

LCBO

Grocery Operations

B2B Claims Application

Store Licensee User Manual

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INTRODUCTION

This Store Licensee User Manual is a reference tool that provides a general overview and contains instructions for the LCBO's B2B Claims Application. Licensed grocers and wine boutiques use the B2B Claims Application to submit claims for refunds, returns, shortages, overages, damages, and product recalls to LCBO Grocery Operations.

GETTING STARTED

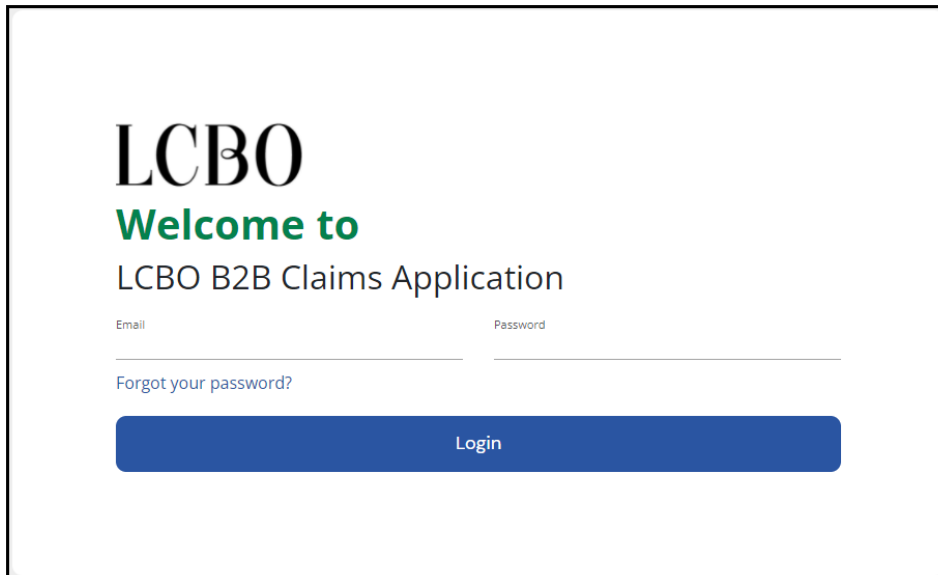
Access to LCBO B2B Claims Application

To gain access to the LCBO's B2B Claims Application, you must have a username and password supplied by Grocery Operations. Contact lcboagroceryoperations@lcbo.com to request access credentials.

Login to LCBO B2B Claims Application

The LCBO's B2B Claims 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.

Using an internet connected computer, smartphone or tablet, go to the application URL <https://B2B-Claims.lcbo.com> and enter your supplied username and password and click **Login**.



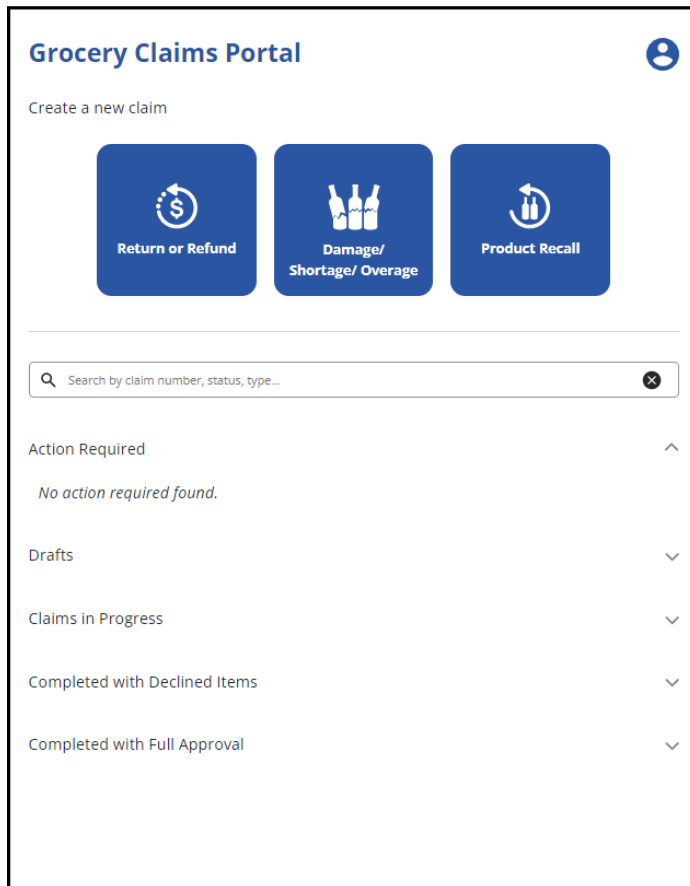
The screenshot shows the login interface for the LCBO B2B Claims Application. At the top left is the LCBO logo. Below it, the text reads "Welcome to LCBO B2B Claims Application". There are two input fields: "Email" and "Password". Below the "Email" field is a link that says "Forgot your password?". At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

- Return or Refund, or
- Damage/Shortage/Overage, or
- Product Recall

This screen also displays 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' process for claim #3857.

Left Screenshot: Basic Information

- Progress indicator: 1 (Instructions), 2 (Basic Info), 3 (Items).
- Section: **Basic Information**
- Section: **BILL OF LADING PHOTOS***
- Instructions:
 - Include all pages of the shipping paperwork; PO Number must be visible.
 - Submit images or pdfs. Please ensure pdfs have unique file names.
- Field: Photo Thumbnails (dashed box)
- Button: Upload Images
- Field: Completed by** (Your full name)
- Navigation: Previous (disabled), Next (active)

Right Screenshot: Item Details

- Progress indicator: 1 (Instructions), 2 (Basic Info), 3 (Items).
- Section: **Item Details**
- Button: Add Item
- Navigation: Previous (disabled), Submit (active)

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' form for claim #3478. The top of both screens features a progress indicator with three steps: 1. Instructions, 2. Basic Info, and 3. Items. The left screenshot shows the 'Carrier Details' section, which includes input fields for 'Carrier Name*', 'Bill of Lading Number*', and 'Seal Number'. Below these is a section for 'BILL OF LADING PHOTOS*' 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 with the placeholder 'Your full name' and 'Previous' and 'Next' navigation buttons. The right screenshot shows the 'Item Details' section, featuring a prominent green 'Add Item' button. At the bottom, there are 'Previous' and 'Submit' 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.

Adjustment Claim

#3478

1
Instructions2
Basic Info3
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

Claim Category*

Quantity

Cases Claimed

Units Claimed

UPLOAD PHOTOS AND DOCUMENTS*

- Product photos

Photo Thumbnails

Upload Images

Back to Items

Save Item

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:

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.

5555 - #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 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 QA 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 image displays two screenshots of the 'QA Alert Product Recall Claim' application interface.

Left Screenshot: QA Alert Product Recall Claim #903

The interface shows a progress bar with four steps: 1. Instructions, 2. Basic Info (current step), 3. Item Details, and 4. Submit. Below the progress bar, the 'Basic Information' section includes:

- 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*: A dropdown menu with 'Select an option...' selected.
- LOT CODE(S): 123456

At the bottom, there are 'Previous' and 'Next' buttons.

Right Screenshot: QA Alert Product Recall Claim #903 - Return To LCBO QA

The interface shows the same progress bar, but step 3, 'Item Details', is the current step. Below the progress bar, the 'Select Recalled Items' section includes:

- A list of items with a checkbox, a bottle image, and details: Heineken, 6 X 330 ML, Item #: 18. A '# Of Units*' input field is next to it.
- 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: Photos may be uploaded here. A dashed box labeled 'Photo Thumbnails' is provided for uploads.
- 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"/>
--------------------------	---	-------------------------------------

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
Instructions

2
Basic Info

3
Item Details

4
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.

Previous

Submit

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 your 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 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 main action buttons: 'Return or Refund', 'Damage/ Shortage/ Overage', and 'Product Recall'. Below these is a search bar and a list of claim categories with expandable arrows. On the right, the details for 'Adjustment Claim #3478' are shown, including the product '18 - Heineken (6 X 330 ML)', a 'View Claim' button, and sections for 'General Status' (Submitted), 'Item Decision' (Not Approved), and 'Claim History' (Dhaval Patel marked the claim as submitted). A comment input field and a 'Submit' button are at the bottom.

Grocery Claims Portal

Create a new claim

Return or Refund | Damage/ Shortage/ Overage | Product Recall

Search by claim number, status, type...

Action Required
No action required found.

Drafts

Claims in Progress

Completed with Declined Items

Completed with Full Approval

Adjustment Claim #3478
18 - Heineken (6 X 330 ML)

View Claim

General Status
Status: Submitted
Date Submitted: November 9, 2022
Last Updated: November 9, 2022

Item Decision
18 - Heineken (6 x 330 mL) (Purchase #Test3242): **Not Approved**

Claim History

09 Nov 2022

Dhaval Patel
Marked the claim as **submitted**

Add a comment... Submit

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.

Grocery Claims Portal

Create a new claim

Return or Refund Damage/ Shortage/ Overage Product Recall

Search by claim number, status, type...

Action Required

Adjustment #3478 Submitted

Item Numbers: 18

Last Update: 09 Nov 2022

Drafts

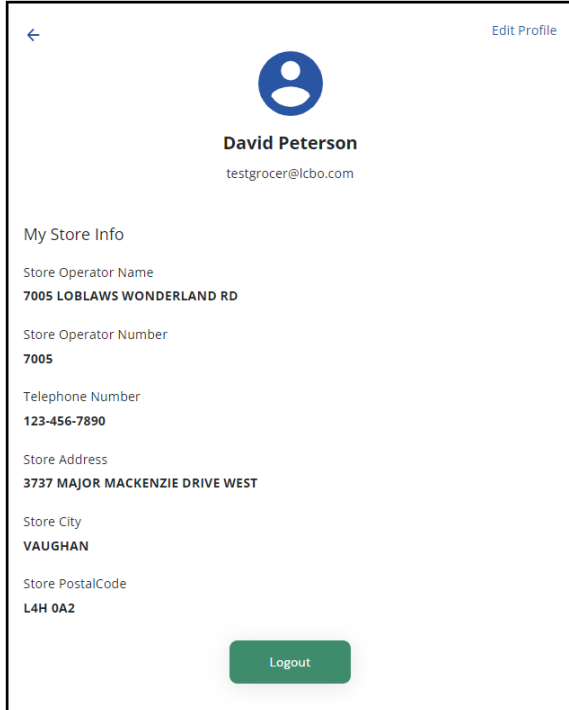
Claims In Progress

Completed with Declined Items

Completed with Full Approval

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 shows a mobile application profile screen. At the top left is a back arrow, and at the top right is the text "Edit Profile". Below this is a blue circular profile icon. Under the icon, the name "David Peterson" is displayed in bold, with the email address "testgrocer@lcbo.com" below it. A section titled "My Store Info" contains the following details: "Store Operator Name" is "7005 LOBLAWS WONDERLAND RD", "Store Operator Number" is "7005", "Telephone Number" is "123-456-7890", "Store Address" is "3737 MAJOR MACKENZIE DRIVE WEST", "Store City" is "VAUGHAN", and "Store PostalCode" is "L4H 0A2". At the bottom center of the screen is a green "Logout" button.

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, contact 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.

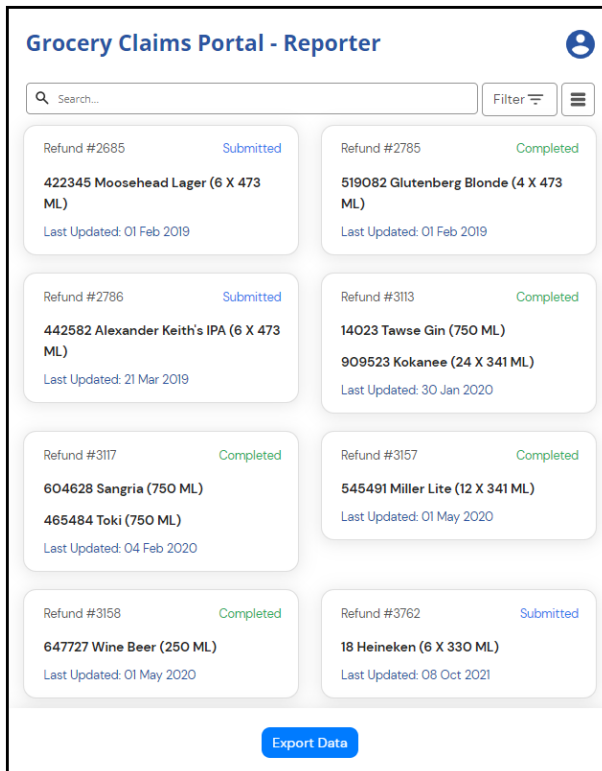
Click the **Logout** button to log out of the application.

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.

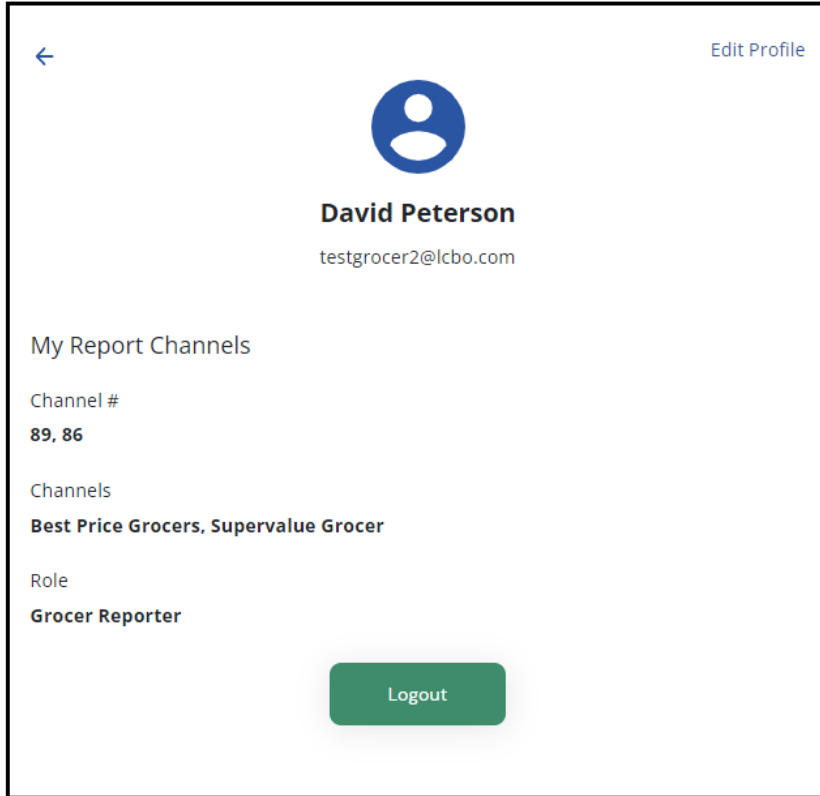
Click on **Filter** to sort claims by type, status and channel.

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

If you have questions about channel assignments and/or licensed stores listed in different channels, contact Grocery Operations 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.



LCBO B2B CLAIMS APPLICATION SUPPORT

If at time you require additional information or have any questions, contact LCBO Grocery Operations at lcbogroceryoperations@lcbo.com.