



# User Guide

Beam Suntory VALO Commerce (US)

2022



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# Accessing Your Site

Access the VALO site through STIR by clicking on the VALO icon.

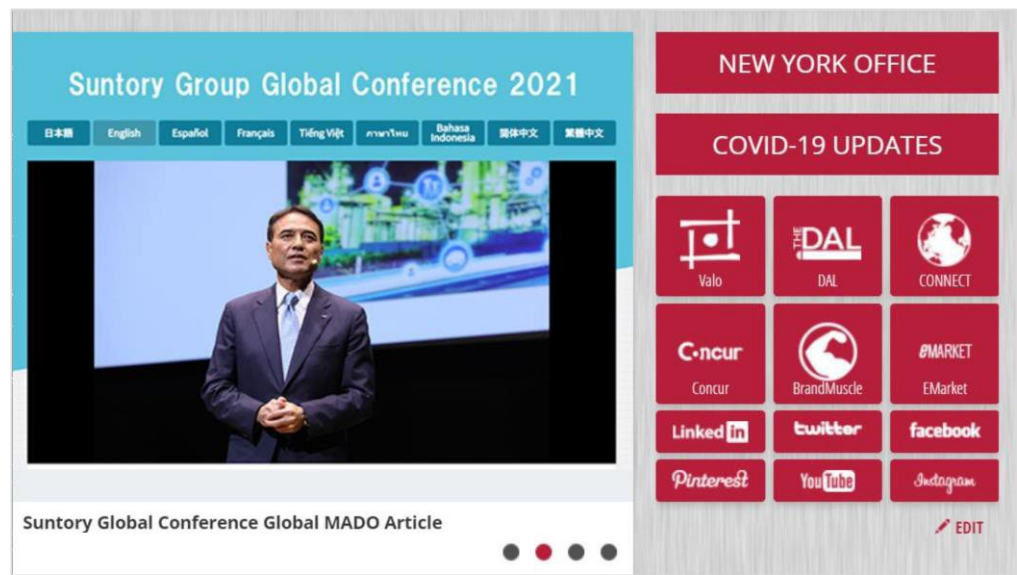


Figure 1 – STIR Application Selection Screen

After you click the VALO icon within STIR, you will be automatically logged in to the VALO Portal and presented with several options.

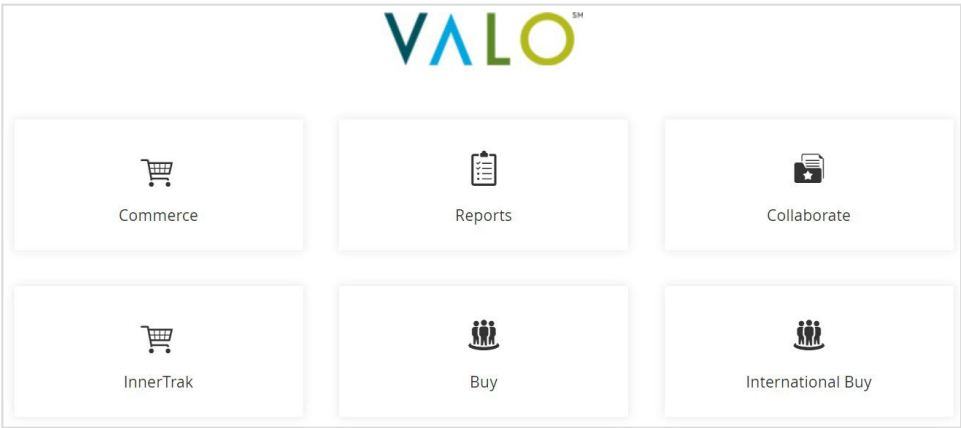


Figure 2 – VALO Portal Home Page

**Commerce** – Manage previously purchased inventory

**Buy** – Place POS Orders during periodic order windows

**Reports** – View reporting generated from using **Commerce** and **Buy**

Beam **SUNTORY**

Reports (7)

– Allocation Report

Figure 3 – Reports Dashboard



# Viewing VALO Reports

VALO Commerce Reports allows users to check their inventory levels and orders.

To view reports, click on the reports module. (Figure 3).

**Please note:** To allocate inventory based on the buy, VALO Commerce assigns users to allocation groups which are based on the user's area of responsibility (e.g. geography, brand or functional area).

Available reports include:

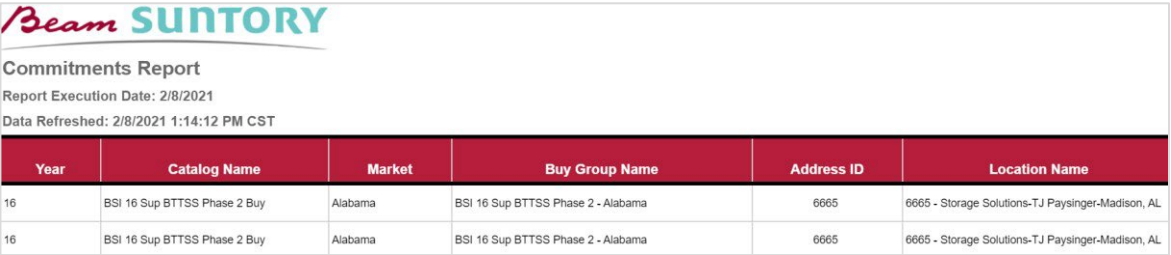
- **Allocation Report:** Summary of all available inventory users can order on the allocation group level. This report is specific to POS placed into allocation groups on Commerce during the Buy. It excludes POS ordered during the Buy that will auto-ship out of MCX. (Figure 4)
- **Inventory Movements Report:** Summary of orders placed in VALO Commerce on the individual user and allocation group level
- **Inventory SKU Report:** Provides inventory aging on the SKU level and allocation group level
- **Commitments Report:** View details on all POS ordered during Buy Windows. This report includes items that auto-ship out of MCX as well as those placed into hold accounts and available to release for shipments using Commerce. (Figure 5)

Reports can be pulled from the site as needed by all BSI users with inventory in Commerce



Catalog Name	Warehouse	Item SKU	Item Name	Brand	Pack Size	Your Available Quantity (Packs)	Group Name	Total Inventory Quantity
Beam Suntory	MCX	HR201017122	HR 20 H1 Sampling Cups - 2 oz.	Hornitos	Pack of 2500	180	REG-Regionals	180
Beam Suntory	MCX	BEAMSUN-JBWS06	JBW Condiment Caddy	Jim Beam White	Pack of 6	1	REG-Regionals	5
Beam Suntory	MCX	BEAMSUN-JBWS03	JBW Napkin Caddy	Jim Beam White	Pack of 12	5	Control-Rgn-FOQ-Michigan	5

Figure 4 – Inventory Report



Year	Catalog Name	Market	Buy Group Name	Address ID	Location Name
16	BSI 16 Sup BTTSS Phase 2 Buy	Alabama	BSI 16 Sup BTTSS Phase 2 - Alabama	6665	6665 - Storage Solutions-TJ Paysinger-Madison, AL
16	BSI 16 Sup BTTSS Phase 2 Buy	Alabama	BSI 16 Sup BTTSS Phase 2 - Alabama	6665	6665 - Storage Solutions-TJ Paysinger-Madison, AL

Figure 5 – Commitments Report

# Using VALO Commerce

## Browsing the items

POS items in VALO Commerce are categorized by brands listed on the left-hand side of the screen. Each has subcategories based on the type of item. Click on a category to see its items. Click the arrow next to the brand to view the available sub-categories and click one to further reduce the list.

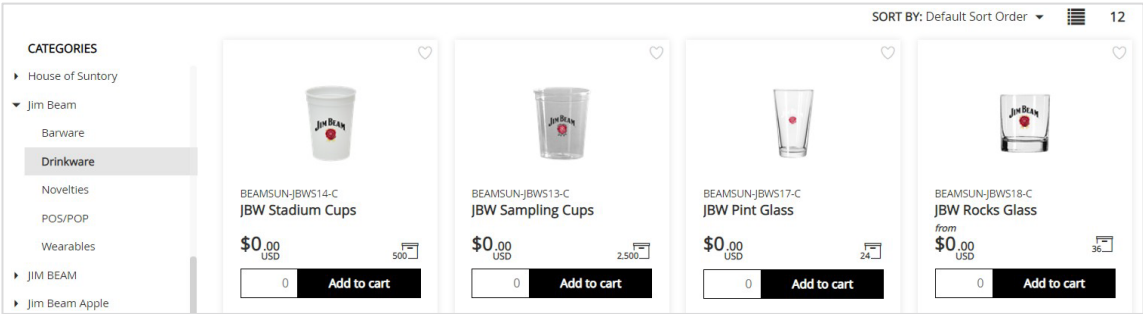


Figure 11 – Item List with Category Screen

Here is a close-up view of the items with key info points listed below.



Figure 12 – Item (Close-up View)



Figure 13 – Favorites Icon

# Using VALO Commerce

## Saving Favorite Items

To save an item to your personal favorites category, click the heart icon in the upper-right corner. You can view your favorite items by clicking the *My Favorites* category on the left in the Navigation menu.

**Please note:** The prices on the items will display as \$0 in VALO Commerce as all items were already purchased during the Buy window.

# Using VALO Commerce

## The item detail screen

Click an item image to view additional information on the item detail screen.

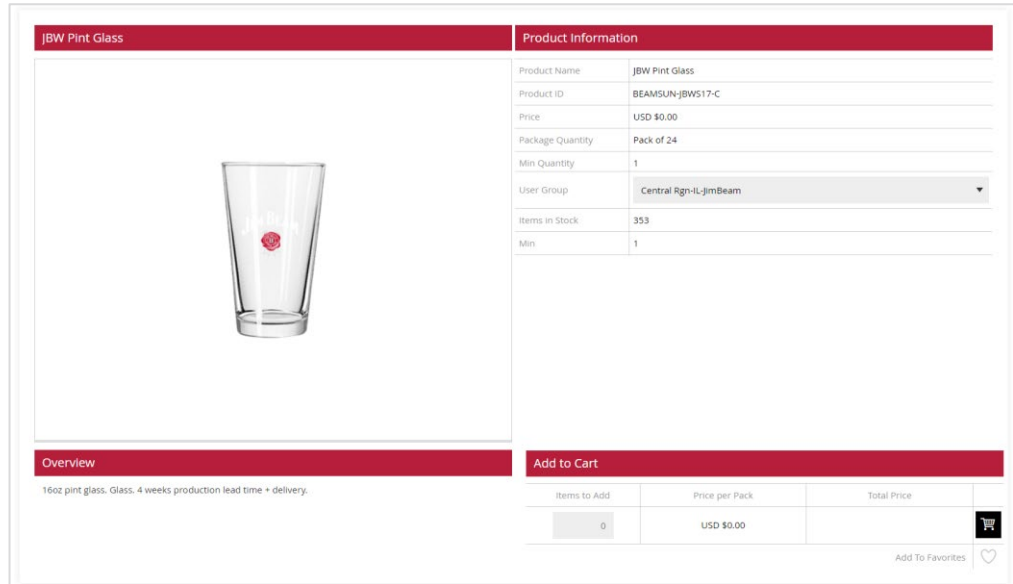


Figure 14 – Item Detail Screen (see Figure 15, 16 for close up view)

The left side of the screen shows the item image and description.



Figure 15 – Item Image and Description on Item Detail Page

# Using VALO Commerce

## The item detail screen

Product information is shown on the upper-right side. (Figure 16)  
Items in stock are in packs. An order of 1 would be for the full pack quantity.

Product Information	
Product Name	JBW Sampling Cups
Product ID	JB20A09321S17-C
Price	USD \$0.00
Package Quantity	Pack of 2500
Allocation Group	East-RGN-NY
Items in Stock	4
Min Quantity	1

Group For Allocations  
This will be a dropdown if you are a part of more than one group.

Available stock for this item for the displayed group.

Add at least 1 to your cart to begin an order.

Figure 16 – Item Detail Screen - Product Information Close-up

The allocation group will appear as a dropdown on the right in the product information section. You'll be able to select a different group if you have more than one allocation group assigned to the item.

The lower left area includes add to cart and favorites options. (Figure 17)

Add item to cart Details

Price will show \$0. Items were already Purchased in the Buy Window

Add to Cart

Items to Add	Price per Pack	Total Price	
0	USD \$0.00		<div>Add to Cart</div> <div>Add to Favorites</div>
Remove from favorites			

Figure 17 – Item Detail Screen - Add to Cart Close-up

\*Please note, only full packs can be ordered. Packs cannot be broken into smaller quantities.



# Using VALO Commerce

## Adding items to your shopping cart

There are two ways to add an item to your shopping cart:

From the product list, enter the desired quantity in the field provided and click the Add to cart button.



If you have more than one allocation group, e.g. inventory in both KY and NY, the item will show the word “Configure” instead of an add to cart option.

For those items, you’ll have to go to the item detail screen by clicking the Configure button and select which allocation group to draw inventory from.



Figure 18 – Item with “Configure” Button

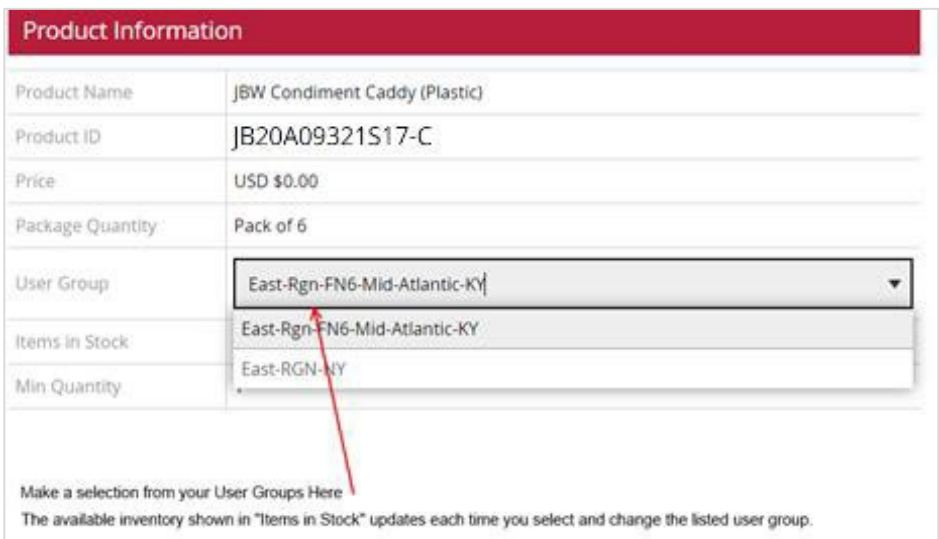


Figure 19 – Selecting Allocation groups on the Item Detail Screen

# Using VALO Commerce

## Placing a Standard Order

When you have added all the necessary items to your shopping cart, hover over the cart icon in the upper right corner of the screen and select Checkout.

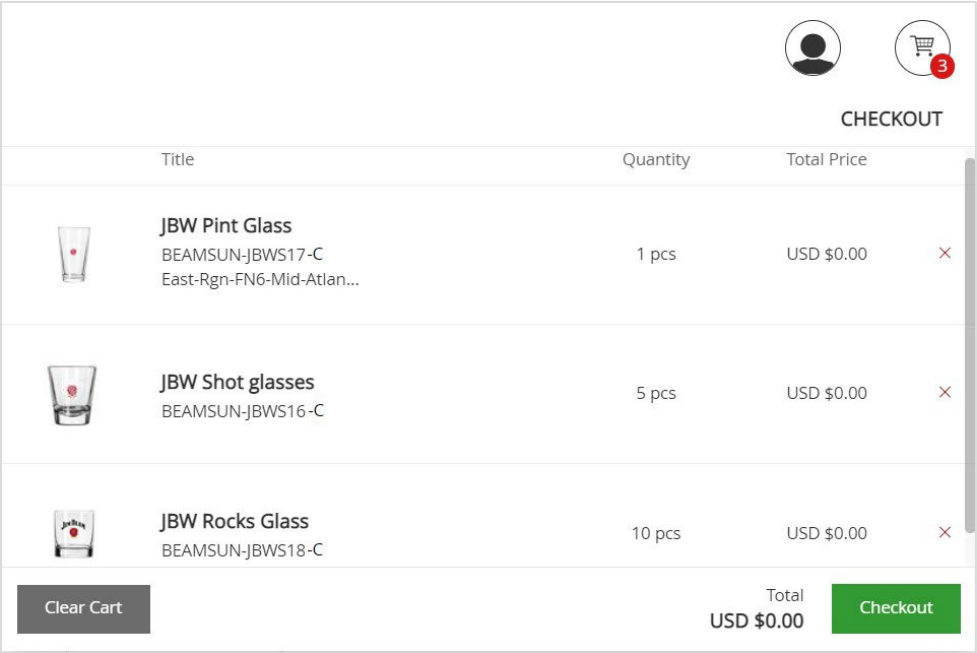


Figure 20 – Checkout Icon

Clicking Checkout launches the checkout screen, which consists of five simple steps.



After completing each step, click the Next button to proceed.

**Please Note:** Use the *Back* button to access the previous page. *Do not use the browser back arrow during the checkout process otherwise data can be lost.*



# Using VALO Commerce: Placing a Standard Order

## Checkout Step #1: Review your items




In the shopping cart, you can:

- 1. Remove all the items from your shopping cart by clicking Clear
- 2. Modify item quantities in the Quantity field
- 3. Remove individual items by clicking the red X button on the right
- 4. Continue adding items to your cart by clicking the Continue Shopping button
- 5. Switch from a single address to multiple address checkout process by clicking the “Enable Multiple Address Shipping” button circled in red

Shopping Cart

Enable Multiple Address Shipping

Clear

Item Description	Quantity	Price	Subtotal	
 SKU BEAMSUN-JBWS17 <b>JBW Pint Glass</b> Group East-Rgn-FN6-Mid-Atlantic-KY Pack of 24	1	USD \$0.00	USD \$0.00	×
 SKU BEAMSUN-JBWS16 <b>JBW Shot glasses</b> Pack of 72	5	USD \$0.00	USD \$0.00	×
 SKU BEAMSUN-JBWS18 <b>JBW Rocks Glass</b> Pack of 36	10	USD \$0.00	USD \$0.00	×

Continue Shopping

Subtotal: USD \$0.00

TOTAL: USD \$0.00

Next

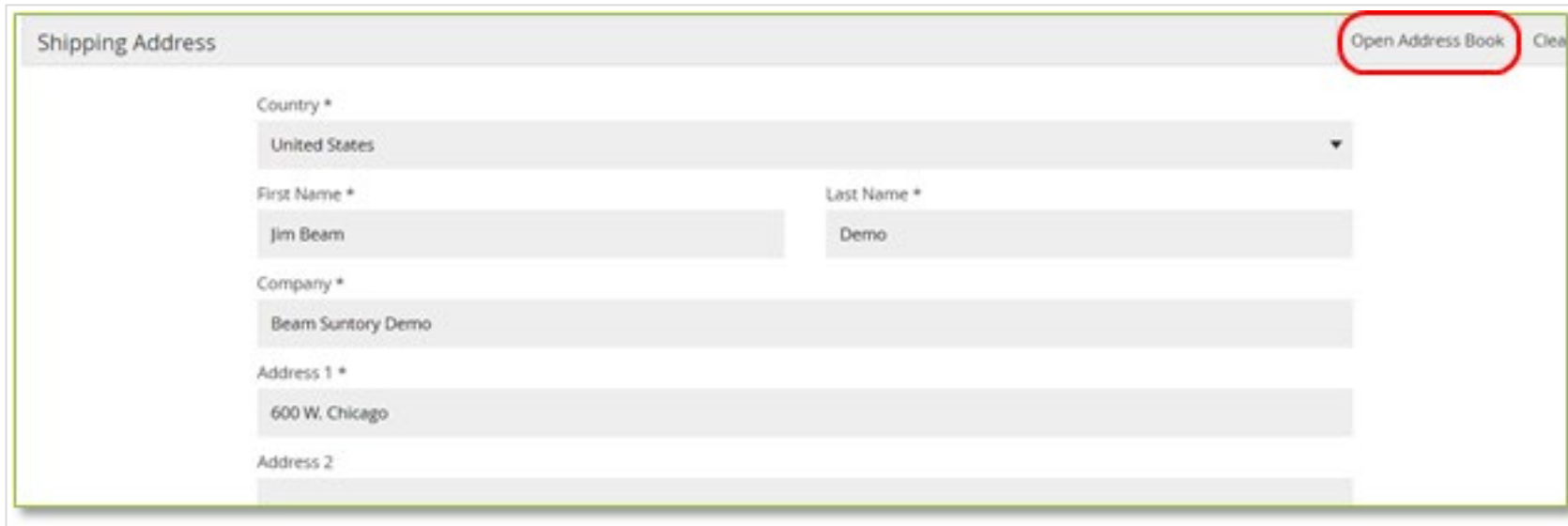
To continue the checkout process, click the green Next button.

# Using VALO Commerce: Placing a Standard Order

## Checkout Step #2: Enter single shipping address

In the Shipping Address section, enter the location where the order should be shipped.

To select a shipping address from the address books, click the “Open Address Book” button in the upper right.



The screenshot shows the 'Shipping Address' form. At the top right, there is a button labeled 'Open Address Book' which is circled in red, and a 'Clear' button. The form contains the following fields:

- Country \***: A dropdown menu with 'United States' selected.
- First Name \***: A text input field containing 'Jim Beam'.
- Last Name \***: A text input field containing 'Demo'.
- Company \***: A text input field containing 'Beam Suntory Demo'.
- Address 1 \***: A text input field containing '600 W. Chicago'.
- Address 2**: An empty text input field.

On the address book selection screen, you can choose Corporate Address Book to see a list of all the shipping addresses maintained for the entire company, or Personal Address Book to see only the shipping addresses you have saved in your user profile. (The personal address book is covered in the section after the checkout process).

# Using VALO Commerce: Placing a Standard Order

## Checkout Step #2: Enter single shipping address.

The addresses appear on the right side of the screen. Click “Corporate Address Book” or “Personal Address Book” found above the addresses to switch address books.

On the right-hand side, there are a selection of options:

	<b>Cancel:</b> Closes the Address Book.
	<b>Refresh:</b> Refreshes the addresses displayed in the Address Book.
	<b>Grid:</b> Displays the addresses in a grid format.
	<b>List:</b> Displays the addresses in a list format.
	<b>Ok:</b> Selects the highlighted address.
	<b>Copy:</b> Copies a selected Corporate Address to your Personal Address book.
	<b>Results Displayed:</b> Selects the number of results displayed on the page (6, 12, or 24).

To narrow the list of displayed addresses, enter the desired criteria in the **Search By** area and click the Search button. The list of available addresses on the right will update to reflect the search results.

Select the correct shipping address and click the check mark to add it to your order.

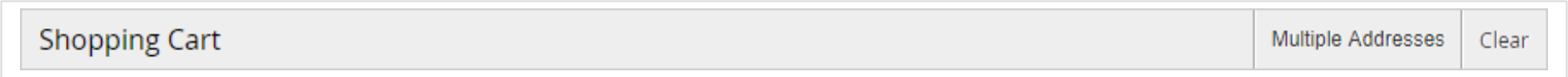
Click *Next* to proceed to the Delivery page.



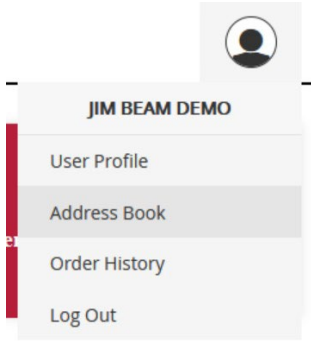
# Using VALO Commerce: Placing a Standard Order

## Checkout Step #2: Enter multiple shipping addresses

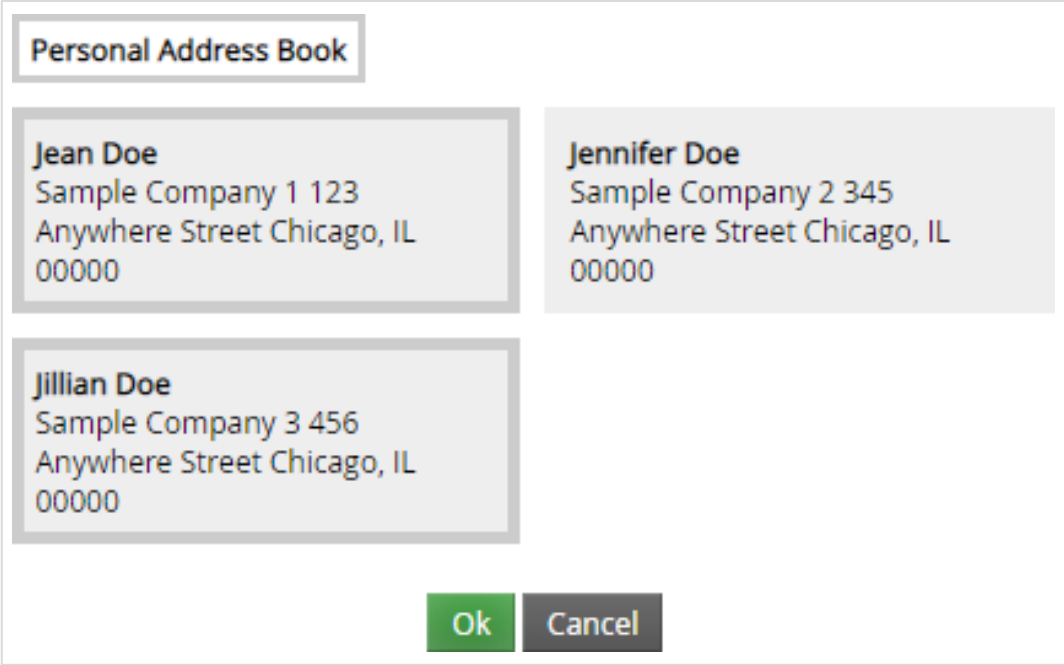
If you'd like to have the items in your shopping cart route to more than one shipping address, click the button labelled "MultipleAddresses" in the upper right corner of the shopping cart.



To ship to locations already in the system, click the "Add from Address Books" button under the Account Icon shown below to open the address book screen.



Select addresses from the Personal and/or Corporate Address Books and click on "Ok" when done.



# Using VALO Commerce: Placing a Standard Order

## Checkout Step #2: Enter multiple shipping addresses

The screenshot displays the VALO Commerce checkout interface for Step 2: Enter multiple shipping addresses. It features a table with three columns for items and three rows for shipping addresses. The items are JBW Pint Glass, JBW Shot glasses, and JBW Rocks Glass. The shipping addresses are Jim Beam Demo, Jim Beam Demo 2, and Test User. The interface includes buttons for 'Copy To All', 'Calculate Shipping', and 'Next'. A 'Subtotal: USD \$0.00' and 'TOTAL: USD \$0.00' are shown at the bottom. Red 'X' and green '+' icons are used to adjust quantities. Numbered callouts 1 through 4 highlight specific features: 1 points to the quantity input field, 2 points to the 'Copy To All' button, 3 points to the red 'X' icon, and 4 points to the 'Calculate Shipping' button.

	JBW Pint Glass	JBW Shot glasses	JBW Rocks Glass	Shipping Methods
Jim Beam Demo United States Chicago IL 60654 600 W. Chicago	1 USD \$0.00	7 USD \$0.00	10 USD \$0.00	Calculate Shipping
Jim Beam Demo 2 United States Chicago IL 60601 203 North LaSalle Suite 1800,	1 USD \$0.00	5 USD \$0.00	0 USD \$0.00	Calculate Shipping
Test User United States Bolingbrook IL 60440 300 E. Crossroads Parkway Southern Wine & Spirits	0 USD \$0.00	5 USD \$0.00	10 USD \$0.00	Next Kit USD \$0.00

Subtotal: USD \$0.00  
TOTAL: USD \$0.00

Calculate Shipping Back Next

On the Items page, items will appear in columns on the right with each address listed in the rows starting on the left. On this screen, you can:

1. Update item quantities per item, per each ship-to address
2. Apply the quantity of the first item to all locations by clicking “Copy to All” (e.g. if you change the original quantity)
3. Zero out an item from a specific location by clicking the red X
4. Click “Calculate Shipping” which populates the shipping method dropdown for each location, then select the shipping option for each location. The cost estimates shown for expedited shipping will be based on each location and the items being shipped to it

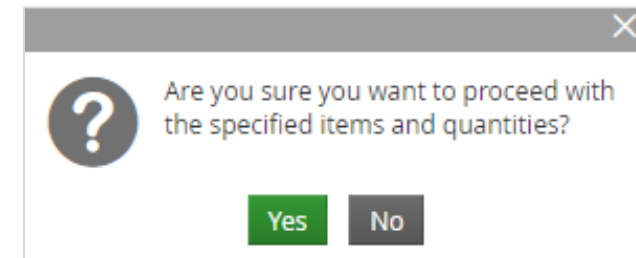
You will be able to select different shipping methods for each location (e.g. the first two orders are consolidated shipments but the third is expedited).

**Please Note:** When quantities are adjusted, the shipping method listed will change to “Calculate Shipping”. Click the button to refresh the listed shipping entry.

Click Next to continue. A prompt will appear asking to confirm that you wish to continue. Click “Yes” to continue.

The rest of the checkout is similar to the single address shipment option.

You will also see an on screen order confirmation and receive a copy by email after completing your checkout.



# Using VALO Commerce: Placing a Standard Order

## Checkout Step #3: Select delivery method

The available delivery methods are displayed to the right of the shipping address.

Click “Next Kit” for the weekly consolidated shipping option, or “Expedited Shipping” for rush delivery.

**PLEASE NOTE:** Selecting the weekly consolidation shipment “Next Kit” option shows as \$0 because it is billed back to a central budget at no cost for the user. If expedited shipping is required you must provide a valid IO code to fund the cost.

Jim Beam Demo  
Beam Suntory Demo  
600 W. Chicago  
Chicago, IL, 60654  
United States  
jimbeam@inwk.com  
312-555-5555

Next Kit	USD \$0.00
Expedited Shipping	USD \$186.08

### NEXT KIT

- Orders are consolidated & shipped out of MCX every Friday
- Orders must be placed by Thursday 12 PM CT to meet next kit
- Cost will always remain \$0.00
- Enter “N/A” in I/O Code Field

### EXPEDITED

- Orders are expedited to arrive next day or 2 days
- Orders ship out same day if placed before 2 PM CT
- Costs are **estimated** at time of order. The final cost will be available once order has been processed and shipped out of MCX
- Valid I/O Code required

Click Next to continue to the payment screen.

# Using VALO Commerce: Placing a Standard Order

## Checkout Step #4: Enter payment information

For Expedited Shipping, please enter approval name and date approved. If sending by Next Kit, please enter N/A.  
All expedited shipping must be approved via email by [michelle.cater@beamsuntory.com](mailto:michelle.cater@beamsuntory.com) prior to checkout.

✓

✓

✓

4

5

Items

Shipping Address

Delivery

Payment

Checkout

Payment method

Bill to My Account

Expedited: Enter Approver Name & Date; Next Kit Shippin...

Click Next to proceed to the Final Checkout page.

# Using VALO Commerce: Placing a Standard Order

## Checkout Step #5: Finalize your order

On the final screen, you can review and change your order information if needed before clicking Checkout.

Shipping Address

Jim Beam Demo  
Beam Sundry Demo  
600 W. Chicago  
Chicago, IL, 60654  
▼  
[Change](#)

Delivery Information

Next Kit  
[Change](#)

Payment Information

Bill to My Account  
IO Code for Expedited Shipping default  
[Change](#)

[Change](#)

Subtotal: USD \$0.00  
Shipping Total: USD \$0.00  
TOTAL: USD \$0.00

[Continue Shopping](#)[Back](#)[Checkout](#)

When you click Checkout, your order will be submitted. On screen, you will see an order confirmation and you will receive a copy of the confirmation by email. The order number is at the top left under the heading “Order Confirmation”.

ORDER CONFIRMATION

10/15/2019

ORDER # PO242167753

DETAILS  
In Progress

SHIPPING ADDRESS

Jean Doe  
Sample Company 1  
123 Anywhere Street  
Chicago, IL 00000  
United States  
000-000-0000

Item	Line Item Status	Quantity	Price	Sub
JBA PHONE FAN COURTNEY STARK JBA20A09235-C Group East-RGN-NY	In Progress	23	USD \$0.00	USD \$0.00
Next Kit				USD \$0.00

PAYMENT INFORMATION

Payment method: Bill to My Account

TOTAL: USD \$0.00

[Continue Shopping](#)





# Using VALO Commerce: Placing a Standard Order

## Checkout Step #5: Finalize your order

Please write down your order number so that you have it for reference if you need to contact customer support for any reason. You will receive another email confirmation when your order is shipped which will include tracking information.

The order confirmation is also stored in the order history section and tracking adds to it at the same time it is sent by email.

ORDER CONFIRMATION

10/15/2019

ORDER #PO1154578359

DETAILS  
In Progress

SHIPPING ADDRESS

Jean Doe  
Sample Company 1  
123 Anywhere Street  
Chicago, IL 00000  
United States  
000-000-0000

Item	Line Item Status	Quantity	Price	Sub
JBA PHONE FAN COURTNEY STARK JBA20A09235-C Group East-RGN-NY	In Progress	23	USD \$0.00	USD \$0.00
Tracking Received Fed Ex Ground 12/20/2020 Tracking Number 8675309 Tracking URL <a href="http://wwwapps.ups.com/WebTracking/processInputRequest?US&amp;InquiryNumber1=8675309&amp;track.x=0&amp;track.y=0">http://wwwapps.ups.com/WebTracking/processInputRequest?US&amp;InquiryNumber1=8675309&amp;track.x=0&amp;track.y=0</a>				
Next Kit				USD \$0.00

PAYMENT INFORMATION

# Using VALO Commerce: Placing a Bulk Order

## Step #1: Create a New Bulk Order or resume a previously saved Bulk Order.

- The feature can be access in the top right of the commerce screen, under the profile image.



- Choose one of your available inventory groups from the drop down and create a name for the new Bulk Order. All items in the order will be from this inventory group.

### Create new Bulk Order

Select an Inventory Group (if applicable) and set Bulk Order name

GBH-El Tesoro

GBH-Bowmore

GBH-Bruxo

GBH-Canadian Club

GBH-Courvoisier

GBH-Cruzan

GBH-DeKuyper

Bulk Order Name

Start

# Using VALO Commerce: Placing a Bulk Order

## Step #1: Create a New Bulk Order or resume a previously saved Bulk Order.

- To view a previously saved order, select any open order from the Bulk Order Home Screen and click “Continue”.

Create new Bulk Order

Select an Inventory Group (if applicable) and set Bulk Order name

Advocacy POS

Bulk Order Name

Start

or

Select existing Bulk Order

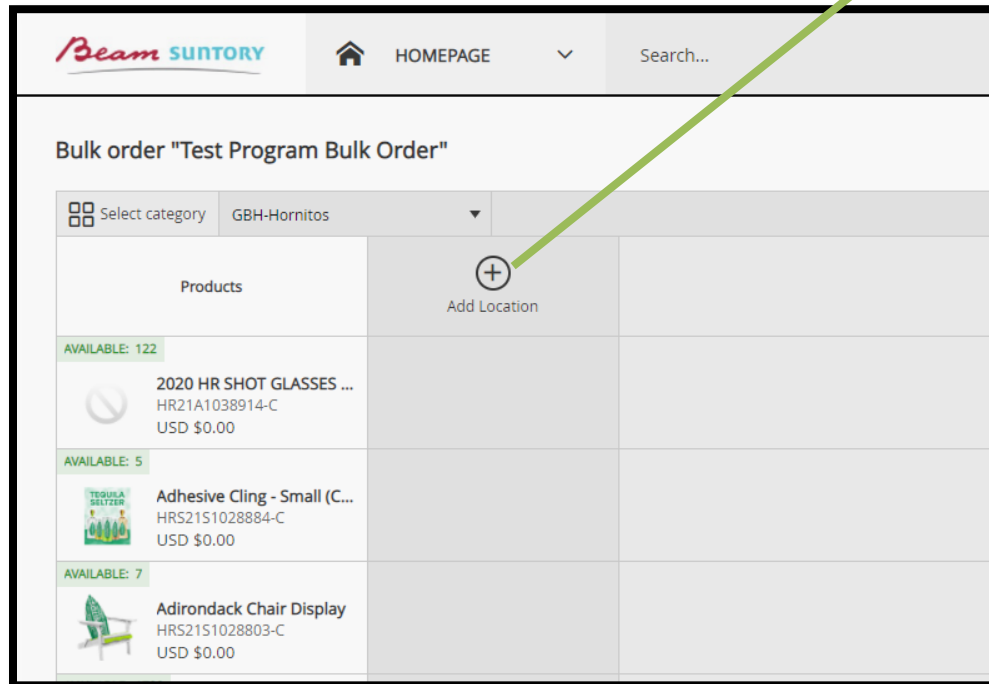
BULK ORDER NAME	GROUP INVENTORY	LAST SAVED	STATUS	
Test Program Bulk Order	GBH-Hornitos	12/15/2021, 2:42:54 PM	OPEN	<div>Continue</div> <div>✕</div>
Test	Central Rgn-AR	12/8/2021, 1:54:59 PM	OPEN	<div>Continue</div> <div>✕</div>
Central RGN - LA	AMB-Gardner Dunn	12/8/2021, 1:36:57 PM	OPEN	<div>Continue</div> <div>✕</div>
Test CR IL	Central Rgn-NE	12/6/2021, 3:26:38 PM	OPEN	<div>Continue</div> <div>✕</div>

# Using VALO Commerce: Placing a Bulk Order

## Step #2: Enter Shipping Locations.

Locations can be added by:

- Choosing an address from the Corporate Address Book or Personal Address Book
- Entering a completely new address
- Copying addresses from a previous Bulk Order
- Uploading multiple addresses via a template







Beam SUNTORY

HOMEPAGE

Search...

Bulk order "Test Program Bulk Order"

Select category GBH-Hornitos

Products		
		
AVAILABLE: 122		
 2020 HR SHOT GLASSES ... HR21A1038914-C USD \$0.00		
AVAILABLE: 5		
 Adhesive Cling - Small (C... HRS21S1028884-C USD \$0.00		
AVAILABLE: 7		
 Adirondack Chair Display HRS21S1028803-C USD \$0.00		

### Add Location

Corporate Address Book Personal Address Book New Address Copy Previous Address Multiple Address Upload

Country  
United States

First Name Last Name

Company

Phone Mobile Phone

Purchaser's Email

Address 1

Address 2

Address 3

Cancel Add

# Using VALO Commerce: Placing a Bulk Order

## Step #3: Select Items and Quantities.

Enter Quantities to be delivered to each address. (1)

Available item quantity is displayed above each item. (2) Total Quantity ordered per item will automatically calculate in rightmost column. (3) US Items all be \$0.00.

Bulk order "Test Program Bulk Order"

Hornitos

GBH-Hornitos

Selected items only

+

Products	Lisa Wade Beam Suntory 222 West Merchandise Mart Plaza	Melissa Raad HH Global 3180 Curlew Ave Oldsmar, FL, 33761	Test User Beam Suntory 222 West Merchandise Mart Plaza	<div>+</div> <div>Add Location</div>	Sub Total
<div>(2)</div> <div>AVAILABLE: 122</div> <div><div>2020 HR SHOT GLASSES ...</div><div>HR21A1038914-C</div><div>USD \$0.00</div></div>	<div>(1)</div> <div>5</div> <div>USD \$0.00</div>	<div>0</div> <div>USD \$0.00</div>	<div>0</div> <div>USD \$0.00</div>		<div>(3)</div> <div>Qty: 5</div> <div>USD \$0.00</div>
<div>AVAILABLE: 25</div> <div><div>Cocktails-To-Go, 2 oz. Sh...</div><div>HR21S1029180-C</div><div>USD \$0.00</div></div>	<div>5</div> <div>USD \$0.00</div>	<div>10</div> <div>USD \$0.00</div>	<div>0</div> <div>USD \$0.00</div>		<div>Qty: 15</div> <div>USD \$0.00</div>
<div>AVAILABLE: 65</div> <div><div>Cocktails-To-Go, Citrus S...</div><div>HR21S1029190-C</div><div>USD \$0.00</div></div>	<div>0</div> <div>USD \$0.00</div>	<div>0</div> <div>USD \$0.00</div>	<div>0</div> <div>USD \$0.00</div>		<div>Qty: 0</div> <div>USD \$0.00</div>
<div>AVAILABLE: 100</div> <div><div>Cocktails-To-Go, Cocktail...</div><div>HR21S1029178-C</div><div>USD \$0.00</div></div>	<div>6</div> <div>USD \$0.00</div>	<div>20</div> <div>USD \$0.00</div>	<div>0</div> <div>USD \$0.00</div>		<div>Qty: 26</div> <div>USD \$0.00</div>
<div>AVAILABLE: 400</div> <div><div>Cocktails-To-Go, Collapsi...</div><div>HR21S1029189-C</div><div>USD \$0.00</div></div>	<div>100</div> <div>USD \$0.00</div>	<div>100</div> <div>USD \$0.00</div>	<div>100</div> <div>USD \$0.00</div>		<div>Qty: 300</div> <div>USD \$0.00</div>
<div>AVAILABLE: 4</div> <div><div>Cocktails-To-Go, Drink C...</div><div>HR21S1029182-C</div><div>USD \$0.00</div></div>	<div>0</div> <div>USD \$0.00</div>	<div>0</div> <div>USD \$0.00</div>	<div>0</div> <div>USD \$0.00</div>		<div>Qty: 0</div> <div>USD \$0.00</div>
Total	USD \$0.00	USD \$0.00	USD \$0.00		USD \$0.00

6

←

1

2

3

...

37

→

Save For Later

Checkout



# Using VALO Commerce: Placing a Bulk Order

## Step #4: Continue to checkout or save the order for later

Orders can be submitted for processing, or saved to review and submit at a later date.

Bulk order "Test Program Bulk Order"

Hornitos

GBH-Hornitos

Selected items only

+

Products	Lisa Wade Beam Suntory 222 West Merchandise Mart Plaza	Melissa Raad HH Global 3180 Curlew Ave Oldsmar, FL, 33761	Test User Beam Suntory 222 West Merchandise Mart Plaza	<div><div>+</div><div>Add Location</div></div>	Sub Total
<div>AVAILABLE: 122</div> <div><div></div><div>2020 HR SHOT GLASSES ... HR21A1038914-C USD \$0.00</div></div>	<div>5</div> <div>USD \$0.00</div>	<div>0</div> <div>USD \$0.00</div>	<div>0</div> <div>USD \$0.00</div>		<div>Qty: 5</div> <div>USD \$0.00</div>
<div>AVAILABLE: 25</div> <div><div><div></div><div></div></div><div>Cocktails-To-Go, 2 oz. Sh... HR21S1029180-C USD \$0.00</div></div>	<div>5</div> <div>USD \$0.00</div>	<div>10</div> <div>USD \$0.00</div>	<div>0</div> <div>USD \$0.00</div>		<div>Qty: 15</div> <div>USD \$0.00</div>
<div>AVAILABLE: 65</div> <div><div><div></div></div><div>Cocktails-To-Go, Citrus S... HR21S1029190-C USD \$0.00</div></div>	<div>0</div> <div>USD \$0.00</div>	<div>0</div> <div>USD \$0.00</div>	<div>0</div> <div>USD \$0.00</div>		<div>Qty: 0</div> <div>USD \$0.00</div>
<div>AVAILABLE: 100</div> <div><div><div></div></div><div>Cocktails-To-Go, Cocktail... HR21S1029178-C USD \$0.00</div></div>	<div>6</div> <div>USD \$0.00</div>	<div>20</div> <div>USD \$0.00</div>	<div>0</div> <div>USD \$0.00</div>		<div>Qty: 26</div> <div>USD \$0.00</div>
<div>AVAILABLE: 400</div> <div><div><div></div></div><div>Cocktails-To-Go, Collapsi... HR21S1029189-C USD \$0.00</div></div>	<div>100</div> <div>USD \$0.00</div>	<div>100</div> <div>USD \$0.00</div>	<div>100</div> <div>USD \$0.00</div>		<div>Qty: 300</div> <div>USD \$0.00</div>
<div>AVAILABLE: 4</div> <div><div><div></div></div><div>Cocktails-To-Go, Drink C... HR21S1029182-C USD \$0.00</div></div>	<div>0</div> <div>USD \$0.00</div>	<div>0</div> <div>USD \$0.00</div>	<div>0</div> <div>USD \$0.00</div>		<div>Qty: 0</div> <div>USD \$0.00</div>
<div>Total</div>	<div>USD \$0.00</div>	<div>USD \$0.00</div>	<div>USD \$0.00</div>		<div>USD \$0.00</div>

6

1

2

3

...

37

Save For Later

Checkout

# Using VALO Commerce: Placing a Bulk Order

## Step #5: Choose Shipping Method(s) for each location.

Available shipping method and approval rules are the same as standard Commerce orders.

Bulk order "Test Program Bulk Order"

Lisa, Wade, Beam Suntory, 222 West Merchandise Mart Plaza, Chicago, IL, 60654, United States

Next Kit USD \$0.00

Melissa, Raad, HH Global, 3180 Curlew Ave, Oldsmar, FL, 33761, United States

Next Kit USD \$0.00  
FedEx Standard Overnight USD \$93.86  
FedEx 2 day USD \$104.84

Test, User, Beam Suntory, 222 West Merchandise Mart Plaze, Chicago, IL, 60654, United States

Next Kit USD \$0.00

ORDER SUMMARY

Sub Total

USD \$0.00

SHIPPING

Shipping Total

USD \$0.00

TOTAL

USD \$0.00

Back

Submit

Next Kit Orders must be placed by 5 PM Wednesday to meet Friday consolidated shipments.

Expedited Orders will ship from the warehouse the following day after the order is placed.

Users will receive Email Notifications when order has shipped.

Click “Submit” to complete Bulk Order.

# Corporate and Personal Address Books

VALO Commerce offers two types of address books to make the process easier to complete.

The **Corporate Address Book** is a set of pre-loaded addresses covering the complete, nationwide list of locations. It is the one source of truth that is maintained and also used in POS Buys. During the checkout process, Users can search and select an address from the Corporate address book as well as add it to their Personal Address Book (see p. #21 for more details). The Corporate Address Book must be utilized as the “single source of truth” for all current addresses across the business.

The **Personal Address Book** is a user level address book you can manage. We recommend using it to store your frequently used addresses. The corporate address entries can be copied to the personal address book, **however, personal addresses do not automatically update when the corporate address book is updated**. With that in mind, you can pull in corporate addresses that are most relevant, but we recommend checking the Corporate Address Book and periodically updating any saved PersonalAddress entries.

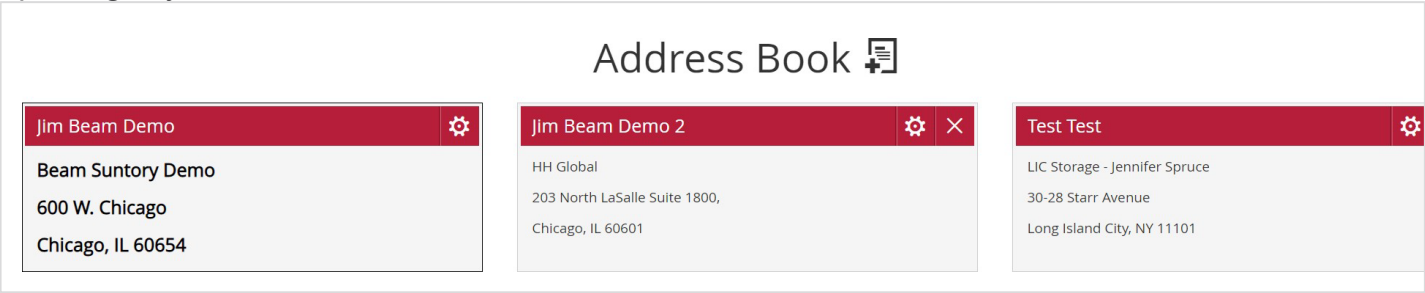


Figure 21 – Personal Address Book Screen

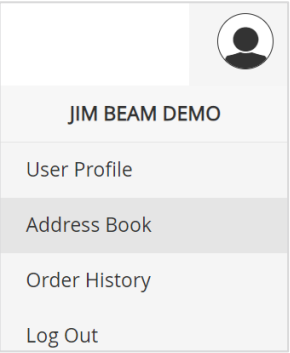


Figure 22 – User Icon Address Book Link

To manually add an address to the Personal Address book, log in to VALO, click on Commerce on the Portal Home page, then on “Address Book” found under the user icon at the top right side of the VALO Commerce screen.

# Corporate and Personal Address Books

Click the Add Address icon  to enter a new address.

You can modify an address by clicking the gear icon , or click the X icon  to delete it.

You can save corporate addresses to your Personal Address Book when viewing them during the checkout process.

To add a CorporateAddress to your PersonalAddress Book,  
Select the Shipping Address and click the copy icon which is on the right.  
(Figure 24)

If you’re completing a multiple address checkout, you’ll be able to add all of the selected addresses to the personal address book at the same time.

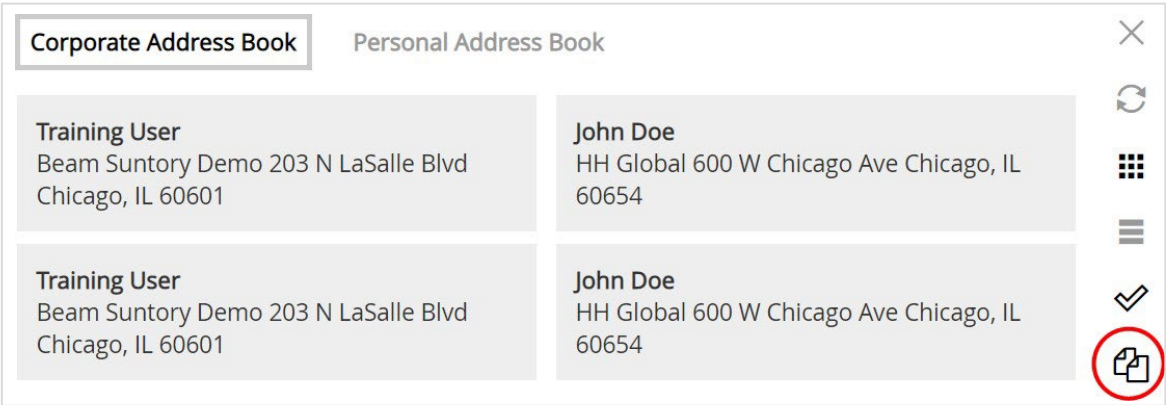


Figure 24 – Copying Corporate address to personal address book option

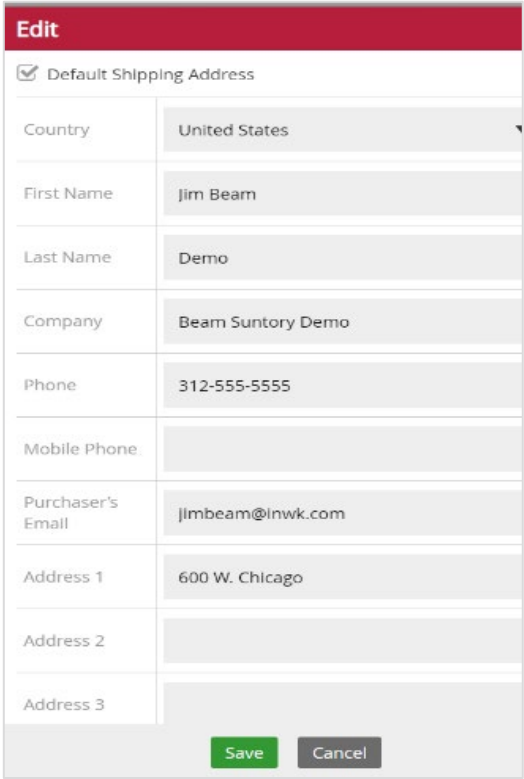
The 'Edit' screen has a red header. Below it, a checkbox labeled 'Default Shipping Address' is checked. The form contains several input fields: 'Country' (United States), 'First Name' (Jim Beam), 'Last Name' (Demo), 'Company' (Beam Suntory Demo), 'Phone' (312-555-5555), 'Mobile Phone' (empty), 'Purchaser's Email' (jimbeam@inwk.com), 'Address 1' (600 W. Chicago), 'Address 2' (empty), and 'Address 3' (empty). At the bottom right are 'Save' and 'Cancel' buttons.

Figure 23 – Personal Address Screen

# Additional Tools

The following features can be accessed by a menu that pops up when you hover over the user icon at the top right corner of the site.

User profile

Use to view user information and default address.  
For updating personal addresses, we recommend using the address.

\*You should not need to updated your default address at any point. This address does not affect any orders placed in through Commerce.

Profile

User Account

First Name

Jim Beam

Last Name

Demo

Email

jimbeam@inwk.com

English (US)

Default Shipping Address

Country

United States

First Name

Jim Beam

Last Name

Demo

Company

Beam Suntory Demo

Purchaser's Email

jimbeam@inwk.com

Phone

312-555-5555

Mobile Phone

Address 1

600 W. Chicago

Address 2

Address 3

Address 4

City

Chicago

St / Province

IL

Default Billing Address

Country

First Name

Last Name

Company

Purchaser's Email

Phone

Mobile Phone

Address 1

Address 2

Address 3

Address 4

City

St / Province

JIM BEAM DEMO

User Profile

Address Book

Order History

Log Out

Figure 25 – User Profile Screen



# Additional Tools

## Order history

To access a list of your previous orders, hover over your User icon, and then select *Order History*.

On the Order History page, you can filter by order date or status, or search for a key word.

Shop

Date Range

12/31/2000

3/19/2019

Order Status

☒ In Progress

☒ Partially Shipped

☒ Completed

☒ Invoiced

☒ Canceled

Order Number

Product name

Description



Search

Order History

6

ORDER NUMBER	ORDER DATE	ORDER TOTAL	ORDER STATUS	ORDER DETAILS
#PO1223011457	2/8/2019	USD \$0.00	Completed	<a href="#">View Details</a>

Click the *View Details* link in the Order Details column to open the order's Confirmation information, which lists all the items included in the order.

At the bottom of the screen, you can click the Shopping Cart button  to add all the items to your cart if you want to reorder a previous order placed, or you can click the Print button  to print the screen

ORDER CONFIRMATION

10/15/2019

ORDER #PO2421677753

DETAILS  
In Progress

SHIPPING ADDRESS

Jean Doe  
Sample Company 1  
123 Anywhere Street  
Chicago, IL 00000  
United States  
000-000-0000

Item	Line Item Status	Quantity	Price	Sub
JBA PHONE FAN COURTNEY STARK JBA20AD0129-C Group East-RGN-NY	In Progress	23	USD \$0.00	USD \$0.00
Next Kit				USD \$0.00

PAYMENT INFORMATION

Payment method: Bill to My Account

TOTAL: USD \$0.00



Figure 26 – Order History Order Details Screen



JIM BEAM DEMO

User Profile

Address Book

Order History

Log Out

# Additional Tools

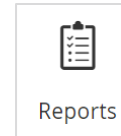
## Frequently asked questions

### 1. Who do I reach out to if I have questions or concerns about using VALO?

Please send an email to [inventory.beam@hhglobal.com](mailto:inventory.beam@hhglobal.com) to reach our customer support team.

### 2. How do I view my inventory allocations?

After logging into VALO, click on the “Reports” module to access the Allocation Report.



### 3. How do I transfer inventory to another allocation group?

If you wish to transfer inventory to another location, please email [inventory.beam@hhglobal.com](mailto:inventory.beam@hhglobal.com) your request and you'll be promptly assisted. This is an interim solution as development is underway to support inventory transfer within the Commerce site, completion is due Q3 2021.

### 4. What search terms can I use in the item search in the VALO Commerce Module?

The search bar will search through item codes, names, and descriptions.

### 5. When should I use the Personal vs. Corporate address book?

The Corporate Address Book represents the master address book which is the one source of truth for address data. We recommend using it for ordering.

The Personal Address Book should be used to save frequently used addresses and can be used to hold a copy of corporate addresses but these will need to be manually updated (recopied from the corporate address book) to ensure they reflect the most recent changes.

# Additional Tools

## Frequently asked questions

### 6. How do I find a shipping location to complete an order?

You can search the corporate address book during your checkout process by clicking “Open Address Book” on the Shipping page.

Items

Shipping Address

Delivery

Payment

Checkout

✓

2

3

4

5

Shipping Address

Open Address Book

Clear

The Corporate addresses will appear and can be searched using search fields on the left side of the screen by entering search terms and clicking the “Search” button.

Shipping Address

Search by

Search

COUNTRY

FIRST NAME

LAST NAME

Corporate Address Book

Personal Address Book

Aaron Beavers  
Aaron Beavers 1213 West 6th St. #4006  
Austin, TX 78703 FNY-Texas BGSW

Aaron Beavers  
Glazer's San Angelo 2030 A Loop 306 Attn:

Aaron Bea  
Aaron Bea  
Austin, TX

Aaron Bea  
Glazer's Te

# Additional Tools

## Frequently asked questions

### 7. How can I look up shipping addresses to check the most recent?

The Corporate Address Book will contain the most recent version of addresses and can be reviewed while placing an order. To access choose the Address Book option under the user icon. It does not automatically update your Personal Address Book so you may need to make updates to the address in personal address book if they've changed in the CorporateAddress Book.


### 8. How can I estimate how long shipping will take to a certain destination?

Please [click here](#) to view our national map for domestic ground service transit estimates.

### 9. My order has shipped. When will it arrive?

You will receive tracking information via email when your order ships. It is also visible in the VALO Commerce module in Order History. Click on the Order History link under the user icon at the top-right of the VALO commerce screen, then on “View Details” on the listed order.

ORDER NUMBER	ORDER DATE	ORDER TOTAL	ORDER STATUS	ORDER DETAILS
#PO2421677753	2/8/2021	USD \$43.00	Completed	<a href="#">View Details</a>



JIM BEAM DEMO

User Profile

Address Book

Order History

Log Out

Tracking information appears underneath each line item. It will include a link to click on to view the estimated arrival time for your order.

JBA PHONE FAN COURTNEY STARK JBA20A09235-C Group East-RGN-NY	In Progress	23	USD \$0.00
<div>Tracking Received Fed Ex Ground 12/20/2020 Tracking Number 8675309 Tracking URL <a href="http://wwwapps.ups.com/WebTracking/processInputRequest?US&amp;InquiryNumber1=8675309&amp;track.x=0&amp;track.y=0">http://wwwapps.ups.com/WebTracking/processInputRequest?US&amp;InquiryNumber1=8675309&amp;track.x=0&amp;track.y=0</a></div>			

# Additional Tools

## Frequently asked questions

### 10. I have questions about placing orders with a single or multiple ship-to addresses. Who can I reach out to?

Please email [inventory.beam@hhglobal.com](mailto:inventory.beam@hhglobal.com) for assistance with any questions or concerns you have for orders of any size.

### 11. What is a bulk order?

HH Global considers the following to be bulk order:

- \*An order that exceeds 5 items each going to 5 different locations (25 different line items)
- \*An order that exceeds 20 + items going to an individual location

### 11. How do I submit a Bulk Order?

- \*Complete all applicable fields in the Bulk Order Request Template and email it to [inventory.beam@hhglobal.com](mailto:inventory.beam@hhglobal.com). The template can be found [here](#).
- \*Please note that this is a short-term process as a long-term system enhancement is currently in development.
- \*Customer Service is available to assist with all order inquiries, including those that do not meet the definition of a bulk order.



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