

# MONTGOMERY COUNTY ALCOHOL BEVERAGE SERVICES iStore User Guide for Sales Representatives

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## **Login Instructions**

1. Log into the iStore from the ABS website at <a href="www.MontgomeryCountyMD.gov/ABS">www.MontgomeryCountyMD.gov/ABS</a>. Once on the ABS website, click the <a href="Suppliers">Suppliers</a> link in the left menu bar, then click the <a href="IStore">iStore</a> – <a href="Sales Reps">Sales Reps</a> link. On the sign-in screen, enter your <a href="email">email</a> address and <a href="password">password</a>, and click the <a href="Log In">Log In</a> button.

<u>Note</u>: if you have never before logged into iStore, click the link that says "County Has Setup My Account" and follow the prompts using the temporary user name and password provided to you by ABS. If you have not received a temporary user name and password, please contact ABS at 240-777-1961 or ABSiStoreHelp@montgomerycountymd.gov.

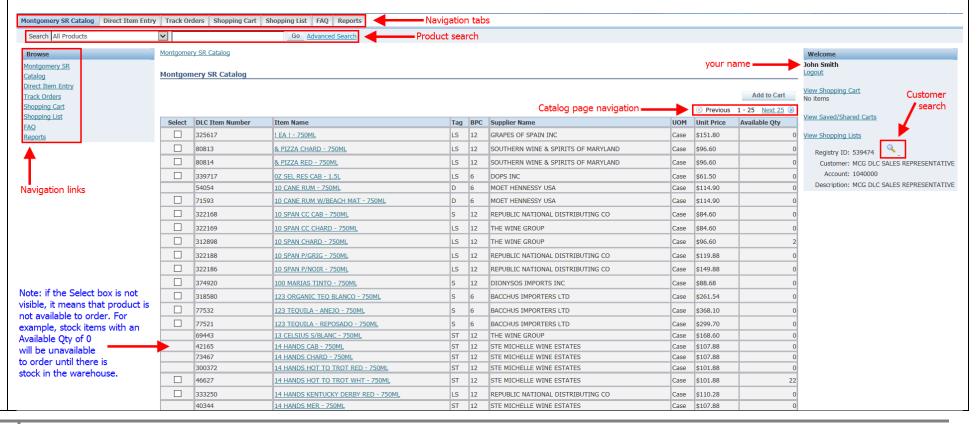




2. The first screen is a landing page. This is where ABS will post messages such as scheduled system outages or other relevant information. To proceed to iStore, click the box that says **Click Here to Go to iStore Application**.

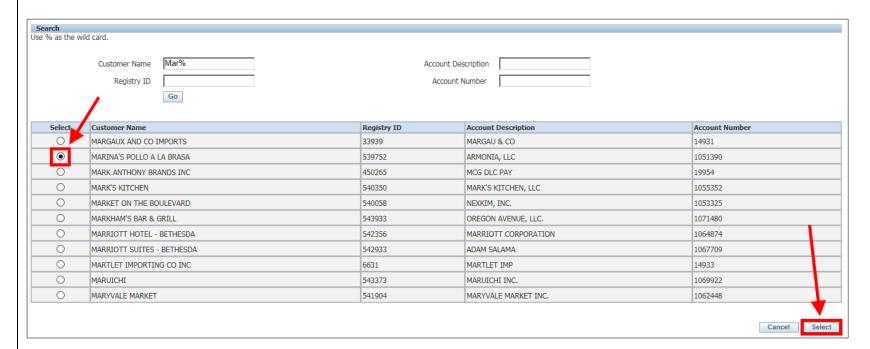


3. Upon entering iStore, you will be on the Home/Catalog screen. From here you can search for and select a licensee for which you want to place an order, search for products and add them to a shopping cart, and access other areas of the site through the navigation tabs or links.



#### **Select a Customer**

The first thing you must do before you can begin adding items to a shopping cart, is select the customer/licensee for whom you are placing the order. Click the **magnifying glass** icon in the *Welcome* box to right. Welcome John Smith Logout View Shopping Cart No items View Saved/Shared Carts View Shopping Lists Registry ID: 539474 Customer: MCG DLC SALES REPRESENTATIVE Account: 1040000 Description: MCG DLC SALES REPRESENTATIVE Enter the customer name or account number in the corresponding field and click Go. Note: use the percent sign (%) as a wild card to search using a partial name. For example, enter Mar% to see all business names that begin with Mar. A percent sign placed in front of the search term will find all names with that search term anywhere in the name. Search and Select Customer (Current Customer Context: MCG DLC SALES REPRESENTATIVE) Cancel Use % as the wild card. Customer Name Account Description Cancel 3. Select the customer and click the **Select** button. Once the customer is selected, orders you place or look at are for this customer until you either log out or select a different customer. If unsure which customer is selected, click the Montgomery SR Catalog navigation tab or link to access the Home screen and look in the *Welcome* box.



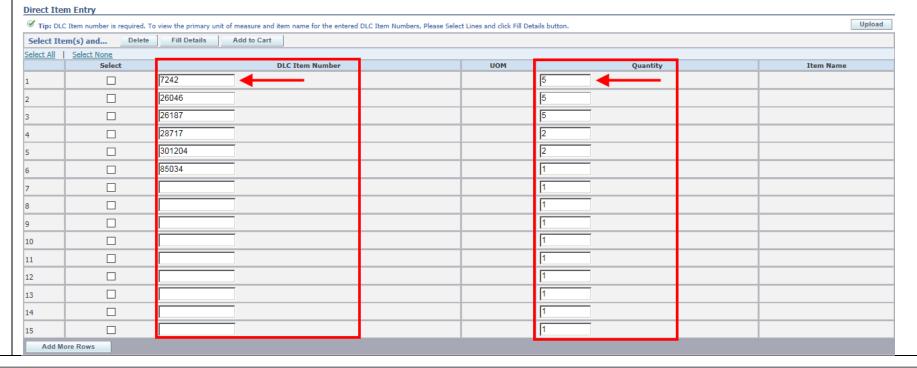


## **Order Products Using Direct Item Entry**

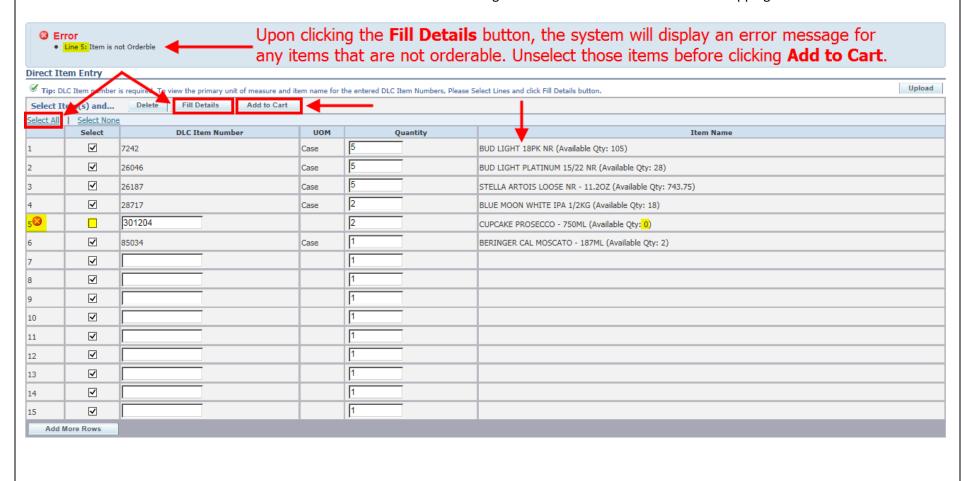
1. Click the **Direct Item Entry** tab or the Direct Item Entry link.



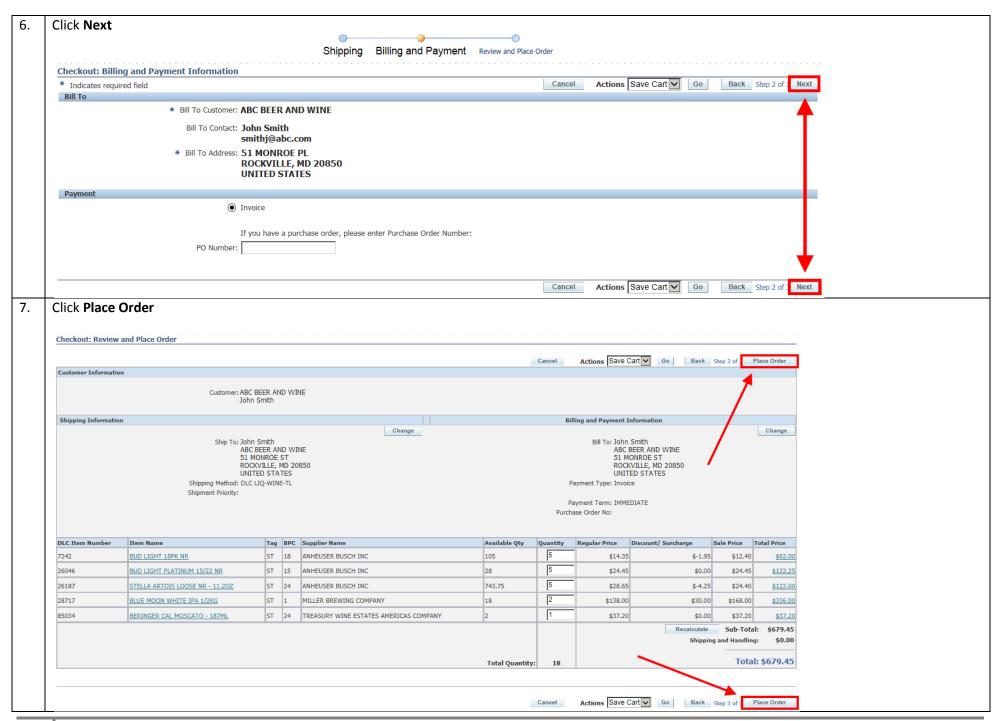
2. Enter the ABS item number in that column and the number of cases in the Quantity column.



3. Once you finish entering items, click the **Select All** link to select the items. Click the **Fill Details** button to display a description of the items so you can review them before you add them to the cart. <u>Note</u>: Upon clicking the Fill Details button, the system will display an error message if any items you've entered are not available to order. Uncheck the Select button for those items before clicking **Add to Cart** to add the items to the shopping cart.



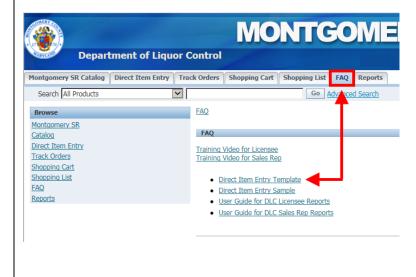
The shopping cart displays. From here you can change the quantities (click the Recalculate button to see the adjusted total), delete items from the cart by clicking the trash can icon in the Remove column to the far right, and verify any applicable discounts. Note: please refer to page 24 of this document for item tag definitions. **Shopping Cart** Actions Save Cart **∨** Go Continue Shopping Checkout Your Store cart expires on 23-FEB-2016. Please save this cart if you intend to use it beyond this date Available Qty **DLC Item Number** Item Name Tag BPC Supplier Name Quantity Regular Price Discount/ Surcharge Sale Price Total Price Remove 7242 BUD LIGHT 18PK NR ANHEUSER BUSCH INC 105 \$14.35 \$-1.95 \$12.40 \$62.00 26046 BUD LIGHT PLATINUM 15/22 NR ANHEUSER BUSCH INC 28 \$24.45 \$24.45 \$122.25 \$0.00 26187 STELLA ARTOIS LOOSE NR - 11,20Z ANHEUSER BUSCH INC 743.75 \$28.65 \$-4.25 \$24.40 \$122.00 2 28717 BLUE MOON WHITE IPA 1/2KG MILLER BREWING COMPANY 18 \$138.00 \$30.00 \$168.00 85034 BERINGER CAL MOSCATO - 187ML TREASURY WINE ESTATES AMERICAS COMPANY \$37.20 \$0.00 \$37.20 Recalculate Sub-Total: \$679.45 \$0.00 Shipping and Handling: Total: \$679.45 **Total Quantity:** Actions Save Cart ✓ Go Checkout Continue Shopping When you're ready to check out, click Checkout. Shopping Cart Actions Save Cart Checkout Continue Shopping Your Store cart expires on 23-FEB-2016. Please save this cart if you intend to use it beyond this date DLC Item Number Item Name Tag BPC Supplier Name Available Qty Quantity Regular Price Discount/ Surcharge Sale Price Remove 7242 BUD LIGHT 18PK NR ANHEUSER BUSCH INC 105 \$14.35 18 \$-1.95 \$12.40 5 **BUD LIGHT PLATINUM 15/22 NR** 28 26046 ANHEUSER BUSCH INC \$24.45 \$0.00 \$24.45 5 743.75 26187 STELLA ARTOIS LOOSE NR - 11.20Z ST 24 ANHEUSER BUSCH INC \$28.65 \$-4.25 \$24.40 \$122.00 2 18 \$138.00 \$168.00 28717 BLUE MOON WHITE IPA 1/2KG MILLER BREWING COMPANY \$30.00 \$336.00 85034 BERINGER CAL MOSCATO - 187ML ST 24 TREASURY WINE ESTATES AMERICAS COMPANY \$37.20 \$0.00 \$37.20 Recalculate Sub-Total: 79.45 .00 Shipping and Handling: Total: \$679.4 **Total Quantity:** 18 Continue Shopping Actions Save Cart Checkout



You will receive a confirmation with the order number. Montgomery SR Catalog | Direct Item Entry | Track Orders | Shopping Cart | Shopping List | FAQ | Reports Search All Products Go Advanced Search **Confirmation** Your order number is: 1075043 Please print this page and keep it for your records. **Customer Information** Customer: ABC BEER AND WINE John Smith **Shipping Information** Ship To: John Smith ABC BEER AND WINE 51 MONROE ST ROCKVILLE, MD 20850 UNITED STATES

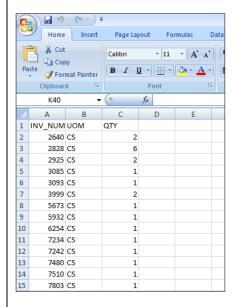
#### **Order Products Using the File Upload Feature**

1. Under the **FAQ** tab, there is a Microsoft Excel template called **Direct Item Entry Template** that you can use to enter your item numbers and quantities, which can then be uploaded to the Direct Item Entry screen. Since it is an Excel document, you can save this document and use it repeatedly, or use it to build a specific type of order and save it as a list (refer to the <u>Create a Shopping List</u> section on page 15 of this guide).

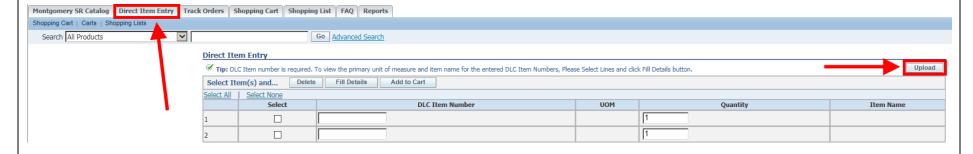


2. Open the template and enter the ABS item numbers and quantities in the corresponding columns.

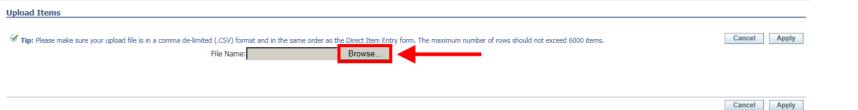
Note: the UOM, or unit of measure, column should always contain CS (i.e. case). **Save** the document.

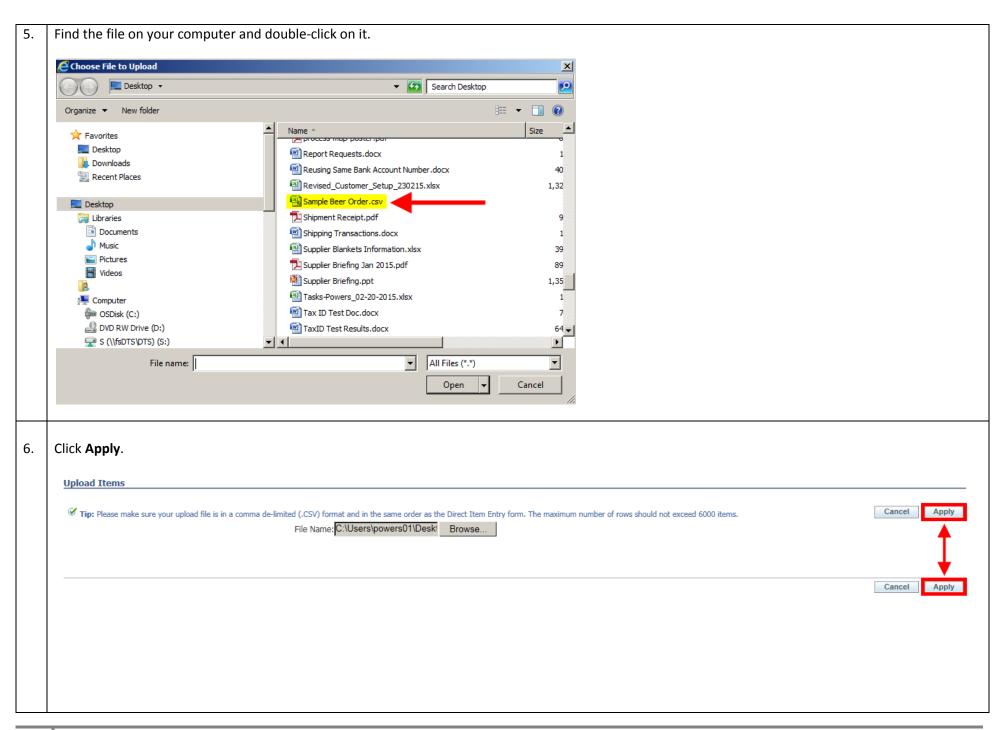


3. Click the **Direct Item Entry** tab, and then click **Upload**.



4. Click **Browse** to find the file on your computer.

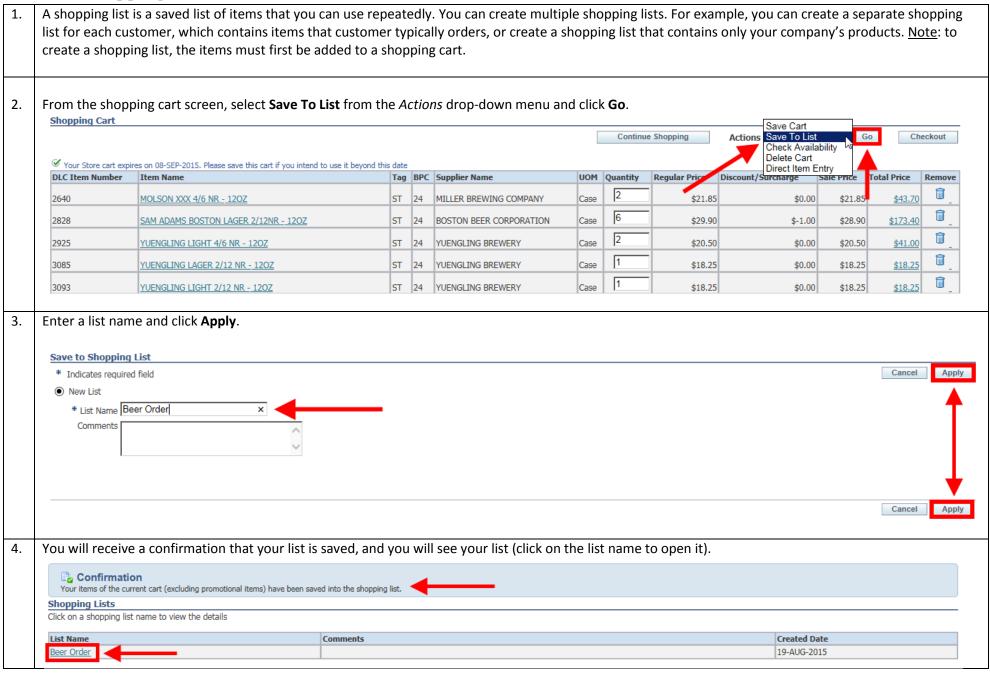


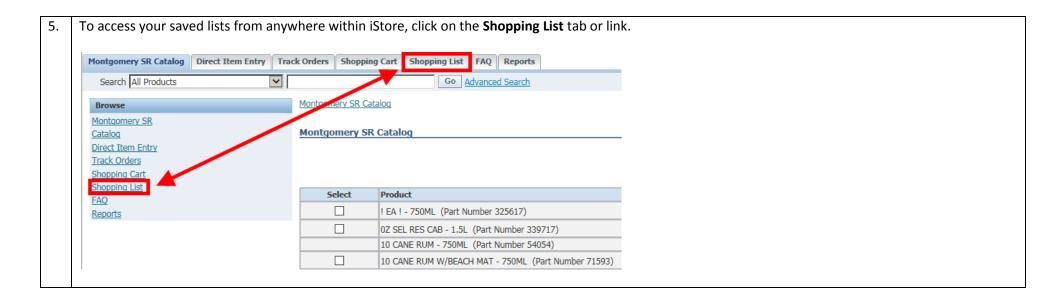


The items will appear in the Direct Item Entry screen. Note: Click the Select All link and Fill Details to see if any items you entered are not available to order (for instance if it is out of stock, a seasonal item or a discontinued item). Uncheck the items for which there is an error message and then click Add To Cart. Line 13: Item is not Orderable Line 17: Item is not Orderable **Direct Item Entry** 🗹 Tip: A customer part number or a cross reference part number and type combination or an inventory part number is required. To view the primary unit of measure and item name for the entered part numbers, click Fill Details button. Select Item(s) and... Delete Fill Details Add to Cart Select None Select All **Customer Part Number** Cross Reference Type **Cross Ref Part Number Inventory Part Number** UOM Quantity **Item Name ✓** Case MOLSON XXX 4/6 NR - 12OZ 6 **✓** 2828 SAM ADAMS BOSTON LAGER 2/12NR - 12OZ Case 3 ✓ 2925 Case YUENGLING LIGHT 4/6 NR - 12OZ **✓** 3085 Case YUENGLING LAGER 2/12 NR - 120Z ✓ 3093 Case YUENGLING LIGHT 2/12 NR - 120Z ✓ 3999 Case BLUE MOON 4/6 NR - 12OZ ✓ 5673 Case FLYING DOG SNAKE DOG 4/6 NR - 120Z **✓** 5932 Case MODELO ESPECIAL 4/6 NR - 120Z **✓** 6254 ST PAULI GIRL 2/12 NR - 120Z Case 10 ✓ 7234 Case BUD 18PK LNNR - 12OZ 11 ✓ 7242 BUD LIGHT 18PK NR Case ✓ 12 7480 Case FLYING DOG HEFFEWEIZEN 4/6NR - 120Z 13 7510 FLYING DOG K-9 CRUISER 4/6 NR - 120Z ✓ 14 7803 Case HEINEKEN 4/6NR - 7OZ ✓ 15 7838 Case FLYING DOG VARIETY PACK 2/12 NR - 120Z **✓** 16 8273 SHINER WHITE WING NR 12.0Z Case 17 8508 SAM ADAMS WINTERLAGER 2/12 LN - 120Z ✓ 18 8788 Case BUD 2/12 LNNR - 120Z

Your shopping cart will appear. Click Checkout. **Shopping Cart** Actions Save Cart Continue Shopping **∨** Go Checkout ✓ Your Store cart expires on 08-SEP-2015. Please save this cart if you intend to use it beyond this date. DLC Item Number Item Name Tag BPC Supplier Name UOM Quantity Regular Price Discount/Surcharge Sale Price Total Remove 2640 MOLSON XXX 4/6 NR - 120Z ST 24 MILLER BREWING COMPANY Case \$21.85 \$0.00 \$21.85 2828 SAM ADAMS BOSTON LAGER 2/12NR - 12OZ BOSTON BEER CORPORATION Case \$29.90 \$-1.00 \$28.90 \$173.40 2925 \$20.50 \$0.00 \$20.50 \$41.00 YUENGLING LIGHT 4/6 NR - 120Z ST 24 YUENGLING BREWERY Case 3085 YUENGLING LAGER 2/12 NR - 120Z ST 24 YUENGLING BREWERY Case \$18.25 \$0.00 \$18.25 \$18.25 3093 YUENGLING LIGHT 2/12 NR - 120Z YUENGLING BREWERY Case \$18.25 \$0.00 \$18.25 \$18.25 2 3999 BLUE MOON 4/6 NR - 120Z MILLER BREWING COMPANY Case \$27.45 \$0.00 \$27.45 \$54.90 5673 FLYING DOG SNAKE DOG 4/6 NR - 120Z ST 24 FLYING DOG BREWERY LLLP Case \$27.50 \$0.00 \$27.50 \$27.50 5932 MODELO ESPECIAL 4/6 NR - 120Z CROWN IMPORTS Case \$26.50 \$0.00 \$26.50 \$26.50 6254 ST PAULI GIRL 2/12 NR - 12OZ ST 24 ANHEUSER BUSCH INC Case \$25.55 \$0.00 \$25.55 \$25.55 7234 BUD 18PK LNNR - 12OZ ANHEUSER BUSCH INC Case \$13.95 \$0.00 \$13.95 \$13.95 \$13.95 \$13.95 7242 BUD LIGHT 18PK NR ANHEUSER BUSCH INC Case \$13.95 \$0.00 7480 FLYING DOG HEFFEWEIZEN 4/6NR - 120Z FLYING DOG BREWERY LLLP \$27.50 \$0.00 \$27.50 \$27.50 Case 7803 HEINEKEN 4/6NR - 7OZ HEINEKEN USA \$15.60 \$0.00 \$15.60 Case FLYING DOG VARIETY PACK 2/12 NR - 120Z ST 24 FLYING DOG BREWERY LLLP \$28.50 \$0.00 \$28.50 \$28.50 7838 Case

# **Create a Shopping List**





#### **Search the Catalog**

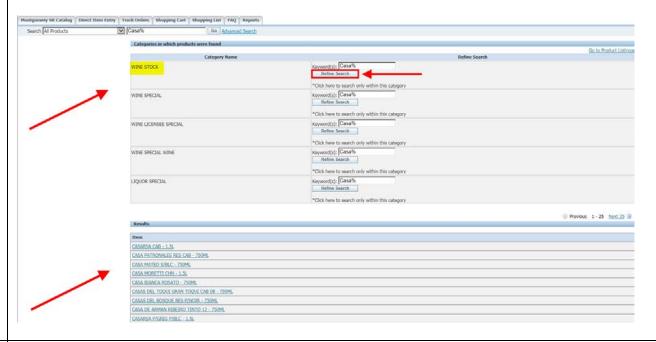
1. To search for products in the catalog, use the **Search** field in the top, left corner of the screen.



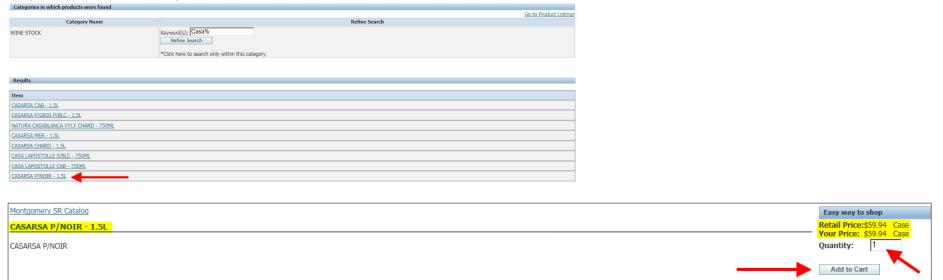
2. Enter a product name. Use the percent sign (%) as a wild card to search using a partial name. For example, enter Casa% to see all products in the catalog that begin with Casa. A percent sign placed in front of the search term will find all products with that search term anywhere in the product name.

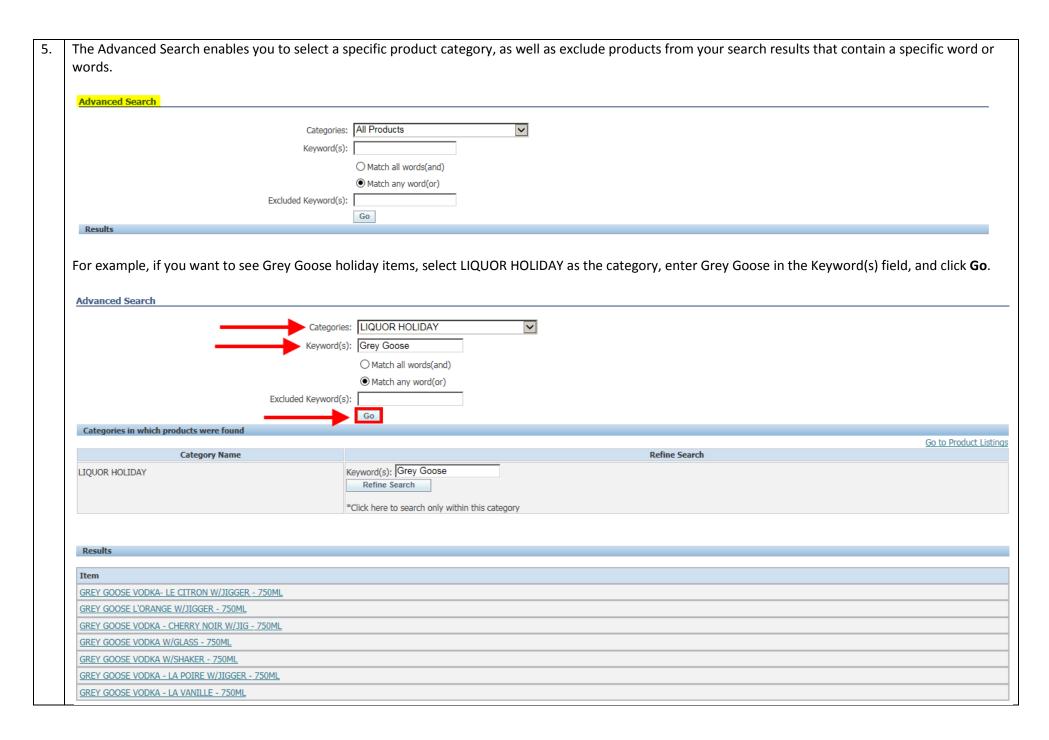


3. The bottom section lists all of the products in the catalog that begin with Casa. The top section lists the categories that contain products beginning with Casa. You can click the **Refine Search** button that corresponds to a category to see only items in that category.



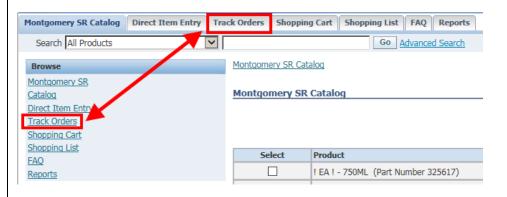
4. For example, if you click Refine Search for the WINE STOCK category, you will see a list of stock wines that begin with Casa. Click on a product name to see the price or add the item to your cart.



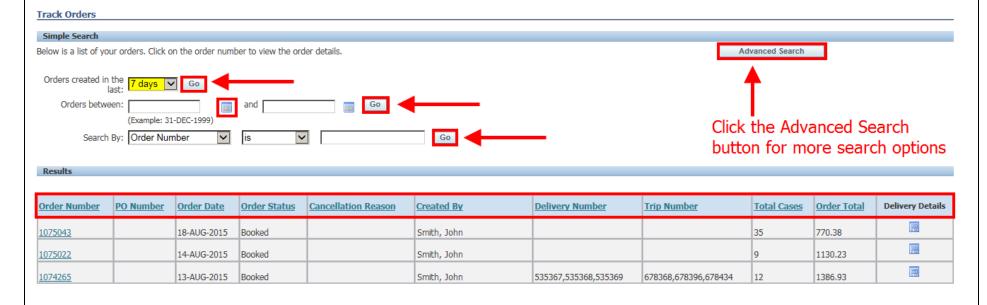


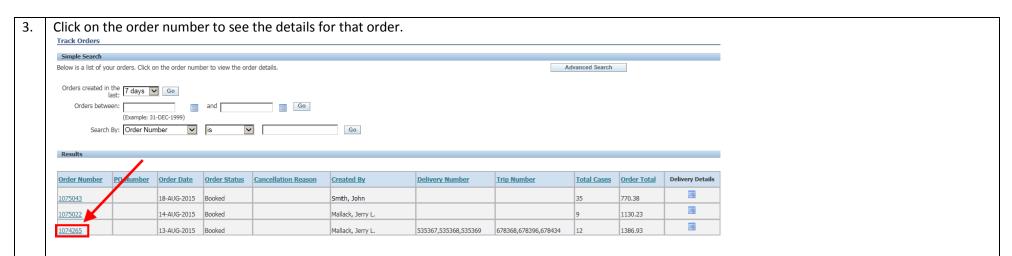
#### **Track Orders**

1. Click on the **Track Orders** tab or link. Note: data is based on login credentials; therefore you will only see information for orders that you placed.

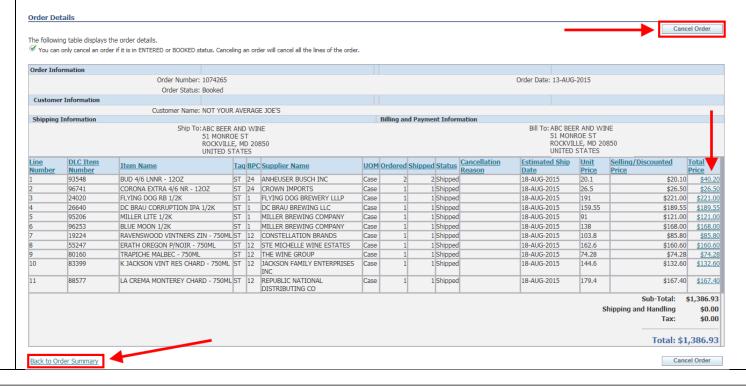


2. By default, orders placed within the last seven days will be displayed. Click on the *Orders created in the last:* drop-down menu to select 7, 14, 30, 60, or 90 days. You can also search orders placed within a specified date range or on a specific date (click the calendar icon to select a date). Additionally, you can search by any of the column headings on this screen by clicking the *Search By:* drop-down menu. Click the **Go** button to initiate the search. Note: when the column headings are blue and underlined, you can click on a heading name to sort the information by that column. Click **Advanced Search** for more options.





4. From the Order Details screen, you can cancel the entire order by clicking the **Cancel Order** button. <u>Note</u>: you can only cancel an order if the order status is *Entered* or *Booked*. Additionally, you can only cancel the entire order. If you want to cancel only certain line items, you must contact the ABS Order Section at 240-777-1901. Click the **Back to Order Summary** link to return to the order summary screen. <u>Note</u>: please refer to page 24 of this document for an explanation of what the various statuses on this screen mean.



5. Note: when the column headings are blue and underlined, you can click on a heading name to sort the information by that column. In the example below, the Supplier Name heading was clicked, which displays the data alphabetically by that column.

<u>Line</u> Number	DLC Item Number	<u>Item Name</u>	Tag E	<u>BPC</u>	Supplier Name	<u>UOM</u>	<u>Ordered</u>	Shipped Status	Cancellation Reason	Estimated Ship Date	Unit Price		<u>Total</u> <u>Price</u>
11	80911	KIM CRAWFORD S/BLC - 750ML	ST 1	12	CONSTELLATION BRANDS	Case	1	1 Shipped		31-JUL-2015	163.8	\$151.80	\$151.80
1	25425	DOGFISH HEAD TWEASON' ALE 6/4 NR - 120Z	ST 2	24	DOGFISH HEAD CRAFT BREWERY	Case	1	1 Shipped		31-JUL-2015	38.75	\$38.75	<u>\$38.75</u>
9	75884	CANYON ROAD MERLOT - 750ML	AL 1	12	E & J GALLO WINERY	Case	1	1 Shipped	i e	31-JUL-2015	54.6	\$54.60	\$54.60
12	85432	LA MARCA PROSECCO - 187ML	AL 2	24	E & J GALLO WINERY	Case	1	1 Shipped		31-JUL-2015	92.4	\$92.40	\$92.40
8	405817	CANYON ROAD P/GRIG - 750ML	AL 1	12	E & J GALLO WINERY	Case	1	1 Shipped		31-JUL-2015	54.6	\$54.60	<u>\$54.60</u>
2	95206	MILLER LITE 1/2K	ST 1	1	MILLER BREWING COMPANY	Case	1	1 Shipped	i e	31-JUL-2015	91	\$121.00	\$121.00
3	96253	BLUE MOON 1/2K	ST 1	1	MILLER BREWING COMPANY	Case	1	1 Shipped		31-JUL-2015	138	\$168.00	\$168.00
4	25601	LEINENKUGEL SUMMER SHANDY 1/2K	ST 1	1	MILLER BREWING COMPANY	Case	1	1 Shipped	I	31-JUL-2015	132	\$162.00	\$162.00
7	305112	HOGUE S/BLC - 750ML	LS 1	12	REPUBLIC NATIONAL DISTRIBUTING CO	Case	1	1 Shipped		31-JUL-2015	101.88	\$101.88	<u>\$101.88</u>
6	100803	CYT XPLORADOR CHARD - 750ML	LS 1	12	REPUBLIC NATIONAL DISTRIBUTING CO	Case	6	6 Shipped		25-AUG-2015	71.4	\$71.40	<u>\$428.40</u>
10	80160	TRAPICHE MALBEC - 750ML	ST 1	12	THE WINE GROUP	Case	1	1 Shipped		31-JUL-2015	74.28	\$62.28	\$62.28
5	95281	YUENGLING LAGER 1/2K	ST 1	1	YUENGLING BREWERY	Case	1	1 Shipped		31-JUL-2015	90	\$120.00	\$120.00

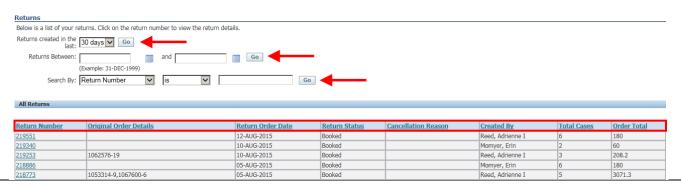
#### **Track Returns**

1. Click on the **Track Orders** tab or link and then click on the **Returns** link. <u>Note</u>: data displayed here is based on login credentials; therefore you will only see returns data for orders that you placed.



By default, returns made within the last seven days will be displayed. Click on the *Returns created in the last:* drop-down menu to select 7, 14, 30, 60, or 90 days. You can also search returns made within a specified date range or on a specific date (click the calendar icon to select a date). Additionally, you can search by any of the column headings on this screen by clicking the *Search By:* drop-down menu. Click the **Go** button to initiate the search. In the example below, returns made is the last 30 days are displayed based on the search criterion entered.

<u>Note</u>: when the column headings are blue and underlined, you can click on a heading name to sort the information by that column.



Click on the return number to see detailed information about the return. **Return Number** Original Order Details **Return Order Date Cancellation Reason** Created By Total Cases Order Total Return Status 219551 12-AUG-2015 Booked Reed, Adrienne I 180 10-AUG-2015 2 60 219340 Booked Momyer, Erin 3 219253 Reed, Adrienne I 208.2 1062576-19 10-AUG-2015 Booked Momyer, Erin 6 180 218886 05-AUG-2015 Booked 5 1053314-9,1067600-6 05-AUG-2015 Booked Reed, Adrienne I 3071.3 **Return Details Return Information** Return Number: 218773 Return Status: Booked Ordered Date 05-AUG-2015 Customer Name ABC BEER AND WINE Return Status BOOKED Order Total \$-3,071.30 Charges \$0.00 DLC Item Status Cancellation Reason Original Order Item Line Number Item Name Tag BPC Supplier Name UOM Returned Return Reason Price Number Ordered Details Business 顨 75562 LADYBURN 40YR SINGLE MALT - 750ML AL 1 WILLIAM GRANT AND SONS INC Case 2 Closed 2,857.10 1053314 Decision REPUBLIC NATIONAL DISTRIBUTING Business 匰 100803 CYT XPLORADOR CHARD - 750ML Case 3 Closed \$-214.20 1067600 Decision

Sub Total:

Charges:

Tax:

Return Total: \$-3,071.30

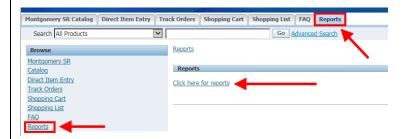
\$-3,071.30

\$0.00

\$0.00

## **View Reports**

1. Click the **Reports** tab or link and then click the link that says **Click here for reports**.



On the left side, click on the report you want to view. Data is real-time and can be sorted, filtered and grouped to meet your specific needs. To access the user guide that explains how to use iStore reports, please go to the ABS website at <a href="https://www.montgomerycountymd.gov/ABS">www.montgomerycountymd.gov/ABS</a> and click on the Suppliers then Suppliers Home link on the left side and click on User Guide - ABS Sales Rep Reports in iStore under the Sales Reps heading, or click <a href="https://www.montgomerycountymd.gov/ABS">https://www.montgomerycountymd.gov/ABS</a> and click on the Suppliers



## Logout

1. You can log out of iStore from any screen by clicking on **Logout** either at the top, right or bottom, middle of the screen.

\*\*Cart Order Profile Logout\*

## **Tag and Status Definitions**

Item Tag – a ABS tag that identifies what category a product falls into

- AL = Allocated items (limited supply)
- **HO** = Holiday (available only during certain times of the year)
- LS = Licensee Special (items not sold in stores and must be purchased out of the warehouse)
- **S** = Special items (not normally carried in stores, but have been requested by licensee)
- SB = Special Beer
- **SC** = Specialty Center (not stocked in the warehouse, but carried in ABS retail stores)
- **ST** = Stock items
- **SW** = Special Wine (special wines that have a ABS cost of \$18 per bottle or more, only sold out of warehouse)

*Order Status* – the order status identifies what stage the order or item is in. There are different statuses depending on which iStore screen you're on. Statuses on the Track Orders / Order Details screen include:

- Supply Eligible product has been successfully booked and accepted in the system (visible for special-order products only)
- External Req Open ABS Purchasing is preparing a purchase order (visible for special-order products only)
- PO Open ABS Purchasing has sent the purchase order to the supplier/vendor for fulfillment (visible for special-order products only)
- Awaiting Shipping
  - a) For special-order products, this indicates that the product has been received in the ABS warehouse
  - b) For stock products, this will be the status (whether the product is in the warehouse or not) until the item is shipped