Liquor Modernization Project

Agency Checklist

REVIEWING, UPDATING AND SUBMITTING TRANSFER ORDERS IN ENTEPRISE PORTAL

Step 1: ***Print Transfer Overview Report***

- ❒ Sign on to Enterprise Portal
- ❒ Select the Retail tab
- ❒ Select "Transfer Overview" under Reports on the left side of the Retail page
- ❒ Select the dropdown arrow, select the correct Transfer Order by date (will be highlighted blue) and select "OK"
- ❒ Select "View Report"
- ❒ You may select to print the report by selecting "Print" icon or by selecting the "Save" icon and saving to PDF first to print. This will help with the manual review outlined below

Step 2: *Review Transfer Order Overview Manually*

Note: The report will be in numerical order

- ❒ Cross off items not wanted/needed
- ❒ Mark changes to quantities
- ❒ Review in-store stock to identify brand codes and quantities not reflected on the Transfer overview
- ❒ Add additional brand codes and quantities to the Transfer Overview

Example: Your review of the Transfer Order (TO) Overview shows planned delivery of one case of 1234B. However, your store has seen a slowdown in purchase of 1234B, so you don't want any more of that product. Cross that "line" off the printed copy of the TO Overview. Also, you see your in-store stock of 2345D is low and you know an upcoming event will drive increased demand of that product for the weekend. Add increased quantities (or add the product code and the desired quantity of brands not on the transfer overview) to your printed copy of the TO Overview to cover that demand.

Step 3: *Update Transfer Order on Enterprise Portal*

- ❒ Sign on to Enterprise Portal
- ❒ Open Transfer Order
- ❒ Click on the "Item Number" field (this will sort Brand Codes in numerical order) This will then allow you to follow the TO Overview Report in order with the brands on the TO page by page.
- ❒ Use the changes to quantities you've marked on your printed version of the TO Overview to make the same quantity adjustments on the Portal. NOTE: **SAVE** your TO each time you make a change to ensure TO stays accurate and to avoid having to start over in case of a service interruption.
- ❒ After making quantity adjustments, add any additional items as usual by selecting the add items icon. You should save the TO after every 3-5 product codes to ensure your TO stays accurate and avoid having to start over in case of a service interruption.
- ❒ If, when attempting to add a product code, you get a non-allocation message that tells you to contact your allocation clerk, make a note of that product code and move to the next product you want to add.
- ❒ When you have added all the product codes, save the TO as "Not Submitted." DO NOT SUBMIT THE ORDER IF YOU HAVE BRANDS FLAGGED AS NON-ALLOCATED THAT WILL NEED APPROVAL BY THE ORDER CLERK. If you do not need the order clerk to add any brands, you can then Submit the order.
- ❒ Call your allocation clerk and use your notes about product codes to request that the allocation clerk add the "new" or non-allocated brands to the order.
- ❒ If you do not reach your allocation clerk via phone, email the allocation clerk the brand codes and quantities and ask them to submit the order when those codes/quantities have been added.

NOTE: You may review/print the "approved" Transfer Overview Report before delivery to review what will be on your delivery.