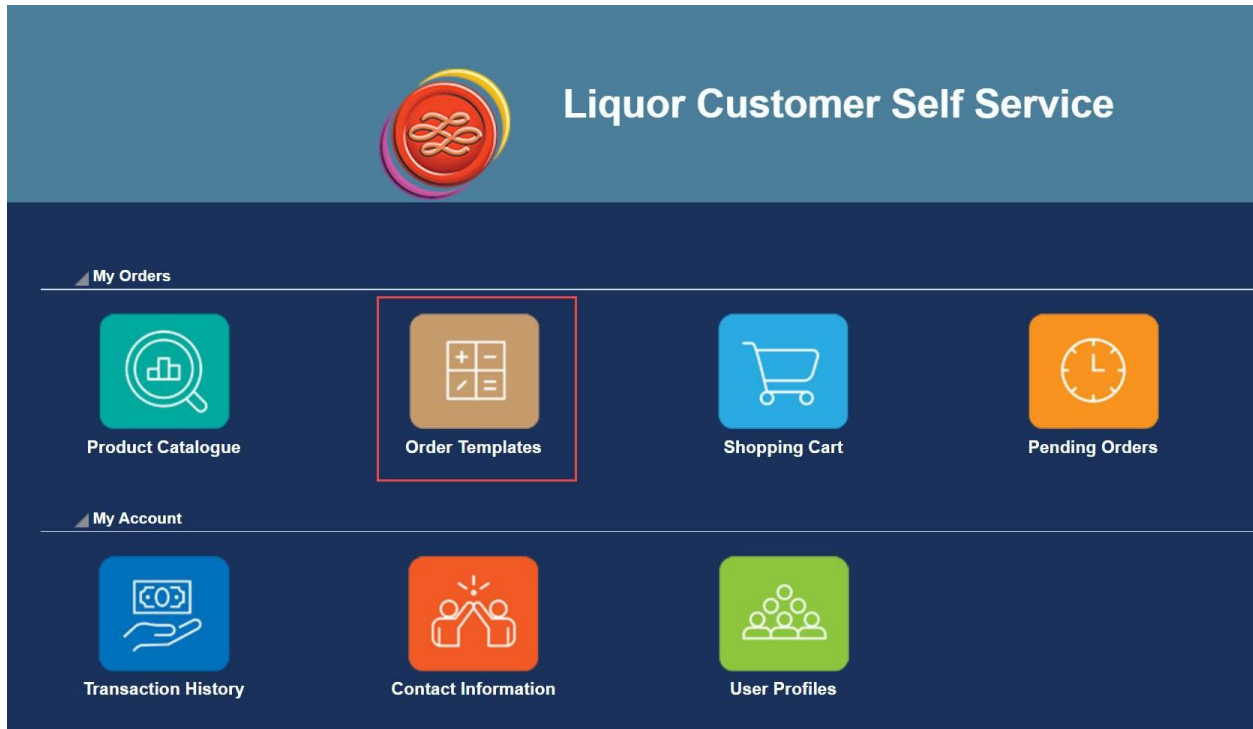
Records 1 - 50 >

<input type="checkbox"/>	<input type="checkbox"/>	Order Quantity	Item Number ↕	UPC	Product Description	Selling Unit ↕	Units Per Case ↕	Container Material
<input type="checkbox"/>	<input type="checkbox"/>		18	072890000224	HEINEKEN	1 X 330 ML	24	GLASS BOTTLE
<input type="checkbox"/>	<input type="checkbox"/>		67	776103000260	SMIRNOFF NO 21 VODKA	1 X 750 ML	12	GLASS BOTTLE

## 2.Order Templates

### Accessing the Order Templates Screen

Click on the **Order Templates** icon located in the **My Orders** section to open. Here you can create, edit and use templates for repeat orders that you place.



## Creating a New Order Template

To create a new order template, click on the green **+** located in the toolbar along the top or the **New Template** button.

ORACLE® JD Edwards

Order Templates - Available Templates

✓ 🔍 **+** 📄 🗑️ ✖️ ⚙️ Tools

### Manage Order Templates

Customer Name *LIQUOR RETAIL STORE*

Load Order Template **New Template** Edit Copy Delete Close

Records 1 - 6

	Template Name
<input type="radio"/>	COOLER ORDER #1
<input type="radio"/>	LIQUOR ORDER #1
<input type="radio"/>	LIQUOR ORDER #2

Enter the name of the template into the **Template Name** field. This field is required.

ORACLE® JD Edwards

Order Templates - Order Template Revisions

✓ 🗑️ ✖️ ⚙️ Tools

### Add Order Template

Company Name *LIQUOR RETAIL STORE*

Template Name

Delete Save Close

Records 1 - 1 \* OrderTemplate\_Grid\_CSS

<input type="checkbox"/>	<input type="checkbox"/> Item Number *	Quantity *	Product Description
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	

To add order items to the template, enter the **Item Number** and **Quantity**.  
Once you enter the item number, the **Product Description** field will automatically populate.

ORACLE® JD Edwards

Order Templates - Order Template Revisions

✓ 🗑️ ✖️ ⚙️ Tools

### Add Order Template

Company Name *LIQUOR RETAIL STORE*

Template Name

Records 1 - 2 \* OrderTemplate\_Grid\_CSS

<input type="checkbox"/>	<input type="checkbox"/>	Item Number *	Quantity *	Product Description
<input type="checkbox"/>	<input type="checkbox"/>	18	48	HEINEKEN LAGER 330 B
<input type="checkbox"/>	<input type="checkbox"/>			

Once you have finished entering all your order items, click the **Save** button to save your new template.

ORACLE® JD Edwards

Order Templates - Order Template Revisions

✓ 🗑️ ✖️ ⚙️ Tools

### Add Order Template

Company Name *LIQUOR RETAIL STORE*

Template Name

Records 1 - 2 \* OrderTemplate\_Grid\_CSS

<input type="checkbox"/>	<input type="checkbox"/>	Item Number *	Quantity *	Product Description
<input type="checkbox"/>	<input type="checkbox"/>	18	48	HEINEKEN LAGER 330 B
<input type="checkbox"/>	<input type="checkbox"/>			

**If you click the Close button before you save, anything entered into this template will be lost.**

Once you have clicked the **Save** button, the screen will close and redirect you back to the **Manage Order Templates** screen.

You will now see the new template available for your use.

ORACLE<sup>®</sup> JD Edwards


Order Templates - Available Templates

✓ 🔍 + 📄 🗑️ ✕ ⚙️ Tools

### Manage Order Templates

Customer Name *LIQUOR RETAIL STORE*

Load Order Template New Template Edit Copy Delete Close

Records 1 - 4 








	Template Name
<input type="radio"/>	COOLER ORDER #1
<input type="radio"/>	LIQUOR ORDER #1
<input type="radio"/>	LIQUOR ORDER #2
<input checked="" type="radio"/>	Weekly Order

## Using a Template to Place an Order

Select the template you would like to use and then click on the **Load Order Template** button.

**ORACLE®** JD Edwards

Order Templates - Available Templates

       Tools

### Manage Order Templates

Customer Name    *LIQUOR RETAIL STORE*

Load Order Template

2

Template

Edit

Copy

Delete

Close

Records 1 - 4

	Template Name
<input type="radio"/>	COOLER ORDER #1
<input type="radio"/>	LIQUOR ORDER #1
<input type="radio"/>	LIQUOR ORDER #2
<input checked="" type="radio"/>	Weekly Order

1

A preview of the order template will open showing the items and quantities.  
Click on the **Add to Shopping Cart** button to add all the items to your shopping cart.

ORACLE® JD Edwards

Order Templates - Order Templates

✓ 🔍 ✕ ⚙️ Tools

## Load Order Template

Template Name **Weekly Order** Add to Shopping Cart Close

Records 1 - 1 \* SelectTemplate\_Grid\_CSS ⬆ ⬇ ⬆

Item Number *	Quantity	Product Description
18	48	HEINEKEN LAGER 330 B

**If items are not available or order multiples are not met, these items will be highlighted in the Shopping Cart with an explanation.**

The order has now been added to the Shopping Cart and a screen previewing the Shopping Cart will automatically open.

To place the order, follow the checkout process in the Shopping Cart - items can be added, modified and removed there.

**To exit this screen, save the items you have added to the Shopping Cart and return to Order Templates, click on the Save and Exit button.**

ORACLE® JD Edwards

Order Templates - Sales Order Detail Revisions

⚙️ Tools

### Detail Revisions

Order Date 01/11/2022 Privately Distributed Requested Date MBLL Distributed Requested Date

Sold To 27010 Privately Distributed Delivery Instructions MBLL Distributed Delivery Instructions

Customer Reference Save and Exit Delete Line Reprice Order Checkout

Records 1 - 2

Item Number	Order Quantity	Product Description	Package Size	Unit Price	Extended Price
18	48	HEINEKEN LAGER 330 B			










## Editing an Existing Template

Select the template you would like to edit and then click on the **Edit** button.

**ORACLE** JD Edwards

Order Templates - Available Templates

       Tools

### Manage Order Templates

Customer Name     *LIQUOR RETAIL STORE*

Load Order Template


New Tem **2**

**Edit**

Copy

Delete

Close

Records 1 - 4 

	Template Name
<input type="radio"/>	COOLER ORDER #1
<input type="radio"/>	LIQUOR ORDER #1
<input type="radio"/>	LIQUOR ORDER #2
<input checked="" type="radio"/>	Weekly Order




**1**

In the **Edit Order Template** screen, you can change the **Template Name** and modify the order details.

Once you have made your changes, click the **Save** button.

**ORACLE** JD Edwards

Order Templates - Order Template Revisions

✓    Tools

## Edit Order Template




Company Name *LIQUOR RETAIL STORE*


Template Name

Delete

Save

Close

Records 1 - 3 \* OrderTemplate\_Grid\_CSS   

<input type="checkbox"/>	 Item Number *	Quantity *	Product Description
<input type="checkbox"/>	18	48	HEINEKEN LAGER 330 B
<input checked="" type="checkbox"/>	42	12	CANADIAN CLUB WHISKY
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	

## Copying a Template

To copy a template, highlight the template and click on the **Copy** button.

ORACLE® JD Edwards

Order Templates - Available Templates

✓ 🔍 + 📄 🗑️ ✕ ⚙️ Tools

### Manage Order Templates

Customer Name    *LIQUOR RETAIL STORE*

Load Order Template   New Template   Ed **2**   **Copy**   Delete   Close

Records 1 - 4





	Template Name
<input type="radio"/>	COOLER ORDER #1
<input type="radio"/>	LIQUOR ORDER #1
<input type="radio"/>	LIQUOR ORDER #2
<input checked="" type="radio"/>	Weekly Order

**1**

You can now enter a name for the template and edit the order.  
Click on the **Save** button to save your changes.

**ORACLE®** JD Edwards

Order Templates - Order Template Revisions

 Tools

## Add Order Template

Company Name *LIQUOR RETAIL STORE*

Template Name




Delete


Save

Close

Records 1 - 3

\* OrderTemplate\_Grid\_CSS



<input type="checkbox"/>	 Item Number *	Quantity *	Product Description
<input type="checkbox"/>	18	48	HEINEKEN LAGER 330 B
<input type="checkbox"/>	42	12	CANADIAN CLUB WHISKY
<input type="checkbox"/>			

## Deleting a Template

To delete a template, highlight the template and click on the **Delete** button.

**ORACLE** JD Edwards

Order Templates - Available Templates

✓ 🔍 + 📄 🗑️ ✕ ⚙️ Tools

### Manage Order Templates

Customer Name    *LIQUOR RETAIL STORE*

Load Order Template

New Template

Edit

Cop2

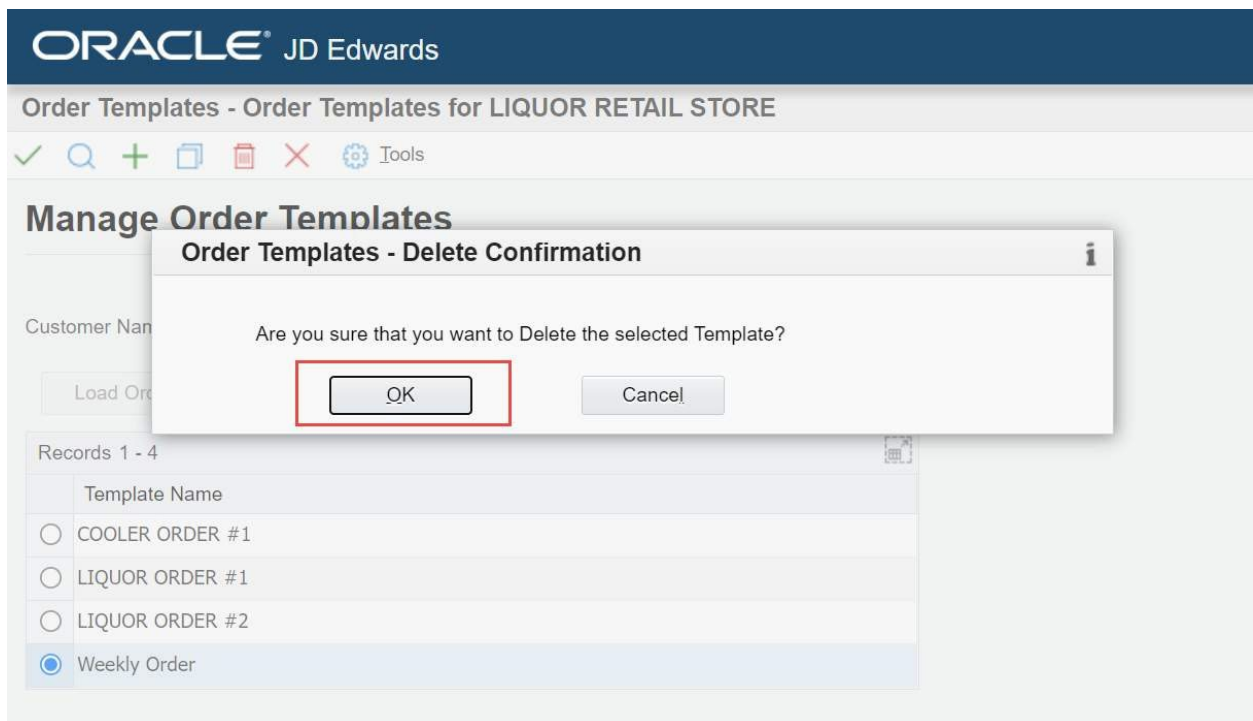
Delete

Close

Records 1 - 4

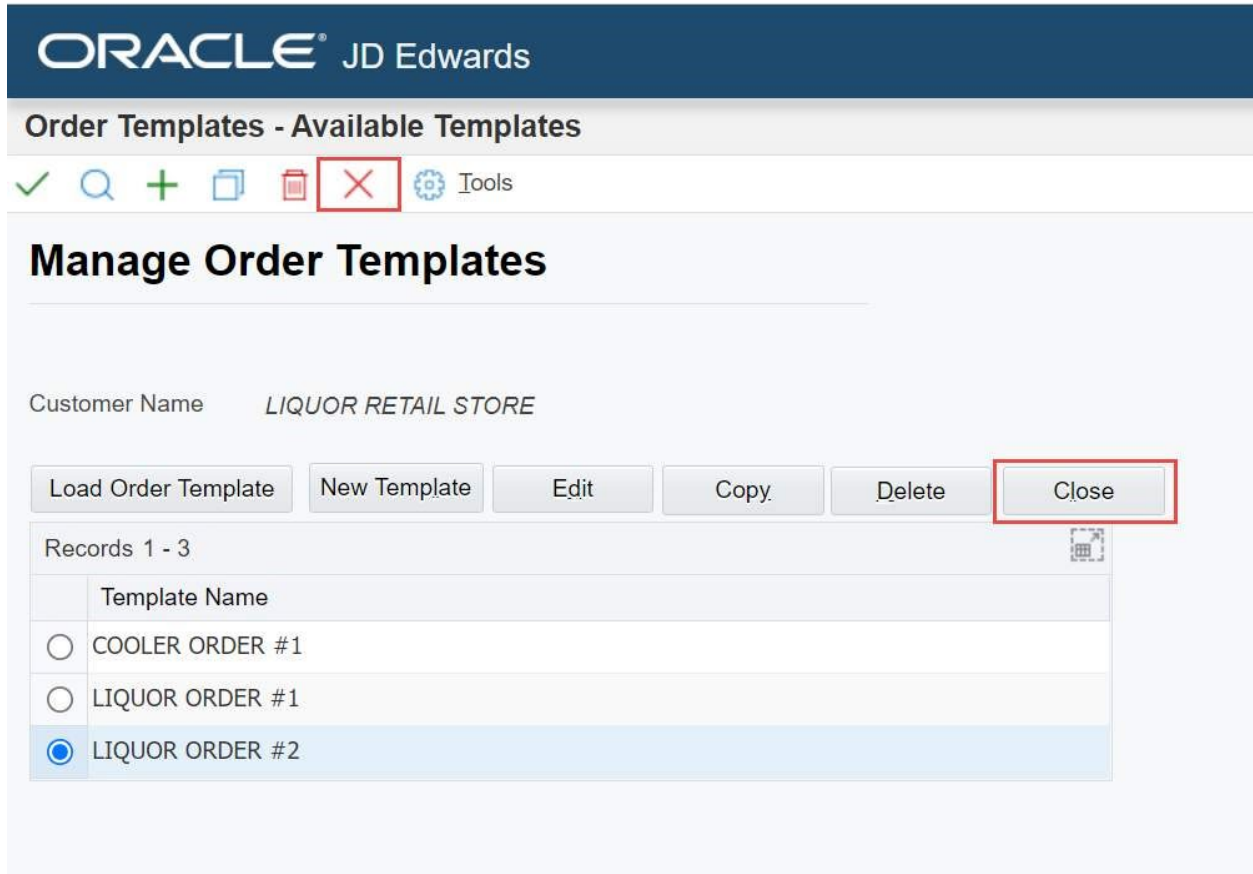
	Template Name
<input type="radio"/>	COOLER ORDER #1
<input type="radio"/>	LIQUOR ORDER #1
<input type="radio"/>	LIQUOR ORDER #2
<input checked="" type="radio"/>	Weekly Order 1

You will be asked to confirm that you want to delete the selected template.  
Click **OK** to delete.



## Closing the Order Templates Screen

To navigate back to the **Main Menu**, click on the red **X** located in the toolbar along the top or click the **Close** button.



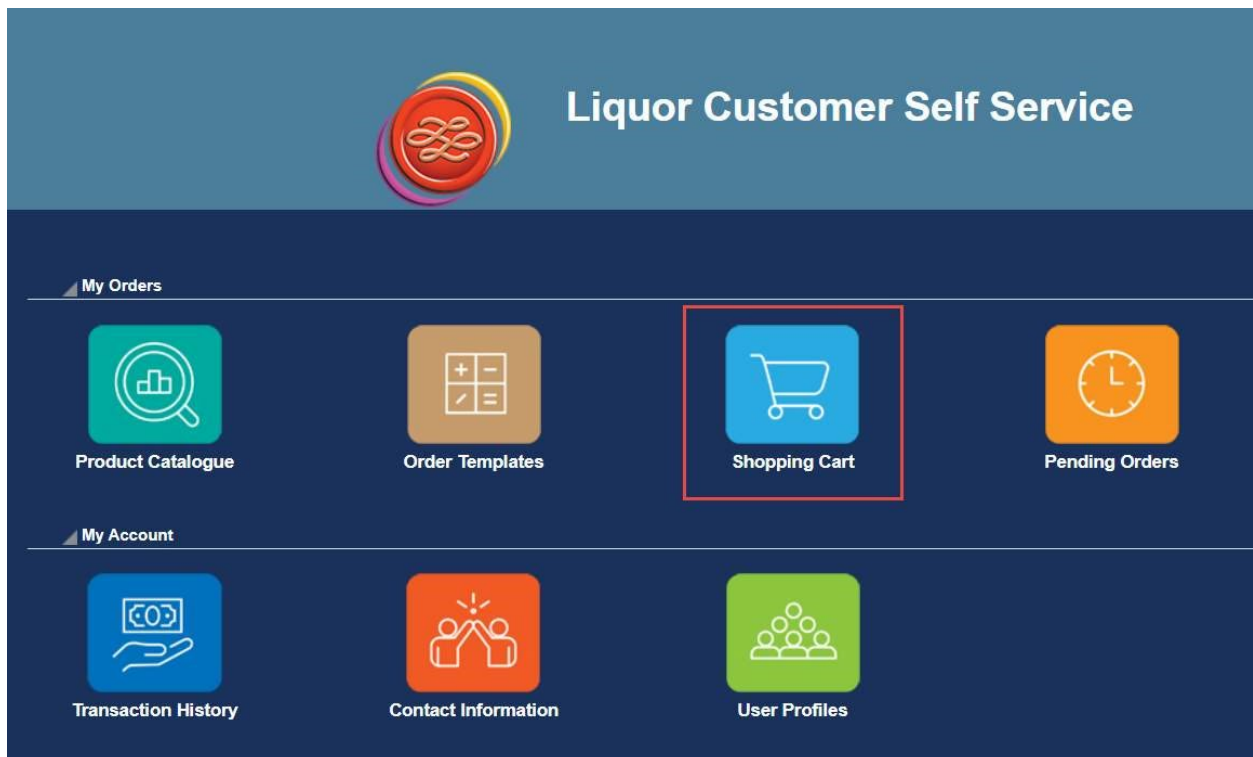
The screenshot displays the Oracle JD Edwards interface for the 'Order Templates - Available Templates' screen. The title bar at the top reads 'ORACLE® JD Edwards'. Below it, the page title is 'Order Templates - Available Templates'. A toolbar contains several icons: a green checkmark, a magnifying glass, a plus sign, a document icon, a trash can, a red 'X' icon (highlighted with a red box), and a gear icon labeled 'Tools'. The main heading is 'Manage Order Templates'. Below this, the 'Customer Name' is set to 'LIQUOR RETAIL STORE'. A row of buttons includes 'Load Order Template', 'New Template', 'Edit', 'Copy', 'Delete', and 'Close' (highlighted with a red box). Below the buttons, it says 'Records 1 - 3' with a small icon to the right. A table lists three templates:

	Template Name
<input type="radio"/>	COOLER ORDER #1
<input type="radio"/>	LIQUOR ORDER #1
<input checked="" type="radio"/>	LIQUOR ORDER #2

### 3.Shopping Cart

#### Accessing the Shopping Cart Screen

Click on the **Shopping Cart** icon located in the **My Orders** section to open. Here you will be able to add items to your shopping cart, modify your shopping cart and place your order.



If multiple users are using the Liquor Customer Self Service at the same time, items being added to an order are saved to a shared shopping cart.



There are several fields located at the top of the Shopping Cart screen.

The **Order Date** and **Sold To** (customer number) fields are generated by the system and you will not be able to edit them.

You are able to edit the following fields:

- **Privately Distributed Requested Date** - the date you would like to receive the privately distributed items in the order
- **MBLL Distributed Requested Date** - the date you would like to receive the MBLL distributed items in the order
- **Privately Distributed Delivery Instructions** - delivery instructions for privately distributed items in the order
- **MBLL Distributed Delivery Instructions** - delivery instructions for MBLL distributed items in the order
- **Customer Reference** - your notes about the order or your in-house order number/order tracking

ORACLE® JD Edwards

Shopping Cart - Sales Order Detail Revisions

Tools

Detail Revisions

Order Date

Sold To

Privately Distributed Requested Date

MBLL Distributed Requested Date


Privately Distributed Delivery Instructions

MBLL Distributed Delivery Instructions

Customer Reference

Save and Exit Delete Line Reprice Order Checkout

Records 1 - 1

<input type="checkbox"/>	 Item Number	Order Quantity	Product Description	Package Size	Unit Price	Extended Price
<input type="checkbox"/>	<input type="text"/>	<input type="text"/>				

**If you have added items to the Shopping Cart from the Product Catalogue or Order Template, they will be listed when you open the Shopping Cart.**

# Adding Items to the Shopping Cart

There are 3 ways to add items when you are in the shopping cart:

1. [Manually Enter Item Number and Quantity](#)
2. [Copy & Paste from an Excel Spreadsheet](#)
3. [Use the Product Search Function](#)



## Option 1 – Manually Enter Item Number and Order Quantity

1. Click in the **Item Number** field and enter the item number you would like to order.
2. Click in the **Order Quantity** field and enter the quantity.
3. Press **Enter**.

ORACLE® JD Edwards

Shopping Cart - Sales Order Detail Revisions

Tools

Detail Revisions

Order Date: 12/13/2021 Privately Distributed Requested Date: MBLL Distributed Requested Date:

Sold To: 27010 Privately Distributed Delivery Instructions: MBLL Distributed Delivery Instructions:

Customer Reference: Save and Exit Delete Line Reprice Order Checkout

Records 1 - 2

Item Number	Order Quantity	Product Description	Package Size	Unit Price	Extended Price
18	24				

**You can only use the Manitoba Liquor & Lotteries' Item Number, the product UPC code will not work.**

Once you have pressed Enter, the system will generate the fields for this item.

ORACLE® JD Edwards

Shopping Cart - Sales Order Detail Revisions

Tools

Detail Revisions

Order Date: 12/13/2021 Privately Distributed Requested Date: MBLL Distributed Requested Date:

Sold To: 27010 Privately Distributed Delivery Instructions: MBLL Distributed Delivery Instructions:

Customer Reference: Save and Exit Delete Line Reprice Order Checkout

Records 1 - 2

Item Number	Order Quantity	Product Description	Package Size	Unit Price	Extended Price
18		24 HEINEKEN LAGER 330 B	330 ml x 24	2.30	55.20

**Order Quantities must be entered in the item's correct order multiple.** If they are not entered in the correct order multiple, the system will automatically round up to the nearest multiple.

A pop-up window will open alerting you that the system is going to round up to the nearest order multiple.

Click **OK**.

The screenshot shows the Oracle JD Edwards Shopping Cart - Sales Order Detail Revisions screen. A modal dialog box titled "Shopping Cart - Warning" is displayed in the center. The dialog contains the text: "Items must be ordered in multiples. Some order quantities have been set to the nearest order multiple." and an "OK" button at the bottom, which is highlighted with a red rectangle. The background interface includes a header with the Oracle JD Edwards logo, a "Tools" icon, and tabs for "Detail Revisions" and "Line Defaults". Below the tabs, there are fields for "Order Number", "Sold To", "Ship To", and "Currency". To the right, there are fields for "Store/Plant", "Liquor Requested Date", "Beer Requested Date", "Order Date" (set to 12/14/2021), "PO", "Delivery Instruction Liquor", and "Delivery Instruction Beer". At the bottom, there is a table with columns: Item Number, Order Quantity, Product Description, Package Size, Unit Price, and Extended Price. The table shows two records, with the first record having an Item Number of 18 and an Order Quantity of 24. Below the table are buttons for "Save and Exit", "Delete Line", "Delete All Lines", "Bypass New Line", "Checkout", and "Reprice Order".

There may be an occurrence when an item may "red line" if an incorrect order multiple is entered.

### **How to Fix a "Red Line" Order Multiple Error**

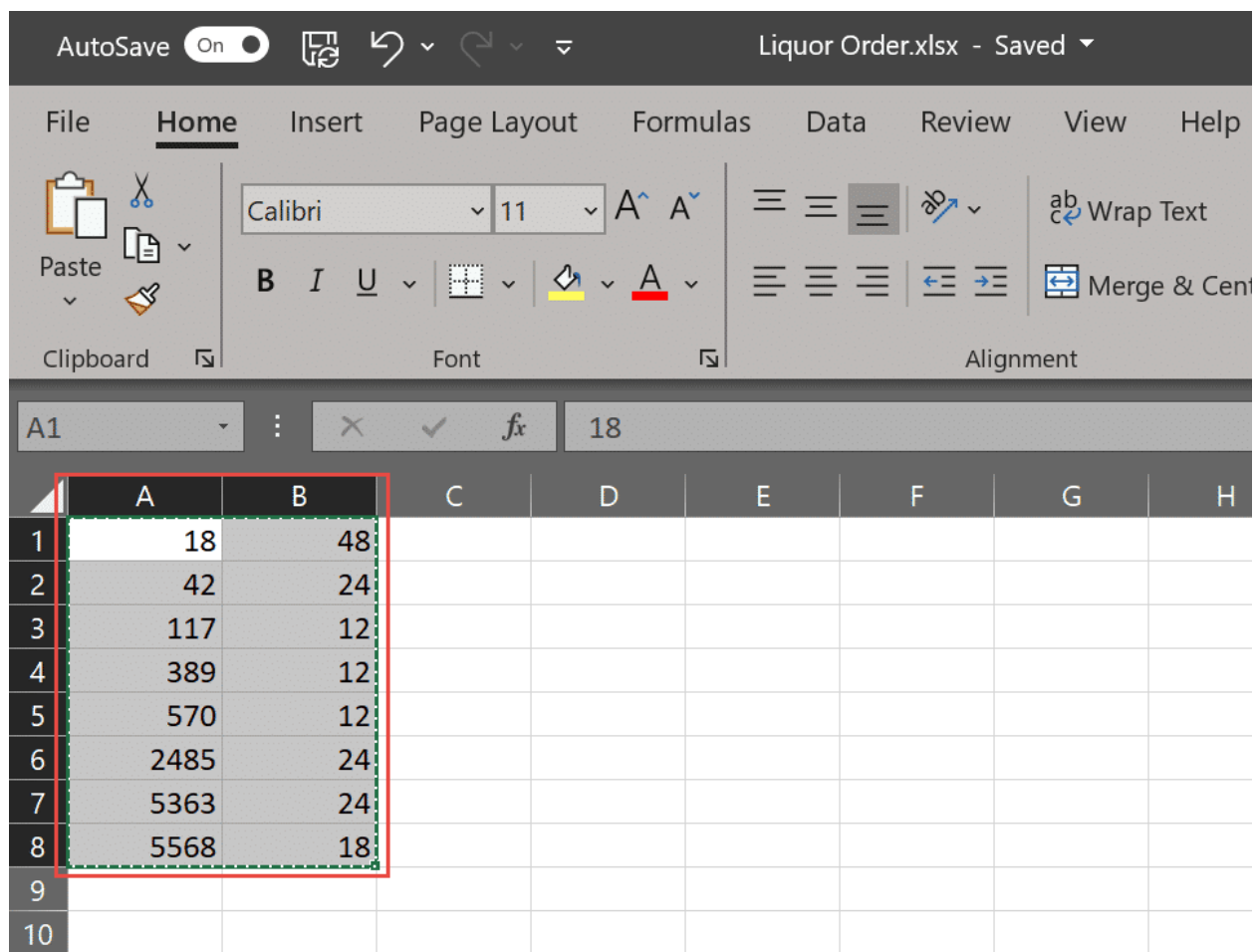
1. On a new line, re-enter the **Item Number**.
2. Enter the correct order multiple in the **Order Quantity** field.
3. Press **Enter**.
4. **Delete** the "red lined" item that contains the incorrect order multiple from the order.

## Option 2 – Copy & Paste from an Excel Spreadsheet

You can copy multiple item numbers and quantities from an Excel spreadsheet and paste directly into the Shopping Cart.

Open your Excel spreadsheet and copy the cells that contain the **Item Number** and **Order Quantity**.

**Note:** The columns in the spreadsheet must be in order of **Item Number** and then **Order Quantity**.



The screenshot shows an Excel spreadsheet with the following data:

	A	B	C	D	E	F	G	H
1	18	48						
2	42	24						
3	117	12						
4	389	12						
5	570	12						
6	2485	24						
7	5363	24						
8	5568	18						
9								
10								

Open your Shopping Cart and click in the **Item Number** field.  
Press **Ctrl + V** on your keyboard to paste.

ORACLE® JD Edwards

Shopping Cart - Sales Order Detail Revisions

Tools

Detail Revisions

Order Date: 12/14/2021 Privately Distributed Requested Date: MBLL Distributed Requested Date:

Sold To: 27010 Privately Distributed Delivery Instructions: MBLL Distributed Delivery Instructions:

Customer Reference:

Save and Exit Delete Line Reprice Order Checkout

Records 1 - 1

<input type="checkbox"/>	Item Number	Package Size	Unit Price	Extended Price
<input type="checkbox"/>				

You can see that the system is processing the paste action when the blue bar appears on the top-right of the screen.

This could take a few minutes depending on the size of the upload, do not hit any buttons or close while this is processing.

ORACLE® JD Edwards

Shopping Cart - Sales Order Detail Revisions

Tools

Detail Revisions

Order Date: 12/14/2021 Privately Distributed Requested Date:

Sold To: 27010 Privately Distributed Delivery Instructions:

Customer Reference:

Records 1 - 1

<input type="checkbox"/>	Item Number	Order Quantity	Product Description
<input type="checkbox"/>			

LIQUOR RETAIL STORE

Personal Form: ShoppingCart\_001\_CSS

Once the system has finished processing the paste action, the blue bar will disappear and you will see all the order items and quantities listed.

**ORACLE** JD Edwards

**Shopping Cart - Sales Order Detail Revisions**

Tools

**Detail Revisions**

Order Date 
 Privately Distributed Requested Date 
 MBLL Distributed Requested Date

Sold To 
 Privately Distributed Delivery Instructions 
 MBLL Distributed Delivery Instructions

Customer Reference

Records 1 - 9

<input type="checkbox"/>		Item Number	Order Quantity	Product Description	Package Size	Unit Price	Extended Price
<input type="checkbox"/>		18		48 HEINEKEN LAGER 330 B	330 ml x 24	2.30	110.40
<input type="checkbox"/>		42		24 CANADIAN CLUB WHISKY	750 ml x 12	24.15	579.60
<input type="checkbox"/>		117		12 BACARDI SUPERIOR WHITE RUM	750 ml x 12	25.41	304.92
<input type="checkbox"/>		389		12 KAHLUA COFFEE LIQUOR	750 ml x 12	29.70	356.40
<input type="checkbox"/>		570		12 BEEFEATER LONDON DRY GIN	750 ml x 12	25.89	310.68
<input type="checkbox"/>		2485		24 SAUZA BLANCO TEQUILA	750 ml x 12	28.99	695.76
<input type="checkbox"/>		5363		24 WYBOROWA VODKA	750 ml x 12	25.39	609.36
<input type="checkbox"/>		5568		18 YELLOW TAIL SHIRAZ	1500 ml x 6	27.39	493.02
<input type="checkbox"/>							


### Option 3 – Use the Product Search Function

You can add items by using the **Product Search Function**:

1. Click in an empty **Item Number** field.  
This will make the Product Search Function button visible to the right of this field.
2. Click the **Product Search Function** button.  
Depending on the internet browser you are using this could be an ellipsis or a magnifying glass.

**ORACLE®** JD Edwards

Shopping Cart - Sales Order Detail Revisions

 Tools


**Detail Revisions**

Order Date09/23/2021Privately Distributed Requested Date

Sold To190Delivery Instructions Privately Distributed

Customer Reference

Records 1 - 1

<input type="checkbox"/>		Item Number	2	Order Quantity	Product Description	Package
<input type="checkbox"/>	1		...			

A Product Search & Select window will open.

To find the item you would like to add to the Shopping Cart, use the search fields.

Shopping Cart - Product Search & Select

✓ 🔍 ✕ ⚙️ Tools

Product Search

Records 1 - 10

\*BACARDI\*

	Item Number ⇅	UPC ⇅	Product Description ⇅	Selling Unit ⇅	Units Per Case ⇅	Category ⇅	Type ⇅
<input checked="" type="radio"/>	117	620213015402	BACARDI SUPERIOR WHITE RUM	1 X 750 ML	12	SPIRITS	RUM
<input type="radio"/>	19332	080480981556	BACARDI GRAN RESERVA MAESTRO DE RON	1 X 750 ML	12	SPIRITS	RUM
<input type="radio"/>	23893	080480007645	BACARDI OAKHEART SPICED RUM	1 X 1140 ML	6	SPIRITS	RUM
<input type="radio"/>	23899	080480007553	BACARDI SUPERIOR WHITE RUM	1 X 1140 ML	6	SPIRITS	RUM
<input type="radio"/>	23906	080480007621	BACARDI BLACK RUM	1 X 1140 ML	6	SPIRITS	RUM
<input type="radio"/>	23913	620213025104	BACARDI GOLD RUM	1 X 1140 ML	6	SPIRITS	RUM
<input type="radio"/>	25708	080480983383	BACARDI ANEJO CUATRO	1 X 750 ML	12	SPIRITS	RUM
<input type="radio"/>	25776	080480983406	BACARDI GRAN RESERVA 10 YEAR RUM	1 X 750 ML	6	SPIRITS	RUM
<input type="radio"/>	29663	29663	BACARDI TEST RUM	1 X 750 ML	12	SPIRITS	RUM
<input type="radio"/>	200295	080480400637	BACARDI COCONUT RUM	1 X 750 ML	12	SPIRITS	RUM



To add the item to your Shopping Cart:

1. Select the row.
2. Click on the **Checkmark** icon located on the toolbar along the top.

Shopping Cart - Product Search & Select

✓

2

✕

Tools

Product Search

Records 1 - 10

	Item Number ↕	UPC ↕	Product Description ↕	Selling Unit ↕	Units Per Case ↕	Category ↕	Type ↕
<input type="radio"/>	117	620213015402	BACARDI SUPERIOR WHITE RUM	1 X 750 ML	12	SPIRITS	RUM
<input type="radio"/>	19332	080480981556	BACARDI GRAN RESERVA MAESTRO DE RON	1 X 750 ML	12	SPIRITS	RUM
<input type="radio"/>	23893	080480007645	BACARDI OAKHEART SPICED RUM	1 X 1140 ML	6	SPIRITS	RUM
<b>1</b>	23899	080480007553	BACARDI SUPERIOR WHITE RUM	1 X 1140 ML	6	SPIRITS	RUM
<input checked="" type="radio"/>	23906	080480007621	BACARDI BLACK RUM	1 X 1140 ML	6	SPIRITS	RUM
<input type="radio"/>	23913	620213025104	BACARDI GOLD RUM	1 X 1140 ML	6	SPIRITS	RUM
<input type="radio"/>	25708	080480983383	BACARDI ANEJO CUATRO	1 X 750 ML	12	SPIRITS	RUM
<input type="radio"/>	25776	080480983406	BACARDI GRAN RESERVA 10 YEAR RUM	1 X 750 ML	6	SPIRITS	RUM
<input type="radio"/>	29663	29663	BACARDI TEST RUM	1 X 750 ML	12	SPIRITS	RUM
<input type="radio"/>	200295	080480400637	BACARDI COCONUT RUM	1 X 750 ML	12	SPIRITS	RUM

You will be taken back to the **Shopping Cart** and the **Item Number** will now be populated, to complete adding the item to the shopping cart:

1. Click in the **Order Quantity** field and enter the quantity.
2. Press **Enter**.

**ORACLE** JD Edwards

Shopping Cart - Sales Order Detail Revisions

Tools

**Detail Revisions**

Order Date12/14/2021Privately Distributed Requested DateMBLL Distributed Requested Date

Sold To27010Privately Distributed Delivery InstructionsMBLL Distributed Delivery Instructions

Customer Reference

Save and ExitDelete LineReprice OrderCheckout

Records 1 - 2

<input type="checkbox"/>	<input checked="" type="checkbox"/> Item Number	Order Quantity	Product Description	Package Size	Unit Price	Extended Price
<input type="checkbox"/>	23906	6				
<input type="checkbox"/>						

## Deleting an Item

To remove an item from your Shopping Cart:

1. Select the item's row you would like to remove by clicking the checkbox on the far left
2. Click the **Delete Line** button

**Note:** You can delete multiple lines at once.

**ORACLE** JD Edwards

Shopping Cart - Sales Order Detail Revisions

Tools

**Detail Revisions**

Order Date 12/14/2021 Privately Distributed Requested Date MBLD Distributed Requested Date

Sold To 27010 Privately Distributed Delivery Instructions MBLD Distributed Delivery Instructions

Customer Reference

Save and 2 Delete Line Reprice Order Checkout

Records 1 - 9

<input type="checkbox"/>	Item Number	Order Quantity	Product Description	Package Size	Unit Price	Extended Price
<input type="checkbox"/>	18		48 HEINEKEN LAGER 330 B	330 ml x 24	2.30	110.40
<input checked="" type="checkbox"/>	42		24 CANADIAN CLUB WHISKY	750 ml x 12	24.15	579.60
<input type="checkbox"/>	117		12 BACARDI SUPERIOR WHITE RUM	750 ml x 12	25.41	304.92
<input type="checkbox"/>	389		12 KAHILUA COFFEE LIQUOR	750 ml x 12	29.70	356.40
<input type="checkbox"/>	570		12 BEEFEATER LONDON DRY GIN	750 ml x 12	25.89	310.68
<input type="checkbox"/>	2485		24 SAUZA BLANCO TEQUILA	750 ml x 12	28.99	695.76
<input type="checkbox"/>	5363		24 WYBOROWA VODKA	750 ml x 12	25.39	609.36
<input type="checkbox"/>	5568		18 YELLOW TAIL SHIRAZ	1500 ml x 6	27.39	493.02
<input type="checkbox"/>						

# Repricing an Order

Customers must select the **Reprice Order** button to see what their final price will be after any applicable pricing changes.

**NOTE:** If the Reprice Order button is not selected, order totals may change.

ORACLE<sup>®</sup> JD Edwards

Shopping Cart - Sales Order Detail Revisions

Tools

Detail Revisions

Order Date12/14/2021Privately Distributed Requested DateMBLL Distributed Requested Date

Sold To27010Privately Distributed Delivery InstructionsMBLL Distributed Delivery Instructions

Customer Reference

Save and ExitDelete LineReprice OrderCheckout

Records 1 - 8

<input type="checkbox"/>	<input checked="" type="checkbox"/> Item Number	Order Quantity	Product Description	Package Size	Unit Price	Extended Price
<input type="checkbox"/>	18		48 HEINEKEN LAGER 330 B	330 ml x 24	2.30	110.40
<input type="checkbox"/>	117		12 BACARDI SUPERIOR WHITE RUM	750 ml x 12	25.41	304.92
<input type="checkbox"/>	389		12 KAHLUA COFFEE LIQUOR	750 ml x 12	29.70	356.40
<input type="checkbox"/>	570		12 BEEFEATER LONDON DRY GIN	750 ml x 12	25.89	310.68
<input type="checkbox"/>	2485		24 SAUZA BLANCO TEQUILA	750 ml x 12	28.99	695.76
<input type="checkbox"/>	5363		24 WYBOROWA VODKA	750 ml x 12	25.39	609.36
<input type="checkbox"/>	5568		18 YELLOW TAIL SHIRAZ	1500 ml x 6	27.39	493.02
<input type="checkbox"/>						

## Saving and Exiting

To save the items in your Shopping Cart and exit without losing them, click the **Save and Exit** button.

**ORACLE** JD Edwards

Shopping Cart - Sales Order Detail Revisions

Tools

**Detail Revisions**


Order Date 12/14/2021 Privately Distributed Requested Date MBLD Distributed Requested Date

Sold To 27010 Privately Distributed Delivery Instructions MBLD Distributed Delivery Instructions

Customer Reference

Save and Exit Delete Line Reprice Order Checkout

Records 1 - 10

<input type="checkbox"/>		Item Number	Order Quantity	Product Description	Package Size	Unit Price	Extended Price
<input type="checkbox"/>		18		48 HEINEKEN LAGER 330 B	330 ml x 24	2.30	110.40
<input type="checkbox"/>		117		12 BACARDI SUPERIOR WHITE RUM	750 ml x 12	25.41	304.92
<input type="checkbox"/>		389		12 KAH LUA COFFEE LIQUOR	750 ml x 12	29.70	356.40
<input type="checkbox"/>		570		12 BEEFEATER LONDON DRY GIN	750 ml x 12	25.89	310.68
<input type="checkbox"/>		2485		24 SAUZA BLANCO TEQUILA	750 ml x 12	28.99	695.76
<input type="checkbox"/>		5363		24 WYBOROWA VODKA	750 ml x 12	25.39	609.36
<input type="checkbox"/>		5568		18 YELLOW TAIL SHIRAZ	1500 ml x 6	27.39	493.02
<input type="checkbox"/>		23906		24 BACARDI BLACK RUM	1140 ml x 6	34.52	828.48
<input type="checkbox"/>		BDL -MINIMUM ORDER QTY.		BDL -MINIMUM ORDER QTY.		30.00	30.00
<input type="checkbox"/>							

# Placing an Order

To begin the checkout out process, click the **Checkout** button.

**ORACLE** JD Edwards

Shopping Cart - Sales Order Detail Revisions

Tools

**Detail Revisions**


Order Date 12/14/2021 Privately Distributed Requested Date MBLL Distributed Requested Date

Sold To 27010 Privately Distributed Delivery Instructions MBLL Distributed Delivery Instructions

Customer Reference

Save and Exit Delete Line Reprice Order **Checkout**

Records 1 - 9

<input type="checkbox"/>	 Item Number	Order Quantity	Product Description	Package Size	Unit Price	Extended Price
<input type="checkbox"/>	18		48 HEINEKEN LAGER 330 B	330 ml x 24	2.30	110.40
<input type="checkbox"/>	117		12 BACARDI SUPERIOR WHITE RUM	750 ml x 12	25.41	304.92
<input type="checkbox"/>	389		12 KAH LUA COFFEE LIQUOR	750 ml x 12	29.70	356.40
<input type="checkbox"/>	570		12 BEEFEATER LONDON DRY GIN	750 ml x 12	25.89	310.68
<input type="checkbox"/>	2485		24 SAUZA BLANCO TEQUILA	750 ml x 12	28.99	695.76
<input type="checkbox"/>	5363		24 WYBOROWA VODKA	750 ml x 12	25.39	609.36
<input type="checkbox"/>	5568		18 YELLOW TAIL SHIRAZ	1500 ml x 6	27.39	493.02
<input type="checkbox"/>	23906		24 BACARDI BLACK RUM	1140 ml x 6	34.52	828.48
<input type="checkbox"/>						

The **Order Review** screen will open. Here you will see the order total, including taxes and any other applicable fees.

**Note:** We highly recommend you make note of your order number at this stage in case you need to refer to it for future inquiries.

ORACLE®

JD Edwards

Shopping Cart - Order Summary

Order Number

1267913

Sold To

27010

LIQUOR RETAIL STORE

Ship To

27010

LIQUOR RETAIL STORE

Records 1 - 15

\* ShoppingCartOrdRew\_Grid\_001\_CSS

Item Number

Order Quantity

Product Description

Pkge Size

Unit Price

Extended Price

18	48	HEINEKEN LAGER 330 B	1 X 330 ML	2.30	110.40
		Container Deposit			4.80
117	12	BACARDI SUPERIOR WHITE RUM	1 X 750 ML	25.41	304.92
389	12	KAHLUA COFFEE LIQUOR	1 X 750 ML	29.70	356.40
570	12	BEEFEATER LONDON DRY GIN	1 X 750 ML	25.89	310.68
2485	24	SAUZA BLANCO TEQUILA	1 X 750 ML	28.99	695.76
5363	24	WYBOROWA VODKA	1 X 750 ML	25.39	609.36
5568	18	YELLOW TAIL SHIRAZ	1 X 1500 ML	27.39	493.02
23906	24	BACARDI BLACK RUM	1 X 1140 ML	34.52	828.48
BDL -MINIMU...		BDL -Minimum Order Qty.		30.00	30.00
		Order Total. . .			3,743.82
		Taxable Amount			3,739.02
		@ Tax Rate5.00 %			186.95
		INVOICE TOTAL			3,930.77

Revise Order

Place Order

**Before placing your order**, you can export the details of it for future reference. Go to the [Exporting Order Details](#) section to see steps on how to do this.

If you would like to make changes to the order, click the **Revise Order** button and this will take you back to the Shopping Cart.

**Note:** You will see a warning message in the Shopping Cart stating, "Order not placed. Cart can be revised."

ORACLE®

JD Edwards

Shopping Cart - Order Summary

Order Number

1267913

Sold To

27010

LIQUOR RETAIL STORE

Ship To

27010

LIQUOR RETAIL STORE

Records 1 - 15

\* ShopingCartOrdRew\_Grid\_001\_CSS

Item Number

Order Quantity

Product Description

Pkge Size

Unit Price

Extended Price

18	48	HEINEKEN LAGER 330 B	1 X 330 ML	2.30	110.40
		Container Deposit			4.80
117	12	BACARDI SUPERIOR WHITE RUM	1 X 750 ML	25.41	304.92
389	12	KAHLUA COFFEE LIQUOR	1 X 750 ML	29.70	356.40
570	12	BEEFEATER LONDON DRY GIN	1 X 750 ML	25.89	310.68
2485	24	SAUZA BLANCO TEQUILA	1 X 750 ML	28.99	695.76
5363	24	WYBOROWA VODKA	1 X 750 ML	25.39	609.36
5568	18	YELLOW TAIL SHIRAZ	1 X 1500 ML	27.39	493.02
23906	24	BACARDI BLACK RUM	1 X 1140 ML	34.52	828.48
BDL -MINIMU...		BDL -Minimum Order Qty.		30.00	30.00
		Order Total. . .			3,743.82
		Taxable Amount			3,739.02
		@ Tax Rate5.00 %			186.95
		INVOICE TOTAL			3,930.77

Revise Order

Place Order



Once you have reviewed your order and are satisfied with it, click the **Place Order** button.

A blue bar may appear on the top-right of the screen while the system is placing your order.

This could take a few minutes depending on the size of the upload, do not hit any buttons or close while this is processing.

ORACLE<sup>®</sup> JD Edwards

LIQUOR RETAIL STORE ▾

Shopping Cart - Order Summary

Personal Form: (No Personalization) ▾ ?

Order Number1267916

Sold To27010LIQUOR RETAIL STORE

Ship To27010LIQUOR RETAIL STORE

Records 1 - 15

\* ShopingCartOrdRew\_Grid\_001\_CSS ▾

Item Number	Order Quantity	Product Description	Pkge Size	Unit Price	Extended Price
18	48	HEINEKEN LAGER 330 B	1 X 330 ML	2.30	110.40
		Container Deposit			4.80
42	24	CANADIAN CLUB WHISKY	1 X 750 ML	24.15	579.60
117	12	BACARDI SUPERIOR WHITE RUM	1 X 750 ML	25.41	304.92
389	12	KAHLUA COFFEE LIQUOR	1 X 750 ML	29.70	356.40
570	12	BEEFEATER LONDON DRY GIN	1 X 750 ML	25.89	310.68
2485	12	SAUZA BLANCO TEQUILA	1 X 750 ML	28.99	347.88
5363	24	WYBOROWA VODKA	1 X 750 ML	25.39	609.36
5568	18	YELLOW TAIL SHIRAZ	1 X 1500 ML	27.39	493.02
BDL -MINIMU...		BDL -Minimum Order Qty.		30.00	30.00
		Order Total. . .			3,147.06
		Taxable Amount			3,142.26
		@ Tax Rate 5.00 %			157.11
		INVOICE TOTAL			3,304.17

Revise Order

Place Order

**Note:** Once the order has been placed, the Order Review screen will close, and you will automatically be re-directed to a now empty shopping cart.

## Closing the Shopping Cart Screen

To exit the **Shopping Cart**, click on the **X** located on the top right corner.

ORACLE JD Edwards LIQUOR RETAIL STORE

Shopping Cart - Sales Order Detail Revisions Personal Form: ShoppingCart\_001\_CSS ? X

Tools

Detail Revisions

Order Date Privately Distributed Requested Date MBLL Distributed Requested Date

Sold To 27010 Privately Distributed Delivery Instructions MBLL Distributed Delivery Instructions

Customer Reference Save and Exit Delete Line Reprice Order Checkout

Records 1 - 1

<input type="checkbox"/>	<input checked="" type="checkbox"/> Item Number	Order Quantity	Product Description	Package Size	Unit Price	Extended Price
<input type="checkbox"/>						

You will be able to view the order that was just placed under **Pending Orders**, located on the main menu.

## Exporting Order Details (Optional)

**Before placing your order** you can export the details of your order for future reference. In the Shopping Cart - Order Summary, click on the **Export Grid Data** button located on the top right corner of the table.

**ORACLE** JD Edwards

**Shopping Cart - Order Summary**

Order Number 1267917

Sold To 27010 LIQUOR RETAIL STORE

Ship To 27010 LIQUOR RETAIL STORE

Records 1 - 14 \* ShoppingCartOrdRew\_Grid\_001\_CSS

Item Number	Order Quantity	Product Description	Pkge Size	Unit Price	Extended Price
18	48	HEINEKEN LAGER 330 B	1 X 330 ML	2.30	110.40
		Container Deposit			4.80
42	24	CANADIAN CLUB WHISKY	1 X 750 ML	24.15	579.60
117	12	BACARDI SUPERIOR WHITE RUM	1 X 750 ML	25.41	304.92
389	12	KAHLUA COFFEE LIQUOR	1 X 750 ML	29.70	356.40
570	12	BEEFEATER LONDON DRY GIN	1 X 750 ML	25.89	310.68
5363	24	WYBOROWA VODKA	1 X 750 ML	25.39	609.36
5568	18	YELLOW TAIL SHIRAZ	1 X 1500 ML	27.39	493.02
BDL -MINIMU...		BDL -Minimum Order Qty.		30.00	30.00
		Order Total. . .			2,799.18
		Taxable Amount			2,794.38
		@ Tax Rate5.00 %			139.72
		INVOICE TOTAL			2,938.90

Revise Order

Place Order

The **Export Assistant** will open.

1. Select an export option
2. Select All under Define Cell Range (this will export all lines and order totals, including taxes)
3. Click Continue located along the top

**Note:** The export **will not** include the Order Number.

The screenshot shows the Oracle JD Edwards interface. At the top, there's a dark blue header with the "ORACLE® JD Edwards" logo. Below it, a white bar contains the text "3 Shopping Cart - Order Summary". Underneath this bar, there are two buttons: "Continue" (with a green floppy disk icon) and "Cancel" (with a red X icon). The "Continue" button is highlighted with a red rectangle. Below the buttons, the "Export Assistant" dialog is open. It has a title bar "Export Assistant" and two sections. The first section, "Export Options", is highlighted with a red rectangle and contains a blue square with the number "1". It has three radio button options: "Export To Excel" (selected), "Export To Comma Separated Values (CSV)", and "Export To Clipboard". The second section, "Define Cell Range", is also highlighted with a red rectangle and contains a blue square with the number "2". It has three radio button options: "All" (selected), "Selected", and "Range". Below these options, it says "Click Continue to export all rows and all columns."

ORACLE® JD Edwards

3 Shopping Cart - Order Summary

Continue Cancel

Export Assistant

Export Options

1

☒ Export To Excel

☐ Export To Comma Separated Values (CSV)

☐ Export To Clipboard

Define Cell Range

2

Export: ☒ All ☐ Selected ☐ Range

Click Continue to export all rows and all columns.

Depending on your internet browser, a file will be created and saved in your **Downloads** folder.

In Chrome, the file will also temporarily show along the bottom. From here you have the option to **Open** the file.

**ORACLE®** JD Edwards

**Shopping Cart - Order Summary**

Order Number1267917

Sold To27010LIQUOR RETAIL STORE

Ship To27010LIQUOR RETAIL STORE

Records 1 - 14

\* ShopingCartOrdRew\_Grid\_001\_CSS

Item Number	Order Quantity	Product Description	Pkge Size	Unit Price	Extended Price
18	48	HEINEKEN LAGER 330 B	1 X 330 ML	2.30	110.40
		Container Deposit			4.80
42	24	CANADIAN CLUB WHISKY	1 X 750 ML	24.15	579.60
117	12	BACARDI SUPERIOR WHITE RUM	1 X 750 ML	25.41	304.92
389	12	KAHLUA COFFEE LIQUOR	1 X 750 ML	29.70	356.40
570	12	BEEFEATER LONDON DRY GIN	1 X 750 ML	25.89	310.68
5363	24	WYBOROWA VODKA	1 X 750 ML	25.39	609.36
5568	18	YELLOW TAIL SHIRAZ	1 X 1500 ML	27.39	493.02
BDL -MINIMU...		BDL -Minimum Order Qty.		30.00	30.00
		Order Total. . .			2,799.18
					2,794.38
					139.72

Revise Order

Place Order

Open

Always open files of this type

Show in folder

Cancel

Book1 (3).xls

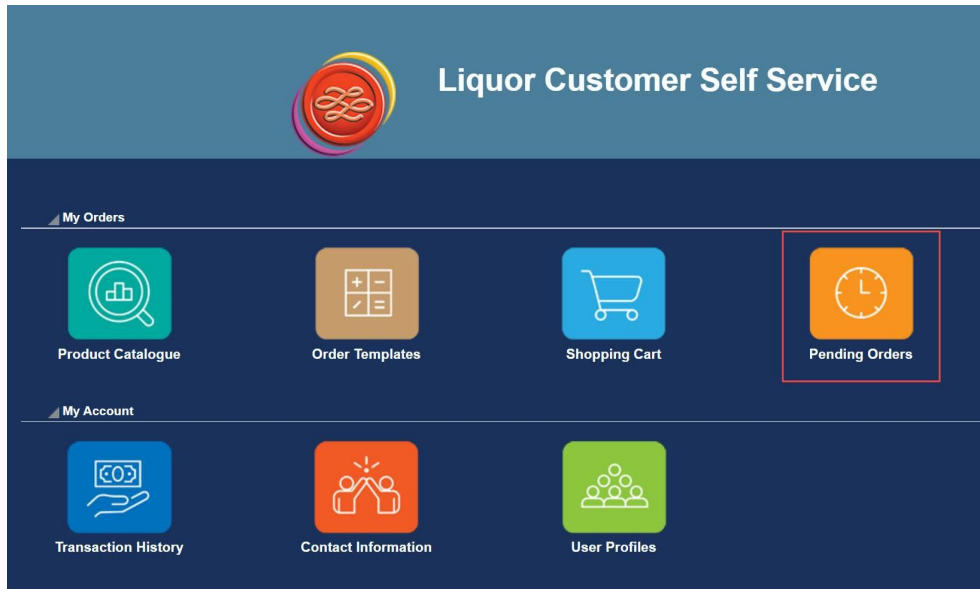
If you selected Excel as your export option, this is what the exported data will look like.

	A	B	C	D	E	F	G
1	Item Number	Order Quantity	Product Description	Package Size	Unit Price	Extended Price	
2	18	48	HEINEKEN	1 X 330 ML	2.3	110.4	
3			Container Deposit			4.8	
4	42	24	CANADIAN	1 X 750 ML	24.15	579.6	
5	117	12	BACARDI S	1 X 750 ML	25.41	304.92	
6	389	12	KAHLUA CC	1 X 750 ML	29.7	356.4	
7	570	12	BEEFEATER	1 X 750 ML	25.89	310.68	
8	5363	24	WYBOROW	1 X 750 ML	25.39	609.36	
9	5568	18	YELLOW TA	1 X 1500 M	27.39	493.02	
10	BDL -MINIMUM ORDER		BDL -Minimum Order		30	30	
11							
12			Order Total. . .			2799.18	
13			Taxable Amount			2794.38	
14			@ Tax Rate 5.00 %			139.72	
15			INVOICE TOTAL			2938.9	
16							

## 4. Pending Orders

### Accessing the Pending Orders Screen

Click on the **Pending Orders** icon located in the **My Orders** section to open. Here you can see your orders that are still open/pending.



This table will only show your orders that are still open/pending and what their status is.

**NOTE:** Privately distributed orders will disappear from this screen overnight and will then be visible in Transaction History.

ORACLE<sup>®</sup> JD Edwards

Pending Orders - Order Review

Personal Form

Q

✕

Tools

Pending Orders - Order Review

Address Number

27010

LIQUOR RETAIL STORE

Find

View Order

Close

Records 1 - 10

OrderReview\_003\_Grid\_CSS

Order Date	Order Number	Order Type	Order Type Description	Customer Reference	Order Status	Held Order Explanation
<input checked="" type="radio"/>	12/14/2021	1267916 S4	Sales Order -Online Self Serve		Order Entered	Finance Hold
<input type="radio"/>	12/14/2021	1267915 S4	Sales Order -Online Self Serve		Order Entered	Finance Hold
<input type="radio"/>	12/14/2021	1267914 S4	Sales Order -Online Self Serve		Order Entered	Finance Hold
<input type="radio"/>	12/09/2021	1267906 S4	Sales Order -Online Self Serve		Order Entered	Finance Hold
<input type="radio"/>	12/09/2021	1267899 S4	Sales Order -Online Self Serve		Order Entered	Finance Hold
<input type="radio"/>	11/23/2021	1267759 S4	Sales Order -Online Self Serve		Order Entered	Finance Hold
<input type="radio"/>	10/28/2021	1267482 S4	Sales Order -Online Self Serve	BDL Order for Oct 29	Order Entered	Finance Hold
<input type="radio"/>	10/27/2021	1267481 S4	Sales Order -Online Self Serve	WINE PO# 12345	Order in Warehousing	
<input type="radio"/>	10/27/2021	1267480 S4	Sales Order -Online Self Serve	Cooler Order Thursday	Order in Warehousing	
<input type="radio"/>	10/27/2021	1267479 S4	Sales Order -Online Self Serve	Liquor Order Friday	Order in Warehousing	

## Held Order Explanation

If the order is being held, an explanation of the type of hold will be provided:

- **Payment Required** - hold will be released once you have made payment for the total invoice amount
- **Finance Hold** - contact Accounting for more information
- **Warehouse Hold** - hold has been put on the order by the warehouse

ORACLE® JD Edwards

Pending Orders - Order Review Personal F

Tools

Address Number 27010 LIQUOR RETAIL STORE

Find View Order Close

Records 1 - 10 OrderReview\_003\_Grid\_CSS

Order Date	Order Number	Order Type	Order Type Description	Customer Reference	Order Status	Held Order Explanation
12/14/2021	1267916 S4	Sales Order -Online Self Serve			Order Entered	Finance Hold

If you have a question regarding a hold on one of your orders, contact the Liquor Contact Centre.



To view the details of a pending order, including the items ordered, quantity and pricing:

1. Select the order row
2. Click the **View Order** button

**ORACLE** JD Edwards

Pending Orders - Order ReviewPersonal Fc

Tools

Address Number

Find 2 View Order Close

Records 1 - 10 OrderReview\_003\_Grid\_CSS

	Order Date	Order Number	Order Type	Order Type Description	Customer Reference	Order Status	Held Order Explanation
<span style="border: 1px solid red; padding: 2px;">1</span>	12/14/2021	1267916	S4	Sales Order -Online Self Serve		Order Entered	Finance Hold
<input type="radio"/>	12/14/2021	1267915	S4	Sales Order -Online Self Serve		Order Entered	Finance Hold
<input type="radio"/>	12/14/2021	1267914	S4	Sales Order -Online Self Serve		Order Entered	Finance Hold
<input type="radio"/>	12/09/2021	1267906	S4	Sales Order -Online Self Serve		Order Entered	Finance Hold
<input type="radio"/>	12/09/2021	1267899	S4	Sales Order -Online Self Serve		Order Entered	Finance Hold
<input type="radio"/>	11/23/2021	1267759	S4	Sales Order -Online Self Serve		Order Entered	Finance Hold
<input type="radio"/>	10/28/2021	1267482	S4	Sales Order -Online Self Serve	BDL Order for Oct 29	Order Entered	Finance Hold
<input type="radio"/>	10/27/2021	1267481	S4	Sales Order -Online Self Serve	WINE PO# 12345	Order in Warehousing	
<input type="radio"/>	10/27/2021	1267480	S4	Sales Order -Online Self Serve	Cooler Order Thursday	Order in Warehousing	
<input type="radio"/>	10/27/2021	1267479	S4	Sales Order -Online Self Serve	Liquor Order Friday	Order in Warehousing	

This will take you to the **Open Orders - Order Review** screen.

This screen shows:

- **specific order details**, including items and quantity ordered
- **order totals**, including additional charges and taxes

**ORACLE®** JD Edwards

**Pending Orders - Open Orders - Order Review**

Tools

Order Number    
 Sold To  *LIQUOR RETAIL STORE*

Records 1 - 15 \* OpenOrder\_Grid\_001\_CSS

	Item Number	Order Quantity	Product Description	Vol/Case Size	Unit Price	Extended Price
<input checked="" type="radio"/>	18	48	HEINEKEN LAGER 330 B	330 ml x 24	2.30	110.40
<input type="radio"/>			Container Deposit			4.80
<input type="radio"/>	42	24	CANADIAN CLUB WHISKY	750 ml x 12	24.15	579.60
<input type="radio"/>	117	12	BACARDI SUPERIOR WHITE RUM	750 ml x 12	25.41	304.92
<input type="radio"/>	389	12	KAHLUA COFFEE LIQUOR	750 ml x 12	29.70	356.40
<input type="radio"/>	570	12	BEEFEATER LONDON DRY GIN	750 ml x 12	25.89	310.68
<input type="radio"/>	2485	12	SAUZA BLANCO TEQUILA	750 ml x 12	28.99	347.88
<input type="radio"/>	5363	24	WYBOROWA VODKA	750 ml x 12	25.39	609.36
<input type="radio"/>	5568	18	YELLOW TAIL SHIRAZ	1500 ml x 6	27.39	493.02
<input type="radio"/>			BDL -Minimum Order Qty.	.	30.00	30.00
<input type="radio"/>						
<input type="radio"/>			Subtotal			<b>3,147.06</b>
<input type="radio"/>			Taxable Amount			3,142.26
<input type="radio"/>			@ Tax Rate 5.000 %			<b>157.11</b>
<input type="radio"/>			INVOICE TOTAL			<b>3,304.17</b>

To navigate back to the **Pending Orders** screen, click on the red **X** located in the toolbar along the top.

**ORACLE® JD Edwards**

**Pending Orders - Open Orders - Order Review**

🔍 ✖ ⚙️ Tools

Order Number    1267916    S4  
Sold To    27010    LIQUOR RETAIL STORE

Records 1 - 15    \* OpenOrder\_Grid\_001\_CSS    📄 📱




	Item Number	Order Quantity	Product Description	Vol/Case Size	Unit Price	Extended Price
<input checked="" type="radio"/>	18	48	HEINEKEN LAGER 330 B	330 ml x 24	2.30	110.40
<input type="radio"/>			Container Deposit			4.80
<input type="radio"/>	42	24	CANADIAN CLUB WHISKY	750 ml x 12	24.15	579.60
<input type="radio"/>	117	12	BACARDI SUPERIOR WHITE RUM	750 ml x 12	25.41	304.92
<input type="radio"/>	389	12	KAHLUA COFFEE LIQUOR	750 ml x 12	29.70	356.40
<input type="radio"/>	570	12	BEEFEATER LONDON DRY GIN	750 ml x 12	25.89	310.68
<input type="radio"/>	2485	12	SAUZA BLANCO TEQUILA	750 ml x 12	28.99	347.88
<input type="radio"/>	5363	24	WYBOROWA VODKA	750 ml x 12	25.39	609.36
<input type="radio"/>	5568	18	YELLOW TAIL SHIRAZ	1500 ml x 6	27.39	493.02
<input type="radio"/>			BDL -Minimum Order Qty.	.	30.00	30.00
<input type="radio"/>						
<input type="radio"/>			Subtotal			3,147.06
<input type="radio"/>			Taxable Amount			3,142.26
<input type="radio"/>			@ Tax Rate5.000 %			157.11
<input type="radio"/>			INVOICE TOTAL			3,304.17

## Closing the Pending Orders Screen



To navigate back to the **Main Menu**, click on the red **X** located in the toolbar along the top or click the **Close** button.

**ORACLE** JD Edwards

Pending Orders - Order Review Personal Form:

   Tools

Address Number

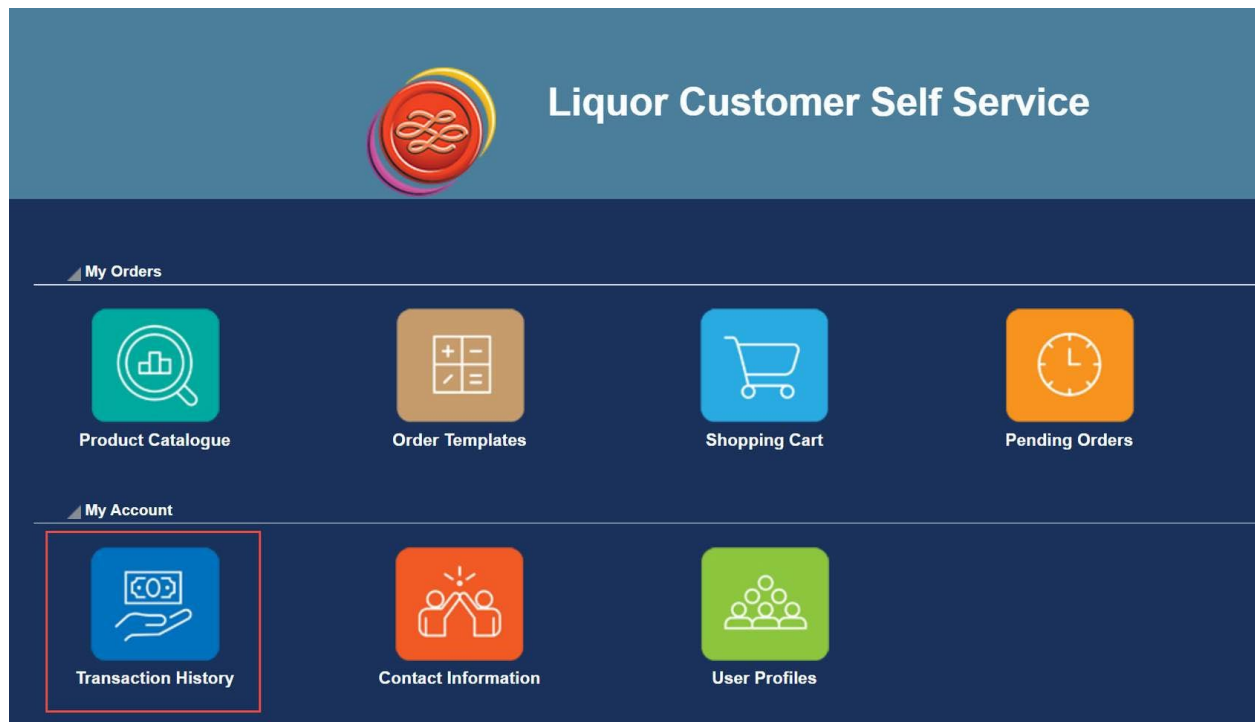
Records 1 - 10 OrderReview\_003\_Grid\_CSS  

	Order Date	Order Number	Order Type	Order Type Description	Customer Reference	Order Status	Held Order Explanation
<input checked="" type="radio"/>	12/14/2021	1267916	S4	Sales Order -Online Self Serve		Order Entered	Finance Hold
<input type="radio"/>	12/14/2021	1267915	S4	Sales Order -Online Self Serve		Order Entered	Finance Hold
<input type="radio"/>	12/14/2021	1267914	S4	Sales Order -Online Self Serve		Order Entered	Finance Hold
<input type="radio"/>	12/09/2021	1267906	S4	Sales Order -Online Self Serve		Order Entered	Finance Hold
<input type="radio"/>	12/09/2021	1267899	S4	Sales Order -Online Self Serve		Order Entered	Finance Hold
<input type="radio"/>	11/23/2021	1267759	S4	Sales Order -Online Self Serve		Order Entered	Finance Hold
<input type="radio"/>	10/28/2021	1267482	S4	Sales Order -Online Self Serve	BDL Order for Oct 29	Order Entered	Finance Hold
<input type="radio"/>	10/27/2021	1267481	S4	Sales Order -Online Self Serve	WINE PO# 12345	Order in Warehousing	
<input type="radio"/>	10/27/2021	1267480	S4	Sales Order -Online Self Serve	Cooler Order Thursday	Order in Warehousing	
<input type="radio"/>	10/27/2021	1267479	S4	Sales Order -Online Self Serve	Liquor Order Friday	Order in Warehousing	

## 5.Transaction History

### Accessing the Transaction History Screen

Click on the **Transaction History** icon located in the **My Account** section to open.



Here you will see all your transactions, including orders placed, credits issued and payments made.

Along the top you have options to control how you search for the transactions you want to see.

You can search for **Paid**, **Open** or **All** transactions.

You also have the option to set a date range to search within. There are 3 types of date ranges you can search for:

- **Invoice Date**
- **Due Date**
- **Statement Date**

ORACLE JD Edwards

Transaction History - Work with Customer Ledger Inquiry

✓ 🔍 ✕ ⚙️ Tools

☐ All ☐ Paid ☒ Open

Date From  Through  ☒ Invoice Date ☐ Due Date ☐ Statement Date

Find View Invoice View Payment Details Close

Records 1 - 101

	Invoice Number	Order Number	Order Type	Order Type Description	Customer Reference	Invoice Amount	Open Amount	Invoice Date
<input checked="" type="radio"/>	5398449	1265921	S4	Sales Order -Online Self Serve	368882			06/02/2020
<input type="radio"/>	5398449	1265921	S4	Sales Order -Online Self Serve	368882	644.14	644.14	06/02/2020

Once you have made your search selection/s click the **Find** button to generate the results.

ORACLE JD Edwards

Transaction History - Work with Customer Ledger Inquiry

✓ 🔍 ✕ ⚙️ Tools

☒ All ☐ Paid ☐ Open

Date From  02/01/2019 Through  02/28/2019 ☐ Invoice Date ☒ Due Date ☐ Statement Date

Find View Invoice View Payment Details Close

Records 1 - 50

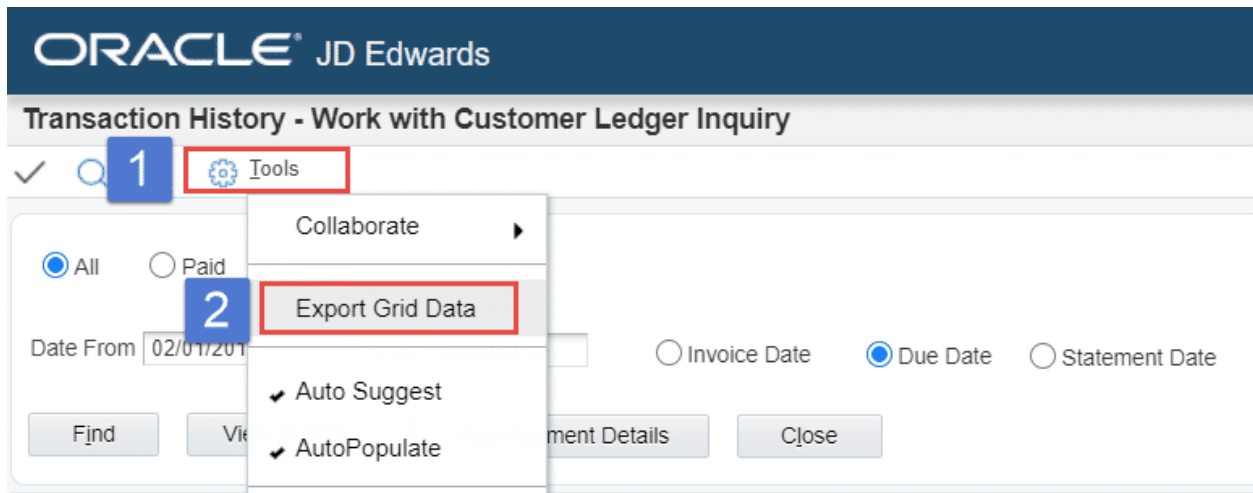
	Invoice Number	Order Number	Order Type	Order Type Description	Customer Reference	Invoice Amount	Open Amount	Invoice Date	Invoice Due Date
<input type="radio"/>	5373476	1254597	S4	Sales Order -Online Self Serve	525992	954.50		01/23/2019	02/22/2019
<input type="radio"/>	5373464	1254521	S4	Sales Order -Online Self Serve	525948	4,224.11		01/23/2019	02/22/2019

## Exporting Data

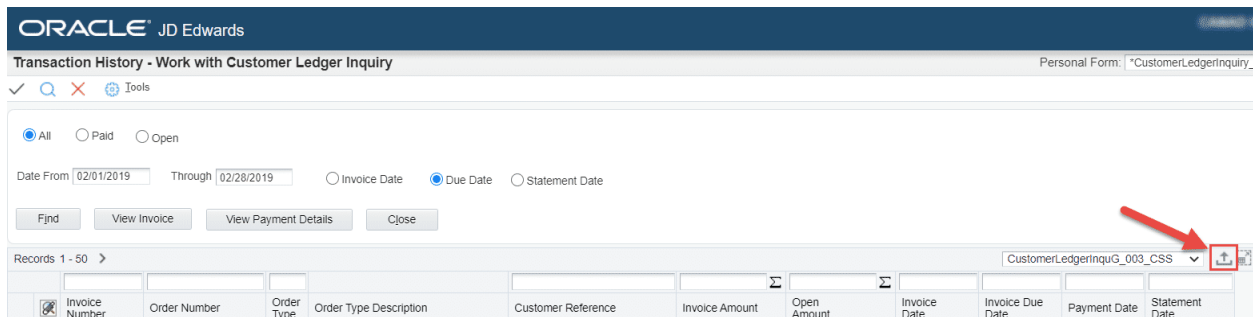
The data in the table can be exported to an Excel spreadsheet.

There are 2 ways this can be done.

The first way to export the data from the table is to click on **Tools** located on the toolbar along the top and then click **Export Grid Data** from the drop-down menu.



The second method to export the data from the table is to click on the **Export Grid Data** button located on the top right corner of the table.



# Online Invoice

To view the online invoice for a transaction:

1. Select the transaction line
2. Click the **View Invoice** button

**ORACLE<sup>®</sup> JD Edwards**

Transaction History - Work with Customer Ledger Inquiry Pers

✓ 🔍 ✕ ⚙️ Tools

☒ All ☐ Paid ☐ Open

Date From 02/01/2019 Through 02/28/2019 ☐ Invoice Date ☒ Due Date ☐ Statement Date

Find **2** **View Invoice** View Payment Details Close

Records 1 - 50 > CustomerLe

	Invoice Number	Order Number	Order Type	Order Type Description	Customer Reference	Invoice Amount	Open Amount	Invoice Date	Invoice Due Date
<input type="radio"/>	5373476	1254597	S4	Sales Order -Online Self Serve	525992	954.50		01/23/2019	02/22/2019
<input checked="" type="radio"/>	5373464	1254521	S4	Sales Order -Online Self Serve	525948	4,224.11		01/23/2019	02/22/2019
<input type="radio"/>	5373424	1254251	S4	Sales Order -Online Self Serve	525766	1,939.83		01/23/2019	02/22/2019

The **Online Invoice Review** provides:

- **specific order details**, including items and quantity ordered
- **order totals**, including additional charges and taxes

**ORACLE<sup>®</sup> JD Edwards**

Transaction History - Online Invoice Review

🔍 ✕ ⚙️ Tools

Invoice Number 5373476 RI 00001  
Order Number 1254597 S4 00001  
Sold To 190

Records 1 - 14 \* TransacHist\_Grid\_CSS



	Item Number	Order Quantity	Product Description	Vol/Case Size	Unit Price	Extended Price	Invoice No.	Invoice Date
<input checked="" type="radio"/>	11717	8	JP WISERS SPECIAL BLEND WHISKY	1140 ml x 8	33.9900	271.92	5373476	01/23/2019
<input type="radio"/>	12182	2	CROWN ROYAL DELUXE WHISKY	1140 ml x 9	39.9900	79.98	5373476	01/23/2019
<input type="radio"/>	23771	12	CANYON ROAD PINOT GRIGIO	750 ml x 12	8.0000	96.00	5373476	01/23/2019
<input type="radio"/>	23893	3	BACARDI OAKHEART SPICED RUM	1140 ml x 6	38.9900	116.97	5373476	01/23/2019
<input type="radio"/>	161356	12	WILDBERRY VODKA 4/341B	1364 ml x 6	8.8162	105.79	5373476	01/23/2019
<input type="radio"/>	323972	2	SAMBUCA LIQUEUR	750 ml x 12	23.1900	46.38	5373476	01/23/2019
<input type="radio"/>	439000	12	CANYON ROAD MERLOT	750 ml x 12	8.0000	96.00	5373476	01/23/2019
<input type="radio"/>	439018	12	CANYON ROAD CABERNET SAUVIGNON	750 ml x 12	8.0000	96.00	5373476	01/23/2019
<input type="radio"/>								
<input type="radio"/>			Order Total . .			909.04		
<input type="radio"/>			Taxable Amount			909.04		
<input type="radio"/>			@ Tax Rate5.000 %			45.46		
<input type="radio"/>			Freight Charges					
<input type="radio"/>			INVOICE TOTAL			954.50		



To close the **Online Invoice Review** screen, click on the red **X** located in the toolbar along the top.

**ORACLE®** JD Edwards

**Transaction History - Online Invoice Review**

Invoice Number: 5373476 RI 00001  
 Order Number: 1254597 S4 00001  
 Sold To: 190

Records 1 - 14
 \* TransachHist\_Grid\_CSS

	Item Number	Order Quantity	Product Description	Vol/Case Size	Unit Price	Extended Price	Invoice No.	Invoice Date
<input checked="" type="radio"/>	11717	8	JP WISERS SPECIAL BLEND WHISKY	1140 ml x 8	33.9900	271.92	5373476	01/23/2019
<input type="radio"/>	12182	2	CROWN ROYAL DELUXE WHISKY	1140 ml x 9	39.9900	79.98	5373476	01/23/2019
<input type="radio"/>	23771	12	CANYON ROAD PINOT GRIGIO	750 ml x 12	8.0000	96.00	5373476	01/23/2019
<input type="radio"/>	23893	3	BACARDI OAKHEART SPICED RUM	1140 ml x 6	38.9900	116.97	5373476	01/23/2019
<input type="radio"/>	161356	12	WILDBERRY VODKA 4/341B	1364 ml x 6	8.8162	105.79	5373476	01/23/2019
<input type="radio"/>	323972	2	SAMBUCA LIQUEUR	750 ml x 12	23.1900	46.38	5373476	01/23/2019
<input type="radio"/>	439000	12	CANYON ROAD MERLOT	750 ml x 12	8.0000	96.00	5373476	01/23/2019
<input type="radio"/>	439018	12	CANYON ROAD CABERNET SAUVIGNON	750 ml x 12	8.0000	96.00	5373476	01/23/2019
<input type="radio"/>								
<input type="radio"/>			Order Total . .			909.04		
<input type="radio"/>			Taxable Amount			909.04		
<input type="radio"/>			@ Tax Rate 5.000 %			45.46		
<input type="radio"/>			Freight Charges					
<input type="radio"/>			INVOICE TOTAL			954.50		

## Payment Details

If a transaction has been paid, you can view the payment details by:

1. Selecting the transaction line
2. Clicking the **View Payment Details** button

ORACLE® JD Edwards

Transaction History - Work with Customer Ledger Inquiry Personal Form: \*Cus

✓ 🔍 ✕ ⚙️ Tools

☒ All ☐ Paid ☐ Open

Date From 02/01/2019 Through 02/28/2019 ☐ Invoice Date ☒ Due Date ☐ Statement Date

Find View Invoice **2** View Payment Details Close

Records 1 - 50 >

	Invoice Number	Order Number	Order Type	Order Type Description	Customer Reference	Invoice Amount	Open Amount	Invoice Date	Invoice Due Date	Payment Date
<input type="radio"/>	5373602	1255326	S4	Sales Order -Online Self Serve	526254	7,492.04		01/23/2019	02/22/2019	02/20/2019
<input checked="" type="radio"/>	5373476	1254597	S4	Sales Order -Online Self Serve	525992	954.50		01/23/2019	02/22/2019	02/20/2019
<input type="radio"/>	5373464	1254521	S4	Sales Order -Online Self Serve	525948	4,224.11		01/23/2019	02/22/2019	02/20/2019

From the **Payment Details** screen, you will see the payment amount, and which orders this payment was applied to.

ORACLE® JD Edwards

Transaction History - Payment Details Payment Details

Payment Details

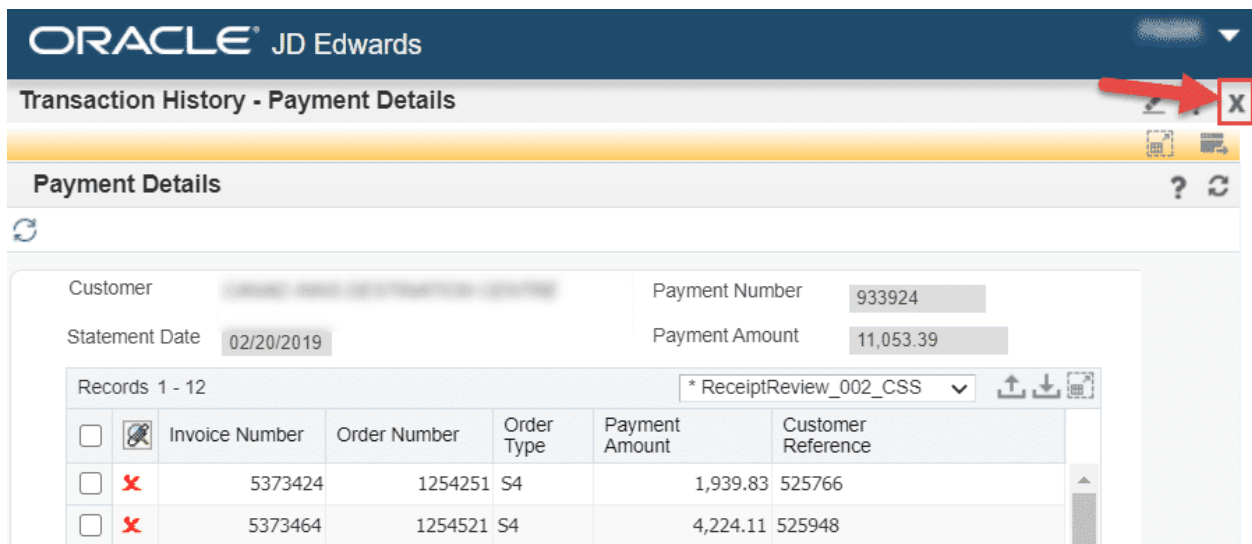
Customer \*\*\*\*\* Payment Number 933924

Statement Date 02/20/2019 Payment Amount 11,053.39

Records 1 - 12 \* ReceiptReview\_002\_CSS

	Invoice Number	Order Number	Order Type	Payment Amount	Customer Reference
<input type="checkbox"/>	5373424	1254251	S4	1,939.83	525766
<input type="checkbox"/>	5373464	1254521	S4	4,224.11	525948
<input checked="" type="checkbox"/>	5373476	1254597	S4	954.50	525992
<input type="checkbox"/>	5373602	1255326	S4	7,492.04	526254
<input type="checkbox"/>	5373634	1255388	S4	604.52	526276
<input type="checkbox"/>	5390905	243554	CB	438.18	90 81956562
<input type="checkbox"/>	5390960	243609	CB	158.65	91 94586
<input type="checkbox"/>	5391031	604887	CE	462.76	90 81987436
<input type="checkbox"/>	5391032	604888	CE	152.41	90 81987437

To close the **Payment Details** screen, click on the grey **X** located in the toolbar along the top right.



ORACLE® JD Edwards

Transaction History - Payment Details

Payment Details

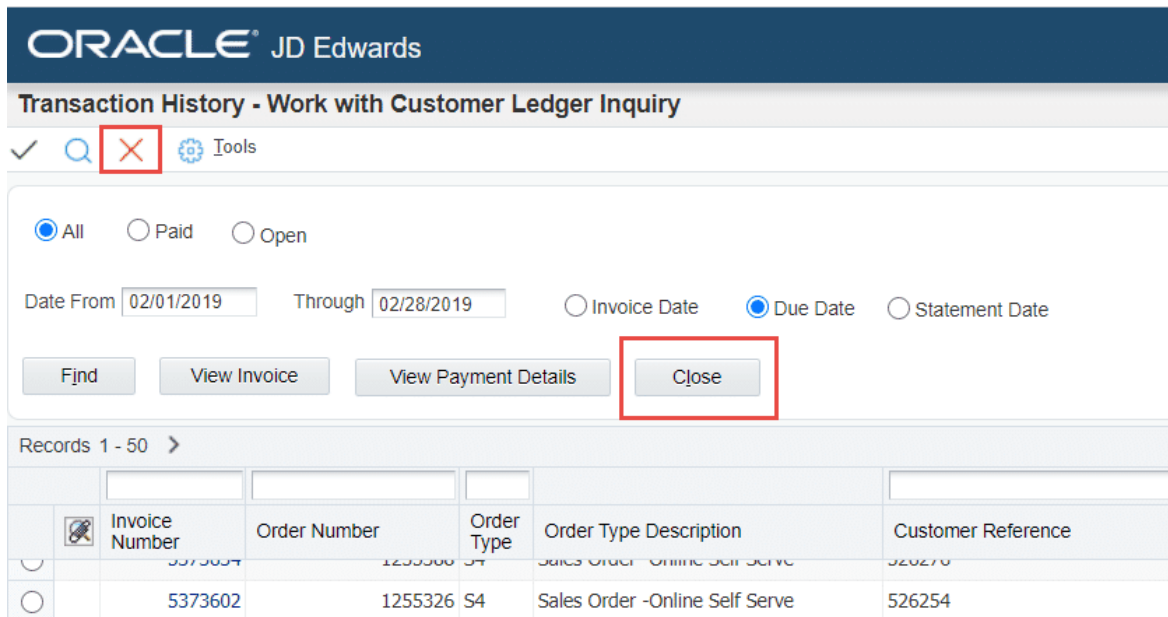
Customer: [Redacted] Payment Number: 933924  
Statement Date: 02/20/2019 Payment Amount: 11,053.39

Records 1 - 12 \* ReceiptReview\_002\_CSS

	Invoice Number	Order Number	Order Type	Payment Amount	Customer Reference
<input type="checkbox"/>	5373424	1254251	S4	1,939.83	525766
<input type="checkbox"/>	5373464	1254521	S4	4,224.11	525948

## Closing the Transaction History Screen

To navigate out of the **Transaction History** screen back to the **Main Menu**, click on the red **X** located in the toolbar along the top, or click the **Close** button.



ORACLE® JD Edwards

Transaction History - Work with Customer Ledger Inquiry

✓ 🔍 **X** ⚙️ Tools

☒ All ☐ Paid ☐ Open

Date From: 02/01/2019 Through: 02/28/2019 ☐ Invoice Date ☒ Due Date ☐ Statement Date

Find View Invoice View Payment Details **Close**

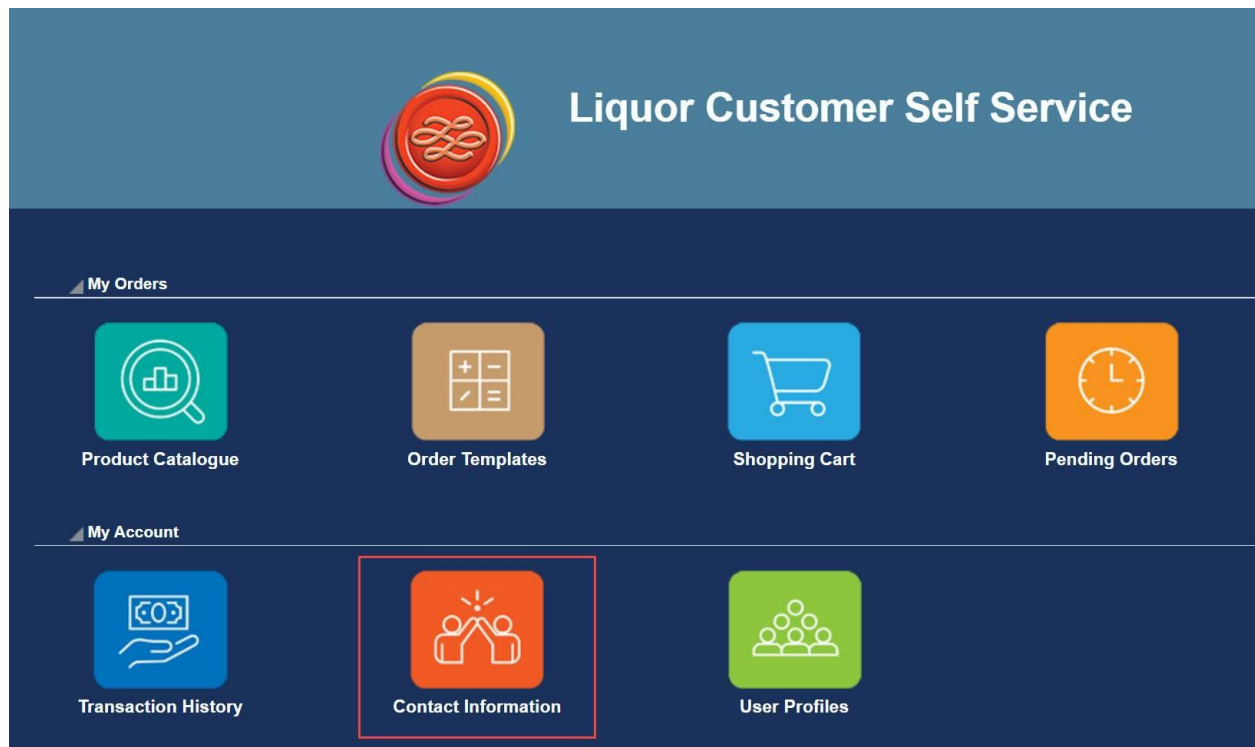
Records 1 - 50 >

	Invoice Number	Order Number	Order Type	Order Type Description	Customer Reference
<input type="radio"/>	5373602	1255326	S4	Sales Order -Online Self Serve	526254

## 6.Contact Information

### Accessing the Contact Information Screen

Click on the **Contact Information** icon located in the **My Account** section to open.



In the **Contact Information** screen, you can view your mailing address, email addresses and phone numbers.

- **Address** – This is your physical address.
- **Electronic Address** – This shows your email addresses which are used for:
  - Email Address – Informational: basic contact email address
  - Order Acknowledgement: order information (these are automatically sent by system)
  - Invoice/Payment Advice: financial information (these are automatically sent by system)
- **Phones** – These are your various contact phone numbers.

The screenshot shows the 'Contact Information - Contact Information Self Service' interface. At the top, the company name is 'LIQUOR RETAIL STORE' and the address book number is '27010'. A red message states: 'For any changes to the below information, please send an email titled "Contact Information Change Request" outlining the change to accounting@mbll.ca'. The 'General Info' tab is active, showing the mailing name 'LIQUOR RETAIL STORE'. Below this is the 'Address' section with fields for Address Line 1 (27010 MAIN STREET), City (WINNIPEG), Province (Manitoba), and Postal Code (R0J 1W0). The 'Electronic Addresses' section displays a table with 4 records, showing email types like 'Order Acknowledgement Email' and 'Email Address - Informational'. The 'Phones' section displays a table with 4 records, showing phone types like 'Business Phone Number' and 'Customer Cellular'.

ORACLE<sup>®</sup> JD Edwards

Contact Information - Contact Information Self Service

Company Name: LIQUOR RETAIL STORE Address Book Number: 27010 Exit

General Info

For any changes to the below information, please send an email titled "Contact Information Change Request" outlining the change to accounting@mbll.ca

Mailing Name: LIQUOR RETAIL STORE

**Address**

Address Line 1: 27010 MAIN STREET City: WINNIPEG  
Address Line 2: Province: Manitoba  
Address Line 3: Postal Code: R0J 1W0  
Address Line 4:

**Electronic Addresses**

Records 1 - 4 \* ElectronicAdd\_003\_CSS

Email Address Type	Email Address
<input checked="" type="radio"/> Order Acknowledgement Email	bob@liquorretailstore.ca
<input type="radio"/> Invoice/Payment Advice Email	
<input type="radio"/> Email Address - Informational	betty@liquorretailstore.ca
<input type="radio"/> -- Select One --	

**Phones**

Records 1 - 4 \* Phone\_Cust\_003\_CSS

Phone Type	Phone/Fax Number
<input checked="" type="radio"/> Business Phone Number	2047881234
<input type="radio"/> Customer Cellular	2042229898
<input type="radio"/> Business - Accounting Dept	2047885678
<input type="radio"/> -- Select One --	

Changes to your Contact Information can't be made directly in this screen.

To update any of your information, send an email titled "Contact Information Change Request" to [accounting@mbll.ca](mailto:accounting@mbll.ca)

## Closing the Contact Information Screen

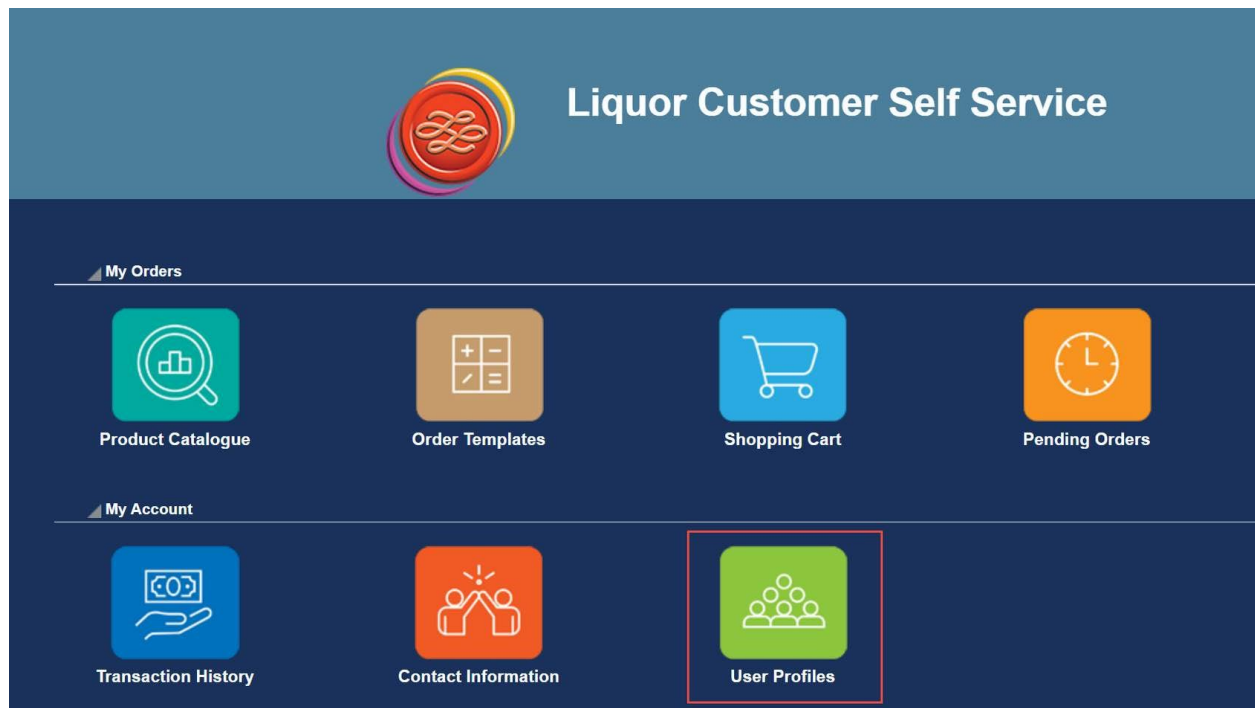
To exit the **Contact Information** screen, click on the **Exit** button located on the top-right corner of the screen.

The screenshot shows the Oracle JD Edwards interface for the 'Contact Information - Contact Information Self Service' screen. At the top, the Oracle logo and 'JD Edwards' are displayed. Below this, the page title 'Contact Information - Contact Information Self Service' is shown. The main content area includes a 'Company Name' field with the value 'LIQUOR RETAIL STORE' and an 'Address Book Number' field with the value '27010'. In the top right corner, there is an 'Exit' button, which is highlighted with a red rectangular box. Below the main content area, there is a 'General Info' tab. Under this tab, a message in red text states: 'For any changes to the below information, please send an email titled "Contact Information Change Request" outlining the change to accounting@mbll.ca'. Below this message, there is a 'Mailing Name' field with the value 'LIQUOR RETAIL STORE'.

## 7. User Profiles

### Accessing the User Profiles Screen

Click on the **User Profiles** icon located in the **My Account** section to open.



In the **Manage Users** screen, user profiles can be setup and managed.

**While all users can see this screen, only those assigned an admin role will be able to access its functionality.**

ORACLE<sup>®</sup> JD Edwards

User Profiles - Manage Users for LIQUOR RETAIL STORE

View Company Users

Find

Close

Records 1 - 3

System ID

User Name

Account Status

<input checked="" type="radio"/>	CSSTESTLCC	csstestlcc	
<input type="radio"/>	CSSTESTRO	csstestro	
<input type="radio"/>	CSSTESTSUP	csstestsup	

Add User

Delete User

Reset Password

Lock/Unlock

Available Security Roles

Records 1 - 4

Role

Role Description

Status

Effective Date

<input checked="" type="radio"/>	L_ADMIN	Liquor CSS Admin Role	10/22/2021
<input type="radio"/>	L_FINCLK	Liquor CSS Finance Clerk role	10/22/2021
<input type="radio"/>	L_ORDERCLK	Liquor CSS Ordering Clerk role	10/22/2021

Add Role

Remove Role



## Types of Security Roles

### **Admin (L\_ADMIN)**

The admin role is the only role that can control the roles of other users on the account. An admin can add, edit and delete user roles. Additionally they can reset passwords and lock/unlock an account.

**It is strongly recommended that you have two admin role users set-up** in case one of the admins gets locked out and needs a password reset. Support through the Liquor Contact Centre is only available Monday to Friday during regular business hours, which means they could be locked out for a while if it were to occur on an evening or weekend.

### **Finance Clerk (L\_FINCLK)**

The finance clerk role is only able to view the financial information for the account, such as transaction history, invoices and payments.

**This role is restricted from placing orders.**

### **Order Clerk (L\_ORDERCLK)**

The order clerk role is able to place orders and has full access to the product catalogue, order templates and the shopping cart.

This role can also see all of the **same information that the finance clerk role can see.**

**When the customer is initially set-up, they will be given a super user account that has all 3 roles assigned to it.**

## Adding a User

To add a new user profile, click on the **Add User** button.

**ORACLE** JD Edwards

User Profiles - Manage Users for LIQUOR RETAIL STORE

View Company Users

Find

Close

Records 1 - 3

	System ID	User Name	Account Status
<input checked="" type="radio"/>	CSSTESTLCC	csstestlcc	
<input type="radio"/>	CSSTESTRO	csstestro	
<input type="radio"/>	CSSTESTSUP	csstestsup	

Add User

Delete User

Reset Password

Lock/Unlock

Available Security Roles

Records 1 - 4

	Role	Role Description	Status	Effective Date
<input checked="" type="radio"/>	L_ADMIN	Liquor CSS Admin Role		10/22/2021
<input type="radio"/>	L_FINCLK	Liquor CSS Finance Clerk role		10/22/2021
<input type="radio"/>	L_ORDERCLK	Liquor CSS Ordering Clerk role		10/22/2021

Add Role

Remove Role

In the **User Profile** section there are 2 fields.

- The **System ID** field is automatically generated by the system and can't be edited.
- The **User Name** field is a required field and can't be changed once the profile has been created. This field must be unique and should help you identify who the user is. A suggestion is to use their first and last name.

**ORACLE**® JD Edwards

User Profiles - Manage User Profiles for LIQUOR RETAIL STORE

✓ ✗ ⚙ Tools

**User Profile**

System ID \*

L27010\_01

User Name

REQUIRED

\*<=254 characters and unique to the system

**User Password**

Password

•

Confirm Password

•

Must include:

- >= 8 characters

- a number

- a special character (!@#\$%)

- <=2 consecutive characters

**User Security**

Account Status

☒ Enabled

☐ Disabled

Create

Cancel

In the **User Password** section, you need to enter and confirm a password for the user you are creating.

The password should follow these rules:

- be at least 8 characters long
- include a number
- include a special character (!@#\$%)
- not have any 2 consecutive characters

**ORACLE** JD Edwards

User Profiles - Manage User Profiles for LIQUOR RETAIL STORE

✓ ✗ ⚙ Tools

**User Profile**

System ID \*

L27010\_01

User Name

jane\_smith

\*<=254 characters and unique to the system

**User Password**

Password

•

Must include:  
- >= 8 characters  
- a number  
- a special character (!@#\$%)  
- <=2 consecutive characters

Confirm Password

•

**User Security**

Account Status

☒ Enabled ☐ Disabled

Create

Cancel

To create the new user profile, click on the **Create** button.

**ORACLE**<sup>®</sup> JD Edwards

User Profiles - Manage User Profiles for LIQUOR RETAIL STORE

✓ ✗ ⚙ Tools

**User Profile**

System ID \*

L27010\_01

User Name

jane\_smith

\*≤254 characters and unique to the system

**User Password**

Password

.....

Must include:  
- ≥ 8 characters  
- a number  
- a special character (!@#\$\$%)  
- ≤2 consecutive characters

Confirm Password

.....

**User Security**

Account Status

☒ Enabled

☐ Disabled

Create

Cancel

## Assigning a Security Role to New or Existing Users

To complete the setup of a new user you will need to assign the type of security role they will have:

1. Select the user
2. Select the type of security role from the **Available Security Roles** list (you can only add 1 role at a time)
3. Click the **Add Role** button


**ORACLE® JD Edwards**

**User Profiles - Manage Users for LIQUOR RETAIL STORE**

View Company Users

FindClose


Records 1 - 4

		System ID	User Name	Account Status
<input type="radio"/>		CSSTESTLCC	csstestlcc	
<input type="radio"/>		CSSTESTRO	csstestro	
<b>1</b>	<input checked="" type="radio"/>	CSSTESTSUP	csstestsup	
	<input checked="" type="radio"/>	L27010_01	jane_smith	

Add UserDelete UserReset PasswordLock/Unlock

**Available Security Roles**

Records 1 - 4

		Role	Role Description	Status	Effective Date
<input type="radio"/>		L_ADMIN	Liquor CSS Admin Role		10/22/2021
<input type="radio"/>		L_FINCLK	Liquor CSS Finance Clerk role		10/22/2021
<b>2</b>	<input checked="" type="radio"/>	L_ORDERCLK	Liquor CSS Ordering Clerk role		10/22/2021

**3** Add RoleRemove Role

Once a role has been assigned, it will show as **"Enrolled"** in the **Status** column.

**ORACLE®** JD Edwards


User Profiles - Manage Users for LIQUOR RETAIL STORE

View Company Users

Find

Close

Records 1 - 4

	 System ID	User Name	Account Status
<input type="radio"/>	CSSTESTLCC	csstestlcc	
<input type="radio"/>	CSSTESTRO	csstestro	
<input type="radio"/>	CSSTESTSUP	csstestsup	
<input checked="" type="radio"/>	L27010_01	jane_smith	

Add User


Delete User

Reset Password

Lock/Unlock

Available Security Roles

Records 1 - 4

	 Role	Role Description	Status	Effective Date
<input type="radio"/>	L_ADMIN	Liquor CSS Admin Role		10/22/2021
<input type="radio"/>	L_FINCLK	Liquor CSS Finance Clerk role		10/22/2021
<input checked="" type="radio"/>	L_ORDERCLK	Liquor CSS Ordering Clerk role	Enrolled	10/22/2021

Add Role

Remove Role

**A security role must be assigned to a new user or they will not be able to login.**

**If a security role is changed, there may be a 10 minute delay while the system updates.**

**When setting up another Admin User Role, all 3 security roles must be assigned (users can only assign roles that are assigned to themselves).**

## Deleting a User

To delete a user profile:

1. Select the user you would like to delete
2. Click the **Delete User** button

**ORACLE<sup>®</sup> JD Edwards**

**User Profiles - Manage Users for LIQUOR RETAIL STORE**

View Company Users

Find Close

Records 1 - 4

	System ID	User Name	Account Status
<input type="radio"/>	CSSTESTLCC	csstestlcc	
<input type="radio"/>	CSSTESTRO	csstestro	
<b>1</b>	CSSTESTSUP	csstestsup	
<input checked="" type="radio"/>	L27010_01	jane_smith	

Add User **2** Delete User Reset Password Lock/Unlock

**Available Security Roles**

Records 1 - 4

	Role	Role Description	Status	Effective Date
<input type="radio"/>	L_ADMIN	Liquor CSS Admin Role		10/22/2021
<input type="radio"/>	L_FINCLK	Liquor CSS Finance Clerk role		10/22/2021
<input checked="" type="radio"/>	L_ORDERCLK	Liquor CSS Ordering Clerk role	Enrolled	10/22/2021

Add Role Remove Role

A **Delete Confirmation** pop-up window will open.

Click the **OK** button to confirm or the **Cancel** button to cancel this action.

**User Profiles - Delete Confirmation** ? □ X

Are you sure that you want to delete the selected user?

**OK** Cancel



## Resetting a User Password

The admin super user account/s will be responsible for managing all of your users' passwords.

They can reset a password if a user forgets it or gets locked out of their account due to entering the incorrect password too many times.

To reset a user password:

1. Select the user you would like to reset the password for
2. Click the **Reset Password** button

ORACLE® JD Edwards

User Profiles - Manage Users for LIQUOR RETAIL STORE

View Company Users

Find Close

Records 1 - 4

	System ID	User Name	Account Status
<input type="radio"/>	CSSTESTLCC	csstestlcc	
<input type="radio"/>	CSSTESTRO	csstestro	
<b>1</b> <input type="radio"/>	CSSTESTSUP	csstestsup	
<input checked="" type="radio"/>	L27010_01	m_sanchez	

Add User Delete User **2** Reset Password Lock/Unlock

In the **Administrative Password Revisions** section:

1. Enter the new password in the **Password** field
2. Re-enter the new password in the **Confirm New Password** field
3. Click the **Save** button

**Note:** You can click the Cancel button to back out of making any changes.

ORACLE® JD Edwards

User Profiles - Manage User Profiles for LIQUOR RETAIL STORE

✓ ✗ ⚙ Tools

**Administrative Password Revisions**

System ID L27010\_01

Password 1

Confirm New Password 2

3

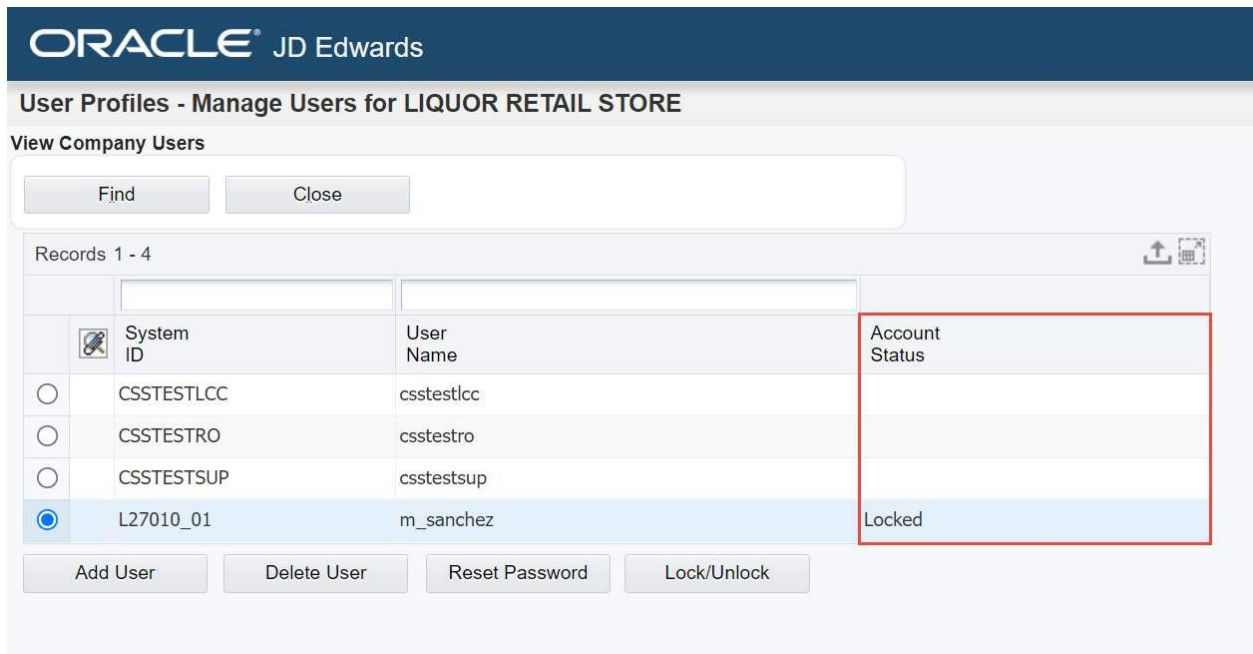
Must include:  
- >= 8 characters  
- a number  
- a special character (!@#\$\$%)  
- <=2 consecutive characters

This process can also be used by a user to update their own password if they would like to change it.

## Lock/Unlock a User

If a user has entered their password incorrectly too many times, they will be locked out of their account.

The user's **Account Status** will show as **Locked**.



ORACLE® JD Edwards

User Profiles - Manage Users for LIQUOR RETAIL STORE

View Company Users

Find Close

Records 1 - 4

	System ID	User Name	Account Status
<input type="radio"/>	CSSTESTLCC	csstestlcc	
<input type="radio"/>	CSSTESTRO	csstestro	
<input type="radio"/>	CSSTESTSUP	csstestsup	
<input checked="" type="radio"/>	L27010_01	m_sanchez	Locked

Add User Delete User Reset Password Lock/Unlock

To unlock a user's account:

1. Select the user you would like to unlock
2. Click the **Lock/Unlock** button

Once you have unlocked the account, reset the user's password following the steps outlined in the **Reset Password** section above.

ORACLE® JD Edwards

User Profiles - Manage Users for LIQUOR RETAIL STORE

View Company Users

Find Close

Records 1 - 4

	System ID	User Name	Account Status
<input type="radio"/>	CSSTESTLCC	csstestlcc	
<input type="radio"/>	CSSTESTRO	csstestro	
<b>1</b> <input checked="" type="radio"/>	CSSTESTSUP	csstestsup	
<input checked="" type="radio"/>	L27010_01	m_sanchez	Locked

Add User Delete User Reset Password **2** Lock/Unlock

The admin super user can also lock a user's account.

For example, if a user no longer requires the login, the account can be locked to ensure that they can't access the account information or place additional orders (if they have order access).

## Close User Profiles Screen

To navigate back to the **Main Menu**, click the **Close** button.

The screenshot shows the Oracle JD Edwards interface for managing users. The title bar reads "ORACLE® JD Edwards". Below it, the page title is "User Profiles - Manage Users for LIQUOR RETAIL STORE". The section "View Company Users" contains a search bar with a "Find" button and a "Close" button, which is highlighted with a red rectangle. Below the search bar, a table displays user records. The table has columns for "System ID", "User Name", and "Account Status". The first four records are CSSTESTLCC, CSSTESTRO, CSSTESTSUP, and L27010\_01. The last record, L27010\_01, is selected with a blue radio button. Below the table, there are four buttons: "Add User", "Delete User", "Reset Password", and "Lock/Unlock".

Records 1 - 4

	System ID	User Name	Account Status
<input type="radio"/>	CSSTESTLCC	csstestlcc	
<input type="radio"/>	CSSTESTRO	csstestro	
<input type="radio"/>	CSSTESTSUP	csstestsup	
<input checked="" type="radio"/>	L27010_01	m_sanchez	

Add User Delete User Reset Password Lock/Unlock