INBOUND SCHEDULING

CARRIER and SUPPLIER
USER GUIDE

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Inbound Scheduling System Requirements

-        Microsoft Windows 7
-        Microsoft Windows Vista
-        Microsoft Windows XP
-        Internet Explorer 6.0 or later versions
-        Internet capability

1
INBOUND SCHEDULING SYSTEM OVERVIEW
INTRODUCTION

Welcome to the Inbound Scheduling (IMS).

This system provides appointments scheduled in real time at the LCBO Retail Service Centres (Durham, London, Ottawa and Thunder Bay) for Continental North American deliveries. Toronto Warehouse, Private Stock and VINTAGES are not included in the system.

With the implementation of the Inbound Scheduling System delivery appointments will be made online, not by telephone and email. Carriers and select Suppliers will schedule their inbound delivery appointments online.

Select Suppliers will book appointments for Ontario and Quebec full truck load orders.

Carriers/Suppliers will book the remaining Continental North American appointments.

Select Suppliers will call Sales and Marketing to have them book appointments.

The inbound scheduling system will:
- Automate and streamline the appointment scheduling process
- Provide visibility to appointments in real time
- Reduce manual activities
- Reduce phone calls to the Retail Service Centres

This online solution will improve customer service and productivity.

1
INBOUND SCHEDULING SYSTEM OVERVIEW
OVERVIEW OF INBOUND SCHEDULING

Carriers and select Suppliers now have the responsibility of booking their delivery appointments with the LCBO's Retail Service Centres.

Continental North American Carriers and select Suppliers will now have the ability to log onto the Inbound Scheduling system to book appointments for Purchase Order(s) under rules and constraints that have been programmed into the system.

It is important to note that before an appointment can be created in IMS:
- **the Purchase Order must be confirmed by the Supplier in Web PO**
- **scheduled ship/arrival dates must be accurately maintained in Web PO, this will ensure that product can be scheduled to arrive at the Retail Service Centre on time.**
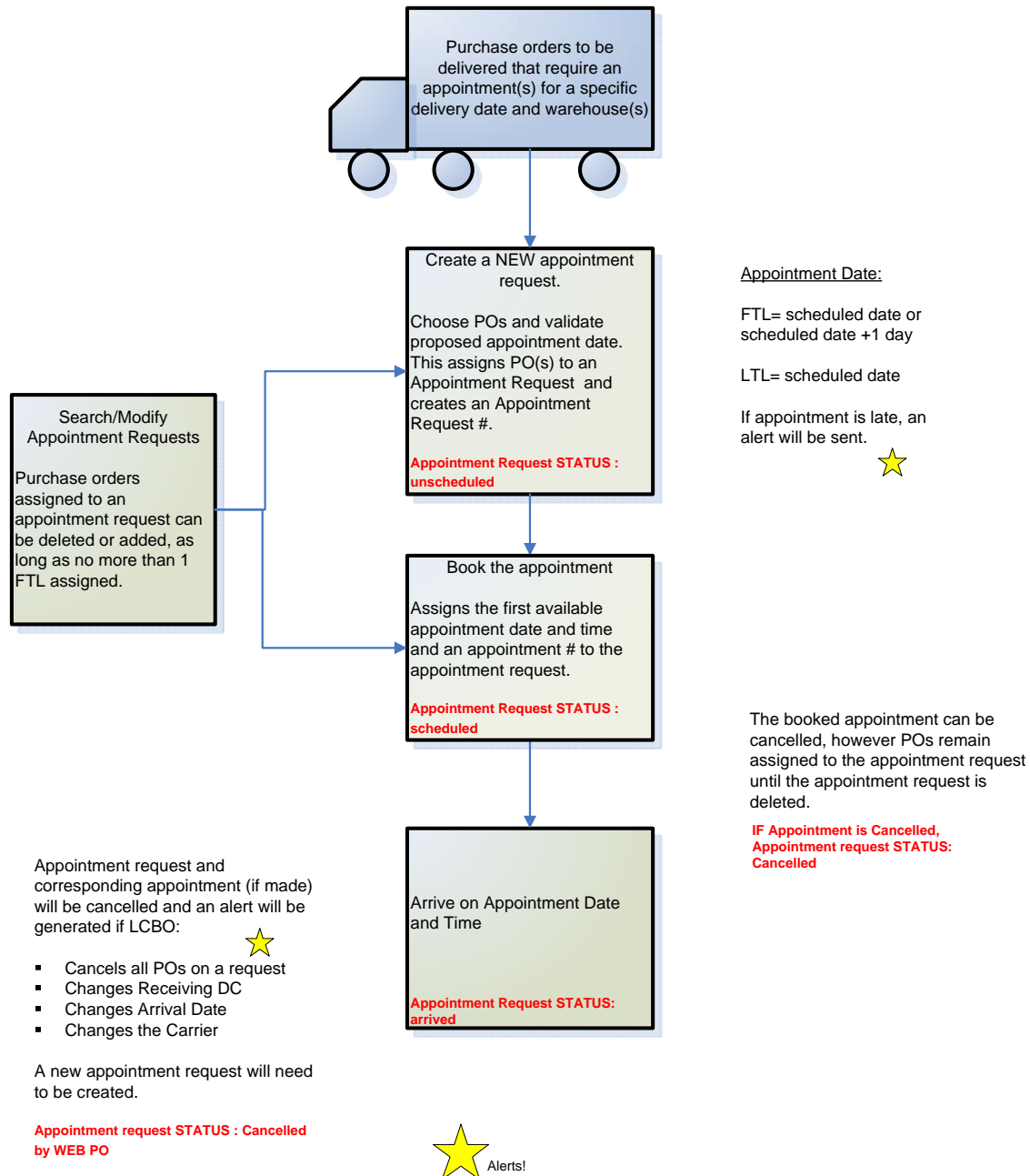
Appointments can be made with the following **Purchase Order combinations:**

1. One supplier, one PO	**Consists of one FTL (Full Truck Load) PO**
2. One supplier, multiple POs, co-loaded	**Consists of one FTL PO and one or more LTL (less than full truckloads) POs**
3. Multiple suppliers, multiple POs	**Consists of one or more LTL POs** *Carrier only
NOTE: For scenarios #2 and #3, the Thunder-Bay Retail Service cannot be included when booking multi-warehouses (multi-stops). **NOTE: London (101) and (103) are considered the same Retail Service Centre for booking purchase orders.**	

The flow chart on the following page visually demonstrates how the Inbound Scheduling process works.

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INBOUND SCHEDULING SYSTEM OVERVIEW
INBOUND SCHEDULING FLOW CHART

Purchase orders to be delivered that require an appointment(s) for a specific delivery date and warehouse(s)

Create a NEW appointment request.

Choose POs and validate proposed appointment date. This assigns PO(s) to an Appointment Request and creates an Appointment Request #.

Appointment Request STATUS : unscheduled

Appointment Date:

FTL= scheduled date or scheduled date +1 day

LTL= scheduled date

If appointment is late, an alert will be sent.

Search/Modify Appointment Requests

Purchase orders assigned to an appointment request can be deleted or added, as long as no more than 1 FTL assigned.

Book the appointment

Assigns the first available appointment date and time and an appointment # to the appointment request.

Appointment Request STATUS : scheduled

The booked appointment can be cancelled, however POs remain assigned to the appointment request until the appointment request is deleted.

IF Appointment is Cancelled, Appointment request STATUS: Cancelled

---

Appointment request and corresponding appointment (if made) will be cancelled and an alert will be generated if LCBO:

- Cancels all POs on a request
- Changes Receiving DC
- Changes Arrival Date
- Changes the Carrier

A new appointment request will need to be created.

Appointment request STATUS : Cancelled by WEB PO

Arrive on Appointment Date and Time

Appointment Request STATUS: arrived

Alerts!

1
INBOUND SCHEDULING SYSTEM OVERVIEW
ACCESS INBOUND SCHEDULING

Inbound Scheduling login:

All users will receive an email titled **LCBO (IMS) - New User Account Creation**.

The email details that your account has been created and provides you with the URL address for Inbound Scheduling; a username; and a temporary password, which you must change as soon as you log into the system.

NOTE

If you enter an incorrect User Name or Password, an error message will show.

Re-enter the correct User Name and Password.

If the user is inactive for more than 20 minutes, the system will automatically log off the user. If this occurs, the user will have to log on again.

1
INBOUND SCHEDULING SYSTEM OVERVIEW
LOG IN

Step 1
Click the URL provided in the LCBO email. The **Welcome to Inbound Scheduling** screen appears.

Tip: Save the URL to your 'Favourites' in your web browser.

Step 2
Enter the **User Name** and **Password** (case sensitive) provided to you by the LCBO administrator.
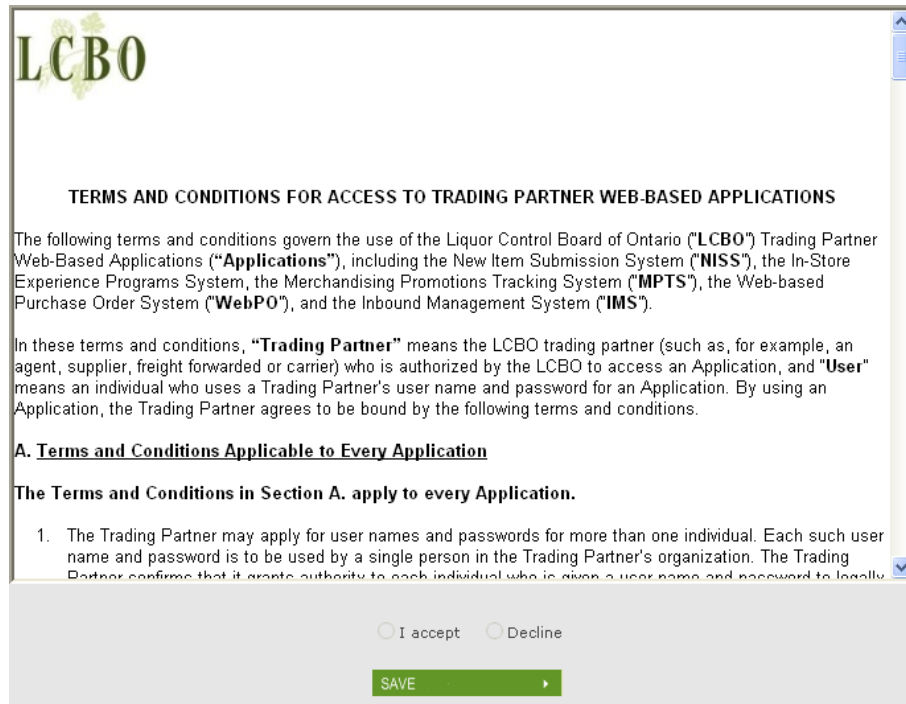
Step 3
Press ENTER or click **Login**.

Step 4
A pop-up screen will show detailing **Terms and Conditions for Access** (for first time users only).

INBOUND MANAGEMENT SYSTEM

Step 5
Scroll down through the entire Terms and Conditions and then click the **Agree** box; then click the **Save**.

Step 6
Users will be prompted to **Reset your password.** Password is case sensitive and must be between 6 to 8 characters in length and contain at least one numeric and one alpha character.

Step 7
Enter **New Password**.

Step 8
Enter the **New Password** again in the **Retype Password** field. Remember this new password for all future logins.

Step 9
Click **Save.** The **Bulletin Board** screen appears and you are **logged in**.

1
INBOUND SCHEDULING SYSTEM OVERVIEW
NEED HELP?

CONTACT US displays contact information for procedural and technical support by email or phone.

HELP displays help topics on the screen selected.

LOG OFF allows users to logoff from the Inbound Scheduling system at any time.

Inbound Scheduling

January 20, 2011   CONTACT US   HELP   LOG OFF
                                                                                              5 Alert(s)

Welcome to the LCBO Inbound Scheduling System
The system is your means of scheduling and tracking appointments for delivery of goods to our warehouses.

Support

If you have questions that are not addressed by this Guide

SUPPORT	EMAIL		TELEPHONE	
Technical Assistance 24/7	techsupport@LCBOsupport.com		1-866-284-8311	
Procedural Support		Dispatch.Operator@lcbo.com	Durham	905-723-3417 ext 2037
	Durham	receivingdepartment.london@lcbo.com	London	519-681-0310 ext 286
	London	shipping.ottawa@lcbo.com	Ottawa	613-733-6329
	Ottawa		Thunder Bay	807-622-9615 ext 227

1
INBOUND SCHEDULING SYSTEM OVERVIEW
NAVIGATION AND SCREEN FEATURES

Navigation

All screens are divided into two sections, navigation on the left and the worksheet on the right. From the Bulletin Board (or from any page or screen), users can navigate through the entire site using the standard menu found on the left-hand side on every screen.

NOTE

Use the Back button or arrow on your Internet browser tool bar with caution and ensure that your last transaction has been saved before exiting the screen.

New Appointment
Allows users with permissions to set up a new appointment using the New Appointment Request screen.

Search / Modify
Allows users to search for all appointment requests at the Retail Service Centres.

Bulletin Board
Displays important information to all users.

My Profile
Provides users the ability to view and change the details of their individual profile and password.

Users
Provides users, **with permission**, the ability to search for users and set up new users. This is only visible for administrator users.

The part of the menu that you are currently working in will be highlighted in **red**.

2
NEW APPOINTMENT REQUEST
INTRODUCTION

The **New Appointment Request** screen allows users to select their Purchase Order(s) to be delivered for a proposed appointment date. The appointment request remains unscheduled until the Carrier/Supplier books an appointment. The appointment request is then scheduled into the first available timeslot at the requested Retail Service Centre (DCs) for the proposed appointment date.

For a Purchase Order to be booked for an appointment, the Purchase Order must have been confirmed by the Supplier in Web PO. Only confirmed Purchase Orders in Web PO are migrated to Inbound Scheduling.

Each appointment request is assigned an Appointment Request Number by the system. Depending on certain criteria, appointment requests can consist of one of these Purchase Order combinations.

Purchase Order combinations:

1. One supplier, one PO	Consists of one FTL (Full Truck Load) PO
2. One supplier, multiple POs, co-loaded	Consists of one FTL PO and one or more LTL (less than full truckloads) POs
3. Multiple suppliers, multiple POs	Consists of one or more LTL POs * Carrier only
NOTE: For scenarios #2 and #3, the Thunder-Bay Retail Service cannot be included when booking multi-warehouses (multi-stops). NOTE: London (101) and (103) are considered the same Retail Service Centre for booking purchase orders.	

2
NEW APPOINTMENT REQUEST
SCREEN FEATURES

Search Criteria Items

Search criteria only apply to Purchase Orders that have not been assigned to an appointment request. Search Criteria are also specific to the user signed on.

Within the **New Appointment Request** screen, users have the ability to choose search criteria to refine or filter a list of Purchase Orders to be included in an appointment request.

New Appointment Request

Vendor:
Please Select ... **1**

Carrier:
Carrier-0111 **2**

Dest DC:
Please Select ... **3**

PO Number:
4

5 PO Delivery Date From:

To:

SEARCH

Sel	PO Number	Delivery Date	Destination DC	Type	Heat	Vendor Name	Carrier Name	Late Delivery Reason
☐	102-00044326	18-Oct-2010	Durham Retail Service Centre	FTL	No	THE WINE GROUP	Carrier	Please Select ...
☐	103-00044332	18-Oct-2010	London Retail Service Centre(101/103)	FTL	No	THE WINE GROUP	Carrier	Please Select ...
☐	102-00044329	19-Oct-2010	Durham Retail Service Centre	LTL	No	THE WINE GROUP	Carrier	
☐	102-00075322	26-Jan-2011	Durham Retail Service Centre	FTL	No	THE WINE GROUP	Carrier	Please Select ...
☐	102-00075323	27-Jan-2011	Durham Retail Service Centre	LTL	No	THE WINE GROUP	Carrier	

Proposed Appointment Date: *

CREATE REQUEST

* Indicates a mandatory field

1 - Vendor drop down box
For Carriers - Shows a list of Supplier names. Suppliers will see only their vendor names. Typing the first letters of any name will show all possible options matching those letters.

2 - Carrier drop down box
For Suppliers - Shows a list of Carrier names. Carriers will only see their own information. Typing the first letters of any name will show all possible options matching those letters.

3 - Dest DC
Shows a list of Retail Service Centres (London, Durham, Ottawa, Thunder Bay and 3rd party where applicable.)

4 - PO Number
Enter the specific Purchase Order using the correct PO# format - 3 digit warehouse prefix, followed by a dash and then a string of 8 digits representing a PO (e.g.102-00012345). If a User enters a PO#, then no other search criteria is required.

5 - PO Delivery Date: From: To:
Selection criteria based on Purchase Order delivery dates.

Search

Click search to activate your query. Provides a list of Purchase Orders that match the search criteria entered. The screen defaults to all confirmed POs available for booking an appointment.

Worksheet Header

Sel	PO Number	Delivery Date	Destination DC	Type	Heat	Vendor Name	Carrier Name	Late Delivery Reason

Users can click on any header and the grid will sort by that header - either by ascending or descending order. **Note – the sorting feature applies to all worksheet headers throughout the Inbound Scheduling system.**

Sel
Checkmark the PO(s) to include in an appointment request. An **appointment request** can consist of more than one PO as long as it meets the PO combinations criteria (page 11).

PO Number
The identifying number of the PO.

Delivery Date
Requested delivery date shown on the PO.

Destination DC
The destination Retail Service Centre for the PO.

Worksheet Header

Sel	PO Number	Delivery Date	Destination DC	Type	Heat	Vendor Name	Carrier Name	Late Delivery Reason

Type

Identifies whether the PO covers a FTL (full truck load) or LTL (less than a truck load).

Heat

Indicates whether a heated truck is required.

Vendor Name

Name of the Supplier.

Carrier/Supplier name

Name of the Carrier/Supplier.

Late Delivery Reason

If delivering one day late, you must select a reason for the late delivery from the drop down menu, e.g. weather, mechanical breakdown, etc.

Sel	PO Number	Delivery Date	Destination DC	Type	Heat	Vendor Name	Carrier Name	Late Delivery Reason
☐	102-00082949	22-Feb-2011	Durham Retail Service Centre	FTL	No	THE WINE GROUP	Carrier	Please Select ... ⌄
☐	102-00082951	22-Feb-2011	Durham Retail Service Centre	FTL	No	THE WINE GROUP	Carrier	Please Select ... ⌄

Proposed Appointment Date: *

[   ] 🗓   CREATE REQUEST ▶

* Indicates a mandatory field

Terms & Conditions   L'⊕BIZ

Proposed Appointment Date

Proposed Appointment Date: *
[   ] 🗓

* Indicates a mandatory field

Proposed Appointment Date is called - Scheduled Arrival Date in Web PO.   The LCBO requires strict adherence to scheduled arrival date. In the event of extenuating circumstances, Carriers/Suppliers can propose a new appointment date different from the requested delivery date detailed on the PO.

- For FTLs (Full truck-loads): The **Proposed Appointment Date** must be the date of the delivery detailed on the PO or one day later.
- For LTLs (Less than full truck-loads): There are no date restrictions for proposing an appointment.

The system default is the requested delivery date on the PO unless this date occurs in the past, then, the current day's date will be shown.

Create Request

CREATE REQUEST   ▸

Click to create an **Appointment Request.** The **New Appointment Request** screen shows the PO's delivery request details and the system assigns an **Appointment Request Number.**

2
NEW APPOINTMENT REQUEST
SET UP AND BOOK A NEW APPOINTMENT REQUEST

The **New Appointment Request** screen allows the user to select their Purchase Order(s) to be delivered for a proposed appointment date. All POs included on a truckload **MUST** be assigned to an appointment request.

For specific details on multi-stop requests, see page 31.

Step 1
Click **New Appointment** from the left-hand side navigation menu.

The **New Appointment Request** screen is displayed.

The Carrier/Supplier field defaults to the user's login ID.

NOTE

When a Carrier/Supplier is logged in, the Vendor drop-down menu lists names of vendors associated with all open and confirmed POs. And when a Vendor is logged in the Carrier/Supplier drop-down menu lists names of Carriers/Suppliers associated with open and confirmed POs.

Step 2

The screen defaults to all confirmed POs available for booking an appointment.

– OR –

Enter the desired search criteria within the appropriate fields,
e.g., PO # 102-00044328 and then click **Search.**

The filtered results show a listing of POs associated with the search criteria entered.

Step 3

Click the checkbox under the Sel (select) column to select **PO(s)** to be included on the appointment request.

NOTE

Purchase Order Combinations:

1 Appt. Request = 1 FTL
1 Appt. Request = 1FTL + 1 or more LTLs
1 Appt. Request = 1 or more LTLs

Step 4

The system default is the requested delivery date on the PO unless this date occurs in the past, then, the current day's date will be shown. For FTL POs delivering one day late, select a **reason** from the **Late Delivery Reason** dropdown box.

Step 5

Enter a **Proposed Appointment Date** if different than the delivery date of the PO.

NOTE

For FTLs the Proposed Appointment Date entered must be the PO's date of delivery or one day later. If not, contact the warehouse to set-up the delivery appointment.

The **Proposed Appointment Date** defaults to the first PO's delivery date selected from the worksheet. Users must ensure the date entered meets the system rules.

Step 6

Click **Create Request**. The screen refreshes.

NOTE

The system carries out a number of validation checks to ensure the conditions for the appointment request are met (e.g., date of delivery and PO combinations). Once the conditions are met, the system assigns an Appointment Request Number. If the conditions are not met, an error message appears indicating what corrective action is required.

A **New Appointment Request** displays:
- Request Number (e.g., 1823)
- Request Date is the date the appointment request was made
- Carrier/Supplier name
- Proposed Appointment Date (entered by the Carrier/Supplier)

The **New Appointment Request** details specific information relating to the appointment request for the PO(s).

Once satisfied with the details of an appointment request, users can book the delivery of the Purchase Order(s) to one or more Retail Service Centres as long as certain system conditions have been met.

NOTE

Each Retail Service Centre has a cut-off time for booking an appointment for the following day. If the deadline has passed, the system will prompt the user to contact the DC to arrange an appointment time.

Step 7

If the Carrier code on the PO indicates a CIF Carrier, the system will prompt the user to enter the name of the Carrier or if applicable, enter the sub-contractor's name. This field must be as accurate as possible and can be updated at any time.

Step 8

From the **New Appointment Request** screen, click **Sel** and click **Book Appts.**

Step 9

After clicking **Book Appt**, a pop-up screen appears, indicating appointment has been booked successfully. Click **OK.**
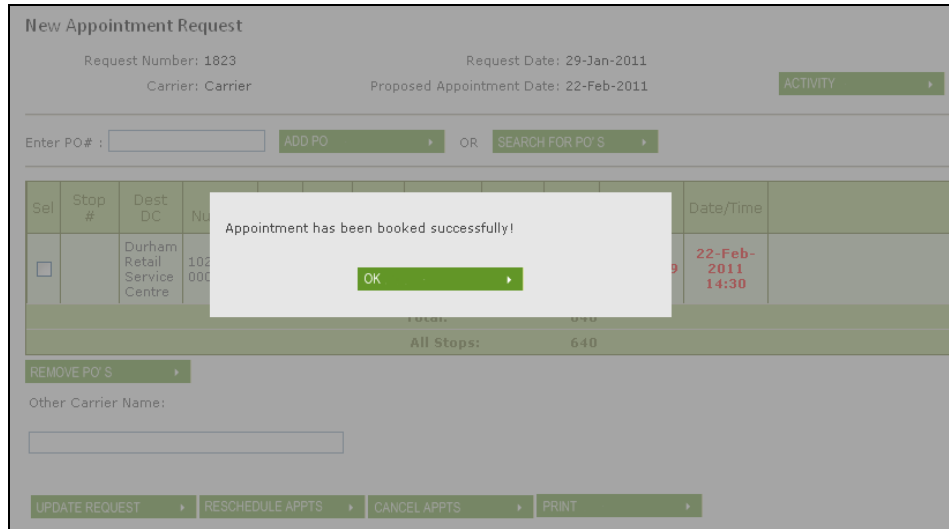
The **Appointment Number** and the **Date/Time** of the booked delivery appointment for a Retail Service Centre is shown in red.
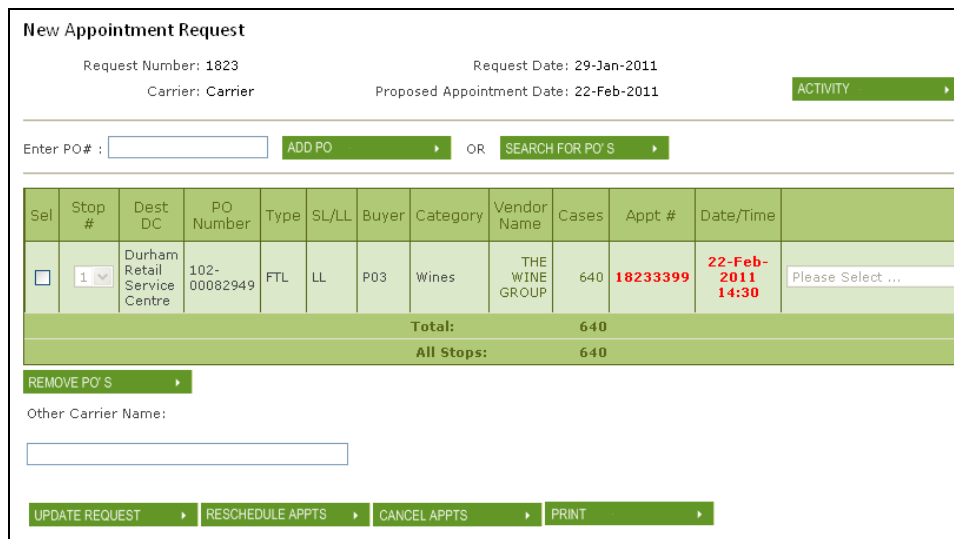
Once the Appointment is booked, the screen refreshes and presents the following new option buttons at the bottom of the page:

1. Update Request
2. Reschedule Appointments
3. Cancel Appointments
4. Print

| UPDATE REQUEST ▸ | RESCHEDULE APPTS ▸ | CANCEL APPTS ▸ | PRINT ▸ |

NOTE

If a user leaves the New Appointment screen at this point - the only way to make changes to the appointment request is to search for the appointment request through the Search / Modify function.

2
NEW APPOINTMENT REQUEST
CHANGE A NEW APPOINTMENT REQUEST

While still in the New Appointment Request screen, users have the option to make changes to the appointment request.

Options at this time are:

- Add a PO (page 26)

- Remove a PO (page 31)

- Reschedule a booked appointment request (page 35)

- Cancel Appointment Request - booked appointment requests (page 39)

- Delete Appointment Request (only for unscheduled appointment requests) (page 42)

- Print (page 45)

- Activity Request Screen (page 46)

2
NEW APPOINTMENT REQUEST
ADD A PURCHASE ORDER

Add a Purchase Order to a New Appointment Request

The system permits users to add Purchase Orders to the **Appointment Request** using one of two methods: adding a PO or searching for POs

Option 1: Add PO by entering a Purchase Order

Step 1
Enter a **Purchase Order number** in the **Enter PO #** box using the correct format (3 digit-warehouse prefix and then a string of 8 digits representing PO #) and then click **Add PO.**

POs can only be added for delivery to the same warehouse using this option. For multiple Retail Service Centres, users need to use the **Search for POs** functionality.

The **New Appointment Request** screen refreshes. The PO has been added to the Appointment Request.

Step 2

Click **Update Request.** The screen refreshes and the appointment has been successfully booked. Click **OK**.

Step 3
The updated screen refreshes with new option buttons along the bottom of the page, you can now – Update Request, Reschedule Appointment, Cancel Appointment or Print.

Option 2: Add a PO by Search for POs

Step 1
Click Search for POs.

The **Select POs for Appointment** screen appears.

Step 2
Under **Sel**, select one or multiple **POs** that you wish to add to the appointment request. Users can use filters to narrow search criteria for POs.

Remember – LTLs can be booked for any date. Click on the **Sel** box of the PO you want to add.

Step 3
Click **Add to Request**.

The **Modify Appointment Request** screen appears detailing that the PO has been added to the Request Number e.g.1828.

2
NEW APPOINTMENT REQUEST
REMOVE A PURCHASE ORDER

Remove a PO(s)
Users can only remove a PO where there are more than one PO on an appointment request.

Step 1
Select the check box beside a PO to remove it from the appointment request.

INBOUND MANAGEMENT SYSTEM

Step 2
Click **Remove PO.**

Step 3
A pop-up window appears notifying the user that the PO has been removed.
Click OK.

A refreshed **Modify Appointment Request** screen appears showing that the PO has been removed from the Appointment Request.

Step 4

Click **Update Request** to save. The screen refreshes with the changes saved.

The appointment request has been saved successfully screen pops up.
Click **OK**.

An updated appointment request screen is displayed. The PO that was removed from the appointment request is now ready to be scheduled.

NOTE

If unscheduled, the appointment request is now ready to be booked.

2
NEW APPOINTMENT REQUEST
RESCHEDULE AN APPOINTMENT REQUEST FOR A SCHEDULED APPOINTMENT

Step 1 Click RESCHEDULE APPTS.

Step 2
A pop-up box appears requesting a new date for the delivery from the calendar icon.

Enter the date. Click **Proceed**.
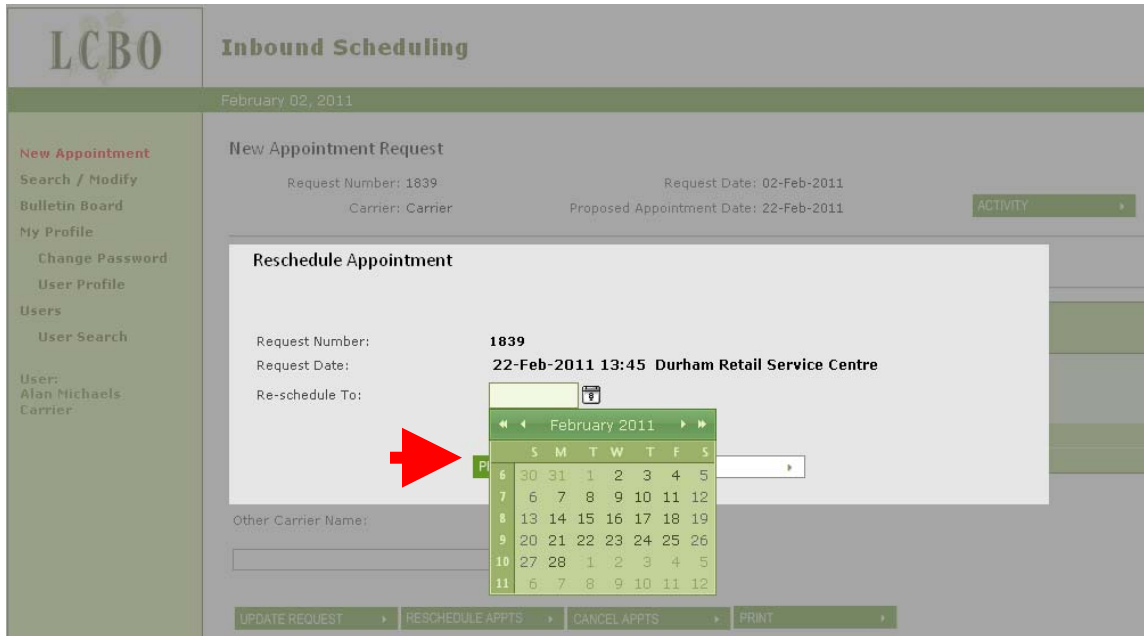
Step 3
If the appointment request is for a FTL - select a **reason** for rescheduling from the **Reason appointment will be late** drop-down box.

Step 4 Click **Proceed**.

Step 5

The pop-up window refreshes. If the system accepts the new date, the message will indicate that the appointment has been rescheduled. Click **OK.**

Once confirmed, a refreshed **New Appointment Request** screen appears detailing the revised appointment date and time (shown in red).

NOTE

Carriers - For FTLs, if the rescheduled delivery date entered is more than one day late, an error message will be displayed and the user will not be able to proceed. Users will be prompted to call the Retail Service Centre to schedule the delivery appointment.

Suppliers – must advise change in the delivery date via Web PO.

NOTE

If the user needs to reschedule or cancel a booked appointment at a later time, access the PO through the Search / Modify screen. (See page 56)

2
NEW APPOINTMENT REQUEST
CANCEL A BOOKED APPOINTMENT

Step 1
From the **New Appointment Request** screen, click the **CANCEL APPTS** button.

Step 2
A **Cancel Appointment** pop-up window appears detailing the **Request Number** and the **Appointment Date**. Click **Proceed.**

Step 3

The User is prompted to select a reason. Click on the **Reason drop down menu**, click on a reason, then click **Proceed**.
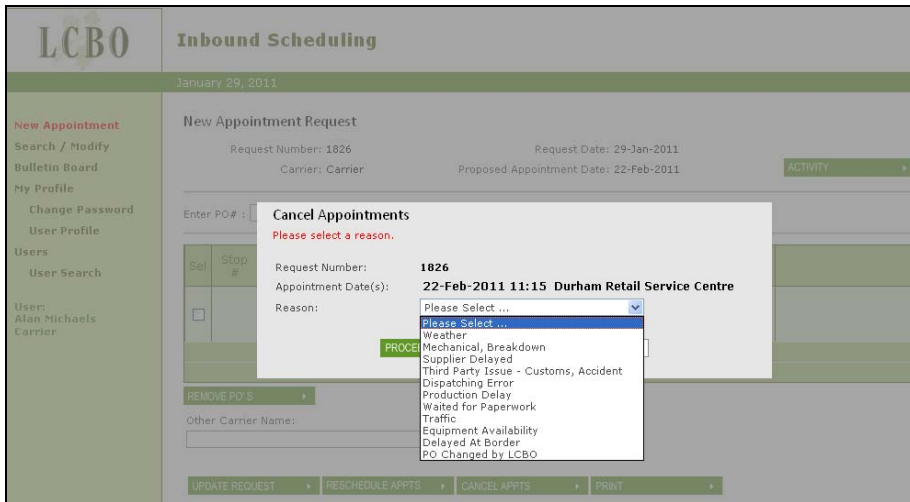
Step 4

The pop-up window appears, indicating the appointment request has been cancelled. Click **OK.**
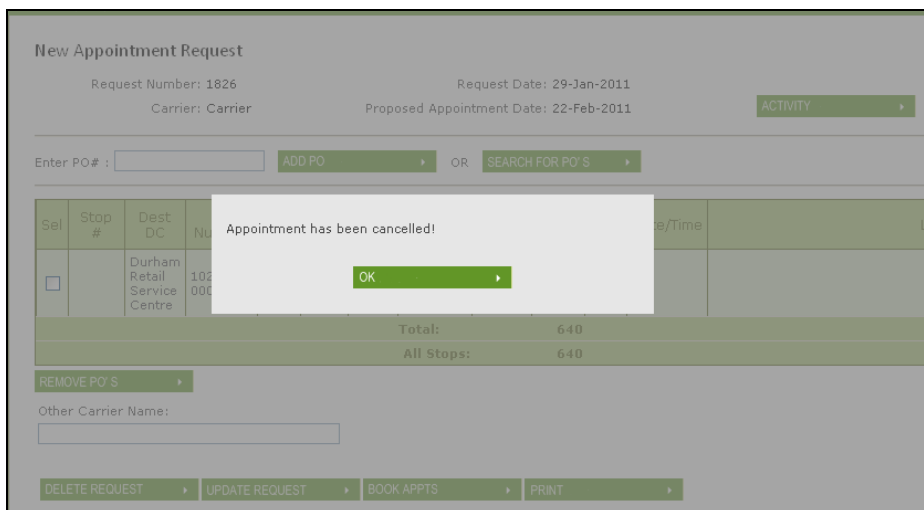
Once the cancelled appointment is confirmed a refreshed **New Appointment** screen appears presenting the user with new options – **Delete Request**, **Update Request**, **Book Appointment** and **Print**.

The booked appointment is cancelled, however the appointment request is still active – ready to be booked.

The user now has the option to delete the entire appointment request or select another course of action.

NOTE

All the scheduled appointments for a PO associated with the appointment request are cancelled. The status of the Appointment Request changes to a status of appointment cancelled.

2
NEW APPOINTMENT REQUEST
DELETE AN APPOINTMENT REQUEST

Delete a New Appointment Request (unscheduled)

The Carrier/Supplier may choose to delete a newly created appointment request. This option is available from the **New Appointment Request** screen before an appointment has been booked (i.e., the status of the appointment request is '*Unscheduled*').

NOTE

If the appointment has been booked, users can also delete an appointment request from the Search/Modify Appointment Request screen after the user first selects the option to cancel an appointment.

Step 1
Click **Delete Request**. A pop-up window appears requesting the user to confirm deleting the appointment request.

INBOUND MANAGEMENT SYSTEM

Step 2
Click **Yes** to delete or **No** to keep the appointment request.

Step 3
Once the user clicks **YES** to delete, the pop-up window refreshes indicating appointment request has been deleted. Click **OK.**

Once the appointment request is deleted, the **Search and Modify Appointment Request** screen appears.

The appointment request for the Purchase Order has been removed from the system.

The Purchase Orders are now available through New Appointment to be assigned to a New Appointment Request.

2
NEW APPOINTMENT REQUEST
PRINT AN APPOINTMENT REQUEST

Print from the New Appointment Request Screen

Click the PRINT button to print the entire Appointment Request Details.

To print, click the printer icon in the top toolbar.
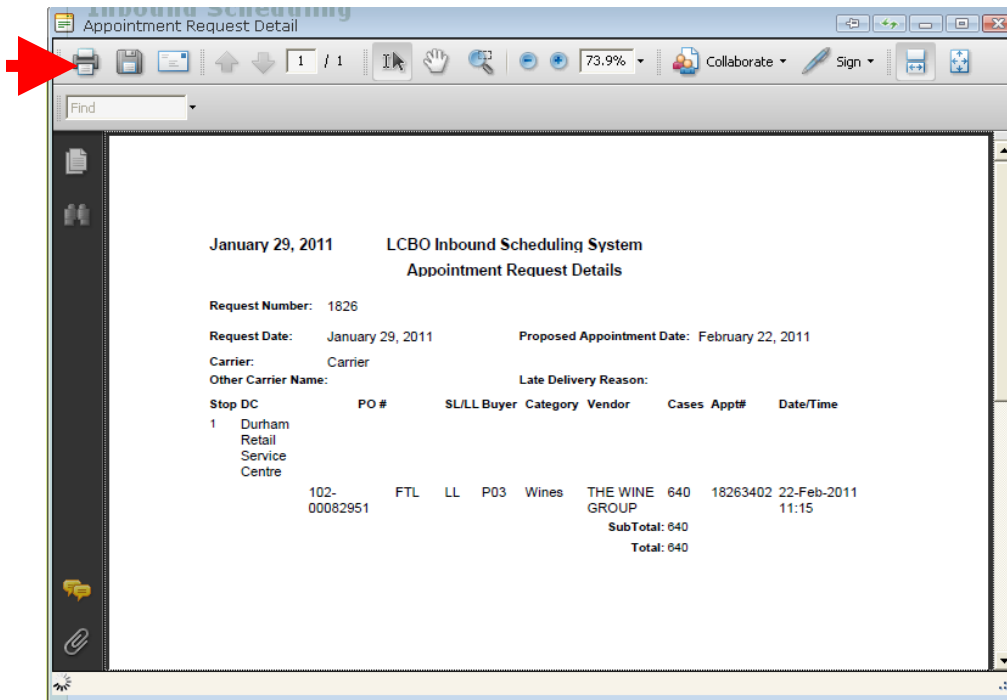
2
NEW APPOINTMENT REQUEST
APPOINTMENT REQUEST ACTIVITY SCREEN

Appointment Request Activity Screen

The history of an appointment request can be accessed through the **New Appointment Request** screen or from the **Search / Modify Appointment** screen once an appointment has been booked.

From the **New Appointment Request** or from **the Search /Modify Appointment** screen click **Activity.**

The **Appointment Request Activity** screen appears showing the history of an appointment request.

The appointment request activity screen details the following:

- Type - of activity for an appointment (e.g. status change, alert)
- Details - of an appointment request (e.g. whether the request was created and not booked, unscheduled, scheduled)
- Reason - if applicable, associated with the entry: e.g. Appointment time changed
- Date - and time of the activity
- User - who initiated the appointment request activity
- Dest DC - destination Retail Service Centre

Appointment Request Activity

Request Number   1812

Type	Detail	Reason	Date/Time	User	Dest DC
Alert	Appointment rescheduled by LCBO.		26-Jan-2011 17:00	Di Ming Nip	Durham Retail Service Centre
Status Change	Appointments Rescheduled		26-Jan-2011 17:00	Di Ming Nip	Durham Retail Service Centre
Status Change	Appointments Scheduled		26-Jan-2011 16:07	Sally Jones	Durham Retail Service Centre
Status Change	Appointment Request Created		26-Jan-2011 16:07	Sally Jones	Durham Retail Service Centre

2
NEW APPOINTMENT REQUEST
MULTI-STOP APPOINTMENT REQUEST

A Carrier/Supplier has the ability to set-up an appointment request that consists of more than one Purchase Order for delivery to more than one Retail Service Centre; referred to as multi-stops.

For multi-stops, the appointment request for the proposed deliveries must be made for the same day. The system will book the appointment at the earliest time available at the first stop (selected by the user). Then the system will book the second appointment for the earliest time available at the second stop taking into account the transit times between the two Retail Service Centres. If there is a third stop, the system will follow the same process.

There are two ways to set-up an appointment request for a multi-stop both will be described on the following pages.

NOTE

If there are no timeslots available at the Retail Service Centres for the second or third delivery request within the same day, the system will try and book all deliveries for the next business day.

NOTE

When an appointment request has been booked (scheduled), only PO's for the Retail Service Centres listed on the delivery request can be added to it.

If the appointment request is not scheduled (no delivery appointment) PO's from any Retail Service Centre can be added to create a multi-stop.

Option 1 - Multi-stop Appointment Request

The Inbound Scheduling system allows users to setup appointment requests with POs for delivery to more than one Retail Service Centre by selecting POs from the New Appointment Request screen.

Step 1
Click the checkbox under the **Sel** (select) column to select **POs** to be included on an appointment request.   You can use the search filters to narrow the search results.

Step 2
For FTL POs delivering one day late, select a **reason** from the **Late Delivery Reason** field.

Step 3
Enter a **Proposed Appointment Date** if different than the delivery date of the PO.

For FTLs the **Proposed Appointment Date** entered must be the PO's date of delivery or one day later.

NOTE

The Proposed Appointment Date defaults to the first PO selected from the worksheet. Users must ensure this date is the delivery date.

Step 4
Click Create Request. A **New Appointment Request** screen appears showing the appointment request details, including the **Stop number**.

The **Stop #** (assigned by the system) indicates the sequence of the deliveries, 1 being the first stop. The user may change this order by using the drop-down menu, if the order is changed the user must click **Update Request** prior to booking the appointment request.

Step 5

Click **BOOK APPTS.** Once an appointment request has been created, the appointment for the Carrier/Supplier can be booked, which changes the status of the appointment request to "scheduled."

The appointment has been booked successfully screen displays. Click **OK**.

The screen refreshes with the updated appointment request and the dates and times of the delivery are shown in red. There are two appointment numbers, one for each Retail Services Centre on the multi-stop.

LCBO   **Inbound Scheduling**

February 02, 2011

New Appointment
Search / Modify
Bulletin Board
My Profile
  Change Password
  User Profile
Users
  User Search

User:
Alan Michaels
Carrier

New Appointment Request

Request Number: 1847   Request Date: 02-Feb-2011

Carrier: **Carrier**   Proposed Appointment Date: 22-Feb-2011   `ACTIVITY ▶`

Enter PO# : [ ] `ADD PO` `▶` OR `SEARCH FOR PO'S` `▶`

Sel	Stop #	Dest DC	PO Number	Type	SL/LL	Buyer	Category	Vendor Name	Cases	Appt #	Date/Time	
☐	1 ∨	Durham Retail Service Centre	102-00082958	FTL	LL	P03	Wines	THE WINE GROUP	640	**18473441**	**22-Feb-2011 12:15**	Please Select …
							Total:		**640**			
☐	2 ∨	London Retail Service Centre (101/103)	103-00082965	LTL	LL	P03	Wines	THE WINE GROUP	640	**18473442**	**22-Feb-2011 16:45**	
							Total:		**640**			
							All Stops:		**1280**			

`REMOVE PO'S` `▶`

Other Carrier Name:

[ ]

`UPDATE REQUEST ▶` `RESCHEDULE APPTS ▶` `CANCEL APPTS ▶` `PRINT ▶`

Option 2 - Multi-stop Appointment Request.

While the User is still in the New Appointment Request screen there is another way to book a multi-stop appointment request. The User can add a Purchase Order to an already existing appointment request. In this case the new Purchase Order is for a different Retail Service Centre, also the Purchase Order combination criteria must be adhered to.

Step 1

From the New Appointment Request screen click **Search for PO.**

Step 2
The **Select PO's for Appointment** screen appears with Purchase Orders that are available to be booked.

Click in the **Sel** column of the Purchase Order to be added – for a multi-stop it must be for a different Retail Service Centre.

Click **Add to Request**.

Step 3

The Modify Appointment Request screen opens showing both of the stops numbers 1 and 2. The Appointment Request is now ready to be booked.

Click **Book Appts**.

Step 4

The Multi-stop appointment has been booked.   Click **OK**.

An appointment number has been assigned for each stop and the delivery date and time have been assigned (red).

3
SEARCH AND/OR MODIFY APPOINTMENTS
SEARCH/MODIFY SCREEN FEATURES

Once an appointment request has been created for a Purchase Order(s), and the user has left the New Appointment Request screen – use Search/Modify from the left hand menu to update and/or make any changes to scheduled or unscheduled appointment request.

The **Search and Modify Appointment Request** screen defaults to show all appointment requests that have been set-up within the system regardless of their status; e.g. Scheduled, Unscheduled, etc.

INBOUND MANAGEMENT SYSTEM

3
SEARCH AND/OR MODIFY APPOINTMENTS
SEARCH FILTERS

Within the **Search and Modify Appointment** screen, users have the ability to search for an appointment request that Purchase Orders have been assigned to by using any one or a combination of the following **Search** filters. Only Purchase Orders assigned to a request will be shown.

PO Number
Enter the specific Purchase Order using the correct PO# format - 3 digit warehouse prefix and a string of 8 digits representing a PO (e.g., 102-00012345).

Request Number
Enter the appointment request number assigned by the system.

Appointment Number
Enter the booked appointment number.

Appointment Date
Enter a booked date to display all appointment requests for that date.

Carrier/Vendor
Select the name from the drop-down list to display all POs assigned to an Appointment Request for that Carrier/Supplier.

Request Status: Under the Request Status search criteria there are a number of options from the drop down menu. By choosing one of them the search results will show those Purchase Orders that match the criteria (i.e. if the user clicks Unscheduled, then the list will only be of POs that have had an appointment request created and that are unscheduled).

- o **Unscheduled:** The appointment request has not been booked (assigned an appointment date and time).
- o **Appointments cancelled:** The appointment request was booked but was then cancelled. **The appointment request is still active and available to be rebooked.**
- o **Scheduled:** The appointment request has been booked.
- o **Arrived:** The single stop appointment request has arrived at the service center or a multi stop appointment request has arrived at the final retail service center.
- o **Delivery in Progress:** The multi stop appointment request has arrived at the first service center but not the final service center.
- o **Cancelled by Web-PO:** The appointment request has been cancelled by the following changes in WEB PO: receiving service center, arrival date, Carrier/Supplier or if all POs on the appointment request are cancelled. Active POs must be assigned to a new appointment request.

Once a user is satisfied with the search criteria entered into the fields click **Search**.

If the results of the search do not return what was intended, e.g. PO(s), perhaps the PO(s) was never assigned to an appointment request. Go to the **New Appointment screen** to set-up the request before booking the delivery of the PO(s).

3
SEARCH AND/OR MODIFY APPOINTMENTS
SEARCH FOR A SPECIFIC APPOINTMENT REQUEST

Step 1
Click **Search / Modify** from the left-side menu. The screen will default to the open requests for the user signed on.

Step 2
If users want to further refine the list of requests that has been returned, enter information into one or more of the filters and click **Search.**

If entering a **PO Number** then no other search criteria is needed.

Click anywhere on the line item to open the **Modify Appointment Request** screen.

INBOUND MANAGEMENT SYSTEM

3
SEARCH AND/OR MODIFY APPOINTMENTS
MODIFY AN APPOINTMENT REQUEST

The screen refreshes displaying the **Modify Appointment Request** screen.

If the appointment request for the Purchase Order(s) is:

Scheduled (assigned an appointment number, booking date and time in red) users can:

- add or remove PO(s)
- update the Other Carrier field
- reschedule to another day and time
- cancel the booked appointment request
- print the PO delivery details

Unscheduled/Cancelled:

- add POs or remove POs before booking
- update Other Carrier field
- delete the appointment request
- book an appointment
- print the PO delivery details

These options are also available within the **New Appointment Request** screen. For detailed instructions, please refer to:

1. Add PO or Search for POs – page 26
2. Remove POs – page 31
3. Reschedule Appointments– page 35
4. Cancel Booked Appointments – page 39
5. Delete Appointment Request – page 42
6. Print – page 45

NOTE

To delete an appointment request Users must first cancel the booked appointment.

Purchase Orders that were assigned to the deleted appointment request will now be available through New Appointment Request.

If the User needs to enter Other Carrier Name:
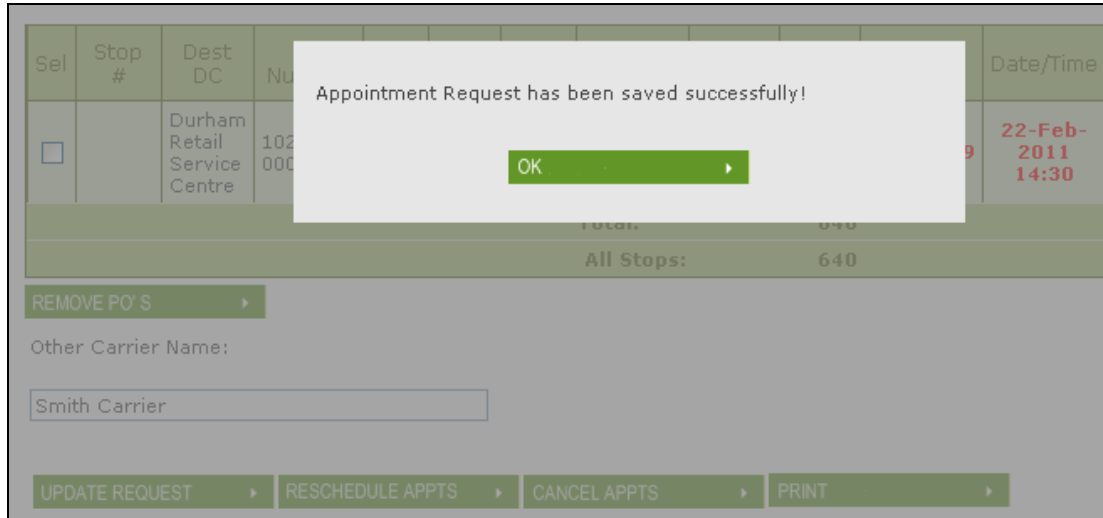
Type in name and click **Update Request**.

The screen refreshes and the Appointment has been successfully saved. Click **OK**.

The **Modify Appointment Request** screen displays showing the new Carrier name.

4
ALERTS
Introduction

Alerts are sent to the user to notify or remind them of action that has or has not been taken. You will only view Alerts specific to your user profile. All Alerts are sent by email and displayed within the portal. The **Alert** screen is accessed by clicking on the **Alerts** hyperlink found at the top right-hand corner on every screen. The system records the user ID of the person closing the alert.

Description	Supplier	Carrier	Action To Be Taken
Appointment cancelled by LCBO	X	X	Appointment to be rebooked by Supplier/Carrier
Appointment cancelled by Vendor		X	Appointment to be rebooked by Supplier
Appointment cancelled by Carrier	X		Appointment to be rebooked by Carrier
Appointment changed by LCBO	X	X	Review and ensure compliance
Appointment rescheduled by LCBO	X	X	Review and ensure compliance
Appointment rescheduled by Vendor		X	Carrier to review and ensure compliance
Appointment rescheduled by Carrier	X		Supplier to review and ensure compliance
Vendor or carrier has not yet scheduled an appointment for PO that has an upcoming expected delivery date.	X	X	Book appointment for PO
Appointment has been cancelled because Requested Delivery Date on the PO has been changed	X	X	Rebook appointment per PO changes
Appointment has been cancelled because a PO has been cancelled	X	X	No further action required
Appointment has been cancelled because the carrier on a PO has been changed	X	X	New Carrier/Supplier to book appointment
Appointment has been cancelled because the DC or receiving warehouse on a PO has been changed	X	X	Carrier/Supplier to book appointment into new RSC
LCBO or Vendor has setup an appointment		X	Review and ensure compliance

4
ALERTS
Screen Features

Screen Features

When users first access the **Alerts** screen, **Open Alerts** are displayed.

Users can select filters to display **Open, Closed** or **All Alerts**.

Alert Worksheet Header:

Alerts

Filter: ⦿ Open ◯ Closed ◯ All

Subject	Date/Time	PO Number	Buyer	Dest Dc	Vendor	Carrier	Closed

Subject
Describes the Alert Type

Date/Time
Shows the date/time of the alert; recent alerts appear at the top

PO Number
PO number associated with the alert

Buyer
LCBO assigned Buyer Code

Dest DC
The Retail Service Centre where the PO is being delivered

Vendor
Name of the Supplier involved in the delivery

Carrier
Name of the Supplier and Carrier involved in the delivery

Closed
Shows closed Alert(s)

Click on any column header to sort the Alerts according to that column first in ascending order then in descending order.

4
ALERTS
VIEW ALERTS

Step 1

To view Alerts click the word **Alert(s)** on any screen. Alert(s) is found in the top right hand corner of all screens.

The **Alerts** screen displays all the alerts in the records worksheet.

Only **Open Alerts** will be displayed.

Step 2

Double click any where on an Alert line item and a pop-window appears showing the **Alert Details**.

INBOUND MANAGEMENT SYSTEM

Users can click **View Request** to make the required changes (if necessary) to the appointment request as indicated in the Alert Details or you can click **Close Alert** to be return to the **Alerts** screen.

When **View Request** is clicked, the **Modify Appointment Request** screen is displayed.

Inbound Scheduling

February 03, 2011

Modify Appointment Request

Request Number: 1828   Request Date: 01-Feb-2011
Carrier: **Carrier**   Proposed Appointment Date: 22-Feb-2011   ACTIVITY ▶

Enter PO# : [   ]   ADD PO   ▶   OR   SEARCH FOR PO'S   ▶

Sel	Stop #	Dest DC	PO Number	Type	SL/LL	Buyer	Category	Vendor Name	Cases	Appt #	Date/Time	
☐	1 ▾	Durham Retail Service Centre	102-00044330	LTL	LL	P03	Wines	THE WINE GROUP	640			
☐			102-00082957	FTL	LL	P03	Wines	THE WINE GROUP	640			
☐			102-00082959	LTL	LL	P03	Wines	THE WINE GROUP	640			
							Total:		**1920**			
							All Stops:		**1920**			

REMOVE PO'S   ▶

Other Carrier Name:
[   ]

DELETE REQUEST   ▶   UPDATE REQUEST   ▶   BOOK APPTS   ▶   PRINT   ▶

Users can then take the necessary action, e.g., reschedule or cancel the appointment, add or remove Purchase Order(s), as indicated in the Alert.

The following chart (page 70) provides a description of the alerts, which alerts are emailed to the Carrier/Supplier or both, and action required to be taken.

Description	Supplier	Carrier	Action To Be Taken
Appointment cancelled by LCBO	X	X	Appointment to be rebooked by Supplier/Carrier
Appointment cancelled by Vendor		X	Appointment to be rebooked by Supplier
Appointment cancelled by Carrier	X		Appointment to be rebooked by Carrier
Appointment changed by LCBO	X	X	Review and ensure compliance
Appointment rescheduled by LCBO	X	X	Review and ensure compliance
Appointment rescheduled by Vendor		X	Carrier to review and ensure compliance
Appointment rescheduled by Carrier	X		Supplier to review and ensure compliance
Vendor or carrier has not yet scheduled an appointment for PO that has an upcoming expected delivery date.	X	X	Book appointment for PO
Appointment has been cancelled because Requested Delivery Date on the PO has been changed	X	X	Rebook appointment per PO changes
Appointment has been cancelled because a PO has been cancelled	X	X	No further action required
Appointment has been cancelled because the carrier on a PO has been changed	X	X	New Carrier/Supplier to book appointment
Appointment has been cancelled because the DC or receiving warehouse on a PO has been changed	X	X	Carrier/Supplier to book appointment into new RSC
LCBO or Vendor has setup an appointment		X	Review and ensure compliance

Alerts can also be closed from the Alert Screen. When the user opens the Alert page and, if after reviewing the Alert, determines that no action is required the Alert can be closed.

Step 1
Highlight the Alert by clicking anywhere on the line item.

Step 2
Then click Close Alert button at the bottom of the Alert list.

The Alert screen refreshes showing only the open Alerts.

5
MY PROFILE
CHANGE PASSWORD

Carrier/Supplier users may change their own password and/or update their own personal and contact information by accessing these items located in the left hand menu at any time and from any screen.
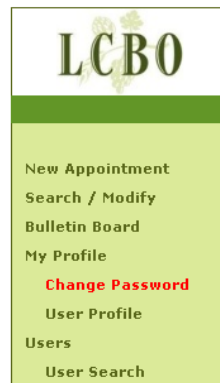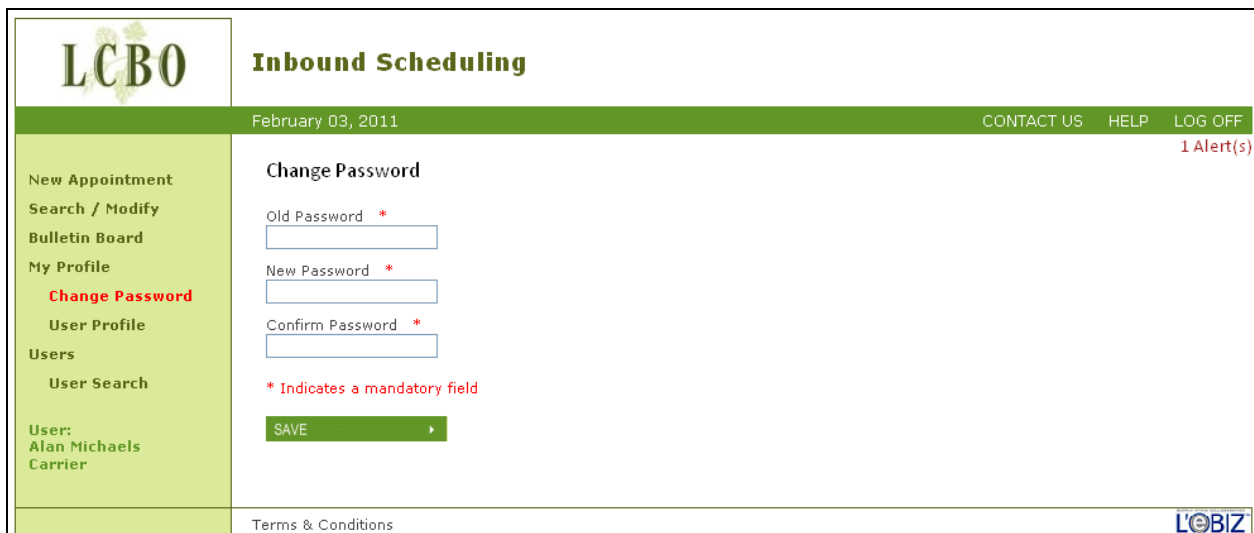
NOTE

Password is case sensitive and must be between 6 to 8 characters in length and contain at least one numeric and one alpha character.

Step 1 Click **Change Password**.

Step 2
Enter **Old Password**.

Step 3
Enter **New Password**. Enter it again in the **Confirm Password** box.

Step 4
Click **Save**. A pop-up screen will verify that the password has been changed. Click **OK**.

5
MY PROFILE
USER PROFILE

Users may change/update their personal profile information.

Step 1
Click **User Profile** from the main menu. The **User Record** screen appears.

Step 2
Edit:
- First Name
- Middle Name
- Last Name
- Email address
- Telephone number
- Fax number

Step 3
Click **Save** once edits have been made. Or, click **Cancel** and the information entered will be cleared from the fields.

INBOUND MANAGEMENT SYSTEM

Step 4
Once saved, a pop-up screen verifies that the account changes have been applied.
Click **OK.**
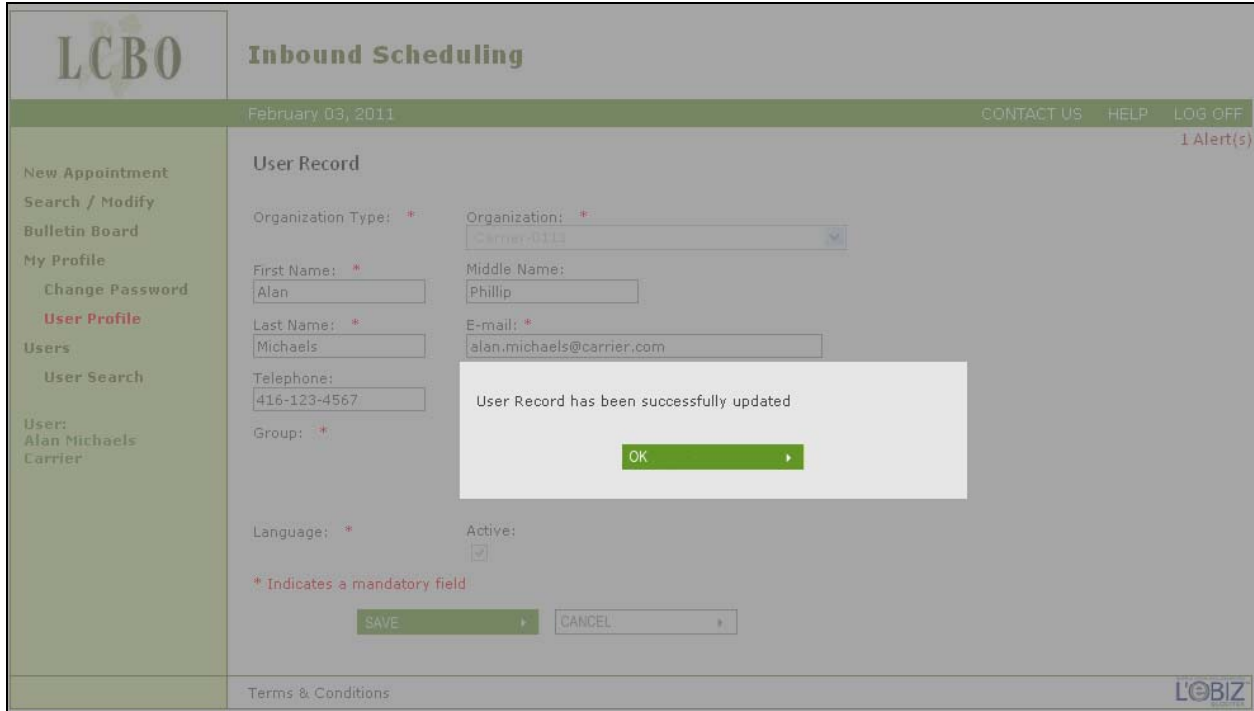
6
USERS ADMINISTRATION
ADMINISTRATIVE PERMISSIONS

Users with Administrator permissions have the ability to search for and edit existing user Information. Administrator permissions should be granted to those individuals who will manage the various administrative functions within the Inbound Scheduling system. The Users function is found on the left hand side of the screen menu.

Functions available under Users include:

- Set up new users
- Change permissions
- Search and view all existing users
- Reset a user's password
- Activate and deactivate users
- Delete users
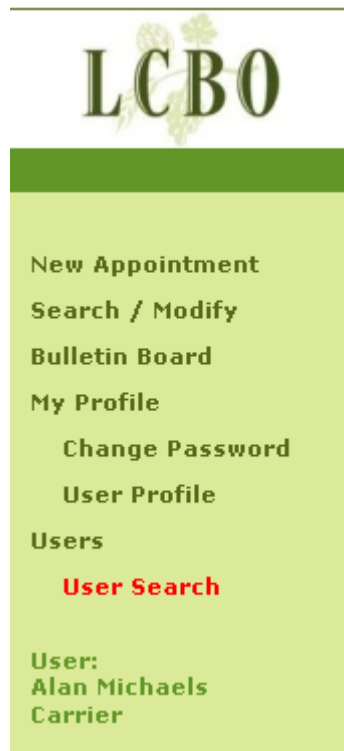
6
USERS ADMINISTRATION
SETTING UP A NEW USER

To register a new user the Administrator must assign either Administrative or User permissions.

Step 1
Click on **User Search** from the left-hand menu.

Step 2
Click **New User** at the bottom of the screen. A blank **User Record** screen appears.

INBOUND MANAGEMENT SYSTEM

Step 3

Enter the new user's information. Mandatory fields are noted with an *asterisk.

Select desired **Group** from the drop-down menu on the screen (either Admin or User).

Select the **Active** check box.

NOTE

If you manage multiple carrier/supplier LCBO #'s then you need to have a separate email address for each carrier/supplier LCBO#, as your email address is your user id.

Step 4
Click **Save** to retain entered information.

Step 5
The User Record screen refreshes indicating that the User Record has been successfully updated. Click OK.

NOTE

The Cancel button allows the Administrator to abandon any changes to the User Record. Once clicked, it returns the Administrator to the User Search List screen.

The New User is displayed within the records field of the **User Search – List** screen.

6
USERS ADMINISTRATION
USER SEARCH

Administrators can use search filters to find users to update their profile(s).

Step 1
The **User Search Screen** will appear with list of Users and search criteria.

INBOUND MANAGEMENT SYSTEM

Enter search criteria to narrow down the list.

For example: Enter the First or Last Name or part of the name in the boxes on the User Search - List screen.

For example, entering "Sa" in the First Name box could find users with the following names: Sally Jones, Sam Smith, etc. – a list of records containing some combination of the letters originally entered.

Once the Administrator has found the User they can double-click on the User line to open their profile.

The system will display the User Record screen for that user, ready for editing.

Step 2
Click within the particular user field to edit it. Mandatory fields are noted with an *asterisk.   A checkmark in the Active box means the user is active; no checkmark means the user is inactive. An administrator can use this field to revoke or re-instate a user on the system.
Click Save.

Step 3
Click **OK** on the confirmation pop-up box.

The **User – Search List** screen will display.

All mandatory fields must be filled in or the record will not be able to be saved.

The Administrator may also:

Click the **Cancel** button to abandon any changes to the **User Record.**
Once clicked, the **User – Search List** screen will show.

<div align="center">

NOTE

</div>

A checkmark in the Active box means the user is active; no checkmark means the user is inactive. An administrator can use this field to revoke or re-instate a user on the system.

Administrators can also delete users.

6
USERS ADMINISTRATION
DELETE USER

Click on the Delete button to remove the user from the User Record screen. A pop-up box will appear requiring confirmation that the User Record is to be deleted.

If the Administration clicks Yes – A pop-up window appears stating that the User record has been successfully deleted.

The User Record screen refreshes with the list of current Users.