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Login Instructions

1. Log into the iStore from the ABS website at www.MontgomeryCountyMD.gov/ABS/istore

   On the Sign-in screen, enter your email address and password, and click the Submit button.
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 products and add them to a shopping cart.

Note: if the Select box is not visible, it means that product is not available to order. For example, stock items (Tag = ST) with an Available Qty of 0 will be unavailable to order until there is stock in the warehouse.
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 you want 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. **Note:** 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.

Upon clicking the **Fill Details** button, the system will display an error message for any items that are not orderable. Unselect those items before clicking **Add to Cart**.
4. 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 see any applicable discounts (note: kegs display the keg deposit as a surcharge). Note: please refer to page 29 of this document for item tag definitions.

5. When you’re ready to check out, click Checkout.
6. **Click Next**

![Next button highlighted]

7. **Click Place Order**

![Place Order button highlighted]
8. You will receive a confirmation with your order number.

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 Create a Shopping List section on page 14 of this guide).
2. Open the template and enter the ABS item numbers and quantities in the corresponding columns. **Note:** the UOM (unit of measure) column should always contain CS (case). **Save** the document to your computer.

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

4. Click **Browse** to find the file on your computer.
5. Find the file on your computer and double-click on it.

6. Click **Apply**.
7. 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**.
8. Your shopping cart will appear. Click **Checkout**.

![Checkout button highlighted in red]

| DL/C Item Number | Item Name                         | Tag | Supplier Name            | UOM | Quantity | Regular Price | Discount/SurchARGE | Sale Price | Total Price |
|------------------|----------------------------------|-----|--------------------------|-----|----------|---------------|-------------------|------------|-------------|-------------|
| 2610             | MOONSHINE 1/2L - 750ML           | ST  | MOONSHINE BREWING CO.   | Case|          |               |                  |            |             |             |
| 2828             | SAM ADAMS BOSTON 500ML NG.       | ST  | SAM BOSTON BREWING CO.  | Case|          |               |                  |            |             |             |
| 2925             | YUENGLING LIGHT 4/6 - 12OZ      | ST  | YUENGLING BREWERY       | Case|          |               |                  |            |             |             |
| 3015             | YUENGLING LAGER 4/6 - 12OZ      | ST  | YUENGLING BREWERY       | Case|          |               |                  |            |             |             |
| 3093             | YUENGLING LIGHT 2/12 NR - 12OZ  | ST  | YUENGLING BREWERY       | Case|          |               |                  |            |             |             |
| 3999             | BLUE MOON 4/6 -12OZ             | ST  | MILLER BREWING COMPANY  | Case|          |               |                  |            |             |             |
| 5673             | FLYING DOG 4/6.5 - 12OZ         | ST  | FLYING DOG BREWERY      | Case|          |               |                  |            |             |             |
| 5932             | MODELO ESPECIAL 4/6 - 12OZ      | ST  | CROWN IMPORTS           | Case|          |               |                  |            |             |             |
| 6254             | ST PAULI GIRL 2/12 NR - 12OZ   | ST  | ANHEUSER BUSCH INC.     | Case|          |               |                  |            |             |             |
| 7291             | BUD LIGHT 10PK NR               | ST  | ANHEUSER BUSCH INC.     | Case|          |               |                  |            |             |             |
| 7400             | FLYING DOG 4/6 - 12OZ           | ST  | FLYING DOG BREWERY      | Case|          |               |                  |            |             |             |
| 7803             | HEINEKEN 4/6 - 12OZ             | ST  | HEINEKEN USA            | Case|          |               |                  |            |             |             |
| 7838             | FLYING DOG VARIETY PACK 2/12 NR - 12OZ | ST  | FLYING DOG BREWERY      | Case|          |               |                  |            |             |             |
Create a Shopping List

1. A shopping list is a saved list of items that you can use repeatedly. For example, if you order the same products every week, you can create a shopping list so you do not have to re-enter the items each week. You can create multiple shopping lists, so you can have one for your beer order and a separate list for your wine order. **Note:** to create a shopping list, the items must first be added to a shopping cart.

2. From the Shopping Cart screen, select **Save To List** from the **Actions** drop-down menu and click **Go**.

3. Enter a list name and click **Apply**.

4. You will receive a confirmation that your list is saved, and you will see your list (click on the list name to open it).
5. To access your saved lists from anywhere within iStore, click on the **Shopping List** tab or link.

![iStore interface with Shopping List highlighted]

**Search the Catalog**

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

   ![Search field highlighted]

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.

   ![Search with Casa% entered and search results displayed]
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 and/or add the item to your cart. **Note:** if you do not see the **Quantity** field and **Add to Cart** button, the product is currently not available to order.
5. The Advanced Search enables you to select a specific product category, as well as exclude products from your search results that contain a specific word or words.

For example, if you want to see Grey Goose holiday items, select LIQUOR HOLIDAY as the category, enter Grey Goose in the Keyword(s) field, and click Go.
**Track Orders**

1. Click on the **Track Orders** tab or link.

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.
3. For example, if you wanted to see all orders placed by a specific person, such as a sales rep, you could select **Created By** from the **Search By:** drop-down menu, use the second drop-down menu to further define the search, enter the name in the search field, and click **Go**. The example below demonstrates that you do not need the full name of the person; you can select “contains” from the secondary drop-down menu and enter a partial name.

![Order Details](image)

4. Click on the order number to see the details of that order.
5. From the Order Details screen, you can cancel the entire order by clicking the **Cancel Order** button. **Note:** 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. **Note:** please refer to page 29 of this document for an explanation of what the various statuses on this screen mean.

6. **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.
1. To access the Track Orders Advanced Search feature, go to the Track Orders tab or link, and click on the Advanced Search button.

2. An error message will display by default until you actually initiate a search. In the Search By: drop-down box, you can select Orders or Items. You will have different search fields depending on which one you select. If you select Orders from the Search By: drop-down menu, you can search by Order Number, PO Number, Order Date (enter a date range to see all orders placed within that date range), Order Status, Delivery Number, Trip Number (a delivery number and trip number are included on every commercial invoice that you receive from the ABS delivery driver), Total Cases, Order Total, or any combination of those search criteria. The more search fields you populate, the more you will narrow your search results. Click the Search button to run the search.
3. If you select **Items** from the **Search By:** drop-down menu, you can search by Order Number, Item Number, (click the magnifying glass first, and then enter the item number on the next screen), Item Name (click on the magnifying first, and then enter the item name on the next screen), the Requested Delivery Date or date range, the Line Status (select the specific status from the Line Status: drop-down menu), the PO Number, or a combination of search criteria. In the example below, an item search was done for item# 84251. The results display all orders that contain that item number.
Track Payments

1. Click the Track Orders tab or link and then click the Payments link.

2. By default, payments made within the last seven days will be displayed. Click on the Payments in the last: drop-down menu to select 7, 14, 30, 60, or 90 days. You can also search payments 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, payments made in the last 14 days are displayed based on the search criteria entered.

Note: when the column headings are blue and underlined, you can click on a heading name to sort the information by that column.
3. To search for a specific payment, for example if your ACH bank account was charged and you want to find that specific payment to see what was included, you would select **Payment Amount** from the **Search By:** drop-down menu, enter the payment amount in the search field and click **Go**. The summary information for that payment displays, including the Delivery Numbers and Sales Orders associated with that payment. Click the **Payment Number** to see additional information. **Note:** a delivery number and trip number are included on every commercial invoice that you receive from the driver at the time of delivery.

<table>
<thead>
<tr>
<th>Payment Number</th>
<th>Customer Name</th>
<th>Payment Date</th>
<th>Payment Amount</th>
<th>Delivery Number</th>
<th>Trip Number</th>
<th>Sales Order Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>131881</td>
<td>ABC BEER AND WINE</td>
<td>11-AUG-2015</td>
<td>$1,627.62</td>
<td>532059,532151,532237,532356</td>
<td>676492,676522,676578</td>
<td>129253,129240,1062576,1067600,1069875,1071432,1071433,1071434</td>
</tr>
</tbody>
</table>

4. The Payment Details screen displays the invoices and credits (and their respective amounts) that made up this payment. In the example below, two credits (returns) and six invoices made up this payment. To see what products were billed or returned, click the invoice number in the **Applied Against Invoice** column to the far right.

<table>
<thead>
<tr>
<th>Payment Number</th>
<th>Type</th>
<th>Original Amount</th>
<th>Amount Applied</th>
<th>Date Applied</th>
<th>Status</th>
<th>Applied Against Invoice</th>
</tr>
</thead>
<tbody>
<tr>
<td>131881</td>
<td>Credit Memo</td>
<td>$208.20</td>
<td>$208.20</td>
<td>11-AUG-2015</td>
<td>Closed</td>
<td>113394</td>
</tr>
<tr>
<td>131881</td>
<td>Credit Memo</td>
<td>$208.20</td>
<td>$208.20</td>
<td>11-AUG-2015</td>
<td>Closed</td>
<td>113314</td>
</tr>
<tr>
<td>131881</td>
<td>Invoice</td>
<td>$101.88</td>
<td>$101.88</td>
<td>11-AUG-2015</td>
<td>Closed</td>
<td>112465</td>
</tr>
<tr>
<td>131881</td>
<td>Invoice</td>
<td>$109.20</td>
<td>$109.20</td>
<td>11-AUG-2015</td>
<td>Closed</td>
<td>113314</td>
</tr>
<tr>
<td>131881</td>
<td>Invoice</td>
<td>$109.20</td>
<td>$109.20</td>
<td>11-AUG-2015</td>
<td>Closed</td>
<td>113394</td>
</tr>
<tr>
<td>131881</td>
<td>Invoice</td>
<td>$90.00</td>
<td>$90.00</td>
<td>11-AUG-2015</td>
<td>Closed</td>
<td>113314</td>
</tr>
<tr>
<td>131881</td>
<td>Invoice</td>
<td>$470.40</td>
<td>$470.40</td>
<td>11-AUG-2015</td>
<td>Closed</td>
<td>113492</td>
</tr>
<tr>
<td>131881</td>
<td>Invoice</td>
<td>$896.55</td>
<td>$896.55</td>
<td>11-AUG-2015</td>
<td>Closed</td>
<td>113492</td>
</tr>
</tbody>
</table>

[Back to Payments Summary]  
[Click here to return to the previous screen.]
5. The Invoice Details screen displays the specific products that were invoiced including the Regular Price, any discounts that were applied, the Sale Price after discount, and the Total Price (sale price multiplied by the quantity).

| Line Number | DLC Item Number | Item Name                     | Tag | Quantity | Regular Price ($) | Unit Discount ($) | Sale Price ($) | Total Price ($) |
|-------------|-----------------|-------------------------------|-----|----------|-------------------|------------------|---------------|----------------|----------------|
Track Returns

1. Click on the Track Orders tab or link and then click on the Returns link.

2. 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 in the last 30 days are displayed based on the search criteria entered.

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

3. Click on the return number to see detailed information about the return.
View Reports

1. Click the Reports tab or link and then click the link that says Click here for reports (you may be promoted to re-enter your iStore user name and password).
2. 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 [www.montgomerycountymd.gov/ABS/licensees](http://www.montgomerycountymd.gov/ABS/licensees), click on *iStore Reports User Guide*.

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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.
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