

LCBO

B2B Claims Application

Store Licensee User Guide

Version 1.8

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Contact Email: lcbogroceryoperations@lcbo.com

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Introduction

This document contains instructions for users of the LCBO B2B Claims Application used by B2B channel customers to submit claims for refunds, returns, shortages, overages, damages and product recalls to the LCBO Grocery Operations team.

If you have any questions, please contact LCBO Grocery Operations at lcboagroceryoperations@lcbo.com

Getting Started

In order to gain access to the LCBO B2B Claims Application, you must have a username and password supplied by the LCBO Grocery Operations team. Please contact us to request access credentials.

Accessing the Application

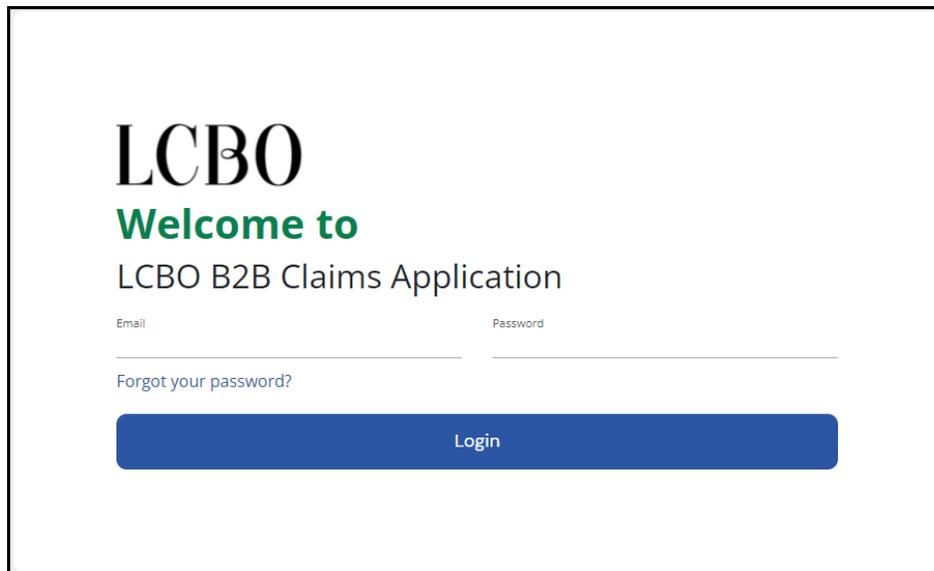
The application is accessible on desktops, mobile or tablet devices using the following web URL: <https://B2B-Claims.lcbo.com>

The application is verified to work on the Chrome browser on both Android and iOS devices.

Log In

Using an internet connected computer, smartphone or tablet, go to the application URL and enter your supplied username and password and click **LOGIN**.

URL: <https://B2B-Claims.lcbo.com>



The screenshot shows the login interface for the LCBO B2B Claims Application. At the top left is the LCBO logo. Below it, the text reads "Welcome to LCBO B2B Claims Application". There are two input fields: "Email" and "Password". Below the "Email" field is a link that says "Forgot your password?". At the bottom of the form is a blue button labeled "Login".

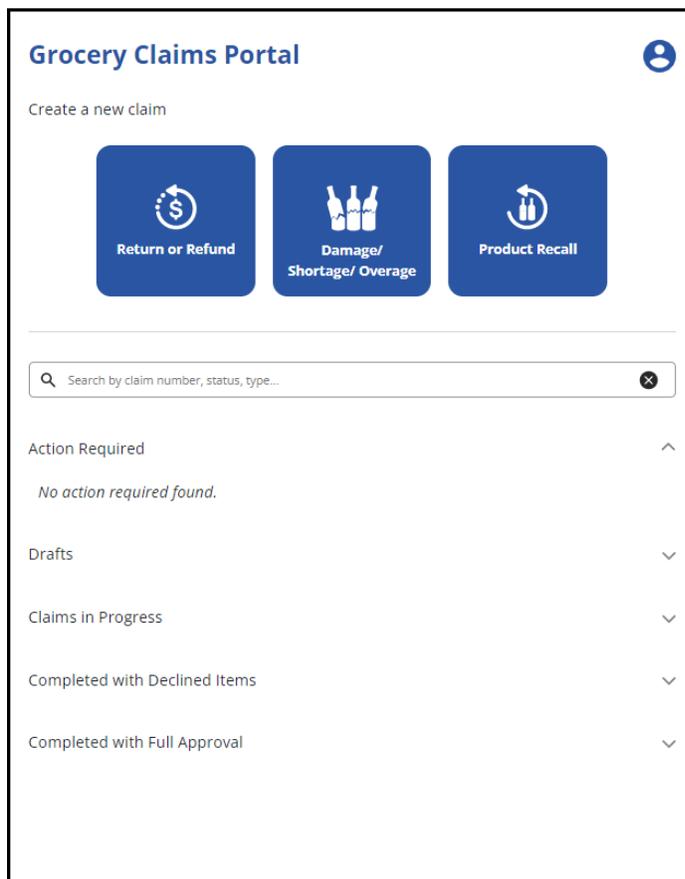
Store Licensee User

Application Main Screen

After logging in, you will be on the main application screen.

You will see three buttons to submit either a **Return or Refund** claim, **Damage/Shortage/Overage** claim or **Product Recall** claim.

It also shows already submitted claims grouped according to their status type, explained below. You can click on each claim entry to see more details.



Action Required

Claims that are marked incomplete by the LCBO and/or additional information is required. You should review these to see if additional action is needed or reply to the LCBO with comments of your own.

Drafts

Claims that are in progress by the store licensee not submitted to the LCBO.

Claims in Progress

Submitted claims that have yet to be reviewed by the LCBO.

Completed with Declined Items

Claims that LCBO has reviewed, one or more items have been declined.

Completed with Full Approval

Claims that LCBO has reviewed, and all items have been approved.

Return or Refund Claim

This claim type is used to submit a request for return/refund of saleable product when a shipment error occurs, i.e. picking error or over shipment that you do not want to keep.

Click **Return or Refund** button on the main screen and complete the following steps, shown below:

1. Add a Bill of Lading file or photo (all pages of the BOL are required), fill in the completed by field and then click **Next**.
2. Click **Add Item** to add at least one item to your claim.
3. For each claim item, fill out all details and upload a picture or file if applicable.
4. Click **Submit** when all claim item details are added to submit the claim.

The image displays two sequential screenshots of the 'Refund Claim' application interface for claim #3857.

Left Screenshot (Step 2): The progress bar shows 'Basic Info' as the active step (2), with 'Instructions' (1) and 'Items' (3) as previous and next steps. The 'Basic Information' section includes a 'BILL OF LADING PHOTOS*' requirement with instructions to include all pages and use unique file names. Below this is a 'Photo Thumbnails' area with an 'Upload Images' button. A 'Completed by*' field with a text input is also present. At the bottom, there are 'Previous' and 'Next' buttons.

Right Screenshot (Step 3): The progress bar shows 'Items' as the active step (3), with 'Instructions' (1) and 'Basic Info' (2) as previous steps. The 'Item Details' section features an 'Add Item' button. At the bottom, there are 'Previous' and 'Submit' buttons.

- After clicking **Add Item**, enter details for each item you wish to make a claim for.

If you received an item you did not order or do not carry and do not have the LCBO Item Number available, check the **I do not have the Item Number; item not ordered/listed** box and manually enter an **Item Description**. Be sure to upload an image of the product and case label if available.

- When entering the quantity, note that units and cases are mutually exclusive; **do not duplicate quantities** in both fields.
 - E.g. 1 – Report 1 case of a product containing 24 selling units as 24 units **OR** 1 case; **do not** enter in both fields.
 - E.g. 2 – Report 1.5 cases of product containing 4 selling units as 6 units **OR** 1 case **and** 2 units.
- You can also click **Upload Images** to upload supporting pictures or files from your mobile device or computer.

Refund Claim
#3857

1 Instructions 2 Basic Info 3 Items

Item Details

Basic Information

LCBO Item Number

I do not have the Item Number; item not ordered/listed.

Item Description*

Purchase Order Number*

Receival Date*
yyyy-mm-dd

Quantity

Cases Claimed

Quantity

Cases Claimed

Units Claimed

Additional Information

Reason for Return*

ITEM PHOTOS

- Product photos (recommended)

Photo Thumbnails

Upload Images

Back to Items Save Item

Damage, Shortage or Overage Claim (Adjustment Claim)

This claim type is used to submit a request for reimbursement when product is received in bad order (damage/not in a saleable condition) or missing, or to report an overage.

To report damage, shortage and overage claims, click the **Damage/Shortage/Overage** button on the main screen and complete the following steps, shown below:

1. Fill in the carrier details, add a Bill of Lading file or photo (all pages of the BOL are required), fill in the completed by field and then click **Next**.
2. Click **Add Item** to add at least one item to your claim.
3. For each claim item, fill out all details and upload a picture or file if applicable.
4. Click **Submit** when all claim item details are added to submit the claim.

The image displays two sequential screenshots of the 'Adjustment Claim' application interface for claim #3478. Both screens feature a progress indicator at the top with three steps: 1. Instructions, 2. Basic Info, and 3. Items. In the left screenshot, step 2 is active. The 'Carrier Details' section includes fields for 'Carrier Name*', 'Bill of Lading Number*', and 'Seal Number'. Below these is a 'BILL OF LADING PHOTOS*' section with instructions: 'Include all pages of the shipping paperwork; PO Number must be visible.' and 'Submit images or pdfs. Please ensure pdfs have unique file names.' A dashed box labeled 'Photo Thumbnails' is present, along with an 'Upload Images' button. At the bottom, there is a 'Completed by*' field for 'Your full name' and 'Next' and 'Previous' navigation buttons. The right screenshot shows step 3 active. The 'Item Details' section features a prominent green 'Add Item' button. At the bottom, there are 'Submit' and 'Previous' navigation buttons.

- After clicking **Add Item**, enter details for each item you wish to make a claim for.

If you received an item you did not order or do not carry and do not have the LCBO Item Number available, check the **I do not have the Item Number; item not ordered/listed** box and manually enter an **Item Description**. Be sure to upload an image of the product and case label if available.

- When entering the quantity, note that units and cases are mutually exclusive; **do not duplicate quantities** in both fields.
 - E.g. 1 – Report 1 case of a product containing 24 selling units as 24 units **OR** 1 case; **do not** enter in both fields.
 - E.g. 2 – Report 1.5 cases of product containing 4 selling units as 6 units **OR** 1 case **and** 2 units.

Additional fields will be required when choosing the damage claim category.

- You can also click **Upload Images** to upload supporting pictures or files from your mobile device or computer. Note, supporting photos are mandatory for overage and damage claims.

The screenshot displays the 'Adjustment Claim' form, which is divided into two main sections: 'Item Details' and 'Quantity'.

Item Details Section:

- Header: Adjustment Claim #3478
- Progress indicator: 1 Instructions, 2 Basic Info, 3 Items (Step 3 is active).
- Section: Item Details
- Sub-section: Basic Information
- Field: LCBO Item Number
- Checkbox: I do not have the Item Number; item not ordered/listed.
- Field: Item Description*
- Field: Purchase Order Number*
- Field: Receipt Date* (format: yyyy-mm-dd)
- Field: Claim Category*

Quantity Section:

- Section: Quantity
- Field: Cases Claimed
- Field: Units Claimed
- Section: UPLOAD PHOTOS AND DOCUMENTS*
 - Product photos
 - Photo Thumbnails area with a dashed border
 - Upload Images button
 - Back to Items button
 - Save Item button

Product Recall

This claim type is used to report affected product(s) that are subject to either a QA Alert Product Recall or Wine Floor Price Product Recall. Prior to completing the Product Recall claim, the Store Licensee will receive a separate communication from the LCBO stating the product(s) being recalled.

To report product(s) that are recalled, click the **Product Recall** button on the main screen and complete the following steps, shown below:

1. Select the product(s) being recalled from the drop-down menu. After selecting the product(s) it will show you if the recall is a **QA Alert Product Recall or Wine Floor Price Product Recall**.

Product Recall

#903

Please select assigned alert number that includes your product(s). Be sure to double check that this is the exact product in your inventory.

9999 - #18 Heineken (6 x 330 mL) ▾

Heineken (6 X 330 ML)



ID: #18 1/1

This product is the subject of a **QA Alert Product Recall**.

[Next](#)

Product Recall

#904

Please select assigned alert number that includes your product(s). Be sure to double check that this is the exact product in your inventory.

55555 - #582817 Peller Estates Family Series Dry Riesling VQA (750 mL) ▾

Peller Estates Family Series Dry Riesling ... (750 ML)



ID: #582817 1/1

This product will undergo a **Wine Floor Price Product Recall**.

[Next](#)

QA Alert Product Recall

Under a QA Alert Product Recall, the Store Licensee has the option to either return the product to the LCBO or destroy it onsite. It is at the discretion of the LCBO to determine the recalled products that are suitable for on site destruction. The type of product recall will be taken into consideration. This will be determined by the LCBO at the time the alert is issued and the available options will be reflected within the application.

Return to LCBO

1. Fill in the **Name of the Store Owner/Manager** and **Work Email**. Then from the **Request to** drop-down menu select option **Return to LCBO**. Verify the Lot Code(s) matches the product(s) and then click **Next**.
2. Select the product(s) and enter in the unit quantity for each. Verify the product(s) to the additional comments section to ensure the correct product is being claimed. Upload Images (not mandatory) and then click **Next**.

The screenshot shows the 'QA Alert Product Recall Claim' form at step 2, 'Basic Info'. The progress bar at the top indicates steps: 1 (Instructions), 2 (Basic Info), 3 (Item Details), and 4 (Submit). The form title is '#903'. Under 'Basic Information', there are fields for 'Date Prepared' (November 26, 2021, 12:33 PM EST), 'Name of Store Owner/Manager*' (with a placeholder 'e.g. Store manager's name'), 'Work Email*' (with a placeholder 'e.g. Company/store's email'), and a 'Request to:' dropdown menu (with a placeholder 'Select an option...'). A 'LOT CODE(S): 123456' field is also present. At the bottom, there are 'Previous' and 'Next' buttons.

The screenshot shows the 'QA Alert Product Recall Claim' form at step 3, 'Item Details'. The progress bar at the top indicates steps: 1 (Instructions), 2 (Basic Info), 3 (Item Details), and 4 (Submit). The form title is '#903 - Return To LCBO QA'. Under 'Select Recalled Items', there is a list item for 'Heikenen 6 X 330 ML Item #: 18' with a checkbox and a '# Of Units*' input field. Below this is an 'Additional Comments:' section with a note: 'Product recall is specific to the six-pack selling unit, single bottle picture here. Do not ship cans. ONE LOT ONLY is affected. See below.' Under 'ITEM PHOTOS', there is a dashed box labeled 'Photo Thumbnails' and an 'Upload Images' button. At the bottom, there are 'Previous' and 'Next' buttons.

3. Fill in the **Submitted on Behalf of Authorized Grocer**, **Title**, and the **Store Phone Number** fields. Check the box to confirm the product(s) and quantities reported are correct and accurate. Then click **Submit**.

QA Alert Product Recall Claim

#903 - Return To LCBO QA

1
Instructions2
Basic info3
Item Details4
Submit

Confirmation

Submitted on Behalf of Authorized Grocer (Full Name)*
Your Full Name _____

Title*
Your Title _____

Store Phone Number*
e.g. (123)-456-7890 _____

By checking this box you agree that the product(s) and quantities reported above are correct and accurately reflect the recalled product and affected Lot.

PreviousSubmit

4. Monitor your store email for a message from ProductRecall@LCBOReturn.com which will provide your Return Authorization and a link to the TForce Courier Portal to arrange for the recalled product to be picked up by LCBO's designated courier, TForce. Once the recalled product(s) is received and validated at LCBO, the claim status will be updated to **Approved** and a credit will be issued for units returned.

Destroy Onsite

1. Fill in the **Name of Store Owner/Manager** and **Work Email**. Then from the **Request to** drop-down menu select option **Destroy Onsite**. Verify the Lot Code(s) matches the product(s) and then click **Next**.
2. Select the product(s) and enter in the unit quantity for each. Verify the product(s) to the additional comments section to ensure the correct product is being claimed. Upload Images (mandatory) and then click **Next**.

QA Alert Product Recall Claim

#903

1 Instructions 2 Basic Info 3 Item Details 4 Submit

Basic Information

Date Prepared
November 26, 2021, 12:33 PM EST

Name of Store Owner/Manager*
e.g. Store manager's name

Work Email*
e.g. Company/store's email

Request to:*
Select an option...

LOT CODE(S): 123456

Previous Next

QA Alert Product Recall Claim

#903 - Destroy Onsite

1 Instructions 2 Basic Info 3 Item Details 4 Submit

Select Recalled Items

<input type="checkbox"/>	 <p>Heineken 6 X 330 ML Item #: 18</p>	# Of Units* <input type="text"/>
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Additional Comments:
Product recall is specific to the six-pack selling unit, single bottle picture here. Do not ship cans. ONE LOT ONLY is affected. See below.

ITEM PHOTOS*

Required photos include:

- All affected inventory to be destroyed; and
- Close-up image of the affected lot code found on the product.

Photo Thumbnails

Upload Images

Previous Next

3. Fill in the **Submitted on Behalf of Authorized Grocer** and **Title** fields. Check the boxes to confirm the product(s) and quantities reported are correct and accurate and you agree to the attestation. Then click **Submit**.

QA Alert Product Recall Claim

#903 - Destroy Onsite

1
Instructions2
Basic Info3
Item Details4
Submit

Confirmation

Submitted on Behalf of Authorized Grocer (Full Name)*
Your Full Name _____

Title*
Your Title _____

By checking this box you agree that the product(s) and quantities reported above are correct and accurately reflect the recalled product and affected Lot(s) in this Authorized Store location.

By checking this box you agree to the attestation below:

I confirm on behalf of the vendor organization listed, that I have confirmed the product is as described in the QA Alert, and that the product(s) has/have been secured for destruction, pending LCBO approval.

I confirm on behalf of the vendor organization listed that, **once approved by LCBO**, the submitted quantity of product(s) will be destroyed in accordance with the LCBO's Policies & Procedures Manual for Authorized Store Operators.

Do NOT destroy any product until this Claim request is approved by the LCBO
- Product destroyed without approval may not be credited.

PreviousSubmit

4. Do NOT destroy product until your claim has been approved by the LCBO. The LCBO will review your claim. Once your claim is approved by the LCBO you will receive a comment in you claim advising that the product can now be destroyed.

Wine Floor Price Product Recall

Wine floor price product recall is completed in the event that a wine product's retail price falls below the regulated floor price, grocery store licensees must return on hand and in-transit product to the LCBO.

1. Select the product(s) and enter in the unit quantity. Verify the product(s) to the additional comments section. Fill in the **Claim completed by** field and then click **Submit**.

Wine Floor Price Product Recall Claim

#904

1
Instructions

2
Information & Submit

Basic Information

Date Prepared
November 26, 2021

Select Recalled Items

Peller Estates Family Series
Dry Riesling VQA
750 ML
Item #: 582817

Of Units *

Additional Comments:
This recall is also for any units in transit. Please fill out an additional claim if more units are received.

Claim completed by (Full Name) *

Your Full Name

PreviousSubmit

Review Submitted Claims

After claims are successfully submitted, the LCBO will review and either ask for more information or approve/decline each claim item.

You can review the progress of each claim, claim details, and any messages from the LCBO by clicking individual claims on the main screen.

Edit Submitted Claims

Once a claim is submitted, you will not be able to edit it unless the LCBO Grocery Operations team marks the claim as *incomplete*. At that point, you can click the **View Claim** button to edit details of a claim (such as uploading BOL or product images) and resubmit it to the LCBO for review.

Replying to LCBO Comments

From the main application screen, you can view all submitted claims sorted by their claim status. Click on any claim to view the claims summary page. It shows claim status, a **View Claim** button to see more claim details, as well as any updates or comments from the LCBO relating to the claim.

You can write new comments or reply to comments from the LCBO by typing your message in the **Add a Comment** field and then click **Submit**.

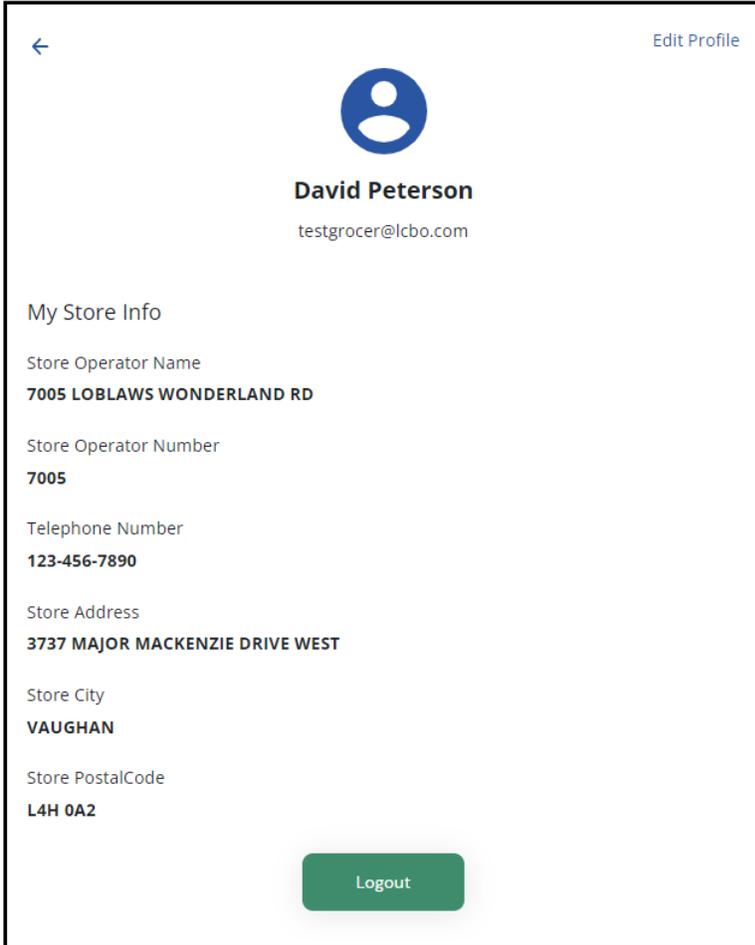
The screenshot displays the 'Grocery Claims Portal' interface. On the left, there are three buttons for 'Return or Refund', 'Damage/ Shortage/ Overage', and 'Product Recall'. Below these is a search bar and a list of filters: 'Action Required', 'Drafts', 'Claims in Progress', 'Completed with Declined Items', and 'Completed with Full Approval'. The main content area shows 'Adjustment Claim #3478' for '18 - Heineken (6 X 330 ML)'. It includes a 'View Claim' button, 'General Status' (Submitted), 'Item Decision' (Not Approved), and a 'Claim History' section showing a comment from 'Dhaval Patel' dated '09 Nov 2022' stating 'Marked the claim as submitted'. At the bottom, there is an 'Add a comment...' input field and a 'Submit' button.

If you see a mail icon beside a claim, it means that the LCBO has left a new comment that requires your attention. You will also receive an email notification to the email address on file when the LCBO leaves a comment on a particular claim. Click on the mail icon to view and edit the claim. The mail icon will disappear once you resubmit the claim or reply back to the LCBO's comment.

The screenshot displays the 'Grocery Claims Portal' interface. At the top, there is a header with the title 'Grocery Claims Portal' and a user profile icon. Below the header, a section titled 'Create a new claim' features three blue buttons: 'Return or Refund' (with a dollar sign icon), 'Damage/ Shortage/ Overage' (with a bottle icon), and 'Product Recall' (with a circular arrow icon). A search bar is located below these buttons, containing the text 'Search by claim number, status, type...'. The main content area is divided into several sections: 'Action Required' (expanded), 'Drafts', 'Claims in Progress', 'Completed with Declined Items', and 'Completed with Full Approval'. The 'Action Required' section contains a card for 'Adjustment #3478' with the status 'Submitted'. The card lists 'Item Numbers: 18' and 'Last Update: 09 Nov 2022'. A red envelope icon (mail icon) is positioned to the right of the 'Last Update' text, and a red arrow points to it from the right side of the card.

Profile Screen

From the main application screen, clicking on the person icon located at top right corner of the screen will take you to the **Profile** page where you can edit your password or log out of the application.



The screenshot displays the 'Profile' screen. At the top left is a back arrow, and at the top right is an 'Edit Profile' link. Below this is a blue circular profile icon. The user's name, 'David Peterson', and email address, 'testgrocer@lcbo.com', are listed. A section titled 'My Store Info' contains the following details: Store Operator Name (7005 LOBLAWS WONDERLAND RD), Store Operator Number (7005), Telephone Number (123-456-7890), Store Address (3737 MAJOR MACKENZIE DRIVE WEST), Store City (VAUGHAN), and Store PostalCode (L4H 0A2). A green 'Logout' button is positioned at the bottom center of the screen.

Your profile details should be kept up to date since they are used to pre-populate new claim forms that you create. If profile details need updating, please contact LCBO Grocery Operations at lcbogroceryoperations@lcbo.com

Click **Edit Profile** to change your password. Note that only your password can be changed. All other details are maintained by the LCBO Grocery Operations team.

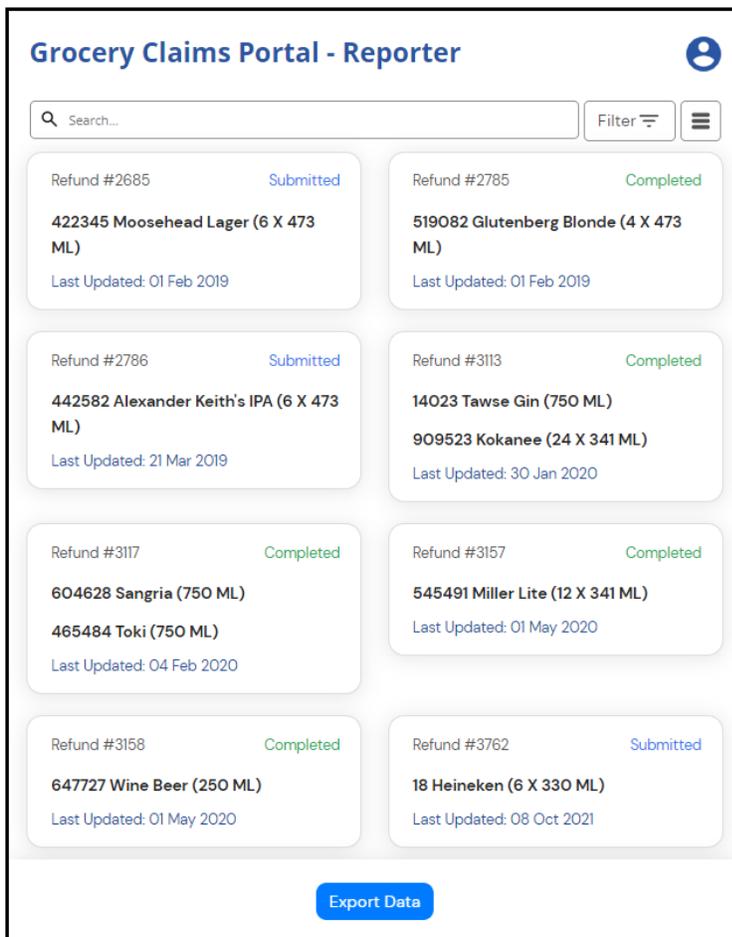
Click the **Logout** button to log out of the application.

Store Licensee Reporter User

The store licensee reporter user is an account that is available to all grocery customers. It gives the grocery customer user the ability to view claims filed by multiple stores that are assigned to their account. Information such as the status of the claim, the store number, item, quantity and more can be exported in PDF and CSV format for use.

Application Main Screen

After logging in as a Reporter User, you will be on the main application screen.



You will see tabs for all claims under the channels assigned to you.

Click on **Filter** to sort claims by type, status and channel.

Click **Export Data** button to download claims as csv/pdf file.

NOTE: If you have questions about channel assignments and/or stores listed in different channels, please contact the LCBO Grocery Operations team at lcboagroceryoperations@lcbo.com

Profile Screen

From the main application screen, clicking the on the person icon located at top right corner of the screen will take you to the Profile page where you can view all channels assigned to you, edit your password by clicking into **Edit Profile** or log out of the application.

