ABC Customer Portal

ABC Version 4.2

COMPUTRONIX®

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Understanding the Customer Portal

The Customer Portal allows outside users to do the following:

- **Register** a user account
- **Submit** online complaints
- **Search** for licenses in the ABC system

The Customer Portal provides the customer with the ability to see a variety of activities, request information and communicate with staff regarding licensing, brand registration, and complaints.
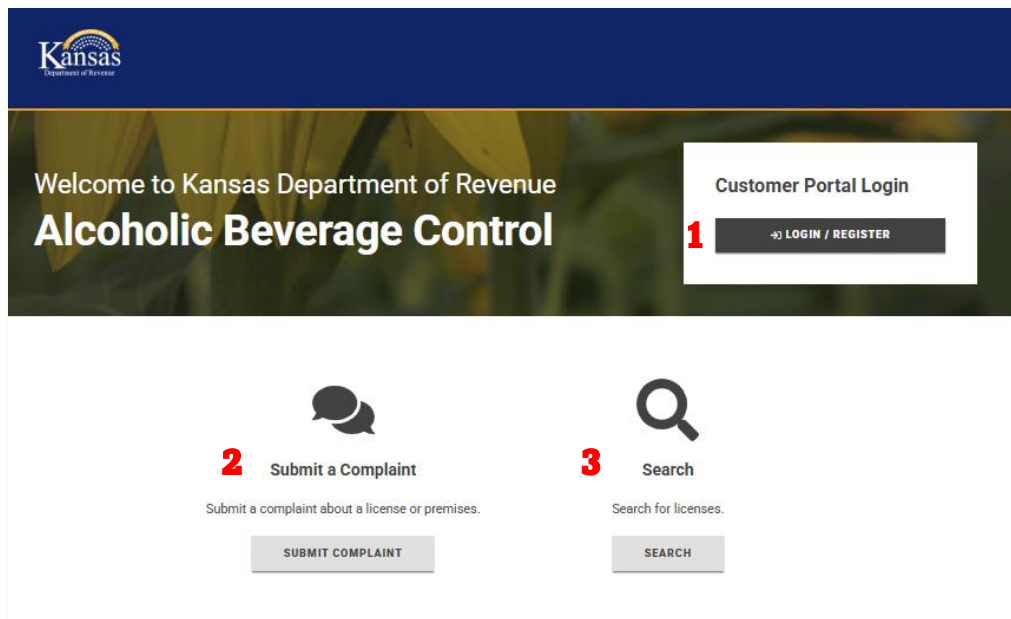
When first accessing the Customer Portal, the user sees a number of options that are available to them.

| Location	Description
1	Provides the ability to enter a valid email address and password for registered users of the system. Also allows users to create an account as a first-time user of the system.
2	Provides the means to allow an external, non-registered user the ability to submit an initial complaint to the jurisdiction.
3	Allows users to search public records and locate current liquor licenses and permit information.

General Features

The Customer Portal has a number of features and icons that allow the user to easily navigate, see results, and access information that can be used throughout the application.

Widgets and Icons

A number of icons and widgets exist in the Customer Portal environment. A few examples and details have been included below.

1. Drop-down arrows allow the user to expand information or include additional criteria to find information. In the example below, when selecting the arrow icon, the user will be presented with a pop-up box that includes additional filtering and selection criteria
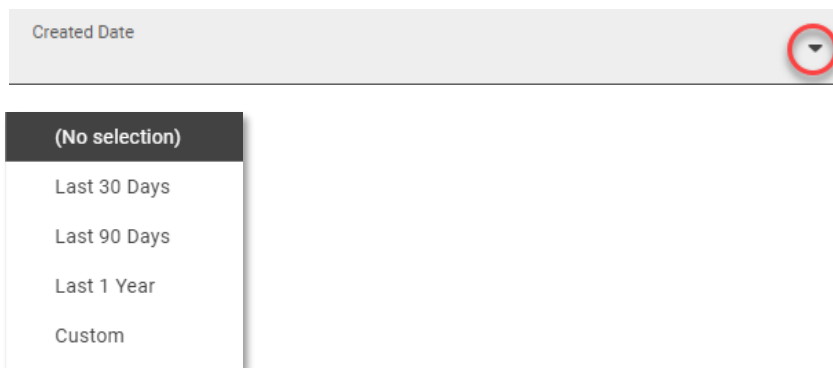
2. Date selection on specific fields, when triggered by the user can be displayed in the system by selecting the date icon, as shown. A full month calendar view will appear, allowing the user to select a date to filter results by in the system.
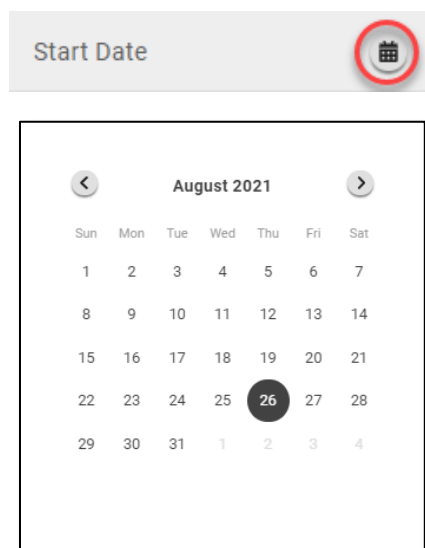
The table below illustrates an additional set of buttons, icons and widgets that may be helpful for the user when initiating action within the Customer Portal.

| Icon	Function	Explanation
▼	**Filter**	Prompts a filter display box where the user can enter a word or words to filter a table of information.
Q	**Search**	Searches for information in the system. Corresponding matches will be displayed.
🛗	**Calendar**	Opens the calendar display as identified above.
↗	**Expand**	Provides the ability to expand a text field or display window allowing more information to be seen.
🗑	**Trash**	Deletes or removes an entry.
🖨	**Print**	Prints a list or table display of results.
✏	**Edit**	Modifies or changes entered text within defined fields in the system.
❓	**Information**	When hovered over, provides additional information explaining, by example, why certain boxes may be "grayed out."
💾	**Save**	Saves entry of information added to fields in the system.
●✓	**Step**	Visually displays the step or steps in an active process on which the user exists within the system wizard.

Responsive Design

Responsive web design ensures that web pages look good and function well on all sizes of devices (i.e. tablet, mobile phone, laptop, etc.). A responsive web design automatically adjusts for different screen sizes, without losing content, functionality, or information, but adjusting those sources based on the type of device used.

The responsive layout allows for text, image, and links to be laid out for the user and to be read easily based on the size of screen. The typical layout of the *Landing Home Page* for the Customer Portal as viewed on a monitor or laptop screen is shown below. The layout changes when viewing the same *Landing Home Page* on a tablet of phone as shown below.
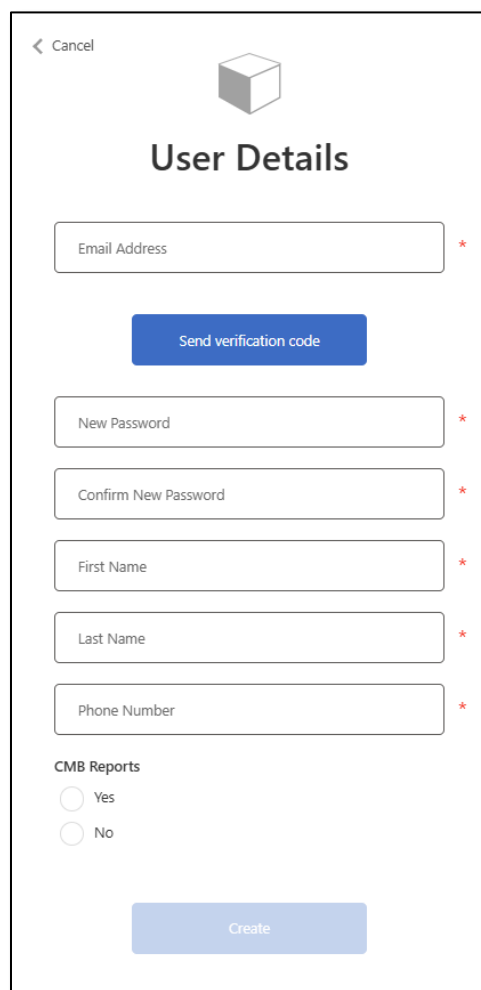
Screen Formats
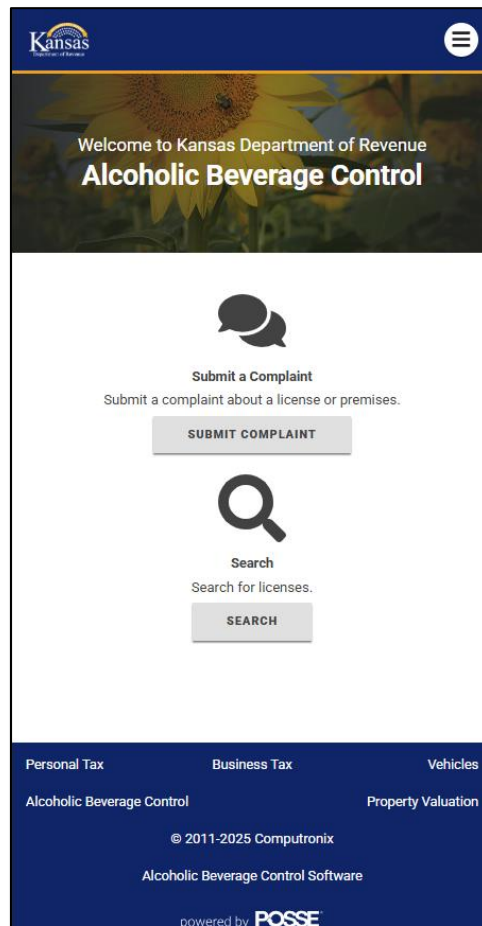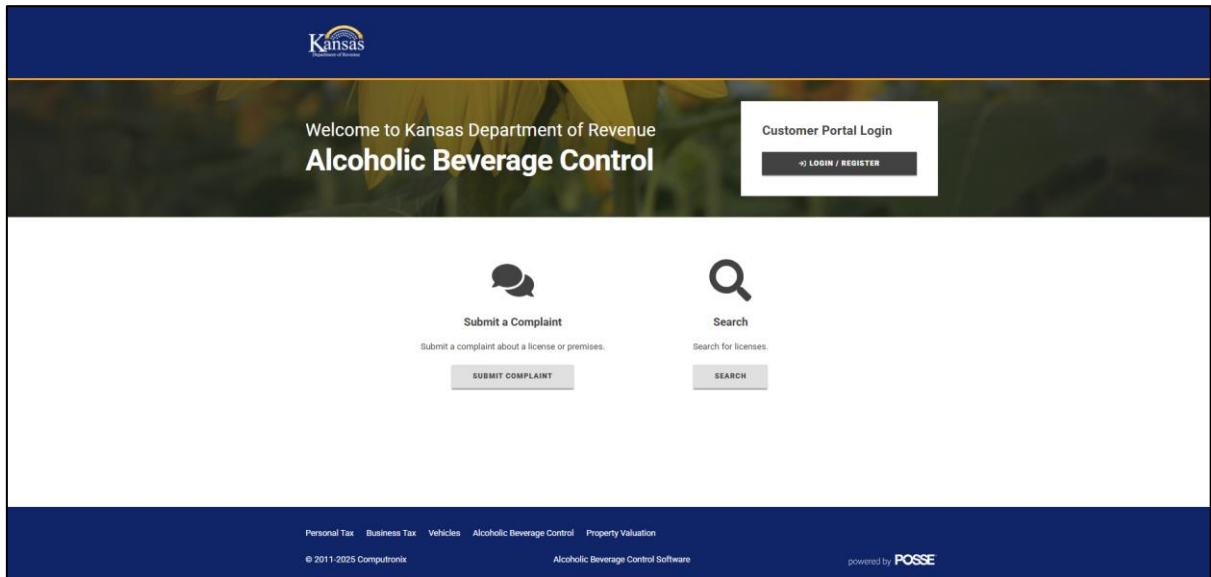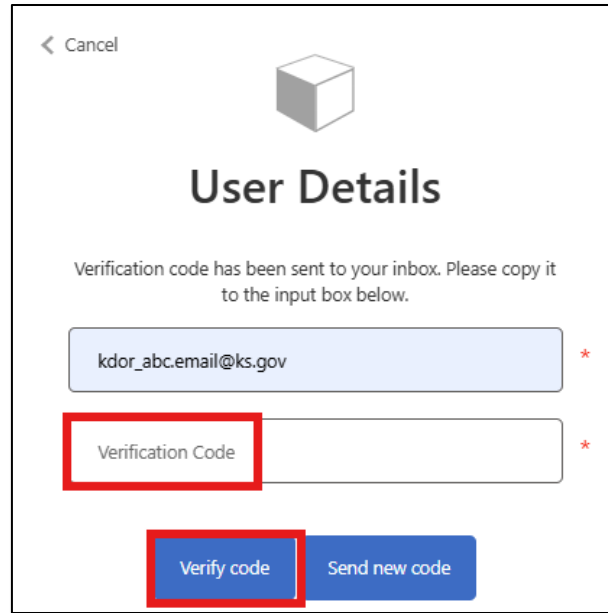
Registering as a New User

First time users to the new Customer Portal must register with the system to have access to specific features in the system. If you previously had an account registered with Kansas ABC, you must register with the same email address, and you will automatically be linked to your license(s).

1. Click **Login / Register** on the Home page.
2. Click **Sign up now**.
3. The system displays the configured information required for first time user registration.

4. Enter an email address and click **Send verification Code**.
5. Find the verification code at the email address specified, enter the verification code, and select **Verify Code**.

6. Enter required details:
   a. New Password
   b. Confirm Password
   c. Given Name
   d. Surname
   e. Phone Number
7. If you are a city or county clerk that reports CMB licenses, mark '**Yes'** for CMB Reports, otherwise mark '**No'**. Note this will only be used by clerks to report and pay for CMB stamps issued prior to October 1, 2025.
8. Click **Create.** Getting Started page displays.

ABC Customer Portal Login

All registered external users must login to the Customer Portal to access specific information and activities related to the Online ABC application.

This can include the ability to submit an online application, search for activities, make payments and update user profile information.

To login to the application, follow these steps:
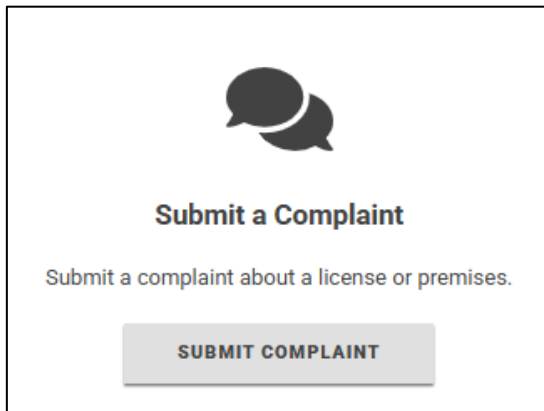
Location	Description
1	Enter the **email** identified during registration.
2	Enter the **password** identified during registration or select your chosen third-party authentication provider.
3	Click **SIGN IN**.

Incorrect entry of either the email address or password is noted by the system, and there is an ability to make another attempt.

If users forget their passwords, the **Forgot your Password?** link allows for resetting of passwords via an email sent to the email address associated with the account. Users must maintain access to the email address associated with their account at all times. If you no longer have access to the email address, a new account will be required.

Submitting a Complaint

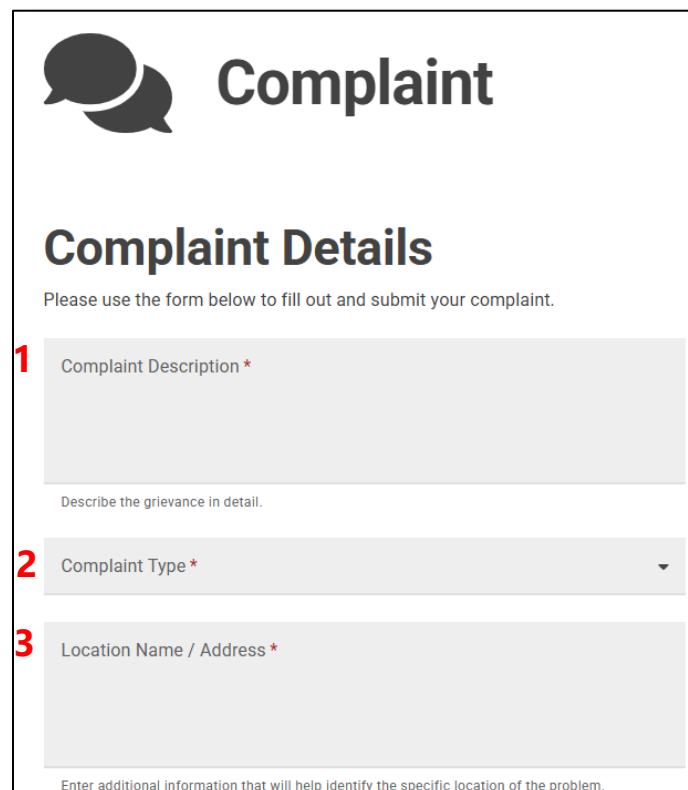The system supports the ability for non-registered users to initiate a complaint related to a potential violation. From the Home Page for the Customer Portal there is a link to initiate a complaint. Click **Submit Complaint** to initiate an online complaint.

Fill in the data requested by the system.

Location	Description
1	Provide a detailed complaint description, including relevant information like the following: • Time of day • Individuals involved • Any observations noted (e.g. excessive noise, operation outside of allowed hours, etc.)
2	Select a complaint type from a drop-down list. Some specific complaint details are mandatory for follow-up action
3	Enter the building, address, and any other relevant location information.

Location	Description
4	Enter a contact name (at minimum) to support the online complaint. A phone number and/or email address allow for possible follow-up if required.
5	Upload any supporting documents or files such as photos.
6	Indicate that you are a valid user by clicking the "I'm not a robot" reCAPTCHA link.

Searching Online ABC

Non-registered users can search the Online ABC system for licenses. To perform a search:
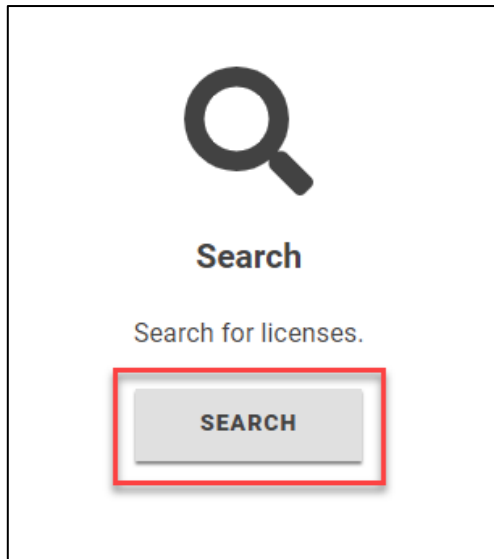
1. Select **Search**.
2. At least one field value must be entered for a search to occur. The system will prompt the user to identify at least one criterion before proceeding.
3. Select **CLEAR** to remove entries.
4. Select **SEARCH** to see any matching results based on criteria that were entered.
5. Matches appear below in a table view. No matches still display a table view, but it has no values populated in it.

License Type	Number	Status	Licensee	Premises Name	Premises Address	Effective	Expires
22% Manufactu...	3041	Active	TEST CORP 2	TEST PREMISES	923 LUNALILLO D...	May 23, 2023	Nov 22, 2023

Location	Description
1	Allows the user to filter the list of results returned based on specific word(s).
2	Displays all matching results and lists additional column details related to the specific search.
3	Provides a means by which the user can print the results listed in the table.
4	The Premises address will display, if it is too long click "…" to bring up the rest of the address.

Moving Around

When the user has logged into the system, it displays a number of links at the top of the menu that allow easy navigation and some additional features.
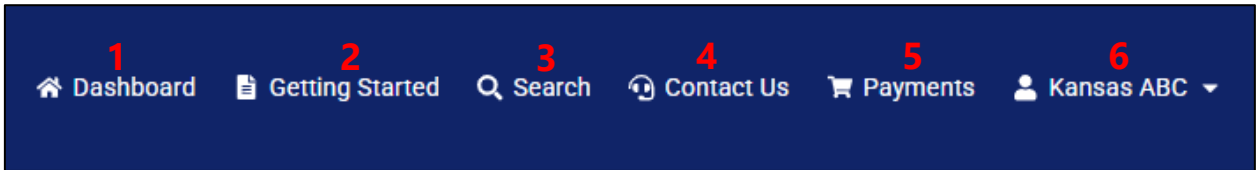

Location	Description
1	Brings the user back to the menu screen based on activity (i.e., Licensing, Brand Registration, Complaints, etc.).
2	Takes user back to the main start screen.
3	Triggers a pop-up display for searching license records.
4	Provides a link to contact information for questions related to using the Customer Portal site.
5	Allows user to pay balance owed on activities in a single location. When payments are due, it will display as Outstanding Fees rather than Payments.
6	Allows for updating, modifying or changing information based on user profile.

Getting Started

The **Getting Started** menu has a number of activities that the user can initiate in the system. Four (4) areas of focus exist in the Customer Portal:

- Licensing **L**
- Brand Registration **BR**
- Complaints **C**
- CMB Reporting **CMB** for city and county clerks

Within each module listed above, you can click the **drop-down arrow** adjacent to the activity name to display a list which allows the user to navigate to other available modules.
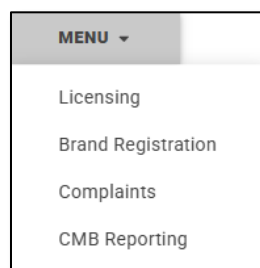
Getting Started

Licensing

In Licensing, you can apply for a new license or special event license, monitor applications and licenses, renew or amend existing licenses, and file and monitor protests.

SELECT

Brand Registration

In Brand Registration, you can apply for new registrations, and for existing brands add new distributors, upload labels, submit corrections or additional information, initiate renewals, and search for and view your brands.

SELECT

Complaints

In Complaints, you can submit a new complaint and monitor complaints you have submitted.

SELECT

CMB Reporting

In CMB Reporting, you can submit a new CMB report and monitor existing CMB reports.

SELECT

Payments

Click **Outstanding Fees** to make one or multiple payments tied to outstanding fees owed. Outstanding Fees are displayed in a simple table format, which can be filtered or adjusted to identify specific activities or licensees. Links exist to allow the user to see additional details about the job. They appear under the File Number heading.

1. You can select **PAY ALL** if you wish to pay all the fees listed.
2. You can select **SELECT FEES** to choose the fees you wish to pay. When using this option,
   a. Use the checkbox ☐ icon to select those fees that should be paid and click '**SELECT FOR PAYMENT**' to add the fees to the **Selected Fees for Payment** section. You can then select your **Payment Method** and click **PAY**.

My Profile

When the identified name is selected, the system provides a drop-down display that includes multiple categories:

1. **My Profile** - Shows details related to the external registered customer.
2. **Sign Out** - Allows you to log out of the Customer Portal.

1. The profile includes the **Details** tab and the **Licensee/Agent** tab.
2. Select the Details pane, which includes fields for *Username* (first and last) and *Phone Number*. These fields can be revised. Note: the Email Address cannot be changed.
3. Click the Save 🔲 icon to save any changes that have been made.

To see Licensee / Agent information tied to the user's profile, select the tab (1) as shown above.

My Profile

DETAILS   LICENSEE / AGENT

My Licensee / Agent Information

Below are the Licensees / Agents that have been verified by internal staff for your use on any future applications. Click the row to view more information.

Name	Legal Entity Type	
Kansas ABC LLC	Limited Liability Company	**1**

To associate Licensees / Agents to your profile, enter an Online Access Code below.

Online Access Code

→ ASSOCIATE   **2**

Please select an address.

Correspondence Address *
109 SW 9th Street, Topeka, KS 66612 Shawnee   **3**

4

1. Displays the entity Name and Legal Entity Type associated with the account. Users can be associated with more than one Legal Entity and can use the filter function to find specific entities in the list.
   a. Clicking on the Legal Entity's name provides a summary of the Legal Entity, address information, and ownership structure.
   b. If the Online User is specified as the Manager, the Online User can manage Online Access Codes, and Manager access for users.
2. The **Associate** button allows the user to link to another business, provided the user has the **Online Access Code** (provided by the online Manager of a Legal Entity or ABC Staff).
3. Displays the **correspondence address(s)** associated with the licensee / agent.
4. Allows any changes to be saved, by selecting the **Save** icon.

Dashboard Features

The Customer Portal dashboard shows activities related to specific module(s) (i.e., Licenses, Brand Registration) and will display relevant functions.


Tabs display based on which module the user is accessing in the Customer Portal. The **Actions Required** tab includes any action required to be completed by the user such as pay fees, renew licenses, submit regulatory report, submit new application draft that was saved etc.

Using the ABC Customer Portal

The Customer Portal allows external customers to access and submit online applications as well as associated activities such as brand registration, complaints, and regulatory reports. Select **Getting Started** at the top of the business menu.

Applying for a License

From the **Getting Started** menu, select the **Licensing** category. The system displays a new web page with a number of features available to the user.
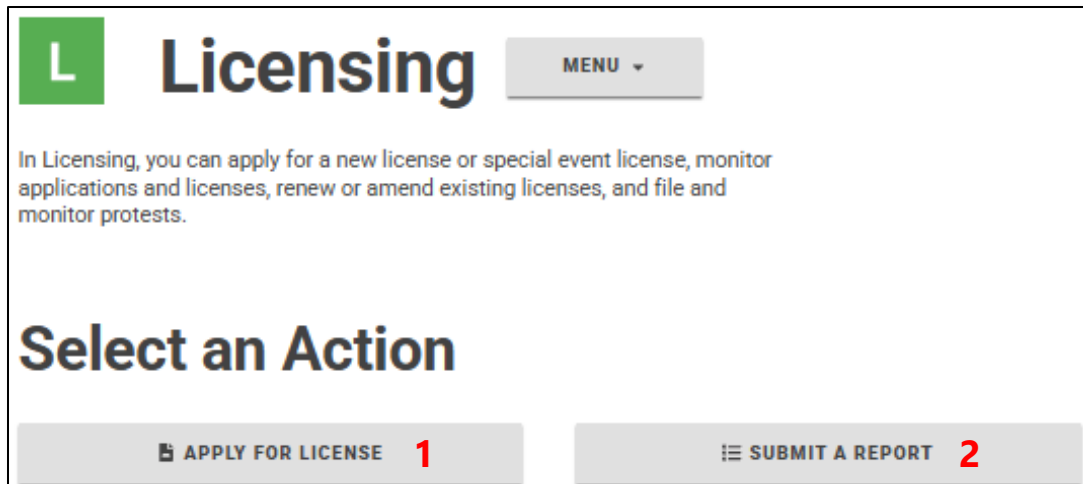
Location	Description
1	Initiates a menu board display of all available licenses to apply for.
2	Provides the ability to submit an ad hoc report request based on an identified license and available report types.

To apply for a license:

1. From the Licensing Action area, click **Apply for License** (1).

2. All license types are displayed in groupings of **On-Premise Licenses**, **Off-Premise and Other Licenses** and **Permits**.
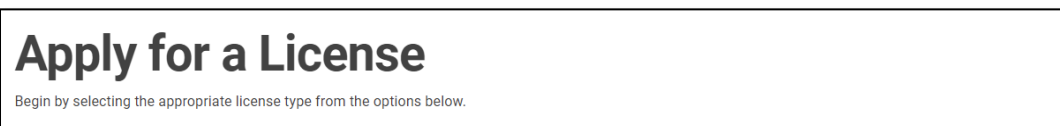
On-Premise Licenses

CATERER	CLASS A CLUB (FRATERNAL/VETERANS)	CLASS A CLUB - SOCIAL (500 MEMBERS O...
CLASS A CLUB - SOCIAL (OVER 500 MEMB...	CLASS B CLUB	DRINKING ESTABLISHMENT
DRINKING ESTABLISHMENT/CATERER	HOTEL DRINKING ESTABLISHMENT	HOTEL DRINKING ESTABLISHMENT AND C...
PUBLIC VENUE LICENSE		

Off-Premise and Other Licenses

DISTRIBUTOR - BEER	DISTRIBUTOR - SPIRITS	DISTRIBUTOR - WINE
FARM WINERY	FARM WINERY OUTLET	FULFILLMENT HOUSE
MANUFACTURER'S LICENSE	MICROBREWERY LICENSE	MICROBREWERY PACKAGING AND WAREH...
MICRODISTILLERY LICENSE	MICRODISTILLERY PACKAGING AND WARE...	NON-BEVERAGE USER LICENSE
PRODUCER	RETAILER'S LICENSE	SPECIAL ORDER SHIPPING LICENSE

Permits

COMMON CONSUMPTION AREA PERMIT	FARMERS' MARKET SALES PERMIT	NON-BEVERAGE PERMIT
PACKAGING AND WAREHOUSING FACILITY...	SUPPLIER PERMIT	TEMPORARY PERMIT

3. Select the license or permit you wish to apply for.

4. This will initiate a new online application submission in the system.

Using the License Wizard

The **License Wizard** allows the registered user to navigate through the steps related to the type of license selected for online submission.

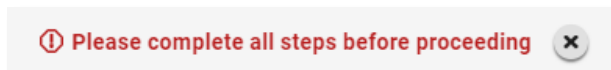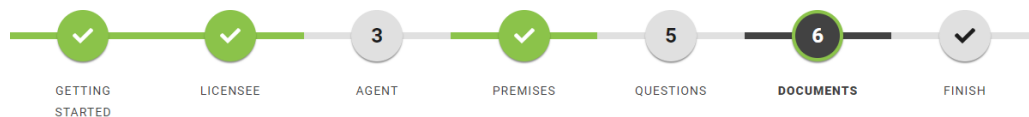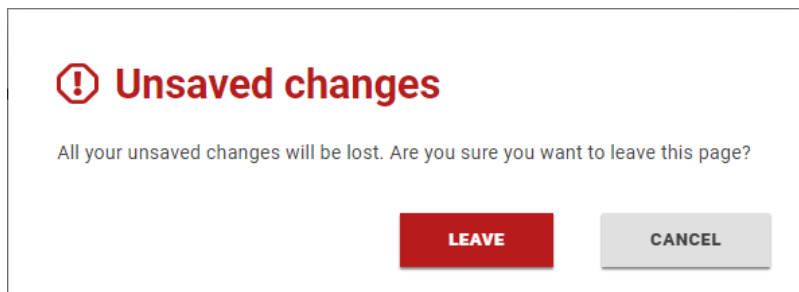| Location	Description
1	Indicates the status of the online application.
2	Allows the user to save or delete the application.
3	Advances the License Wizard to other steps involved for the specific License by clicking **Next**.

Working through an Online License Request

Based on the selected License Type, the user follows several steps to complete the online application and submit for consideration:

1. Start a **License** application and begin the navigation steps outlined on the **Licensing Wizard**.
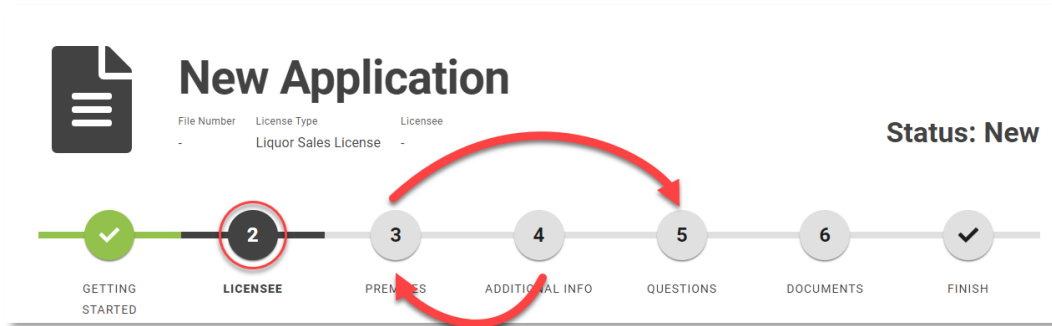
2. The Wizard displays a **Steps Diagram** after the user has completed the "*Getting Started*" page. The user can navigate in sequential order or can skip steps to complete information and return to a previous step, without losing information. The decision of how to complete the application information relies on individual user preference. When all steps have been completed, the system displays a checkmark: ✅ as shown above.

3. The system identifies the next step as a black circle with a number: **2** as shown above.

4. The system notifies the user of any unsaved changes if they leave the application without saving.

5. **Save** at any point in the submission process. The user can return later to continue adding information, prior to applying.

6. Click **Next** to proceed through each of the steps as outlined in the table above.

7. Missing "mandatory" information is noted as a grayed-out "*Number*" without a checkmark. Click the number item to go to the location of where information must be provided or corrected. The system also notes that all steps have not yet been completed.

8. On the **Finish** step, click **Save** to complete later or if you are ready to submit the application you can mark the checkbox for the declaration and choose your Payment Method.

| Location	Description
1	Depending on the license type, you may have the option to pay the first half of your license fee now. The second half would be due in one year along with a 10% surcharge.
2	Read the Declaration and mark the checkbox.
3	There are three options for payment. 1) Add to Payments – allows you to add to your payments list. This option is helpful if submitting multiple applications and you wish to pay in one transaction. 2) Pay & Submit – this option will navigate you to the payment vendors website to enter payment details. Must select the Payment Method prior to clicking this. 3) Submit & Mail Payment – this option will allow you to submit the application online and mail your payment directly to ABC. You will receive an email to print off and mail with your payment. Note: applications will not be approved until payment is received.

Uploading Documents – General

1. Navigate to the **Documents** step. This step is divided into two sections:
    *   Upper section - Outlines the requested attachment types, indicating which is required.
    *   Lower section - For uploading the attachments.
2. Drag the documents to the upload section from the file location.
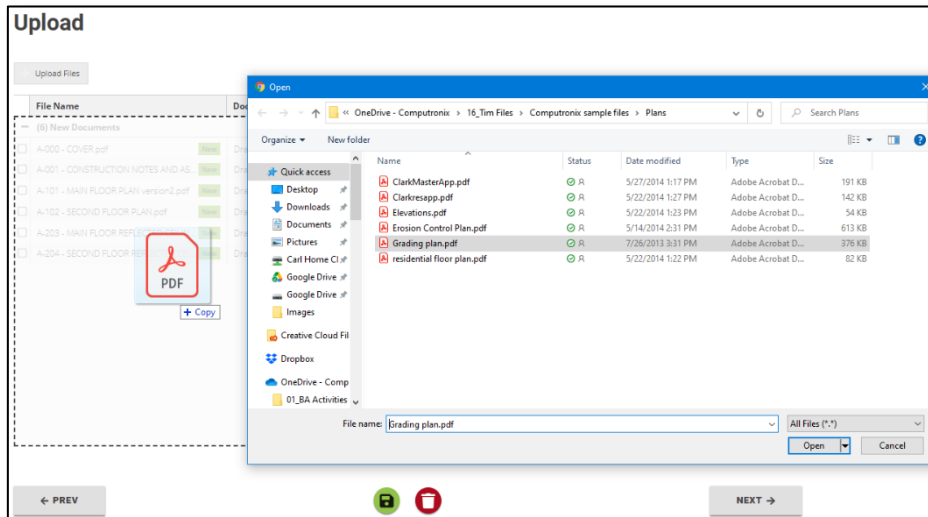
3. The system displays the File Name. Users must select a document type from the drop-down menu. All mandatory document types must be identified before the application can be submitted.
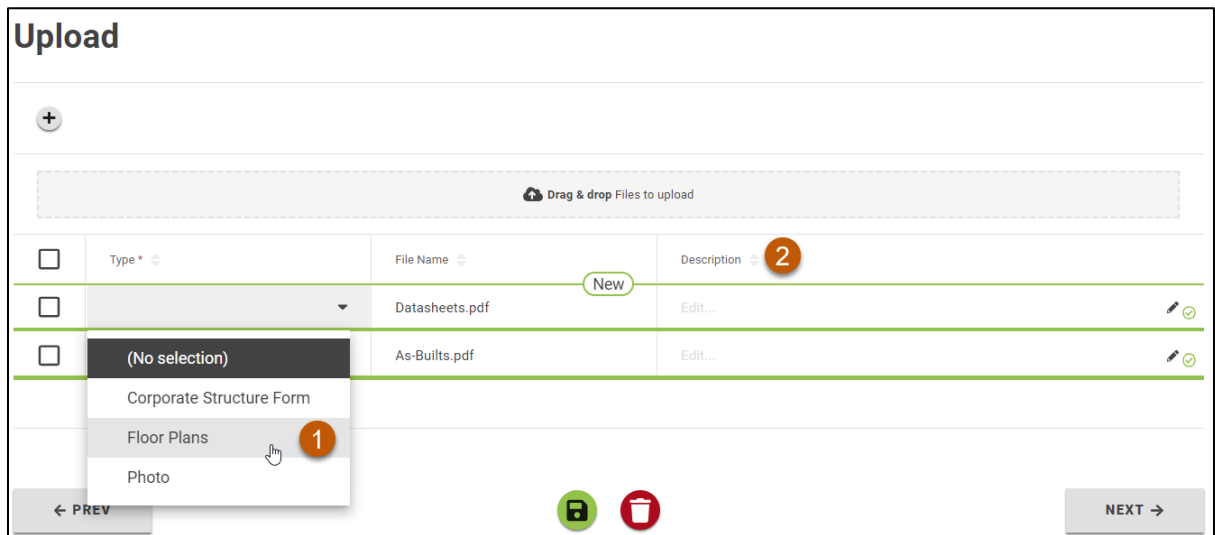
   a. The system prompts the user to identify the **Type** of document uploaded.
   b. The user can also enter a description of the document to help internal staff understand what has been submitted. The edit icon ✏ can be used to edit the description.

Application Details Page

The ability to see a high-level summary of the license application exists within the Customer Portal. This includes additional details and features, depending on the stage of review and activity associated with the application.

1. The user can see the status of the application.

2. Additional features (i.e., outstanding fees, providing additional information) can occur based on the status of the job.

3. The user can request to withdraw the application.

Providing Additional Information

Staff can request additional information or documents from an applicant in relation to an open application. When staff initiate a request for additional information, the applicant will see a notification in their Actions Required grid.

To provide additional information, follow these steps:

1. Select the applicable Application job, based on **Actions Required** previously described and utilize the File Number column to select the Application job.

2. The list of activities includes **Provide Additional Information**.

3. Click **Review** as shown above.

4. Enter any text to answer questions asked by ABC staff or upload any documents requested.

5. The system lists the possible Attachment Types that can be selected as options for the configured License Type.

6. Click the plus ➕ icon to search for a file on the user's computer to add it (1) to the Application job.

7. Select the desired file(s) and click **OK**.

8. **Drag and drop** from the computer's file system is also supported (2).

9. Set the **Document Type**.

10. When all information has been added, select **Submit** (3).

Using the Dashboard

The User Dashboard displays different application information depending on the activity that has been initiated. This information can be filtered.

1. Select the **Licenses** tab on the Dashboard.

2. License jobs appear based on **Type** and **File Number**, as shown above.

3. Click the **File Number** to see specific details around the identified License job.

4. The **Reports** tab displays all reports related to licensing activities, including gallonage tax reports and monthly Supplier reports.

5. Selecting the **Report Number** displays the details on the report and provides the ability to pay any outstanding fees due on the report, if one has been calculated.

6. The registered user can also select **Actions Required** as an ability to see all licenses and license applications that require follow-up or attention from the external user. The table includes details related to the type of item needing attention and an ability to view the item by selecting the **Number** hyperlink to view specific information.

Viewing License Job Details

Selecting the **Licenses** tab provides a list of license applications associated to the registered user.

1. Below the **File Number** column, the system displays all available License jobs that can be selected to display more details.

2. Scroll down past Application Activities and select the **Details** tab.

3. This displays a **Summary** of the License job.

Understanding Activities

On the Details page of the license, several additional features exist, depending on the type of license and how the functionality of the system has been set up by the System Administrator.

1. Select **Amend** to make an amendment request to an active license.

2. Select **Renew** to renew an active license during the renewal period. Typically, a license may be renewed up to 60 days prior to expiration and up to 30 days after expiration.

Note: Kansas ABC does not use Secondary Licenses and state law does not allow licenses to be transferred. These options will always be grayed out.

Submit a Regulatory Report

This feature works for those external registered users who have been identified as having access to certain regulatory reporting features available through the Customer Portal. Kansas ABC uses Regulatory Reporting for the following:

- Distributor Gallonage Tax Return, Sales Report and Purchase Report
- Farm Winery Gallonage Tax Return and Report
- Manufacturer Gallonage Tax Return and Report
- Microbrewery Gallonage Tax Return and Report
- Microdistillery Gallonage Tax Return and Report
- Supplier Permit Monthly Report of Shipments to Kansas Distributors

If you are associated to one of the licenses or permit types listed above, you will have permission to access Regulatory Reporting. A Regulatory Report will be automatically created in the system on the last day of the month, which will be due on the 15th of the following month. To access and submit your monthly Regulatory Report, follow these steps:

1. On the Licensing Dashboard, under the Actions Required tab you will see any Regulatory Reports that have been automatically created by the system with the Action Required status of **Submit Report**.

2. Click on the **Number** to open the Regulatory Report.

3. The Licenses, Report Type, Frequency and Period End Date will automatically be populated. Confirm you are filing for the correct Licensee and for the correct period then click **Next**.

4. For Gallonage Tax Returns you will be required to enter quantities on products imported, manufactured, sold out-of-state, etc., which can be entered and edited using the icon ![icon].

5. Provide any additional information if necessary.

6. Click **Next**.

7. **Upload** all required documents.

8. Click **Next** and review the Report Summary.

9. Certify the information by marking the **Declaration** checkbox.

10. Pay any fees associated with the report by clicking **Pay & Submit** to pay online or clicking **Submit & Pay Later** to mail a payment directly to ABC.

11. If additional Regulatory Reports are needed, you can create an Ad Hoc Regulatory Report from the Licensing menu by clicking **SUBMIT A REPORT**. This may be needed if the report you submitted has already been completed by ABC staff and was missing information or had incorrect information. A second Regulatory Report can be submitted to add the missing or incorrect information. Note: this does not amend your original report submitted. You should contact your licensing representative prior to submitting any additional Regulatory Reports.
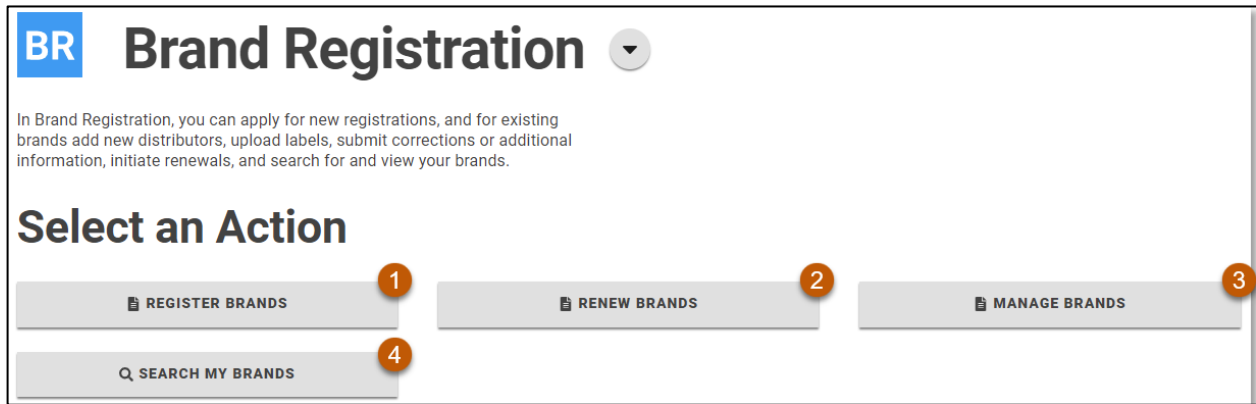
Registering a Brand

Start by going to the **Getting Started** menu and selecting the **Brand Registration** category. The system displays a new page with a number of features available to the user.

BR Brand Registration

In Brand Registration, you can apply for new registrations, and for existing brands add new distributors, upload labels, submit corrections or additional information, initiate renewals, and search for and view your brands.

Select an Action

| REGISTER BRANDS (1) | RENEW BRANDS (2) | MANAGE BRANDS (3) |
| SEARCH MY BRANDS (4) | | |

Location	Description
1	Supports the ability to register brands through the Customer Portal.
2	Allows a registered user to renew brands in the system in June.
3	Provides the ability to manage brands associated with the external user.
4	Searches for brands specifically associated with the external user.

Select an Action

1. From the **Select an Action** area, click **Register Brands** (1).

2. This initiates the Customer Portal Brand Registration wizard that allows the external user to walk through the steps of an online submission.

Starting the Brand Registration Wizard

The **Brand Registration Wizard** allows the registered user to navigate several steps related to the type of registration selected for online submission.

| Location	Description
1	Displays the current status of the online-initiated job.
2	Search for the Licensee you are submitting the job for.
3	Allows the user to save or delete the application.
4	Uses the Brand Registration wizard to advance through the steps.

Brand Registration Wizard Next Steps

The user will follow several steps to complete and submit the online application:

1. Start by selecting Brand Registration and begin navigation steps outlined on the **Brand Registration Wizard**.
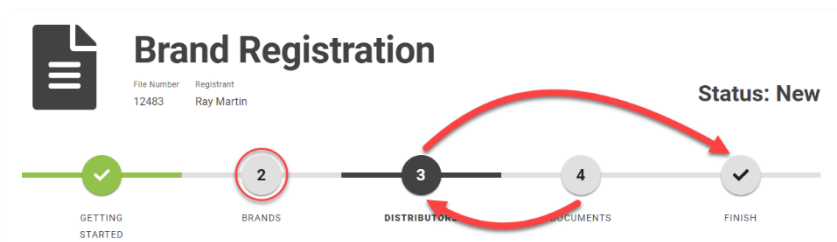

2. When the user has completed the "*Getting Started*" first page, the Wizard displays a **Steps Diagram**. The user can navigate in sequential order or can skip a step or more to complete information and return to a previous step without losing information. When all steps have been completed, the System displays a check mark: ✓ as shown above.

3. The system will identify the next step as black circle with number: ❷ as shown above.

4. The system will notify the user of any unsaved changes if they leave the application without saving.

5. The table below identifies each applicable step tied to the types of brand activities available through online submission.
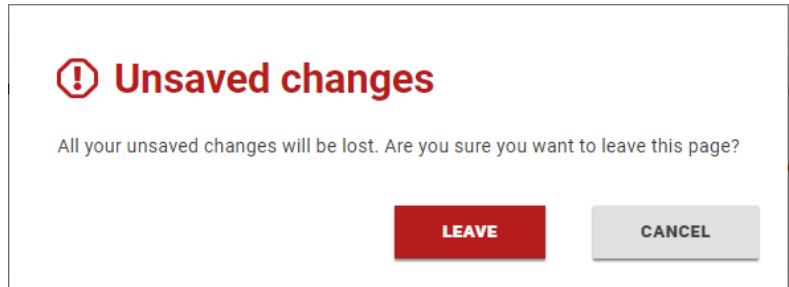
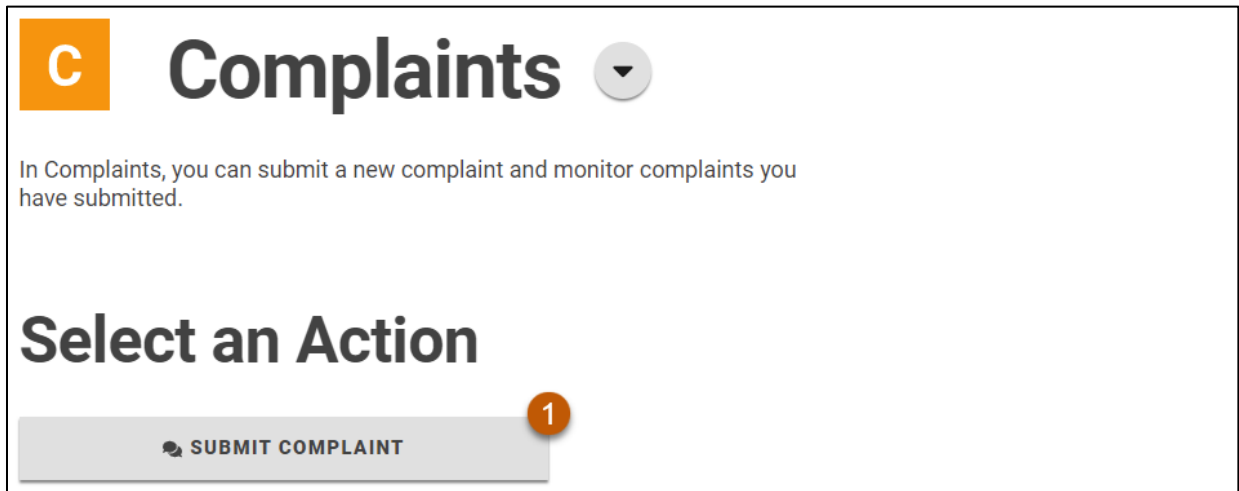|	Brand Registration	Brand Renewal	Brand Amendment
Getting Started	☑		☑
Details		☑	☑
Brands	☑		
Distributors	☑		
Documents	☑		☑
Finish	☑	☑	☑

6. The user can **Save** at any point in the submission process and return later to continue adding information prior to submitting a request.

7. Click **Next** to proceed through each of the steps as outlined in the table above.

8. Missing "mandatory" information is noted as a grayed-out *Number* without a check mark. Click the number item to go to the location of where information must be provided or corrected. The system also notes that all steps have not yet been completed.
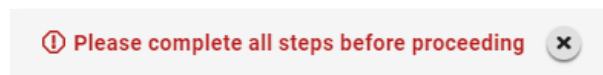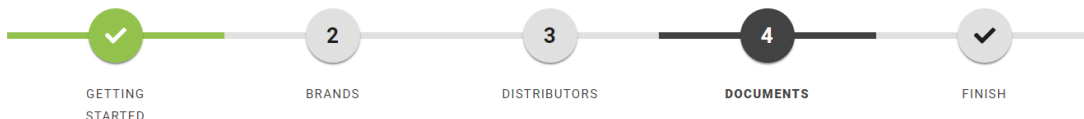
9. On the **Finish** web page, click **Submit Application** or **Save** to complete later.

Filing a Complaint

Start by selecting the **Complaint** category from the Getting Started menu. The system will display a new web page.

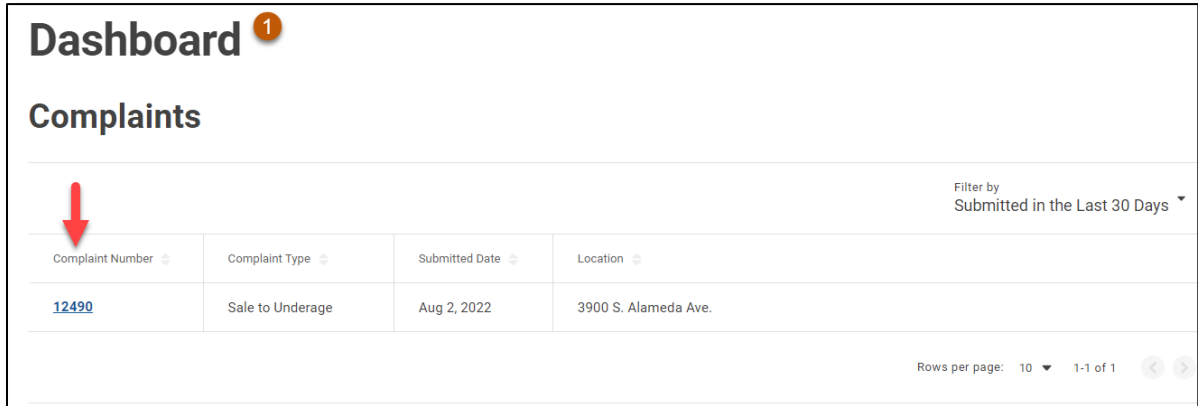| Location	Description
1	Initiates a complaint related to a premises or address.

Select an Action

1. Click **Submit Complaint** (1)

2. This initiates a new online complaint submission in the system.

3. Enter the **Complaint Description**.

4. From the drop-down list, select the **Complaint Type**.
5. Identify the **Premises / Address** for the complaint.
6. Finally, upload any **supporting documentation** related to the complaint.

7. Click **Submit**.

Using the Complaint Wizard

The **Complaint** allows the registered user to track the online submission and see any subsequent details related to the matter.

1. On the Complaints menu page, the **Dashboard** includes a list of all complaints initiated by the registered user.

2. Selecting the hyperlink under **Complaint Number** allows the user to see additional details.