

# INBOUND SCHEDULING



**CARRIER and SUPPLIER  
USER GUIDE**

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## Inbound Scheduling System Requirements

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

# 1

## INBOUND SCHEDULING SYSTEM OVERVIEW

### INTRODUCTION

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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

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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.

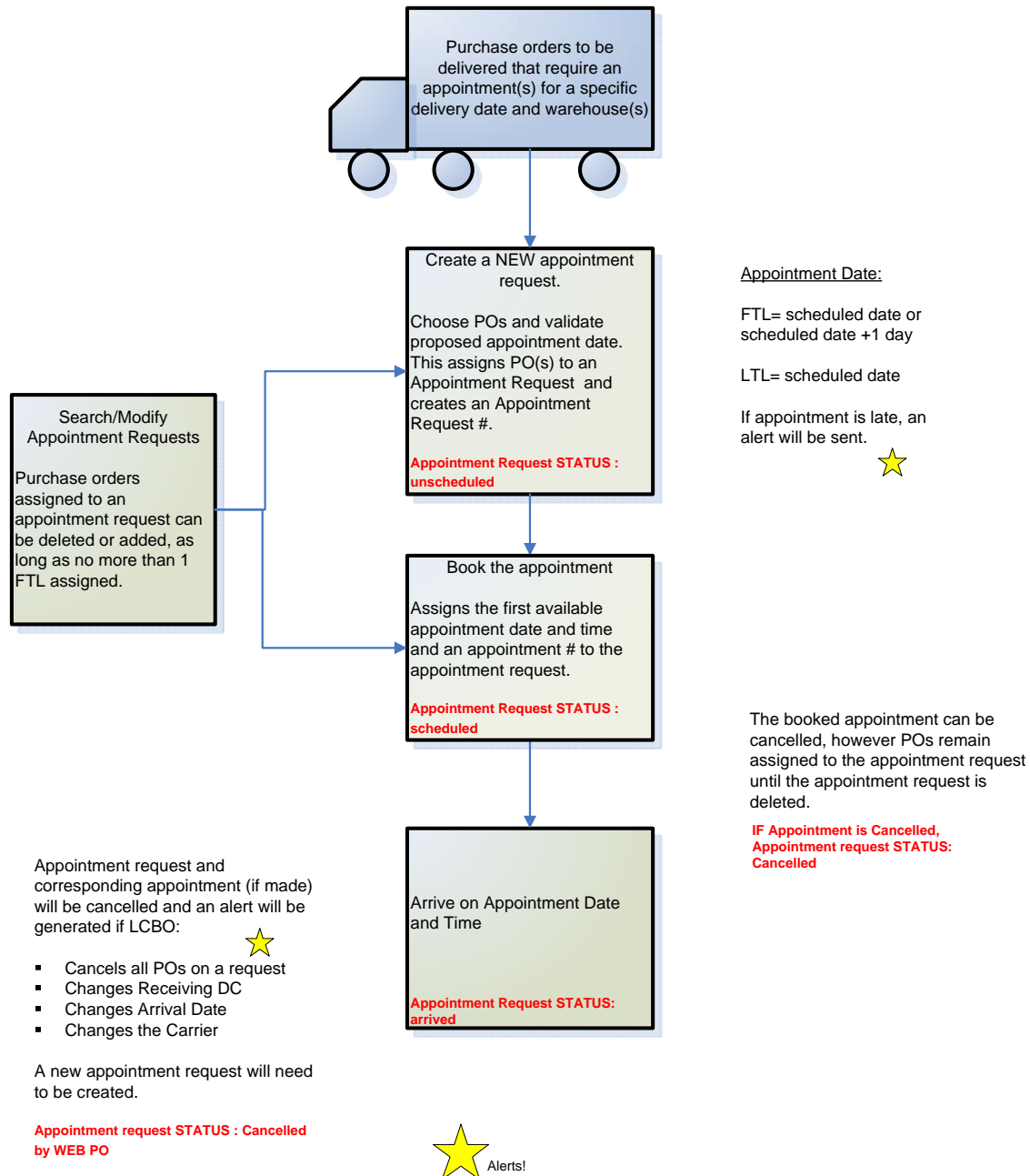
Appointments can be made with the following **Purchase Order combinations:**

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

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

# 1

## INBOUND SCHEDULING SYSTEM OVERVIEW INBOUND SCHEDULING FLOW CHART



# 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.

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### 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.

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# 1

## INBOUND SCHEDULING SYSTEM OVERVIEW LOG IN

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### 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.

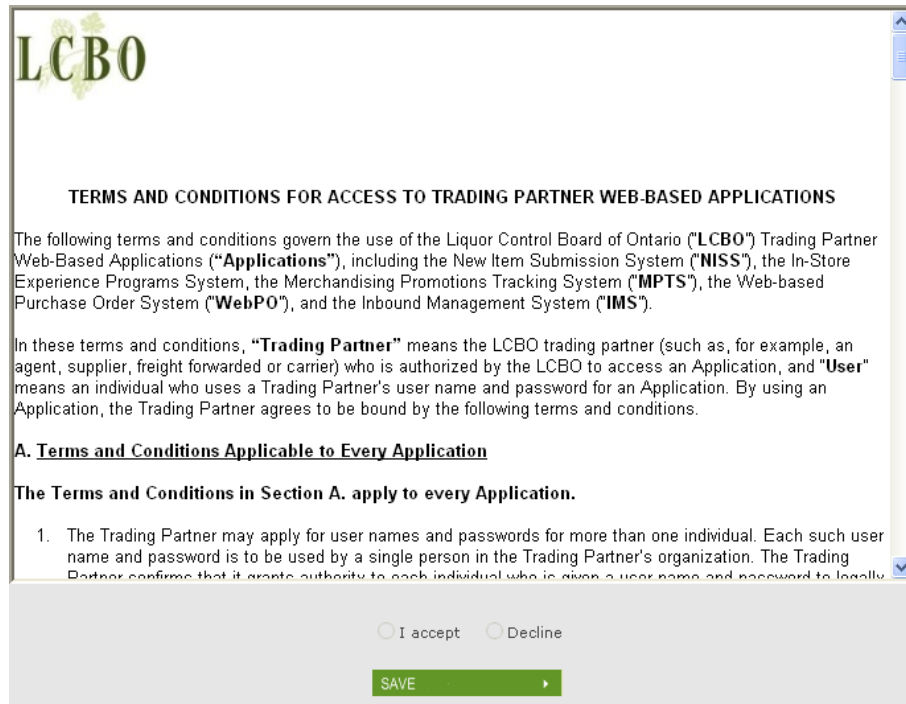
### Step 3

Press ENTER or click **Login**.

### Step 4

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





**LCBO**

**TERMS AND CONDITIONS FOR ACCESS TO TRADING PARTNER WEB-BASED APPLICATIONS**

The following terms and conditions govern the use of the Liquor Control Board of Ontario ("LCBO") Trading Partner Web-Based Applications ("Applications"), including the New Item Submission System ("NISS"), the In-Store Experience Programs System, the Merchandising Promotions Tracking System ("MPTS"), the Web-based Purchase Order System ("WebPO"), and the Inbound Management System ("IMS").

In these terms and conditions, "Trading Partner" means the LCBO trading partner (such as, for example, an agent, supplier, freight forwarded or carrier) who is authorized by the LCBO to access an Application, and "User" means an individual who uses a Trading Partner's user name and password for an Application. By using an Application, the Trading Partner agrees to be bound by the following terms and conditions.

**A. Terms and Conditions Applicable to Every Application**

The Terms and Conditions in Section A. apply to every Application.

1. The Trading Partner may apply for user names and passwords for more than one individual. Each such user name and password is to be used by a single person in the Trading Partner's organization. The Trading Partner confirms that it grants authority to each individual who is given a user name and password to locally

I accept     Decline

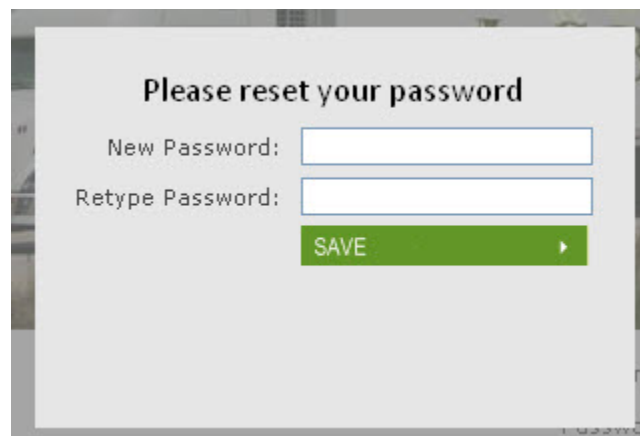
**SAVE** ▶

**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.



**Please reset your password**

New Password:

Retype Password:

**SAVE** ▶

**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**.

**LCBO** **Inbound Scheduling**

January 29, 2011 [CONTACT US](#) [HELP](#) [LOG OFF](#) 0 Alert(s)

**Bulletin Board**

[Welcome LCBO IMS Users](#)

Last Modified: 20-Jul-2010 12:16, by Michele Phillips

[Terms & Conditions](#) **LOBIZ**

**LCBO**  
New Appointment  
Search / Modify  
**Bulletin Board**  
My Profile  
Change Password  
User Profile  
Users  
User Search  
User:  
Alan Michaels  
Carrier

# 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	Durham	Dispatch.Operator@lcbo.com	Durham	905-723-3417 ext 2037
	London	receivingdepartment.london@lcbo.com	London	519-681-0310 ext 286
	Ottawa	shipping.ottawa@lcbo.com	Ottawa	613-733-6329
			Thunder Bay	807-622-9615 ext 227

# 1

## INBOUND SCHEDULING SYSTEM OVERVIEW NAVIGATION AND SCREEN FEATURES

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### 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.

The screenshot displays the LCBO Inbound Scheduling System interface. On the left is a navigation menu with options: New Appointment, Search / Modify, Bulletin Board (highlighted in red), My Profile, Change Password, User Profile, Users, and User Search. Below the menu, it shows the user's identity: User: Sam Smith, Carrier. The main content area is titled 'Inbound Scheduling' and shows the date 'January 12, 2011' and navigation links 'CONTACT US', 'HELP', and 'LOG OFF'. A '3 Alert(s)' notification is present. The main message reads: 'Welcome to the LCBO Inbound Scheduling System. The system is your means of scheduling and tracking appointments for delivery of goods to our warehouses.' Below this is a 'Bulletin Board' section with a green-bordered box containing the text 'Welcome LCBO IMS Users'. At the bottom of the page, it says 'Last Modified: 20-Jul-2010 12:16, by Michele Phillips' and includes 'Terms & Conditions' and the 'LOBIZ' logo.

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### 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:

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

## 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** 5 Alert(s)

Vendor:  1

Carrier:  2

Dest DC:  3

PO Delivery Date From:  5 To:

PO Number:  4

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

Proposed Appointment Date:  \*

\* 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 3<sup>rd</sup> 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
<input type="checkbox"/>	102-00082949	22-Feb-2011	Durham Retail Service Centre	FTL	No	THE WINE GROUP	Carrier	Please Select ...
<input type="checkbox"/>	102-00082951	22-Feb-2011	Durham Retail Service Centre	FTL	No	THE WINE GROUP	Carrier	Please Select ...

Proposed Appointment Date: \*



\* Indicates a mandatory field

Terms & Conditions 

## 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.

**LCBO** Inbound Scheduling

January 29, 2011 CONTACT US HELP LOG OFF 0 Alert(s)

**New Appointment Request**

Vendor: Please Select ...

Carrier: Carrier-0111

Dest DC: Please Select ... PO Delivery Date From: 14-Feb-2011 To: 28-Feb-2011

PO Number: [ ] SEARCH

Sel	PO Number	Delivery Date	Destination DC	Type	Heat	Vendor Name	Carrier Name	Late Delivery Reason
<input type="checkbox"/>	102-00082949	22-Feb-2011	Durham Retail Service Centre	FTL	No	THE WINE GROUP	Carrier	Please Select ...
<input type="checkbox"/>	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 **LOBIZ**

**Step 3**

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

**LCBO Inbound Scheduling**

January 29, 2011 CONTACT US HELP LOG OFF  
0 Alert(s)

**New Appointment Request**

Vendor:

Carrier:

Dest DC:  PO Delivery Date From:  To:

PO Number:

Sel	PO Number	Delivery Date	Destination DC	Type	Heat	Vendor Name	Carrier Name	Late Delivery Reason
<input checked="" type="checkbox"/>	102-00082949	22-Feb-2011	Durham Retail Service Centre	FTL	No	THE WINE GROUP	Carrier	<input type="text" value="Please Select ..."/>
<input type="checkbox"/>	102-00082951	22-Feb-2011	Durham Retail Service Centre	FTL	No	THE WINE GROUP	Carrier	<input type="text" value="Please Select ..."/>

Proposed Appointment Date: \*

\* Indicates a mandatory field

Terms & Conditions LOBIZ

**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.



**Inbound Scheduling**

---

January 29, 2011
CONTACT

**New Appointment**

Search / Modify

Bulletin Board

My Profile

Change Password

User Profile

Users

User Search

User: Alan Michaels  
Carrier

**New Appointment Request**

Request Number: 1823      Request Date: 29-Jan-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	Late Reason
<input type="checkbox"/>	1	Durham Retail Service Centre	102-00082949	FTL	LL	P03	Wines	THE WINE GROUP	640			
<b>Total:</b>									640			
<b>All Stops:</b>									640			

REMOVE PO'S

Other Carrier Name:

DELETE REQUEST
UPDATE REQUEST
BOOK APPTS
PRINT

---

### 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.

**New Appointment Request**

Request Number: 1823 Request Date: 29-Jan-2011  
Carrier: Carrier Proposed Appointment Date: 22-Feb-2011


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/Ti
<input type="checkbox"/>	1	Durham Retail Service Centre	102-00082949	FTL	LL	P03	Wines	THE WINE GROUP	640		
<b>Total:</b>									<b>640</b>		
<b>All Stops:</b>									<b>640</b>		

**REMOVE PO'S**

Other Carrier Name:

**DELETE REQUEST** **UPDATE REQUEST** **BOOK APPTS** **PRINT**


**Step 8**

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

**New Appointment Request**

Request Number: 1823 Request Date: 29-Jan-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
<input checked="" type="checkbox"/>	1	Durham Retail Service Centre	102-00082949	FTL	LL	P03	Wines	THE WINE GROUP	640		
<b>Total:</b>									<b>640</b>		
<b>All Stops:</b>									<b>640</b>		

**REMOVE PO'S**

Other Carrier Name:

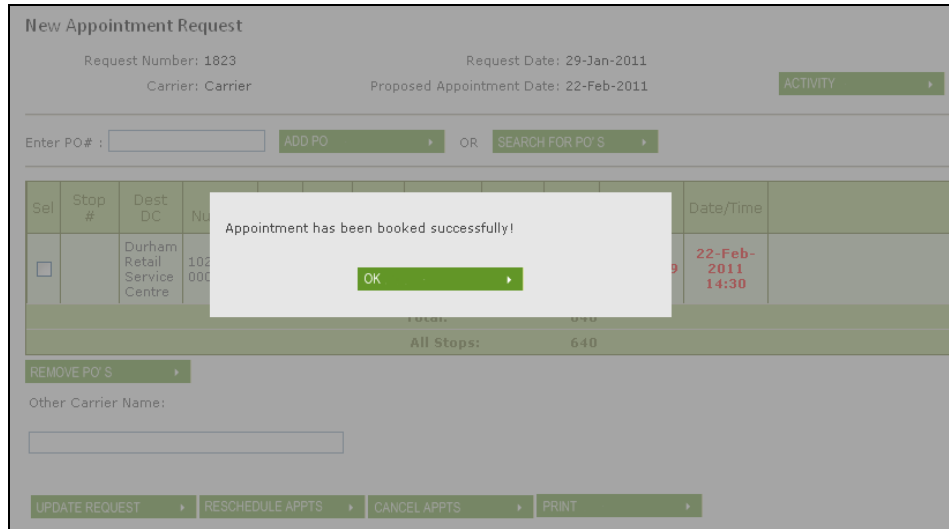
**DELETE REQUEST** **UPDATE REQUEST** **BOOK APPTS** **PRINT**

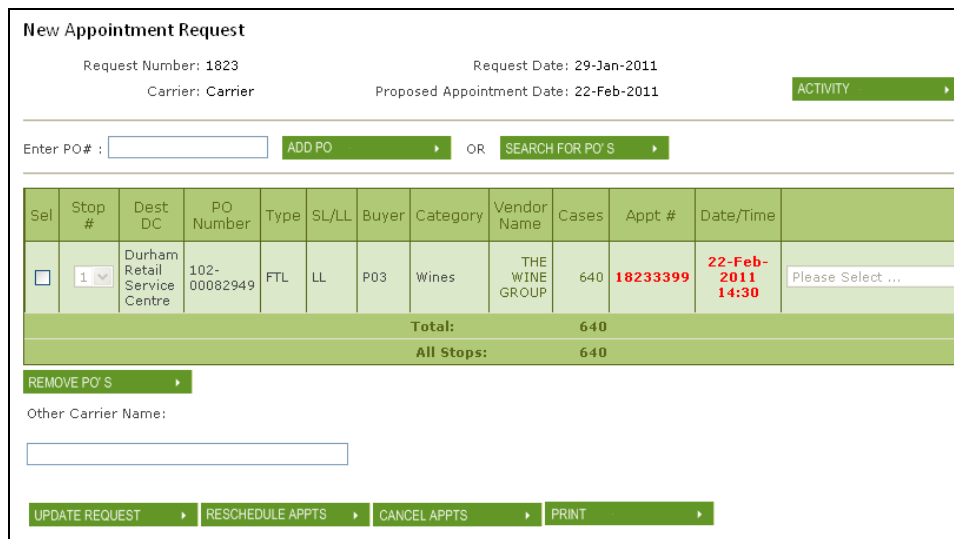


**Step 9**

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



---

### 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**.

**LCBO** Inbound Scheduling  
February 01, 2011

**New 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	
<input type="checkbox"/>	1	Durham Retail Service Centre	102-00082957	FTL	LL	P03	Wines	THE WINE GROUP	640	18283409	22-Feb-2011 12:15	Please Select ...
<b>Total:</b>									640			
<b>All Stops:</b>									640			

**REMOVE PO'S**

Other Carrier Name:

**UPDATE REQUEST** **RESCHEDULE APPTS** **CANCEL APPTS** **PRINT**

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.

**LCBO Inbound Scheduling**  
February 01, 2011

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

Enter PO #: 102-00082959 **ADD PO** OR **SEARCH FOR PO'S**

Sel	Stop #	Dest DC	PO Number	Type	SL/LL	Buyer	Category	Vendor Name	Cases	Appt #	Date/Time	
<input type="checkbox"/>	1	Durham Retail Service Centre	102-00082957	FTL	LL	P03	Wines	THE WINE GROUP	640	18283409	22-Feb-2011 12:15	Please Select ...
<input type="checkbox"/>			102-00082959	LTL	LL	P03	Wines	THE WINE GROUP	640			
<b>Total:</b>									1280			
<b>All Stops:</b>									1280			

**REMOVE PO'S**

Other Carrier Name:

**UPDATE REQUEST** **RESCHEDULE APPTS** **CANCEL APPTS** **PRINT**

**Option 2: Add a PO by Search for POs**

**Step 1**

Click **Search for POs**.

**LCBO Inbound Scheduling**  
February 01, 2011

**New 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	
<input type="checkbox"/>	1	Durham Retail Service Centre	102-00082957	FTL	LL	P03	Wines	THE WINE GROUP	640	18283409	22-Feb-2011 12:15	Please Select ...
<input type="checkbox"/>			102-00082959	LTL	LL	P03	Wines	THE WINE GROUP	640			
<b>Total:</b>									1280			
<b>All Stops:</b>									1280			

**REMOVE PO'S**

Other Carrier Name:

**UPDATE REQUEST** **RESCHEDULE APPTS** **CANCEL APPTS** **PRINT**

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.

**Select PO's for Appointment**

Vendor:  Request Number:

Carrier:  Request Date:

Dest DC:  PO Delivery Date From:  To:

PO Number:

Sel	PO Number	Delivery Date	Destination DC	Type	Heat	Vendor Name	Carrier Name	Late Delivery Reason
<input type="checkbox"/>	102-00044326	18-Oct-2010	Durham Retail Service Centre	FTL	No	THE WINE GROUP	Carrier	<input type="text" value="Please Select ..."/>
<input type="checkbox"/>	102-00044328	18-Oct-2010	Durham Retail Service Centre	FTL	No	THE WINE GROUP	Carrier	<input type="text" value="Please Select ..."/>
<input type="checkbox"/>	102-00044330	19-Oct-2010	Durham Retail Service Centre	LTL	No	THE WINE GROUP	Carrier	

Proposed Appointment Date: \*

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

**Select PO's for Appointment** 1 Alert(s)

Vendor:  Request Number:

Carrier:  Request Date:

Dest DC:  PO Delivery Date From:  To:

PO Number:

Sel	PO Number	Delivery Date	Destination DC	Type	Heat	Vendor Name	Carrier Name	Late Delivery Reason
<input type="checkbox"/>	102-00044326	18-Oct-2010	Durham Retail Service Centre	FTL	No	THE WINE GROUP	Carrier	<input type="text" value="Please Select ..."/>
<input type="checkbox"/>	102-00044328	18-Oct-2010	Durham Retail Service Centre	FTL	No	THE WINE GROUP	Carrier	<input type="text" value="Please Select ..."/>
<input checked="" type="checkbox"/>	102-00044330	19-Oct-2010	Durham Retail Service Centre	LTL	No	THE WINE GROUP	Carrier	

Proposed Appointment Date: \*

\* Indicates a mandatory field

**Step 3**

Click **Add to Request**.

1 Alert(s)

### Select PO's for Appointment

Vendor:  Request Number:

Carrier:  Request Date:


Dest DC:  PO Delivery Date From:  To:

PO Number:


Sel	PO Number	Delivery Date	Destination DC	Type	Heat	Vendor Name	Carrier Name	Late Delivery Reason
<input type="checkbox"/>	102-00044326	18-Oct-2010	Durham Retail Service Centre	FTL	No	THE WINE GROUP	Carrier	<input type="text" value="Please Select ..."/>
<input type="checkbox"/>	102-00044328	18-Oct-2010	Durham Retail Service Centre	FTL	No	THE WINE GROUP	Carrier	<input type="text" value="Please Select ..."/>
<input checked="" type="checkbox"/>	102-00044330	19-Oct-2010	Durham Retail Service Centre	LTL	No	THE WINE GROUP	Carrier	

Proposed Appointment Date: \*

\* Indicates a mandatory field



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



**Inbound Scheduling**

February 01, 2011

New Appointment  
[Search / Modify](#)

Bulletin Board

My Profile  
[Change Password](#)

Users  
[User Search](#)

User: Alan Michaels  
Carrier

### Modify Appointment Request

Request Number: 1828 Request Date: 01-Feb-2011

Carrier: Carrier Proposed Appointment Date: 22-Feb-2011

Enter PO# :   OR

Sel	Stop #	Dest DC	PO Number	Type	SL/LL	Buyer	Category	Vendor Name	Cases	Appt #	Date/Time
<input type="checkbox"/>	1	Durham Retail Service Centre	102-00044330	LTL	LL	P03	Wines	THE WINE GROUP	640	18283409	22-Feb-2011 12:15
<input type="checkbox"/>			102-00082957	FTL	LL	P03	Wines	THE WINE GROUP	640		<input type="text" value="Please Select ..."/>
<input type="checkbox"/>			102-00082959	LTL	LL	P03	Wines	THE WINE GROUP	640		
<b>Total:</b>									1920		
<b>All Stops:</b>									1920		

Other Carrier Name:



## 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.

**LCBO Inbound Scheduling**  
February 02, 2011

**New Appointment Request**  
Request Number: 1839 Request Date: 02-Feb-2011  
Carrier: Carrier Proposed Appointment Date: 22-Feb-2011

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
<input checked="" type="checkbox"/>	1	Durham Retail Service Centre	102-00075323	LTL	LL	P03	Wines	THE WINE GROUP	640	18393426	22-Feb-2011 13:45
<input type="checkbox"/>			102-00082955	FTL	LL	P03	Wines	THE WINE GROUP	640		Please Select ...
<b>Total:</b>									1280		
<b>All Stops:</b>									1280		

REMOVE PO'S  
Other Carrier Name:

UPDATE REQUEST RESCHEDULE APPTS CANCEL APPTS PRINT

**LCBO Inbound Scheduling**  
February 02, 2011

**New Appointment Request**  
Request Number: 1839 Request Date: 02-Feb-2011  
Carrier: Carrier Proposed Appointment Date: 22-Feb-2011

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
<input checked="" type="checkbox"/>	1	Durham Retail Service Centre	102-00075323	LTL	LL	P03	Wines	THE WINE GROUP	640	18393426	22-Feb-2011 13:45
<input type="checkbox"/>			102-00082955	FTL	LL	P03	Wines	THE WINE GROUP	640		Please Select ...
<b>Total:</b>									1280		
<b>All Stops:</b>									1280		

REMOVE PO'S  
Other Carrier Name:

UPDATE REQUEST RESCHEDULE APPTS CANCEL APPTS PRINT

**Step 2**Click **Remove PO**.

**LCBO Inbound Scheduling**  
February 02, 2011

**New Appointment Request**  
Request Number: 1839 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
<input checked="" type="checkbox"/>	1	Durham Retail Service Centre	102-00075323	LTL	LL	P03	Wines	THE WINE GROUP	640	18393426	22-Feb-2011 13:45
<input type="checkbox"/>			102-00082955	FTL	LL	P03	Wines	THE WINE GROUP	640		Please Select ...
<b>Total:</b>									1280		
<b>All Stops:</b>									1280		

**REMOVE PO'S**

Other Carrier Name:

**UPDATE REQUEST** **RESCHEDULE APPTS** **CANCEL APPTS** **PRINT**

**Step 3**

A pop-up window appears notifying the user that the PO has been removed.

Click **OK**.

**LCBO Inbound Scheduling**  
February 02, 2011

**New Appointment Request**  
Request Number: 1839 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
<input type="checkbox"/>		Durham Retail Service Centre	102-00075323	LTL	LL	P03	Wines	THE WINE GROUP	640		22-Feb-2011 13:45
<b>Total:</b>									640		
<b>All Stops:</b>									640		

**REMOVE PO'S**

Other Carrier Name:

**UPDATE REQUEST** **RESCHEDULE APPTS** **CANCEL APPTS** **PRINT**

**PO removed.**  
**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.

**LCBO Inbound Scheduling**  
February 02, 2011

**New Appointment Request**  
Request Number: 1839 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	
<input type="checkbox"/>	1	Durham Retail Service Centre	102-00082955	FTL	LL	P03	Wines	THE WINE GROUP	640	18393426	22-Feb-2011 13:45	Please Select ...
<b>Total:</b>									640			
<b>All Stops:</b>									640			

**REMOVE PO'S**

Other Carrier Name:

**UPDATE REQUEST** **RESCHEDULE APPTS** **CANCEL APPTS** **PRINT**

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

**LCBO Inbound Scheduling**  
February 02, 2011

**New Appointment Request**  
Request Number: 1839 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	
<input type="checkbox"/>	1	Durham Retail Service Centre	102-00082955	FTL	LL	P03	Wines	THE WINE GROUP	640	18393426	22-Feb-2011 13:45	Please Select ...
<b>Total:</b>									640			
<b>All Stops:</b>									640			


**REMOVE PO'S**

Other Carrier Name:

**UPDATE REQUEST** **RESCHEDULE APPTS** **CANCEL APPTS** **PRINT**

Appointment Request has been saved successfully!  
**OK**

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



### 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: 1839      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	
<input type="checkbox"/>	1	Durham Retail Service Centre	102-00082955	FTL	LL	P03	Wines	THE WINE GROUP	640	18393426	22-Feb-2011 13:45	Please Select ...
<b>Total:</b>									640			
<b>All Stops:</b>									640			

REMOVE PO'S ▾

Other Carrier Name:

UPDATE REQUEST ▾
RESCHEDULE APPTS ▾
CANCEL APPTS ▾
PRINT ▾

---

### 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.**

**LCBO Inbound Scheduling**  
February 02, 2011

**New Appointment Request**  
Request Number: 1839 Request Date: 02-Feb-2011  
Carrier: Carrier Proposed Appointment Date: 22-Feb-2011

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	Late Reason
<input type="checkbox"/>	1	Durham Retail Service Centre	102-00082955	FTL	LL	P03	Wines	THE WINE GROUP	640	18393426	22-Feb-2011 13:45	Please Select ...
<b>Total:</b>									640			
<b>All Stops:</b>									640			

**REMOVE PO'S**

Other Carrier Name:

**UPDATE REQUEST** **RESCHEDULE APPTS** **CANCEL APPTS** **PRINT**

## Step 2

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

**LCBO Inbound Scheduling**  
February 02, 2011

**New Appointment Request**  
Request Number: 1839 Request Date: 02-Feb-2011  
Carrier: Carrier Proposed Appointment Date: 22-Feb-2011

**Reschedule Appointment**

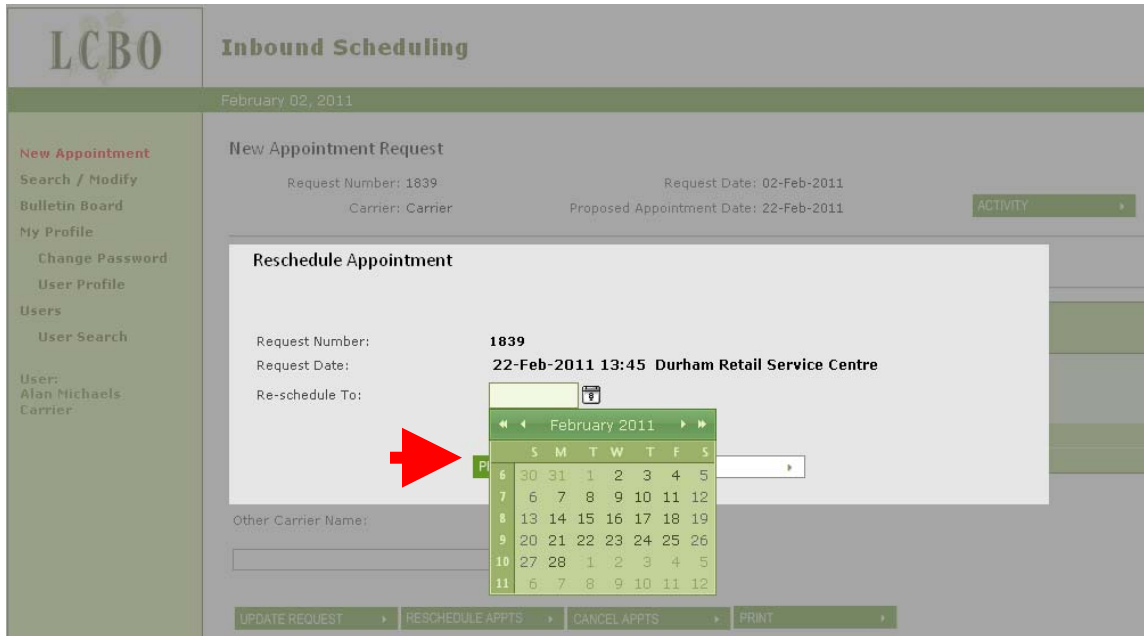
Request Number: 1839  
Request Date: 22-Feb-2011 13:45 Durham Retail Service Centre  
Re-schedule To:

**PROCEED** **CANCEL**

Other Carrier Name:

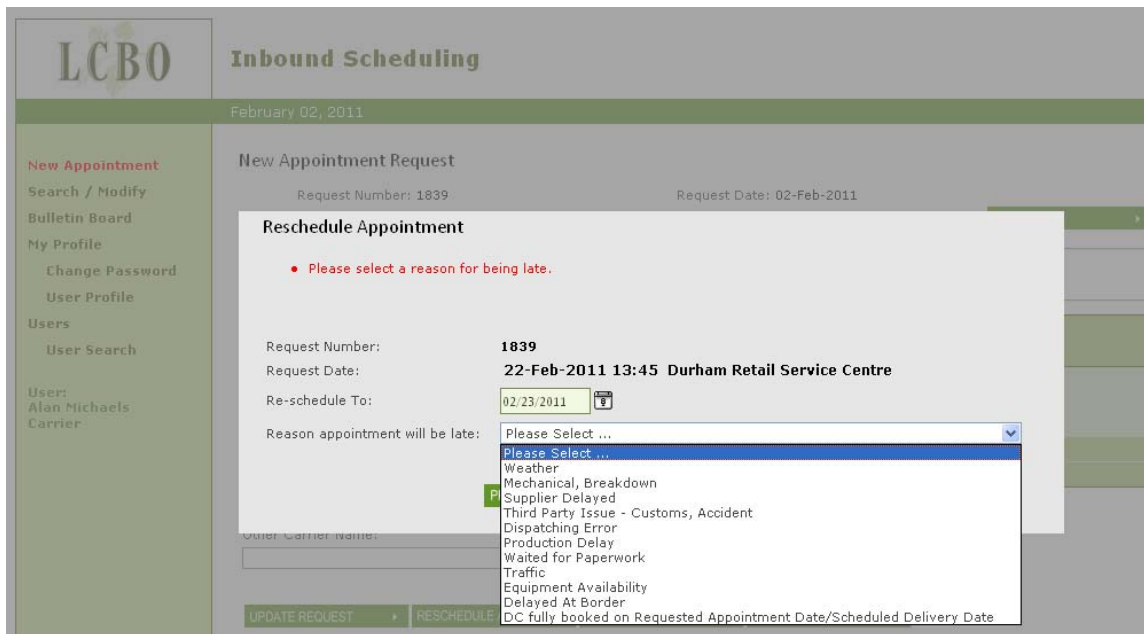
**UPDATE REQUEST** **RESCHEDULE APPTS** **CANCEL APPTS** **PRINT**

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**.

**LCBO Inbound Scheduling**  
February 02, 2011

**New Appointment Request**  
Request Number: 1839 Request Date: 02-Feb-2011

**Reschedule Appointment**

- Please select a reason for being late.

Request Number: **1839**  
Request Date: **22-Feb-2011 13:45 Durham Retail Service Centre**  
Re-schedule To: 02/23/2011  
Reason appointment will be late: Equipment Availability

**PROCEED** **CANCEL**

Other Carrier Name:

UPDATE REQUEST RESCHEDULE APPTS CANCEL APPTS PRINT

**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**.

**LCBO Inbound Scheduling**  
February 02, 2011

**New Appointment Request**  
Request Number: 1839 Request Date: 02-Feb-2011  
Carrier: Carrier Proposed Appointment Date: 22-Feb-2011

Enter PO# :  **ADD PO** OR **SEARCH FOR PO'S**


Sel	Stop #	Dest DC	NU	Data/Time
<input type="checkbox"/>		Durham Retail Service Centre	102000	23-Feb-2011 14:45
Total:				640
All Stops:				640

**REMOVE PO'S**

Other Carrier Name:

UPDATE REQUEST RESCHEDULE APPTS CANCEL APPTS PRINT

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



**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: 1839      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	
<input type="checkbox"/>	1	Durham Retail Service Centre	102-00082955	FTL	LL	P03	Wines	THE WINE GROUP	640	18393427	23-Feb-2011 14:45	Equipment Availability
<b>Total:</b>									640			
<b>All Stops:</b>									640			

[REMOVE PO'S](#)

Other Carrier Name:

[UPDATE REQUEST](#) [RESCHEDULE APPTS](#) [CANCEL APPTS](#) [PRINT](#)

---

### 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.

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### 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.

The screenshot shows the 'New Appointment Request' screen in the LCBO Inbound Scheduling system. The page includes a sidebar with navigation options like 'New Appointment', 'Search / Modify', and 'User Profile'. The main content area displays request details: Request Number: 1826, Request Date: 29-Jan-2011, Carrier: Carrier, and Proposed Appointment Date: 22-Feb-2011. Below this is a table of appointment stops. The first row shows a stop at Durham Retail Service Centre with PO Number 102-00082951, Type FTL, SL/LL LL, Buyer P03, Category Wines, Vendor Name THE WINE GROUP, Cases 640, Appt # 18263402, and Date/Time 22-Feb-2011 11:15. A red arrow points to the 'CANCEL APPTS' button in the bottom navigation bar.

Sel	Stop #	Dest DC	PO Number	Type	SL/LL	Buyer	Category	Vendor Name	Cases	Appt #	Date/Time	
<input type="checkbox"/>	1	Durham Retail Service Centre	102-00082951	FTL	LL	P03	Wines	THE WINE GROUP	640	18263402	22-Feb-2011 11:15	Please Select ...
<b>Total:</b>									640			
<b>All Stops:</b>									640			

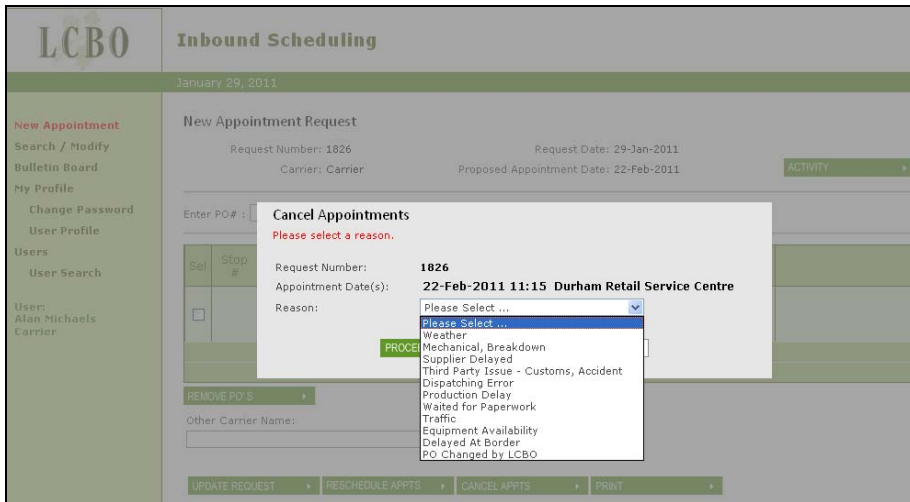
### Step 2

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

The screenshot shows the same 'New Appointment Request' screen as in Step 1, but with a 'Cancel Appointments' pop-up window overlaid. The pop-up window contains the following information: Request Number: 1826, Appointment Date(s): 22-Feb-2011 11:15, and Reason: Durham Retail Service Centre. At the bottom of the pop-up are two buttons: 'PROCEED' and 'CANCEL'.

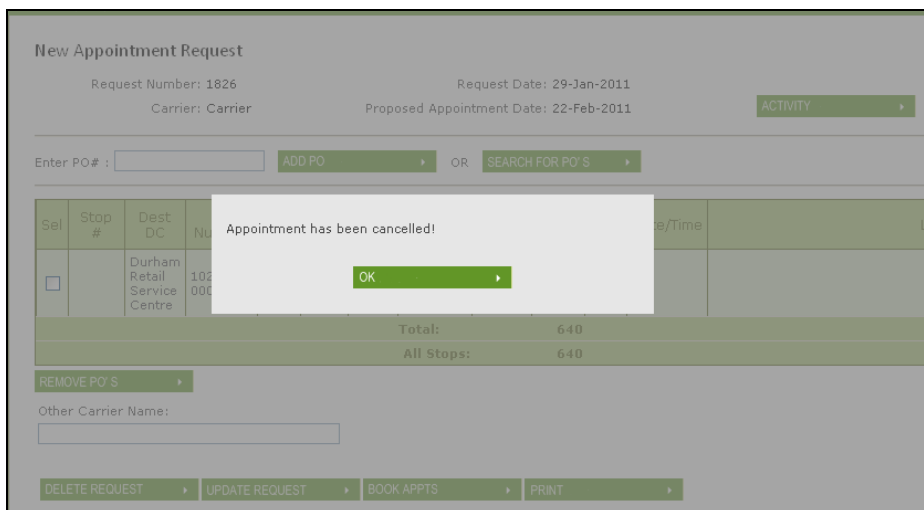
**Step 3**

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**.

**LCBO Inbound Scheduling**  
January 29, 2011

**New Appointment Request**  
Request Number: 1826 Request Date: 29-Jan-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
<input type="checkbox"/>	1	Durham Retail Service Centre	102-00082951	FTL	LL	P03	Wines	THE WINE GROUP	640		
<b>Total:</b>									<b>640</b>		
<b>All Stops:</b>									<b>640</b>		

**REMOVE PO'S**  
Other Carrier Name:

**DELETE REQUEST** **UPDATE REQUEST** **BOOK APPTS** **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

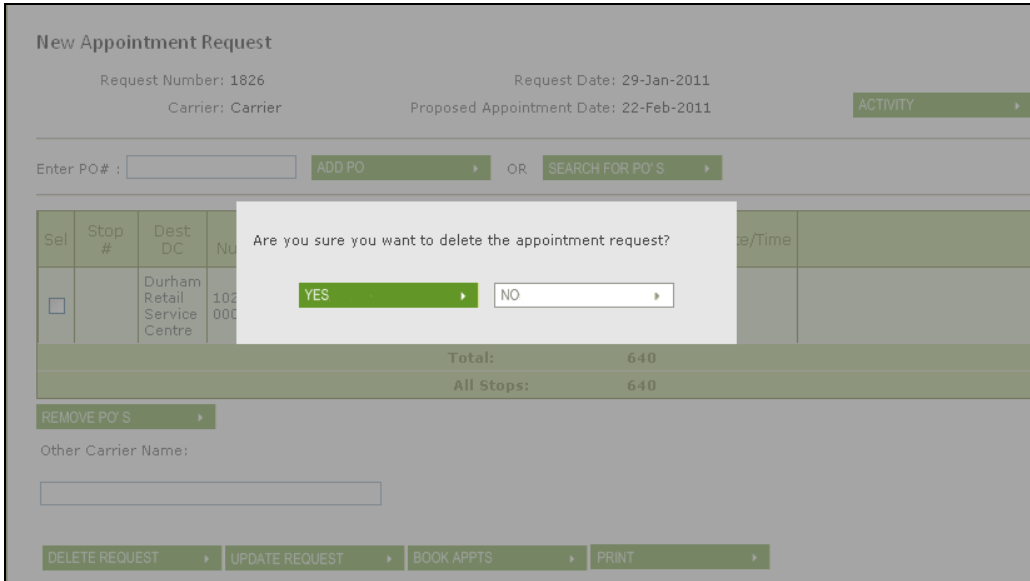
Click **Delete Request**. A pop-up window appears requesting the user to confirm deleting the appointment request.

The screenshot shows the 'New Appointment Request' screen in the LCBO Inbound Scheduling system. The page includes a sidebar with navigation options like 'New Appointment', 'Search / Modify', and 'User Profile'. The main content area displays request details for Request Number 1826, dated 29-Jan-2011, with a carrier of 'Carrier'. A table lists appointment stops, including one for 'Durham Retail Service Centre' with 640 cases. At the bottom, a row of action buttons is visible, with a red arrow pointing to the 'DELETE REQUEST' button.

Sel	Stop #	Dest DC	PO Number	Type	SL/LL	Buyer	Category	Vendor Name	Cases	Appt #	Date/Time
<input type="checkbox"/>	1	Durham Retail Service Centre	102-00082951	FTL	LL	P03	Wines	THE WINE GROUP	640		
Total:									640		
All Stops:									640		

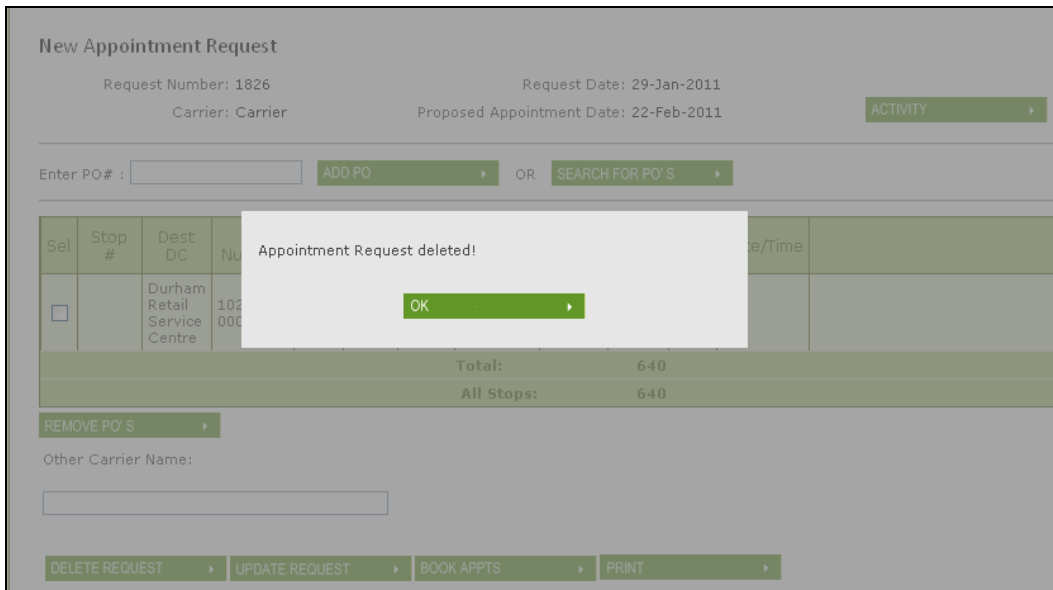
**Step 2**

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.

**New Appointment**

**Search / Modify**

Bulletin Board

My Profile

Change Password

User Profile

Users

User Search

User: Alan Michaels  
Carrier

0 Alert(s)

### Search and Modify Appointment Request

PO Number

Request Number

Appointment Number

Appointment Date

Destination DC

Request Status

**SEARCH**

PO #	Request #	Dest DC	Appt #	Appt Date	Vendor	Carrier	Buyer	Status
102-00075322	1710	Durham Retail Service Centre			THE WINE GROUP	Carrier	P03	Unscheduled
102-00075323	1713	Durham Retail Service Centre			THE WINE GROUP	Carrier	P03	Unscheduled
102-00082949	1823	Durham Retail Service Centre	18233399	22-Feb-2011 14:30	THE WINE GROUP	Carrier	P03	Scheduled
102-00082950	1814	Durham Retail Service Centre			THE WINE GROUP	Carrier	P03	Unscheduled
102-00082952	1813	Durham Retail Service Centre			THE WINE GROUP	Carrier	P03	Unscheduled
102-00082953	1812	Durham Retail Service Centre	18123383	22-Feb-2011 08:00	THE WINE GROUP	Carrier	P03	Scheduled
102-00082954	1811	Durham Retail Service Centre	18113376	22-Feb-2011 10:00	THE WINE GROUP	Carrier	P03	Scheduled
102-00082955	1781	Durham Retail Service Centre			THE WINE GROUP	Carrier	P03	Unscheduled
102-00082956	1815	Durham Retail Service Centre			THE WINE GROUP	Carrier	P03	Unscheduled
102-00082957	1810	Durham Retail Service Centre			THE WINE GROUP	Carrier	P03	Unscheduled

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**.

**New Appointment Request**

Request Number: 1826      Request Date: 29-Jan-2011  
Carrier: Carrier      Proposed Appointment Date: 22-Feb-2011      **ACTIVITY** ▾

Enter PO# :  **ADD PO** ▾ OR **SEARCH FOR PO'S** ▾

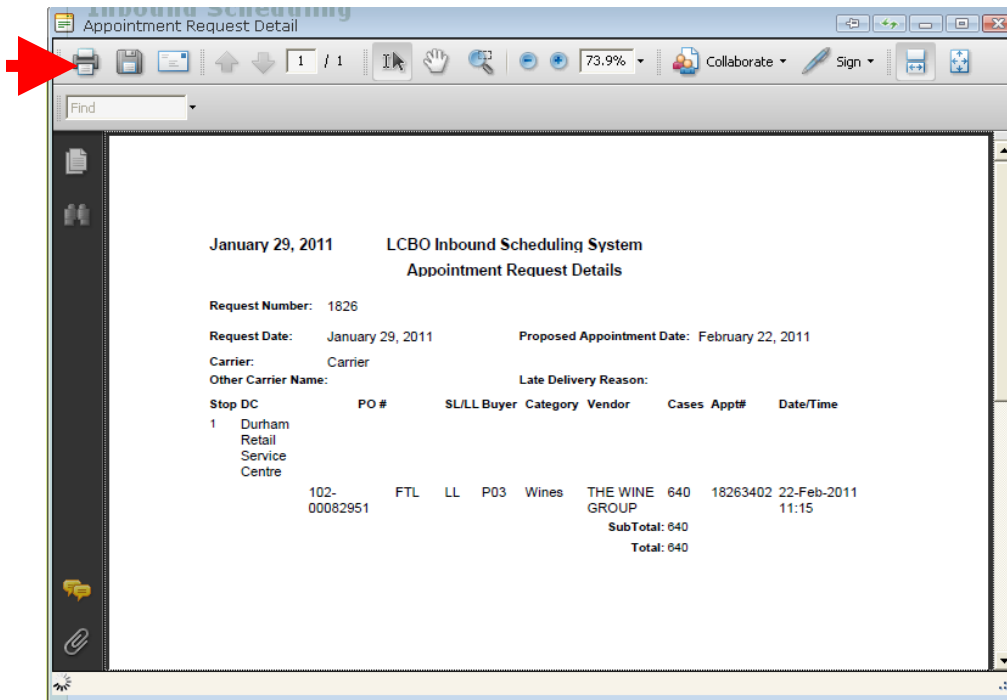
Sel	Stop #	Dest DC	PO Number	Type	SL/LL	Buyer	Category	Vendor Name	Cases	Appt #	Date/Time	
<input type="checkbox"/>	1 ▾	Durham Retail Service Centre	102-00082951	FTL	LL	P03	Wines	THE WINE GROUP	640	18263402	22-Feb-2011 11:15	Please Select ...
<b>Total:</b>									640			
<b>All Stops:</b>									640			

**REMOVE PO'S** ▾

Other Carrier Name:

**UPDATE REQUEST** ▾ **RESCHEDULE APPTS** ▾ **CANCEL APPTS** ▾ **PRINT** ▾

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**.

Request Number: 1812 Request Date: 26-Jan-2011  
Carrier: Carrier Proposed Appointment Date: 22-Feb-2011

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	
<input type="checkbox"/>	1	Durham Retail Service Centre	102-00082953	FTL	LL	P03	Wines	THE WINE GROUP	640	18123383	22-Feb-2011 08:00	Please Select ...
<b>Total:</b>									640			
<b>All Stops:</b>									640			

**REMOVE PO'S**

Other Carrier Name:

**UPDATE REQUEST** **RESCHEDULE APPTS** **CANCEL APPTS** **PRINT**

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

LCBO		Inbound Scheduling																															
January 29, 2011		CONTACT US HELP LOG OFF																															
<ul style="list-style-type: none"> <li>New Appointment</li> <li>Search / Modify</li> <li>Bulletin Board</li> <li>My Profile</li> <li>Change Password</li> <li>User Profile</li> <li>Users</li> <li>User Search</li> </ul>		<p><b>Appointment Request Activity</b></p> <p>Request Number 1812</p> <table border="1"> <thead> <tr> <th>Type</th> <th>Detail</th> <th>Reason</th> <th>Date/Time</th> <th>User</th> <th>Dest DC</th> </tr> </thead> <tbody> <tr> <td>Alert</td> <td>Appointment rescheduled by LCBO.</td> <td></td> <td>26-Jan-2011 17:00</td> <td>Di Ming Nip</td> <td>Durham Retail Service Centre</td> </tr> <tr> <td>Status Change</td> <td>Appointments Rescheduled</td> <td></td> <td>26-Jan-2011 17:00</td> <td>Di Ming Nip</td> <td>Durham Retail Service Centre</td> </tr> <tr> <td>Status Change</td> <td>Appointments Scheduled</td> <td></td> <td>26-Jan-2011 16:07</td> <td>Sally Jones</td> <td>Durham Retail Service Centre</td> </tr> <tr> <td>Status Change</td> <td>Appointment Request Created</td> <td></td> <td>26-Jan-2011 16:07</td> <td>Sally Jones</td> <td>Durham Retail Service Centre</td> </tr> </tbody> </table>		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
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																												
User: Alan Michaels Carrier		Terms & Conditions																															



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.

**New Appointment Request** 2 Alert(s)

Vendor:

Carrier:

Dest DC:

PO Delivery Date From:  To:

PO Number:

Sel	PO Number	Delivery Date	Destination DC	Type	Heat	Vendor Name	Carrier Name	Late Delivery Reason
<input type="checkbox"/>	103-00075324	31-Jan-2011	London Retail Service Centre (101/103)	FTL	No	THE WINE GROUP	Carrier	<input type="text" value="Please Select ..."/>
<input type="checkbox"/>	102-00082958	22-Feb-2011	Durham Retail Service Centre	FTL	No	THE WINE GROUP	Carrier	<input type="text" value="Please Select ..."/>
<input type="checkbox"/>	103-00082965	22-Feb-2011	London Retail Service Centre (101/103)	LTL	No	THE WINE GROUP	Carrier	

Proposed Appointment Date:

\* Indicates a mandatory field

**New Appointment Request** 2 Alert(s)

Vendor:

Carrier:

Dest DC:

PO Delivery Date From:  To:

PO Number:

Sel	PO Number	Delivery Date	Destination DC	Type	Heat	Vendor Name	Carrier Name	Late Delivery Reason
<input type="checkbox"/>	103-00075324	31-Jan-2011	London Retail Service Centre (101/103)	FTL	No	THE WINE GROUP	Carrier	<input type="text" value="Please Select ..."/>
<input checked="" type="checkbox"/>	102-00082958	22-Feb-2011	Durham Retail Service Centre	FTL	No	THE WINE GROUP	Carrier	<input type="text" value="Please Select ..."/>
<input checked="" type="checkbox"/>	103-00082965	22-Feb-2011	London Retail Service Centre (101/103)	LTL	No	THE WINE GROUP	Carrier	

Proposed Appointment Date:

\* Indicates a mandatory field

**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**.

**LCBO Inbound Scheduling**  
February 02, 2011

**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	Late Reason
	1	Durham Retail Service Centre	102-00082958	FTL	LL	P03	Wines	THE WINE GROUP	640			
<b>Total:</b>									<b>640</b>			
	2	London Retail Service Centre (101/103)	103-00082965	LTL	LL	P03	Wines	THE WINE GROUP	640			
<b>Total:</b>									<b>640</b>			
<b>All Stops:</b>									<b>1280</b>			

**REMOVE PO'S**

Other Carrier Name:

**DELETE REQUEST** **UPDATE REQUEST** **BOOK APPTS** **PRINT**

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 screenshot shows the LCBO Inbound Scheduling interface. The main heading is "Inbound Scheduling" with a sub-heading "New Appointment Request". The request details include: Request Number: 1847, Request Date: 02-Feb-2011, Carrier: Carrier, and Proposed Appointment Date: 22-Feb-2011. There is a search bar for PO# and a table of appointment requests. A modal dialog box is displayed over the table with the message "Appointment has been booked successfully!" and an "OK" button. The table contains two rows of data:

Del	Stop #	Dest DC	1	2	3	4	5	6	7	8	9	10	11	12	Date/Time
<input type="checkbox"/>		Durham Retail Service Centre	1	0										41	22-Feb-2011 12:15
<input type="checkbox"/>		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					

Below the table, there are buttons for "REMOVE PO'S", "UPDATE REQUEST", "RESCHEDULE APPTS", "CANCEL APPTS", and "PRINT". A field for "Other Carrier Name:" is also present.

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.



### 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	
<input type="checkbox"/>	1	Durham Retail Service Centre	102-00082958	FTL	LL	P03	Wines	THE WINE GROUP	640	18473441	22-Feb-2011 12:15	Please Select ...
<b>Total:</b>									640			
<input type="checkbox"/>	2	London Retail Service Centre (101/103)	103-00082965	LTL	LL	P03	Wines	THE WINE GROUP	640	18473442	22-Feb-2011 16:45	
<b>Total:</b>									640			
<b>All Stops:</b>									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**.

**LCBO** Inbound Scheduling

February 03, 2011

**New Appointment Request**

Request Number: 1852 Request Date: 03-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
<input type="checkbox"/>	1	Durham Retail Service Centre	102-00082958	FTL	LL	P03	Wines	THE WINE GROUP	640		
<b>Total:</b>									<b>640</b>		
<b>All Stops:</b>									<b>640</b>		

**REMOVE PO'S**

Other Carrier Name:

**DELETE REQUEST** **UPDATE REQUEST** **BOOK APPTS** **PRINT**

### 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**.

**Inbound Scheduling**

February 03, 2011 CONTACT US HELP LOG OFF

**2 Alert(s)**

**Select PO's for Appointment**

Vendor:  Request Number:

Carrier:  Request Date:

Dest DC:  PO Delivery Date From:  To:

PO Number:

**SEARCH**

Sel	PO Number	Delivery Date	Destination DC	Type	Heat	Vendor Name	Carrier Name	Late Delivery Reason
<input type="checkbox"/>	103-00075324	31-Jan-2011	London Retail Service Centre (101/103)	FTL	No	THE WINE GROUP	Carrier	<input type="text" value="Please Select ..."/>
<input checked="" type="checkbox"/>	103-00082965	22-Feb-2011	London Retail Service Centre (101/103)	LTL	No	THE WINE GROUP	Carrier	

Proposed Appointment Date:  \*

\* Indicates a mandatory field

**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.

**Inbound Scheduling**

February 03, 2011

**Modify Appointment Request**

Request Number: 1852 Request Date: 03-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
<input checked="" type="checkbox"/>	1	Durham Retail Service Centre	102-00082958	FTL	LL	P03	Wines	THE WINE GROUP	640		
<b>Total:</b>									<b>640</b>		
<input checked="" type="checkbox"/>	2	London Retail Service Centre (101/103)	103-00082965	LTL	LL	P03	Wines	THE WINE GROUP	640		
<b>Total:</b>									<b>640</b>		
<b>All Stops:</b>									<b>1280</b>		

**REMOVE PO'S**

Other Carrier Name:

**DELETE REQUEST** **UPDATE REQUEST** **BOOK APPTS** **PRINT**

Click **Book Appts.**





**Step 4**

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

**Inbound Scheduling**

February 03, 2011

**Modify Appointment Request**

Request Number: 1852 Request Date: 03-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
<input type="checkbox"/>	1	Durham Retail Service Centre	102-00082958	FTL	LL	P03	Wines	THE WINE GROUP	640	18523452	22-Feb-2011 12:15
<b>Total:</b>									640		
<b>All Stops:</b>									1280		

**REMOVE PO'S**

Other Carrier Name:

**UPDATE REQUEST** **RESCHEDULE APPTS** **CANCEL APPTS** **PRINT**

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

**LCBO** **Inbound Scheduling**

February 03, 2011

**Modify Appointment Request**

Request Number: 1852 Request Date: 03-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
<input type="checkbox"/>	1	Durham Retail Service Centre	102-00082958	FTL	LL	P03	Wines	THE WINE GROUP	640	18523452	22-Feb-2011 12:15
<b>Total:</b>									640		
<input type="checkbox"/>	2	London Retail Service Centre (101/103)	103-00082965	LTL	LL	P03	Wines	THE WINE GROUP	640	18523453	22-Feb-2011 16:45
<b>Total:</b>									640		
<b>All Stops:</b>									1280		

**REMOVE PO'S**

Other Carrier Name:

**UPDATE REQUEST** **RESCHEDULE APPTS** **CANCEL APPTS** **PRINT**

### 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.

**LCBO** **Inbound Scheduling**

July 12, 2010 [CONTACT US](#) [HELP](#) [LOG OFF](#)

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

User:  
Jane Doe  
Carrier

### Search and Modify Appointment Request

PO Number:

Request Number:

Appointment Number:

Appointment Date:

Destination DC:

Vendor  Carrier

Carrier:

Request Status:

PO #	Request #	Dest DC	Appt #	Appt Date	Vendor	Carrier	Buyer	Status
102-00044326	1157	Durham Regional Warehouse	11572143	18-Oct-2010 08:00	THE WINE GROUP	Carrier	P03	Scheduled
102-00044327	1158	Durham Regional Warehouse	11582146	19-Oct-2010 08:00	THE WINE GROUP	Carrier	P03	Scheduled

### 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.

**LCBO** Inbound Scheduling

January 29, 2011 CONTACT US HELP LOG OFF 0 Alert(s)

**Search and Modify Appointment Request**

PO Number

Request Number

Appointment Number

Appointment Date

Destination DC

Request Status

PO #	Request #	Dest DC	Appt #	Appt Date	Vendor	Carrier	Buyer	Status
102-00075322	1710	Durham Retail Service Centre			THE WINE GROUP	Carrier	P03	Unscheduled
102-00075323	1713	Durham Retail Service Centre			THE WINE GROUP	Carrier	P03	Unscheduled
102-00082949	1823	Durham Retail Service Centre	18233399	22-Feb-2011 14:30	THE WINE GROUP	Carrier	P03	Scheduled
102-00082950	1814	Durham Retail Service Centre			THE WINE GROUP	Carrier	P03	Unscheduled
102-00082952	1813	Durham Retail Service Centre			THE WINE GROUP	Carrier	P03	Unscheduled
102-00082953	1812	Durham Retail Service Centre	18123383	22-Feb-2011 08:00	THE WINE GROUP	Carrier	P03	Scheduled
102-00082954	1811	Durham Retail Service Centre	18113376	22-Feb-2011 10:00	THE WINE GROUP	Carrier	P03	Scheduled

#### 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).

**Search and Modify Appointment Request**

PO Number  
 Request Number  
 Appointment Number  
 Appointment Date  
 Vendor  Carrier  
 Carrier-0111  
 Destination DC  
 Please Select ...  
 Request Status  
 Please Select ...  
 UNSCHEDULED  
 Appointments Cancelled  
 Scheduled  
 Arrived  
 Delivery In Progress  
 Cancelled By WebPO  
 SEARCH

PO Number	Request Number	Appointment Number	Dest DC	Appt #	Appt Date	Vendor	Carrier	Buy
102-00075323	1713		Durham Retail Service Centre			THE WINE GROUP	Carrier	P03
			Durham Retail Service Centre			THE WINE GROUP	Carrier	P03

- **Unscheduled:** The appointment request has not been booked (assigned an appointment date and time).
- **Appointments cancelled:** The appointment request was booked but was then cancelled. **The appointment request is still active and available to be rebooked.**
- **Scheduled:** The appointment request has been booked.
- **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.
- **Delivery in Progress:** The multi stop appointment request has arrived at the first service center but not the final service center.
- **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.

The screenshot displays the LCBO Inbound Scheduling interface. On the left is a navigation menu with options like 'New Appointment', 'Search / Modify', 'Bulletin Board', 'My Profile', 'Users', and 'User Search'. The main area is titled 'Search and Modify Appointment Request' and contains several input fields: PO Number, Request Number, Appointment Number, Appointment Date (with a calendar icon), Destination DC (a dropdown menu), and Request Status (a dropdown menu). There are radio buttons for 'Vendor' and 'Carrier', and a dropdown for 'Carrier-0111'. A green 'SEARCH' button is located below the filters. A table of appointment requests is shown at the bottom, with columns for PO #, Request #, Dest DC, Appt #, Appt Date, Vendor, Carrier, Buyer, and Status. A red arrow points to the first row of the table.

PO #	Request #	Dest DC	Appt #	Appt Date	Vendor	Carrier	Buyer	Status
102-00075322	1710	Durham Retail Service Centre			THE WINE GROUP	Carrier	P03	Unscheduled
102-00075323	1713	Durham Retail Service Centre			THE WINE GROUP	Carrier	P03	Unscheduled
102-00082949	1823	Durham Retail Service Centre	18233399	22-Feb-2011 14:30	THE WINE GROUP	Carrier	P03	Scheduled
102-00082950	1814	Durham Retail Service Centre			THE WINE GROUP	Carrier	P03	Unscheduled
102-00082952	1813	Durham Retail Service Centre			THE WINE GROUP	Carrier	P03	Unscheduled
102-00082953	1812	Durham Retail Service Centre	18123383	22-Feb-2011 08:00	THE WINE GROUP	Carrier	P03	Scheduled
102-00082954	1811	Durham Retail Service Centre	18113376	22-Feb-2011 10:00	THE WINE GROUP	Carrier	P03	Scheduled

### 3

## SEARCH AND/OR MODIFY APPOINTMENTS

### MODIFY AN APPOINTMENT REQUEST

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

**LCBO** **Inbound Scheduling**

January 29, 2011

**Modify Appointment Request**

Request Number: 1823 Request Date: 29-Jan-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	
<input type="checkbox"/>	1	Durham Retail Service Centre	102-00082949	FTL	LL	P03	Wines	THE WINE GROUP	640	18233399	22-Feb-2011 14:30	Please Select ...
<b>Total:</b>									640			
<b>All Stops:</b>									640			

**REMOVE PO'S**

Other Carrier Name:

**UPDATE REQUEST** **RESCHEDULE APPTS** **CANCEL APPTS** **PRINT**

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:

Sel	Stop #	Dest DC	PO Number	Type	SL/LL	Buyer	Category	Vendor Name	Cases	Appt #	Date/Time
<input type="checkbox"/>	1	Durham Retail Service Centre	102-00082949	FTL	LL	P03	Wines	THE WINE GROUP	640	18233399	22-Feb-2011 14:30
<b>Total:</b>									640		
<b>All Stops:</b>									640		
REMOVE PO'S											
Other Carrier Name:											
<input type="text"/>											
UPDATE REQUEST			RESCHEDULE APPTS			CANCEL APPTS			PRINT		



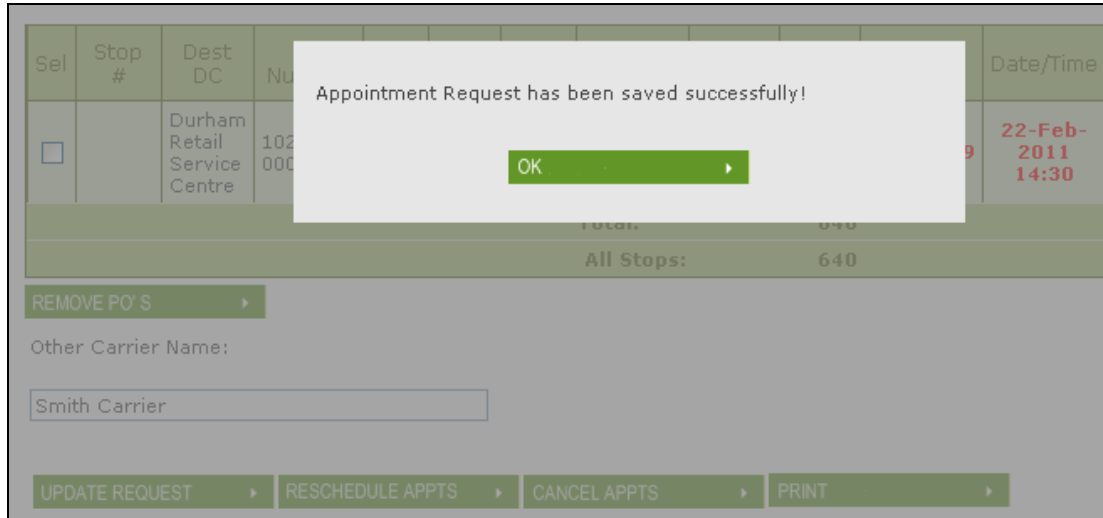
Type in name and click **Update Request**.



### 3 SEARCH AND/OR MODIFY APPOINTMENTS

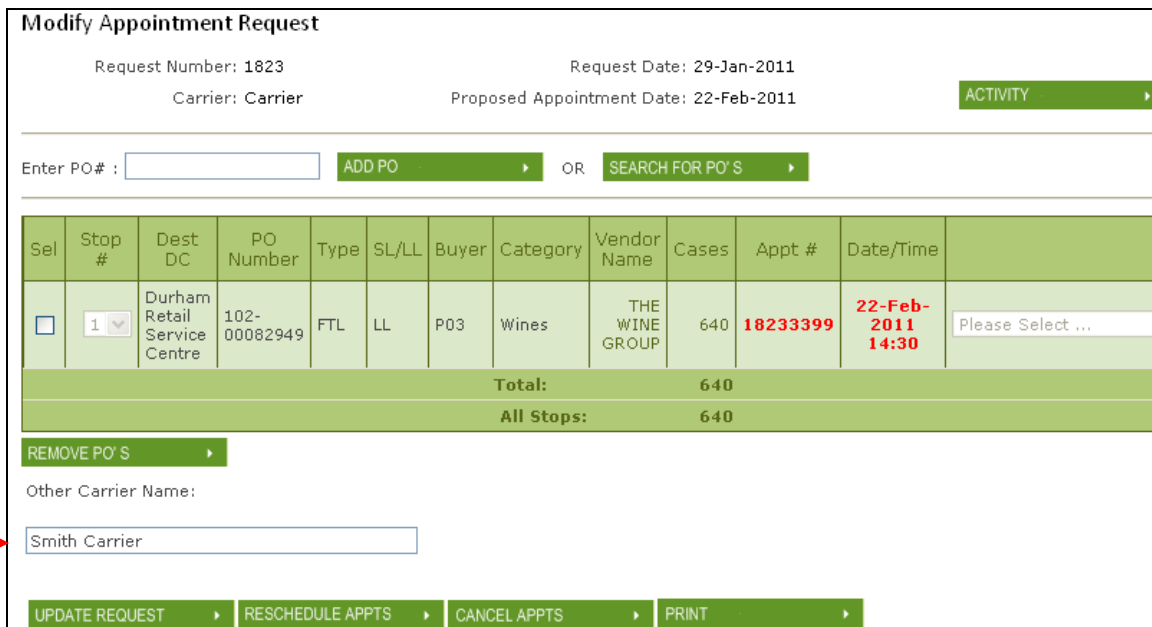
#### MODIFY AN APPOINTMENT REQUEST – OTHER CARRIER NAME

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



A confirmation dialog box is displayed over a table. The dialog box contains the text "Appointment Request has been saved successfully!" and an "OK" button. The table behind it has columns: Sel, Stop #, Dest DC, Nu, and Date/Time. One row is visible with a checkbox, "Durham Retail Service Centre", "102-000", and "22-Feb-2011 14:30". Below the table, there are buttons for "REMOVE PO'S", "UPDATE REQUEST", "RESCHEDULE APPTS", "CANCEL APPTS", and "PRINT". A text input field for "Other Carrier Name" contains "Smith Carrier".

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



The "Modify Appointment Request" screen displays the following information:

- Request Number: 1823
- Request Date: 29-Jan-2011
- Carrier: Carrier
- Proposed Appointment Date: 22-Feb-2011
- ACTIVITY button
- Enter PO# :  ADD PO OR SEARCH FOR PO'S
- Table with columns: Sel, Stop #, Dest DC, PO Number, Type, SL/LL, Buyer, Category, Vendor Name, Cases, Appt #, Date/Time, and a dropdown menu.
- Table Row 1:  1, Durham Retail Service Centre, 102-00082949, FTL, LL, P03, Wines, THE WINE GROUP, 640, 18233399, 22-Feb-2011 14:30, Please Select ...
- Total: 640
- All Stops: 640
- REMOVE PO'S button
- Other Carrier Name:  Smith Carrier (indicated by a red arrow)
- UPDATE REQUEST, RESCHEDULE APPTS, CANCEL APPTS, PRINT buttons

## 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.

**Inbound Scheduling**

July 13, 2010 CONTACT US HELP LOG OFF

Alerts 5 Alert(s)

Filter:  Open  Closed  All

Subject	Date/Time	PO Number	Buyer	Dest Dc	Vendor	Carrier	Closed
Appointment cancelled by Carrier.	30-Jun-2010 17:07	102-00044331	P03	Durham Regional Warehouse	THE WINE GROUP	Carrier	<input checked="" type="checkbox"/>
Appointment cancelled by Carrier.	02-Jul-2010 14:07	102-00044328	P03	Durham Regional Warehouse	THE WINE GROUP	Carrier	<input type="checkbox"/>
Appointment cancelled by Carrier.	02-Jul-2010 14:12	102-00044328	P03	Durham Regional Warehouse	THE WINE GROUP	Carrier	<input type="checkbox"/>
Appointment rescheduled by Carrier.	12-Jul-2010 16:23	102-00044327	P03	Durham Regional Warehouse	THE WINE GROUP	Carrier	<input type="checkbox"/>
Late appointment booked by Vendor or Carrier.	12-Jul-2010 16:23	102-00044327	P03	Durham Regional Warehouse	THE WINE GROUP	Carrier	<input type="checkbox"/>

< First < Previous Next > Last >

CLOSE ALERT

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

**Alert Worksheet Header:**

Alerts							
Filter: <input checked="" type="radio"/> Open <input type="radio"/> Closed <input type="radio"/> 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.

**LCBO** Inbound Scheduling

February 03, 2011 CONTACT US HELP LOG OFF **2 Alert(s)**

**Alerts**

Filter:  Open  Closed  All

Subject	Date/Time	PO Number	Buyer	Dest Dc	Vendor	Carrier	Closed
Appointment booked by LCBO.	31-Jan-2011 16:10	102-00082952	P03	Durham Retail Service Centre	THE WINE GROUP	Carrier	<input type="checkbox"/>
Appointment changed by LCBO.	01-Feb-2011 09:58	102-00044330	P03	Durham Retail Service Centre	THE WINE GROUP	Carrier	<input type="checkbox"/>
		102-00082957	P03		THE WINE GROUP	Carrier	<input type="checkbox"/>
		102-00082959	P03		THE WINE GROUP	Carrier	<input type="checkbox"/>

CLOSE ALERT

Terms & Conditions **LOBIZ**

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**.

**Alert Details**

Appointment changed by LCBO.

=====

Appointment Request: 1828

Date: 01-Feb-2011  
Time: 09:58:00 AM  
User: Alan Michaels

Appointment Number: 18283409

Vendor: THE WINE GROUP  
Carrier: Carrier  
Retail Service Centre: Durham Retail Service Centre

PO Number:	Buyer Code:
102-00044330	P03
102-00082957	P03
102-00082959	P03

AlertDetail.aspx?alertid=24474

[VIEW REQUEST](#) [CLOSE ALERT](#)

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.



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.

**LCBO Inbound Scheduling**

February 03, 2011 CONTACT US HELP LOG OFF

**2 Alert(s)**

Alerts

Filter:  Open  Closed  All

Subject	Date/Time	PO Number	Buyer	Dest Dc	Vendor	Carrier	Closed
Appointment booked by LCBO.	31-Jan-2011 16:10	102-00082952	P03	Durham Retail Service Centre	THE WINE GROUP	Carrier	<input type="checkbox"/>
Appointment changed by LCBO.	01-Feb-2011 09:58	102-00044330	P03	Durham Retail Service Centre	THE WINE GROUP	Carrier	<input type="checkbox"/>
		102-00082957	P03		THE WINE GROUP	Carrier	<input type="checkbox"/>
		102-00082959	P03		THE WINE GROUP	Carrier	<input type="checkbox"/>

Terms & Conditions

The Alert screen refreshes showing only the open Alerts.

**LCBO Inbound Scheduling**

February 03, 2011 CONTACT US HELP LOG OFF

**1 Alert(s)**

Alerts

Filter:  Open  Closed  All

Subject	Date/Time	PO Number	Buyer	Dest Dc	Vendor	Carrier	Closed
Appointment booked by LCBO.	31-Jan-2011 16:10	102-00082952	P03	Durham Retail Service Centre	THE WINE GROUP	Carrier	<input type="checkbox"/>

Terms & Conditions

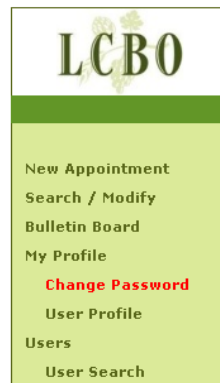
# 5

## 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.



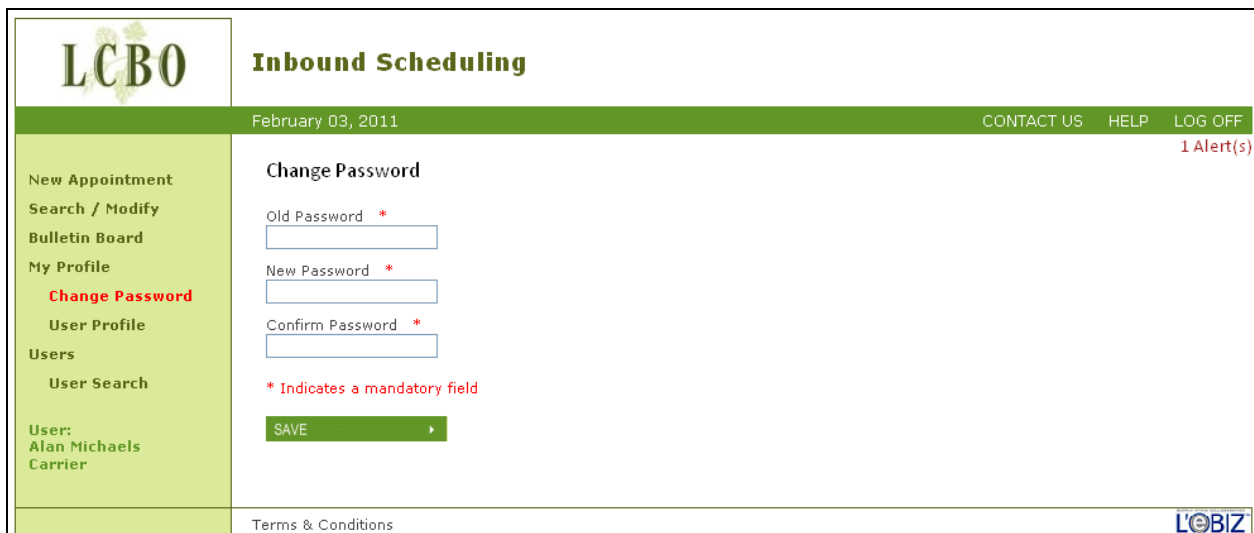
---

### 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.

	<b>Inbound Scheduling</b>	
	February 03, 2011	<a href="#">CONTACT US</a> <a href="#">HELP</a> <a href="#">LOG OFF</a>
<ul style="list-style-type: none"> <li>New Appointment</li> <li>Search / Modify</li> <li>Bulletin Board</li> <li>My Profile               <ul style="list-style-type: none"> <li><b>Change Password</b></li> <li>User Profile</li> </ul> </li> <li>Users               <ul style="list-style-type: none"> <li>User Search</li> </ul> </li> <li>User: Alan Michaels Carrier</li> </ul>	<b>Change Password</b>	
	Old Password *	<input type="password" value="....."/>
	New Password *	<input type="password" value="....."/>
	Confirm Password *	<input type="password" value="....."/>
	* Indicates a mandatory field	
<input type="button" value="SAVE"/>		
Terms & Conditions		

**Step 4**

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

Click **OK**.

	<b>Inbound Scheduling</b>	
	February 03, 2011	<a href="#">CONTACT US</a> <a href="#">HELP</a> <a href="#">LOG OFF</a>
<ul style="list-style-type: none"> <li>New Appointment</li> <li>Search / Modify</li> <li>Bulletin Board</li> <li>My Profile               <ul style="list-style-type: none"> <li><b>Change Password</b></li> <li>User Profile</li> </ul> </li> <li>Users               <ul style="list-style-type: none"> <li>User Search</li> </ul> </li> <li>User: Alan Michaels Carrier</li> </ul>	<b>Change Password</b>	
	Old Password *	<input type="password"/>
	New Password *	<input type="password"/>
	Confirm Password *	<input type="password"/>
	* Indicates a mandatory field	
<input type="button" value="SAVE"/>		
<div style="border: 1px solid gray; padding: 10px; width: fit-content; margin: auto;">       Password has been changed successfully.         <input type="button" value="OK"/> </div>		
Terms & Conditions		

# 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.

The screenshot shows the 'User Record' form in the LCBO Inbound Scheduling system. The form is titled 'User Record' and is located under the 'My Profile' menu item. The form contains the following fields:

- Organization Type: \* (Carrier)
- Organization: \* (Carrier-0111)
- First Name: \* (Alan)
- Middle Name: ( )
- Last Name: \* (Michaels)
- E-mail: \* (alan.michaels@carrier.com)
- Telephone: (416-123-4567)
- Fax: ( )
- Group: \* (CarrierAdmin)
- Language: \* (English)
- Active: (checked)

A red arrow points to the 'SAVE' button. Below the form, there is a note: '\* Indicates a mandatory field'. At the bottom of the form, there are 'Terms & Conditions' and 'L'OBIZ' logos.

#### Step 2

Edit:

- First Name
- Middle Name
- Last Name
- Email address
- Telephone number
- Fax number

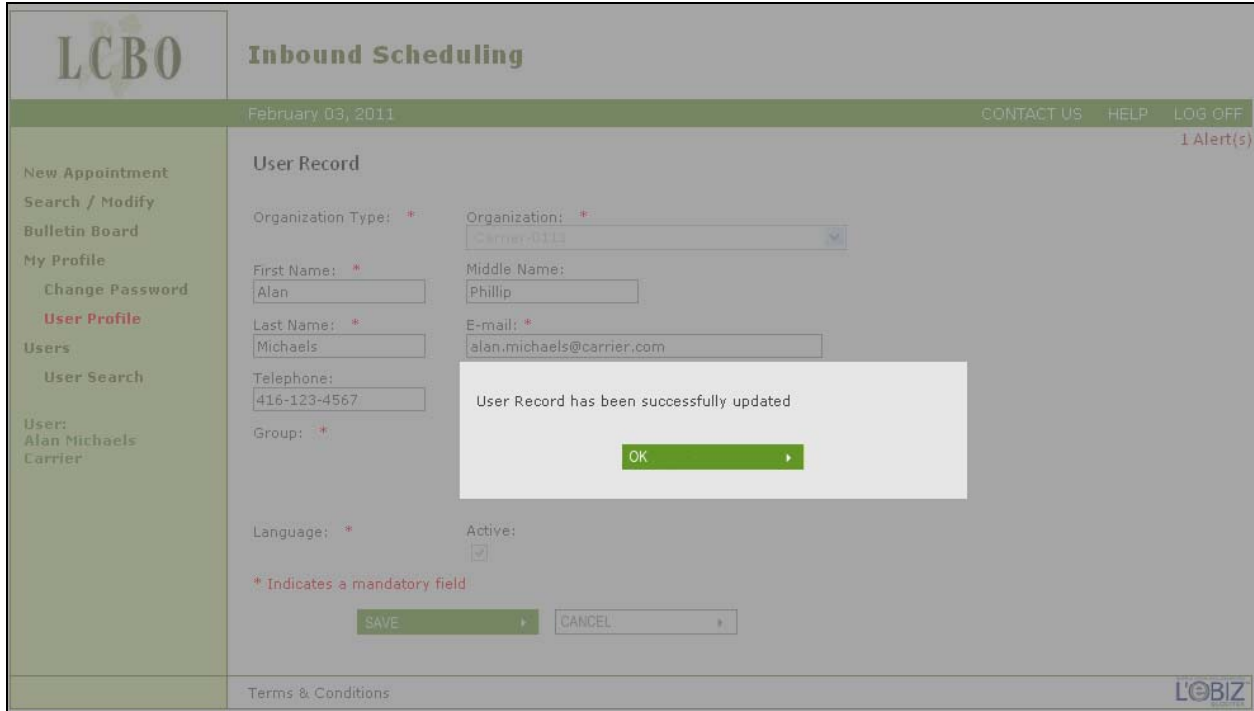
#### Step 3

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

**Step 4**

Once saved, a pop-up screen verifies that the account changes have been applied.

Click **OK**.



# 6

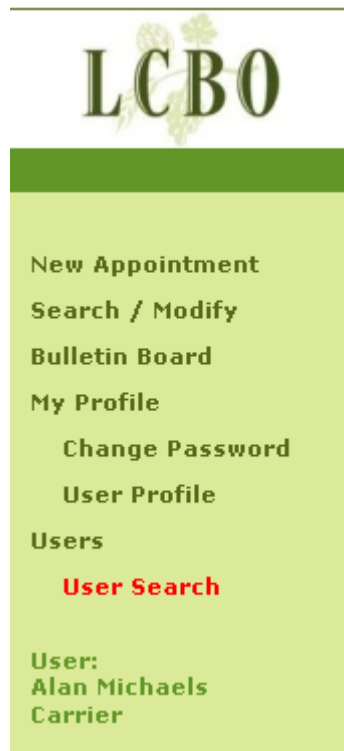
## USERS ADMINISTRATION ADMINISTRATIVE PERMISSIONS

---

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.

**LCBO** Inbound Scheduling

February 03, 2011 CONTACT US HELP LOG OFF 1 Alert(s)

**User Search - List**

Organization Type: \*  
Carrier

Organization:  
Carrier-0111

Group:  
Please Select ...

First Name: Last Name:

SEARCH

Name	Login ID	Group	Active
Alan Michaels	alan.michaels@carrier.com	CarrierAdmin	<input checked="" type="checkbox"/>
Carrier One	carrier1@carrier.com	CarrierAdmin	<input checked="" type="checkbox"/>
Joe Doe	johndoe@carrier.com	Carrier User	<input checked="" type="checkbox"/>
QL-Test1 Tester1	nielsen@qlogitek.com	Carrier User	<input checked="" type="checkbox"/>
Robert Little	carrier2@lcbo.com	CarrierAdmin	<input checked="" type="checkbox"/>
Sally Jones	carrier3@lcbo.com	CarrierAdmin	<input checked="" type="checkbox"/>
Sam Smith	carrier1@lcbo.com	Carrier User	<input checked="" type="checkbox"/>

**NEW USER**

\* Indicates a mandatory field





**LCBO** **Inbound Scheduling**

February 03, 2011

**User Record**

Organization Type: \*  Organization: \*

First Name: \*  Middle Name:

Last Name: \*  E-mail: \*

Telephone:  Fax:

Group: \*

Password: \*  Confirm Password: \*

Language: \*  Active:

\* Indicates a mandatory field

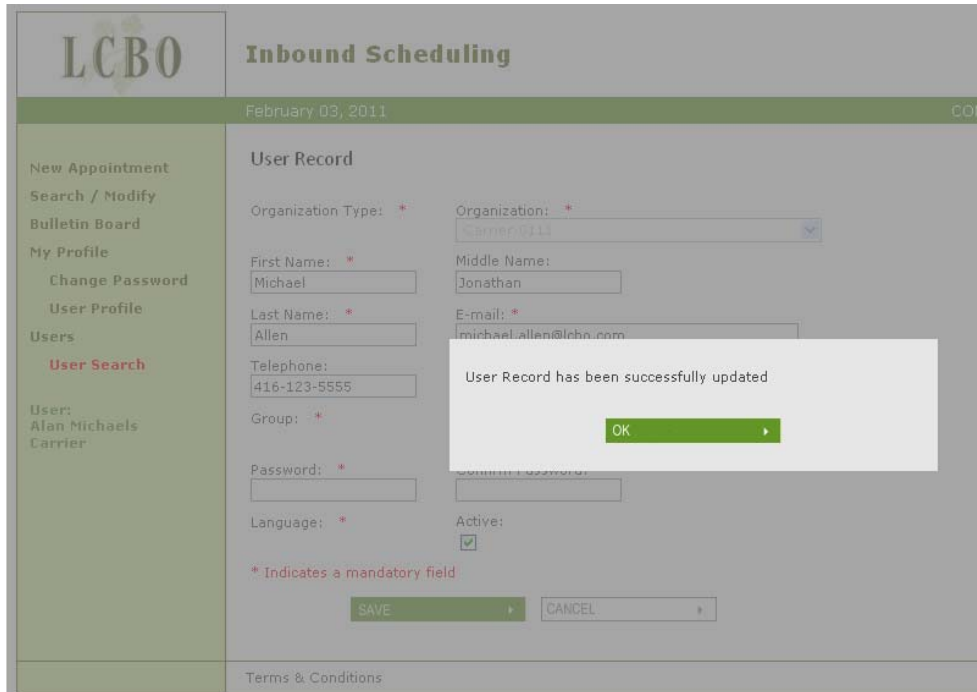
**SAVE** **CANCEL**

Terms & Conditions

**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**.



The screenshot shows the LCBO Inbound Scheduling interface. The main content area is titled "User Record" and contains a form with the following fields:

- Organization Type: \* (dropdown menu)
- Organization: \* (dropdown menu)
- First Name: \* (text input: Michael)
- Middle Name: (text input: Jonathan)
- Last Name: \* (text input: Allen)
- E-mail: \* (text input: michael.allen@lcbn.com)
- Telephone: (text input: 416-123-5555)
- Group: \* (dropdown menu)
- Password: \* (text input)
- Language: \* (dropdown menu)
- Active:

A modal dialog box is overlaid on the form, displaying the message: "User Record has been successfully updated" with an "OK" button.

At the bottom of the form, there are "SAVE" and "CANCEL" buttons. A note below the form states: "\* Indicates a mandatory field".

---

**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.



## Inbound Scheduling

February 03, 2011

**New Appointment**

**Search / Modify**

**Bulletin Board**

**My Profile**

Change Password

User Profile

**Users**

**User Search**

**User:**  
Alan Michaels  
Carrier

### User Search - List

Organization Type: \*

Organization:

Group:

First Name:  Last Name:

Name	Login ID	Group	Active
Alan Michaels	alan.michaels@carrier.com	CarrierAdmin	<input checked="" type="checkbox"/>
Carrier One	carrier1@carrier.com	CarrierAdmin	<input checked="" type="checkbox"/>
Joe Doe	johndoe@carrier.com	Carrier User	<input checked="" type="checkbox"/>
Michael Allen	michael.allen@lcbo.com	Carrier User	<input checked="" type="checkbox"/>
QL-Test1 Tester1	nielsen@qlogitek.com	Carrier User	<input checked="" type="checkbox"/>
Robert Little	carrier2@lcbo.com	CarrierAdmin	<input checked="" type="checkbox"/>
Sally Jones	carrier3@lcbo.com	CarrierAdmin	<input checked="" type="checkbox"/>
Sam Smith	carrier1@lcbo.com	Carrier User	<input checked="" type="checkbox"/>

\* Indicates a mandatory field

# 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.

**LCBO** **Inbound Scheduling**  
February 03, 2011

**User Search - List**

Organization Type: \*

Organization:

Group:

First Name:  Last Name:

Name	Login ID	Group	Active
Alan Michaels	alan.michaels@carrier.com	CarrierAdmin	<input checked="" type="checkbox"/>
Carrier One	carrier1@carrier.com	CarrierAdmin	<input checked="" type="checkbox"/>
Joe Doe	johndoe@carrier.com	Carrier User	<input checked="" type="checkbox"/>
Michael Allen	michael.allen@lcbo.com	Carrier User	<input checked="" type="checkbox"/>
QL-Test1 Tester1	nielsen@qlogitek.com	Carrier User	<input checked="" type="checkbox"/>
Robert Little	carrier2@lcbo.com	CarrierAdmin	<input checked="" type="checkbox"/>
Sally Jones	carrier3@lcbo.com	CarrierAdmin	<input checked="" type="checkbox"/>
Sam Smith	carrier1@lcbo.com	Carrier User	<input checked="" type="checkbox"/>

\* Indicates a mandatory field

**Navigation Sidebar:**  
New Appointment  
Search / Modify  
Bulletin Board  
My Profile  
Change Password  
User Profile  
Users  
**User Search**  
User: Alan Michaels  
Carrier

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**.

**Inbound Scheduling**

February 03, 2011

**User Record**

Organization Type: \*  Organization: \*

First Name: \*  Middle Name:

Last Name: \*  E-mail: \*

Telephone:  Fax:

Group: \*

Password:  Confirm Password:

Language: \*  Active:

\* Indicates a mandatory field

**Step 3**

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

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

Name	Login ID	Group	Active
Alan Michaels	alan.michaels@carrier.com	CarrierAdmin	<input checked="" type="checkbox"/>
Carrier One	carrier1@carrier.com	CarrierAdmin	<input checked="" type="checkbox"/>
Joe Doe	johndoe@carrier.com	Carrier User	<input checked="" type="checkbox"/>
Michael Allen	michael.allen@lcbo.com	Carrier User	<input checked="" type="checkbox"/>
QL-Test1 Tester1	nielsen@qlogitek.com	Carrier User	<input checked="" type="checkbox"/>
Robert Little	carrier2@lcbo.com	CarrierAdmin	<input checked="" type="checkbox"/>
Sally Jones	carrier3@lcbo.com	CarrierAdmin	<input type="checkbox"/>
Sam Smith	carrier1@lcbo.com	Carrier User	<input checked="" type="checkbox"/>

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.

---

### NOTE

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.

The screenshot shows a 'User Record' form with the following fields: Organization Type: \* (dropdown), Organization: \* (dropdown, value: Carrier-0111), First Name: \* (text, value: Joe), Middle Name: (text), Last Name: \* (text, value: Doe), E-mail: \* (text, value: john.doe@carrier.com), Telephone: (text, value: 416-777-9999), Group: \* (dropdown), Password: (text), Language: \* (dropdown), and Active: (checkbox, checked). A red asterisk indicates a mandatory field. At the bottom are buttons for SAVE, CANCEL, and DELETE. A white confirmation dialog box is overlaid on the form, asking 'Are you sure you want to delete this user?' with 'YES' and 'NO' buttons.

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



### User Record

Organization Type: \* Organization: \*  
 Carrier-0111

First Name: \* Middle Name:  
 Joe

Last Name: \* E-mail: \*  
 Doe johndoe@carrier.com

Telephone:  
 416-777-9999

Group: \*

Password: Confirm Password:

Language: \* Active:

\* Indicates a mandatory field

SAVE CANCEL DELETE

This user record has been successfully deleted

OK

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

#### User Search - List

Organization Type: \*  
 Carrier

Organization:  
 Carrier-0111

Group:  
 Please Select ...

First Name: Last Name:

SEARCH

Name	Login ID	Group	Active
Alan Michaels	alan.michaels@carrier.com	CarrierAdmin	<input checked="" type="checkbox"/>
Carrier One	carrier1@carrier.com	CarrierAdmin	<input checked="" type="checkbox"/>
Michael Allen	michael.allen@lcbo.com	Carrier User	<input checked="" type="checkbox"/>
QL-Test1 Tester1	nielsen@qlogitek.com	Carrier User	<input checked="" type="checkbox"/>
Robert Little	carrier2@lcbo.com	CarrierAdmin	<input checked="" type="checkbox"/>
Sally Jones	carrier3@lcbo.com	CarrierAdmin	<input type="checkbox"/>
Sam Smith	carrier1@lcbo.com	Carrier User	<input checked="" type="checkbox"/>

NEW USER

\* Indicates a mandatory field

