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B&R Material Return Portal

B&R Material Return Portal

The B&R Material Return Portal is an application that allows B&R customers to record, process and track reclamation and repair cases via the B&R homepage.

And all this can be accomplished with minimum effort.

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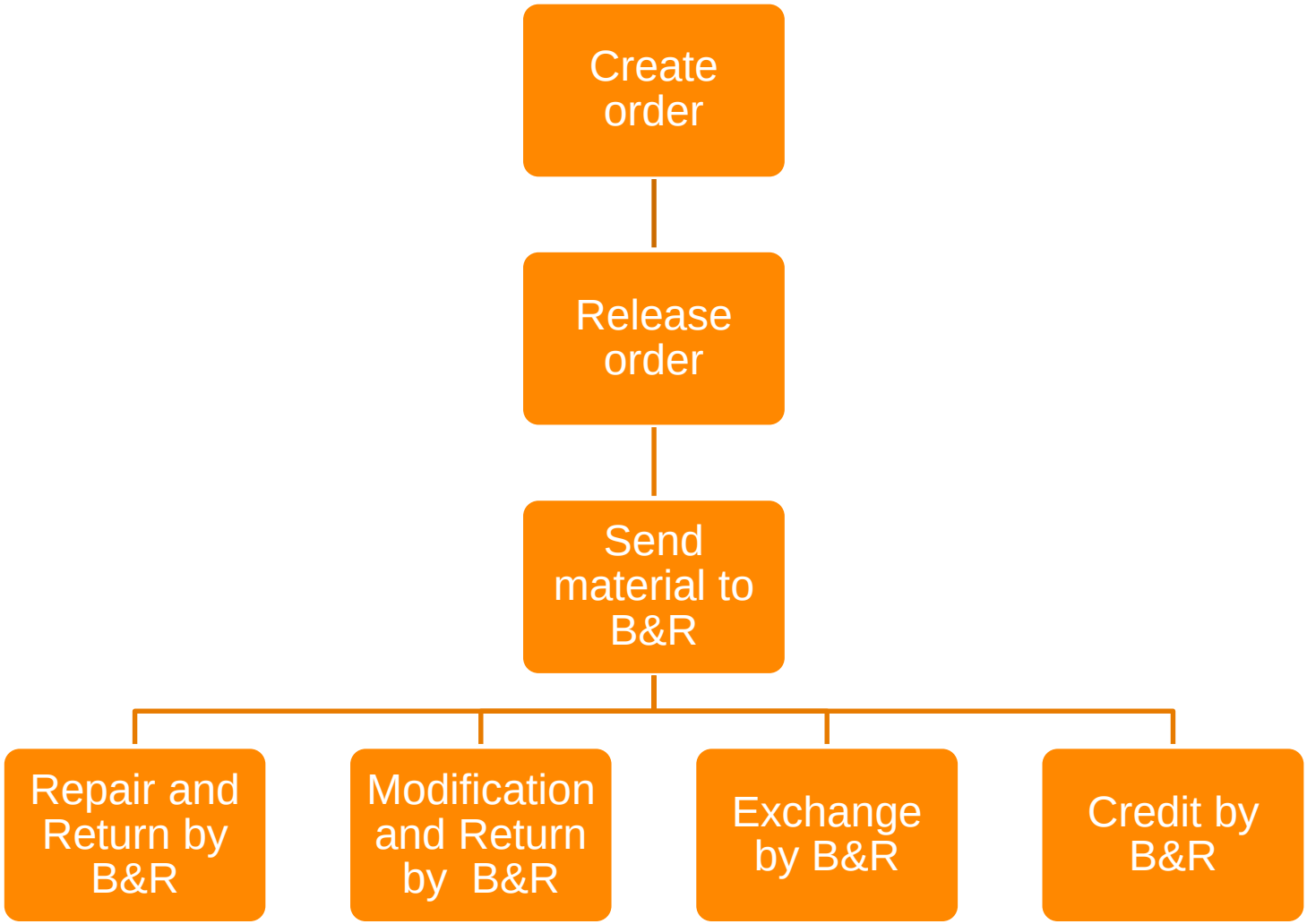
Overview of the workflow

Overview of the workflow



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Value for B&R customers

Value for B&R customers

- Complete and real-time **transparency** throughout all steps of the repair process
- **One interface** for the entire reclamation workflow
- **Shorter information paths** and continuous information flow
- Faster error localization with **online documentation**
- **Time-saving** for the customer's own reclamation handling: A printed material return order from portal serves as delivery note
- Use of paper printouts **only when really needed**

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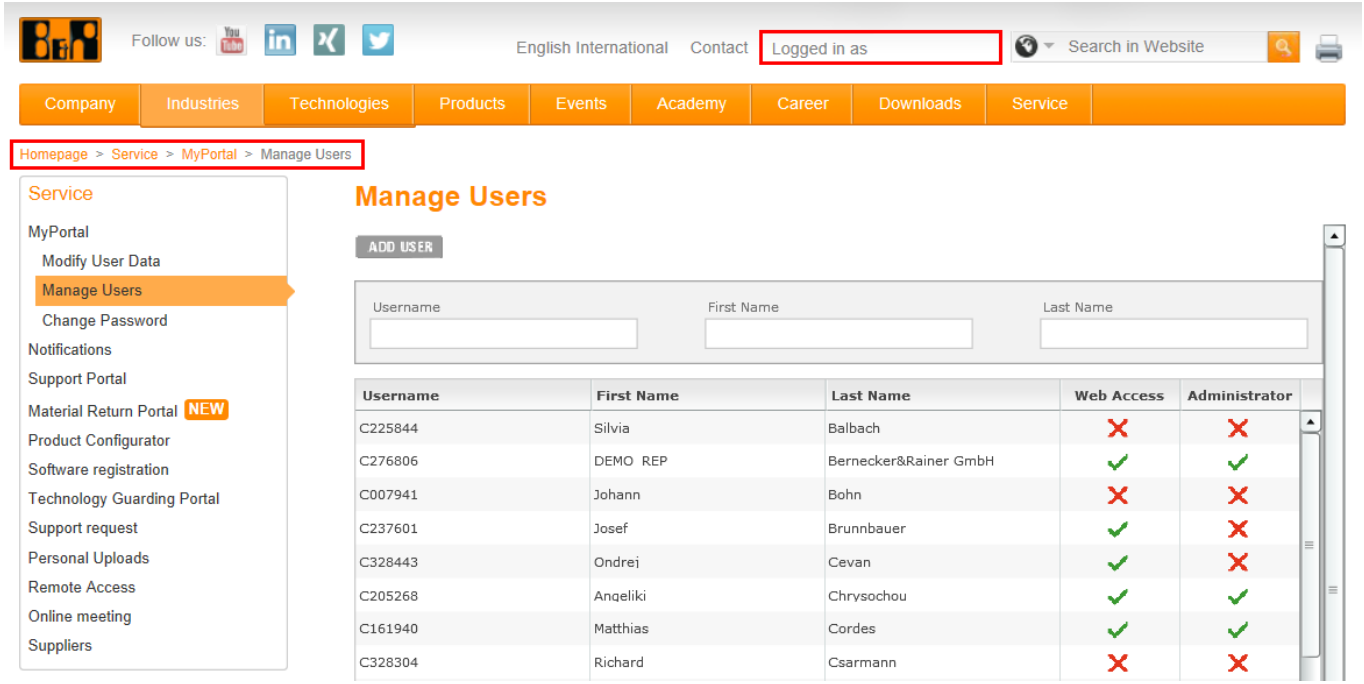
Requirements, user roles and Login

Requirements

- Google Chrome 23 or higher
- Safari 6 or higher
- Internet Explorer 9 or higher
- Mozilla Firefox 17 or higher
- Opera 15 or higher
- Android 2.3 or higher
- iOS 5 or higher
- Windows Phone 8 or higher

User management



- Activation of first administrator by B&R
- Activation of as many users as needed by administrator

User roles

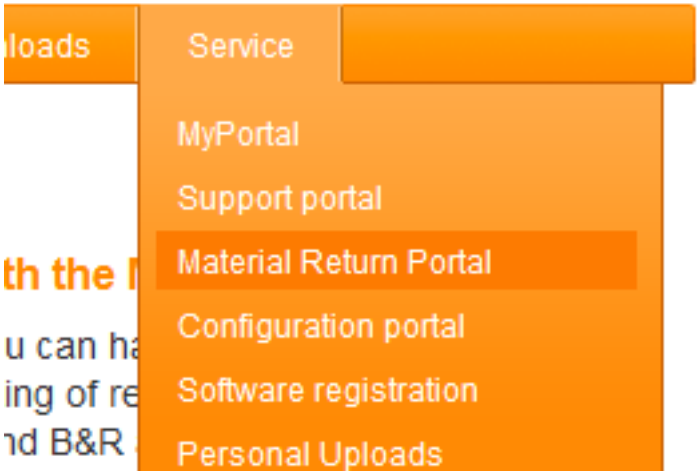
To use the B&R Material Return Portal, it is necessary to enter a user role in the user management

Various user roles:

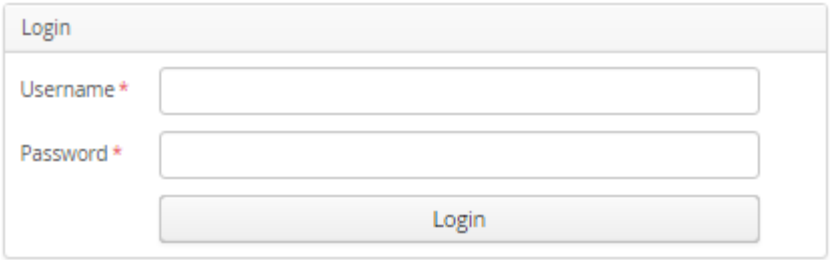
- Service engineer
  - Recording and displaying
- Material return order processor
  - Like the service engineer, plus:
  - Order cancellation
  - Order placement
  - Cost estimate acceptance/rejection
  - Close of repair case
- Service manager
  - Like the material return order processor
  - Reserved for future functions (e.g. QM statistics)

Login

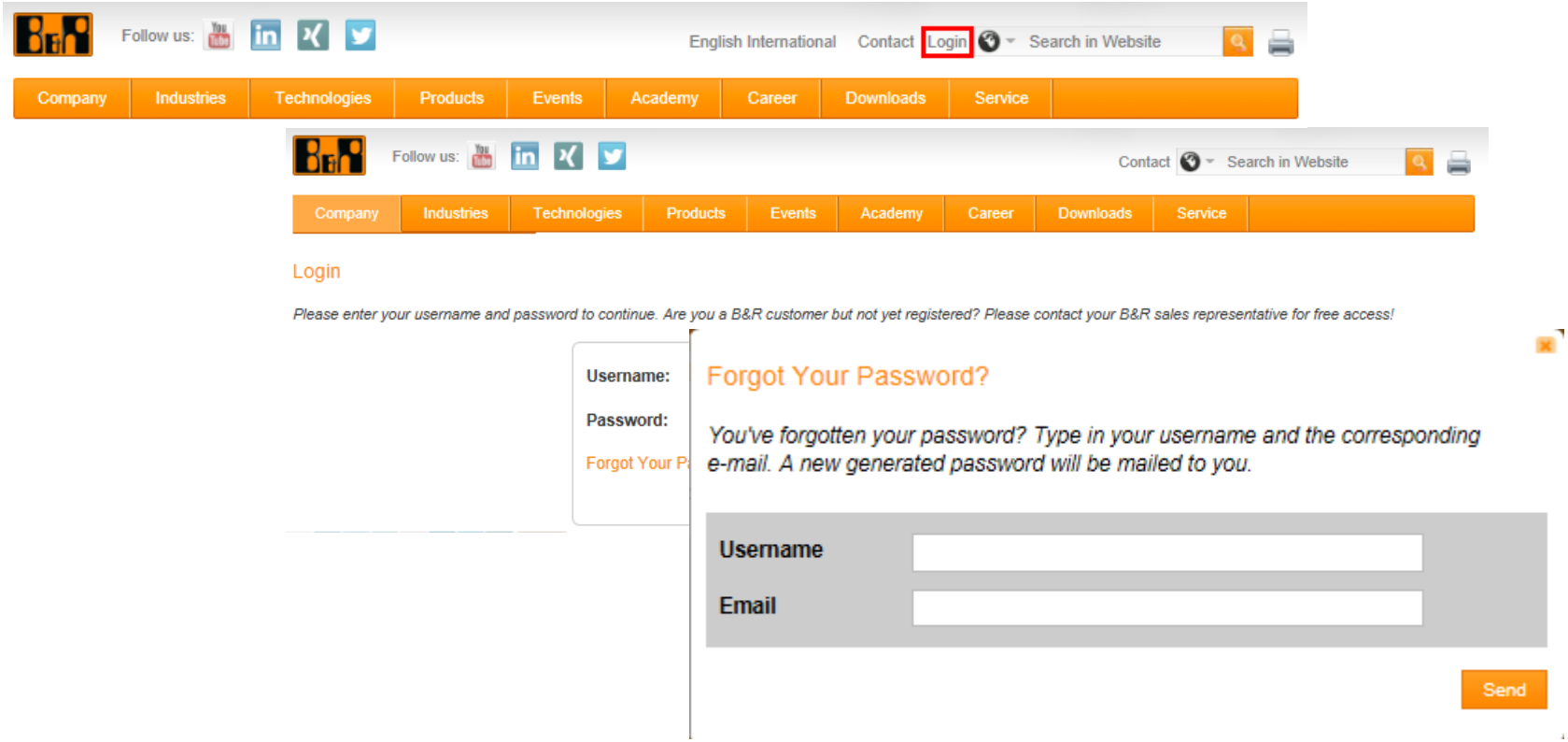
The B&R Material Return Portal can
be opened via the B&R website
www.br-automation.com



Enter user name and password to log in



Forgot password



A new password can be requested on the B&R Homepage www.br-automation.com

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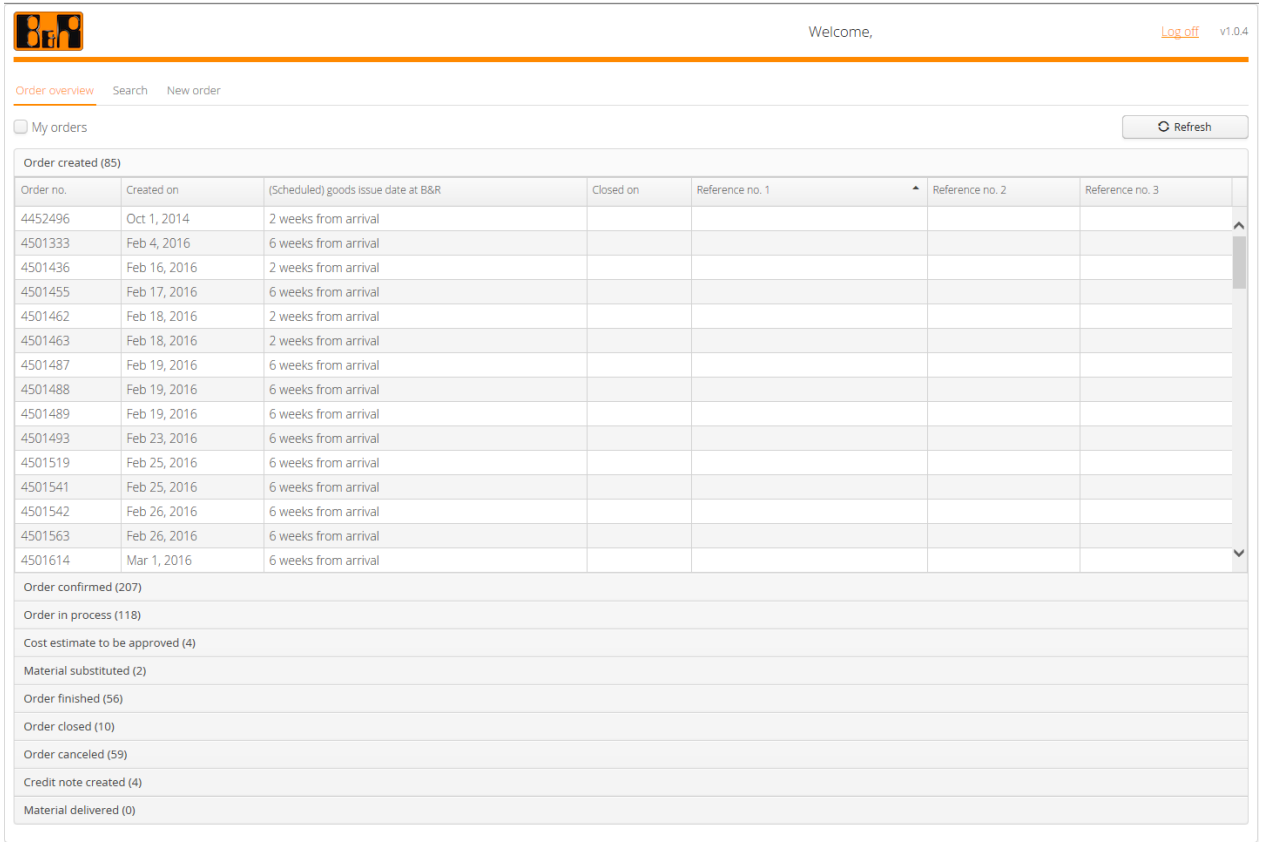
Structure of the B&R Material Return Portal

Structure of the B&R Material Return Portal

- Order Overview
- Search
- New Order



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Order Overview

Structure of the B&R Material Return Portal

Order Overview

- Order Overview is divided according to status in order to track order progress
- “My orders” → only orders created by the user are shown
- Click once to display order
- Change the sort order by clicking on a column header
- Refresh the Order Overview
- Display all material return orders
- Closed and canceled orders will only be shown for 6 months after being closed or canceled

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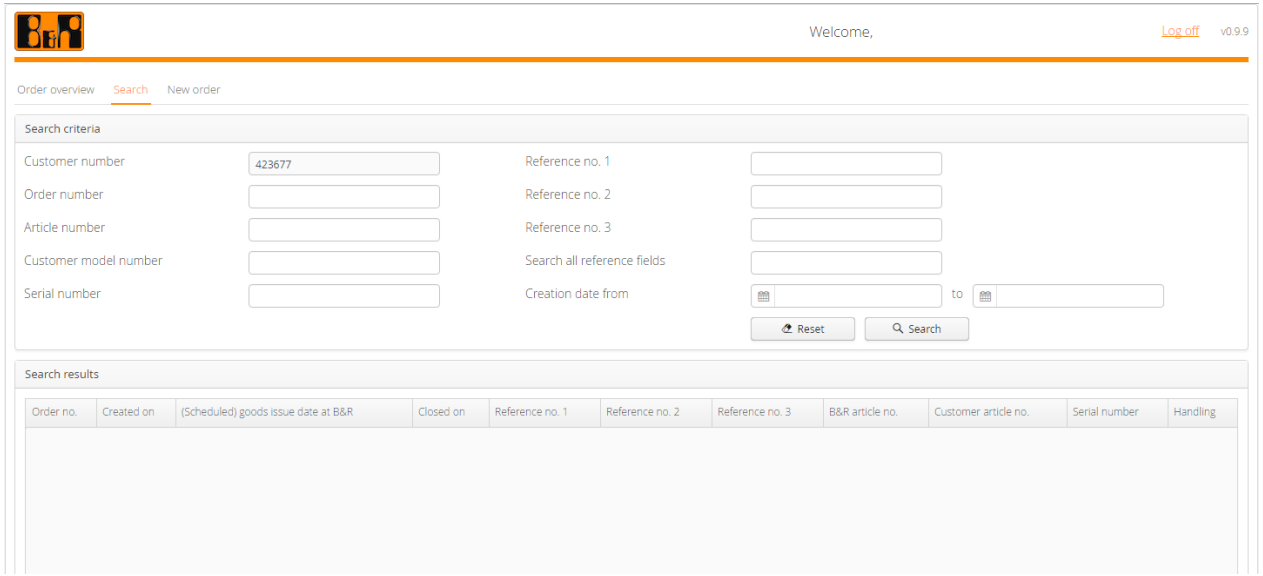
Search

Structure of the B&R Material Return Portal

Search



- Search according to various criteria
- Start the search by clicking on the “Search” button
- Click once to display details for a order

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Elements of a material return order

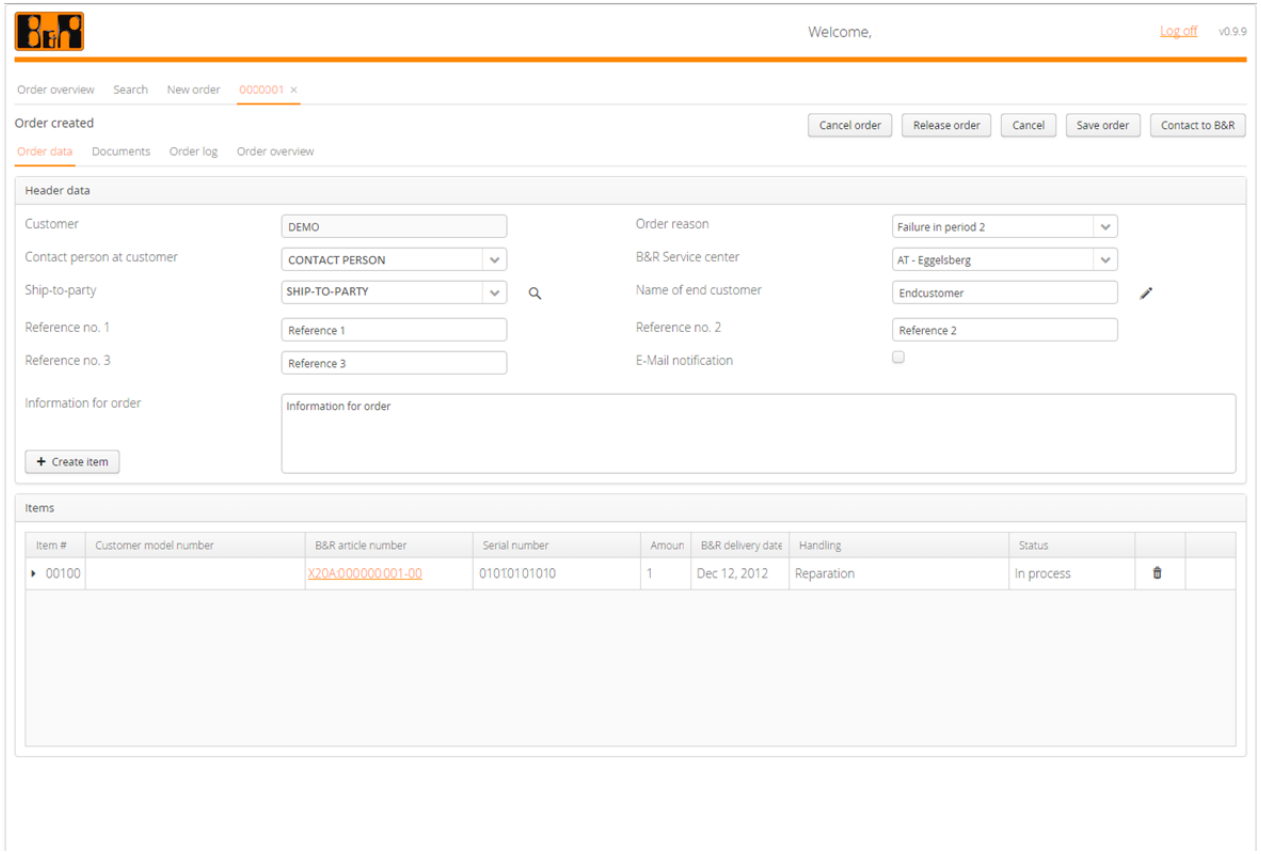
Structure of the B&R Material Return Portal

Elements of a material return order

- Order Status (e.g. Order in process)
- Order functions (e.g. Release Order)
- Order data
  - Header data
  - Item data
- Order documents
- Order log

Order data

Header data



The header data contains data valid for the entire order

Order data

Header data – Part 1

- Contact person at customer: responsible for the repair case
- Ship-to-party: After successfully repairing the article it is sent to the address
- Order reason:
  - Transport damage: the article was damaged during transport
  - Warrenty claim during installation: the module stopped working during installation
  - Warrenty claim item operating in field: Module failed during active operation
  - Repair of item operating in the field: Module failed during active operation
  - Unknown: Any other reason for the claim/repair

Order data

Header data – Part 1

- B&R Service center: You will send the article to this B&R site.

  Repairs are carried out centrally by the B&R Servicecenter in Eggelsberg
- Reference no. 1 – 3:
  - customer’s own references
  - possibility of choosing your own descriptions
  - Change of descriptions → E-Mail to service.portal@br-automation.com
  - Example for own descriptions: order number instead of reference 1
- Name of end customer: name of the final customer

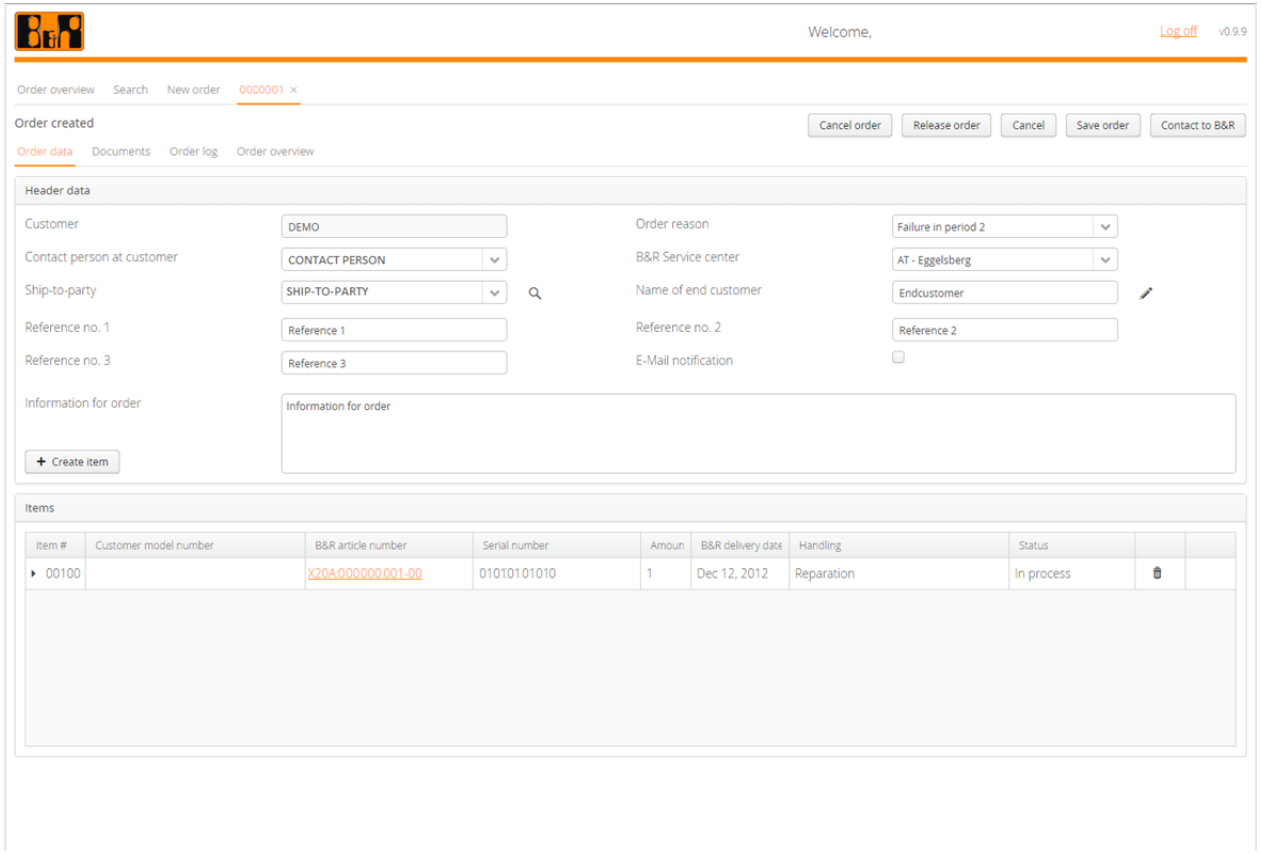
Order data

Header data – Part 1

- E-Mail notification: Contact person receives e-mail notification of relevant actions: Arrival of repair material at B&R, Cost estimate created, Repair complete
- Information for order: Circumstances under which failure occurred

Order data

Item data



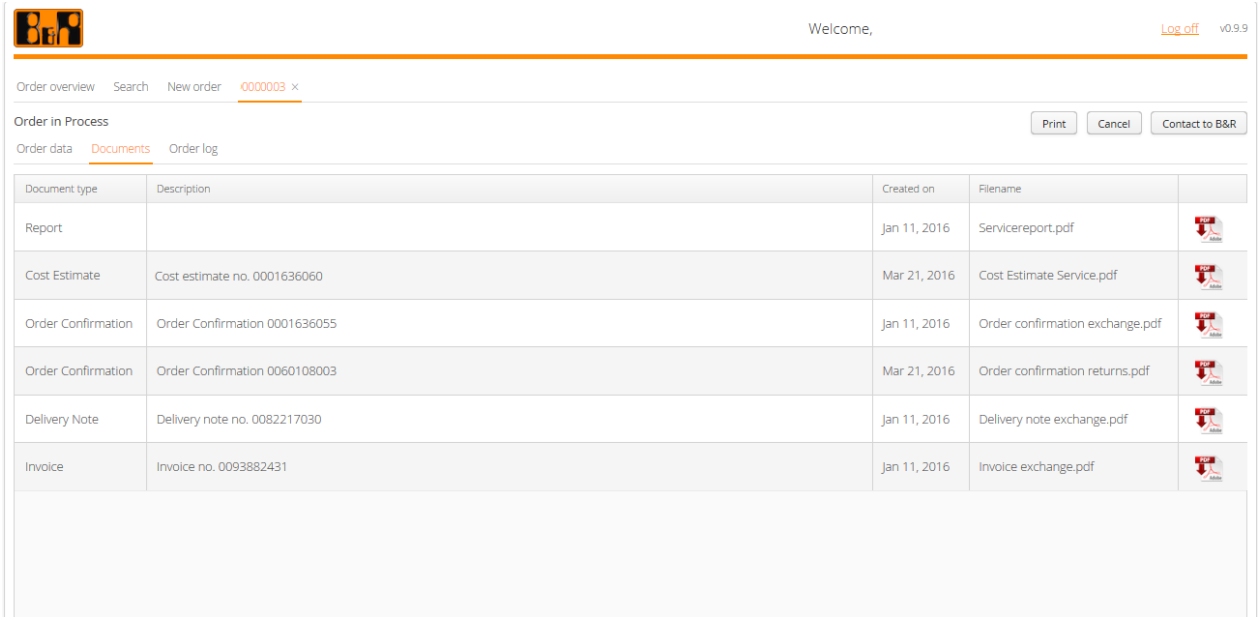
In the item data you will find information which applies to the specific item

Order data

Item data

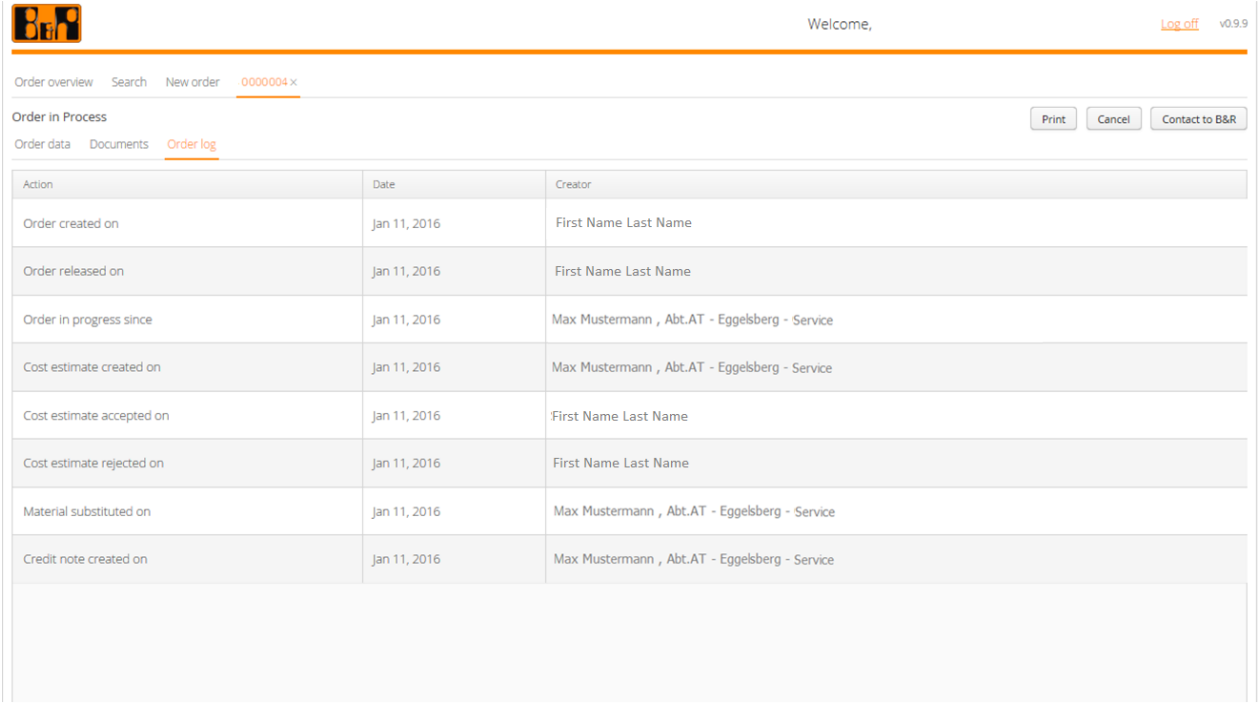
- Item #: B&R item number
- Customer model number: your article number for the item
- B&R article number: B&R article number for the item
- Serial number: entered serial number
- B&R delivery date: original delivery date of the serial number by B&R
- Handling: handling type chosen for the item
- Status:
  - Open: Item in process
  - Closed: Item is completed
  - Irreparable: Item is not repairable

Order documents



All documents – as long as they are available for the order – in PDF format

Order log



All steps of the order

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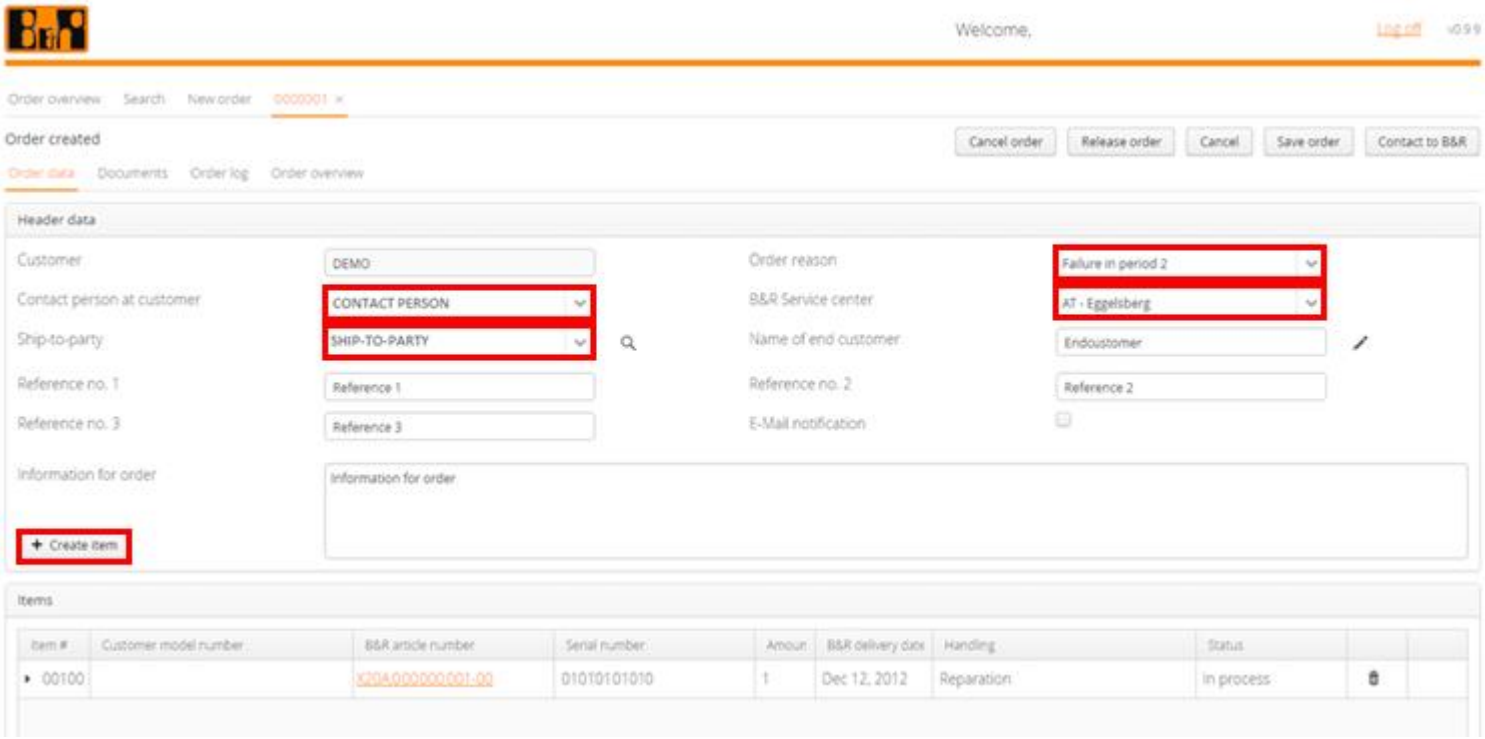
New Order

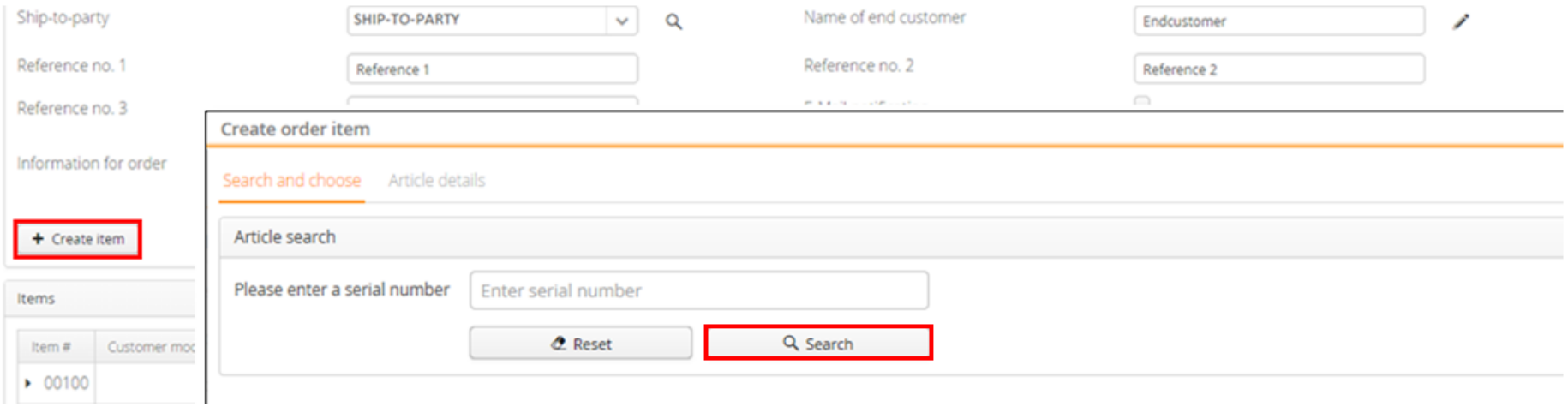
How to use the B&R Material Return Portal

New Order



- Tab “New Order”
- Difference
  - Obligatory fields (highlighted in red)
  - Optional fields

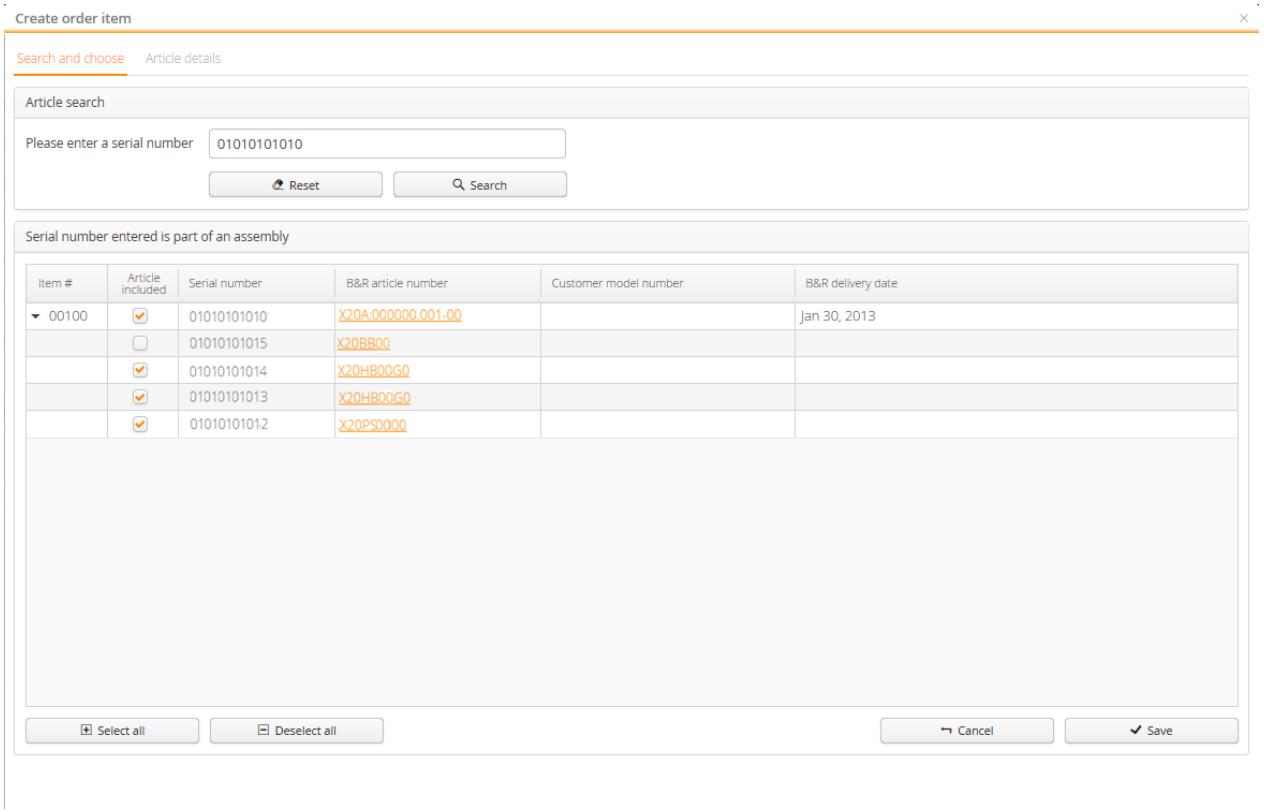
Add item – Part 1



- Button “Create item”
- Enter serial number
- Search

Add item – Part 2

Particularity: structured articles

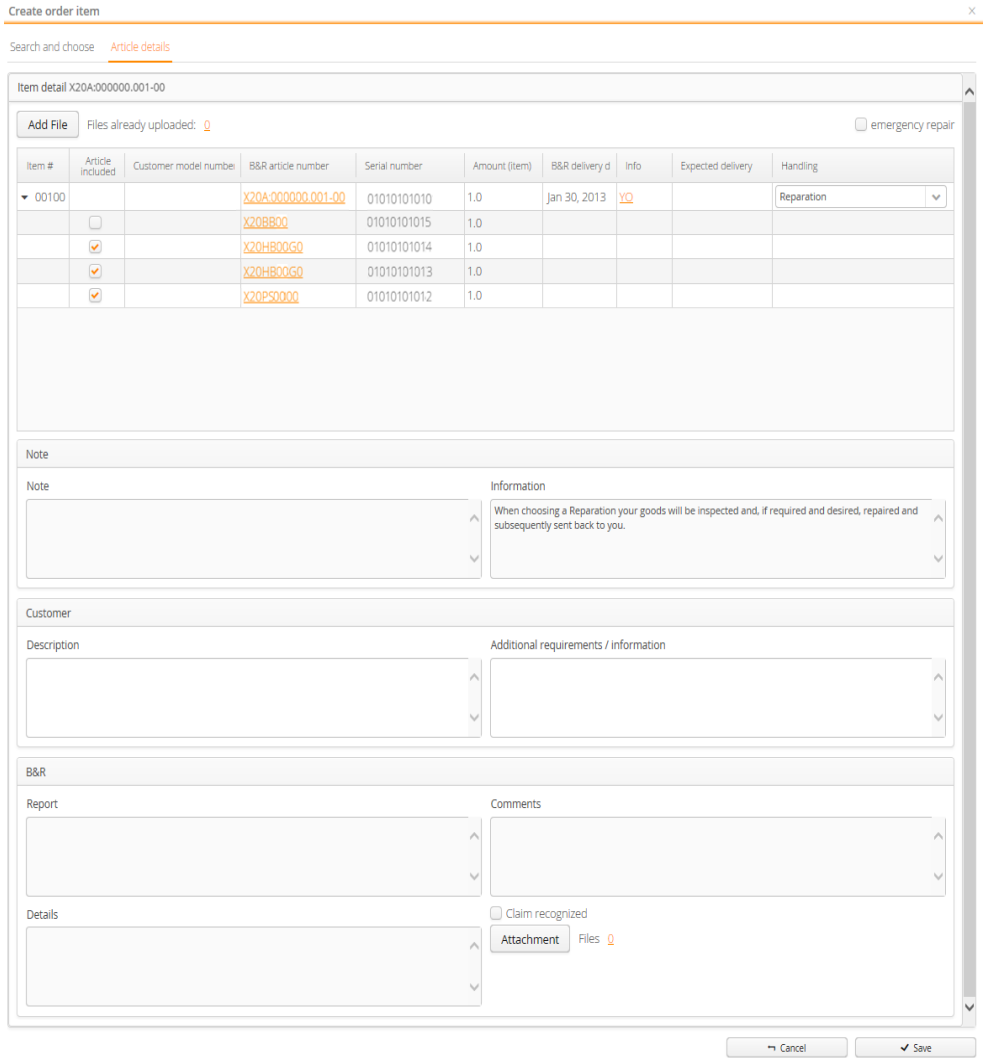


- Overview of the components included
- Select the components to be sent to B&R
- Press “Save”

Add item – Part 3

Details for serial number:

- Information: details for the chosen type of handling (e.g.: Information about the procedure when choosing a certain type of repair)



Add item – Part 4

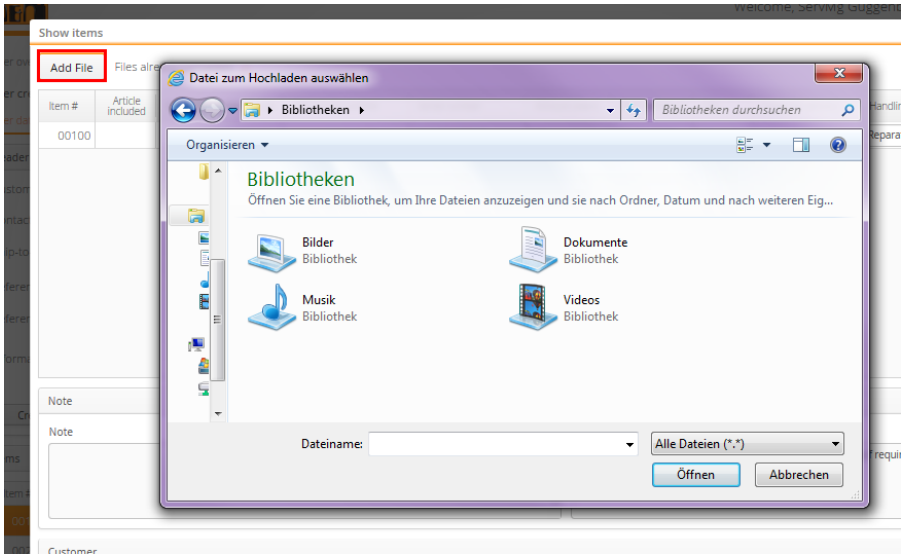
- Available input options:
  - **Article included:** select articles which are to be returned
  - **Handling:** choose handling type for material (details see “Information”)
  - **Description:** enter error description
  - **Additional requirements / information:** you can indicate any special requests you may have regarding the repair of your materials. (in particular when choosing reconditioning)

- Apply entries with the “Save” button

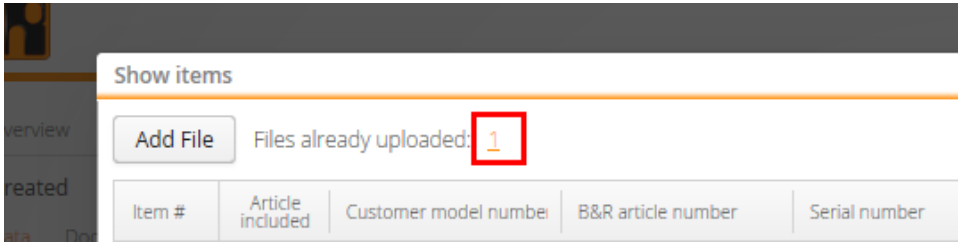
Add item – Part 5

Add file to item

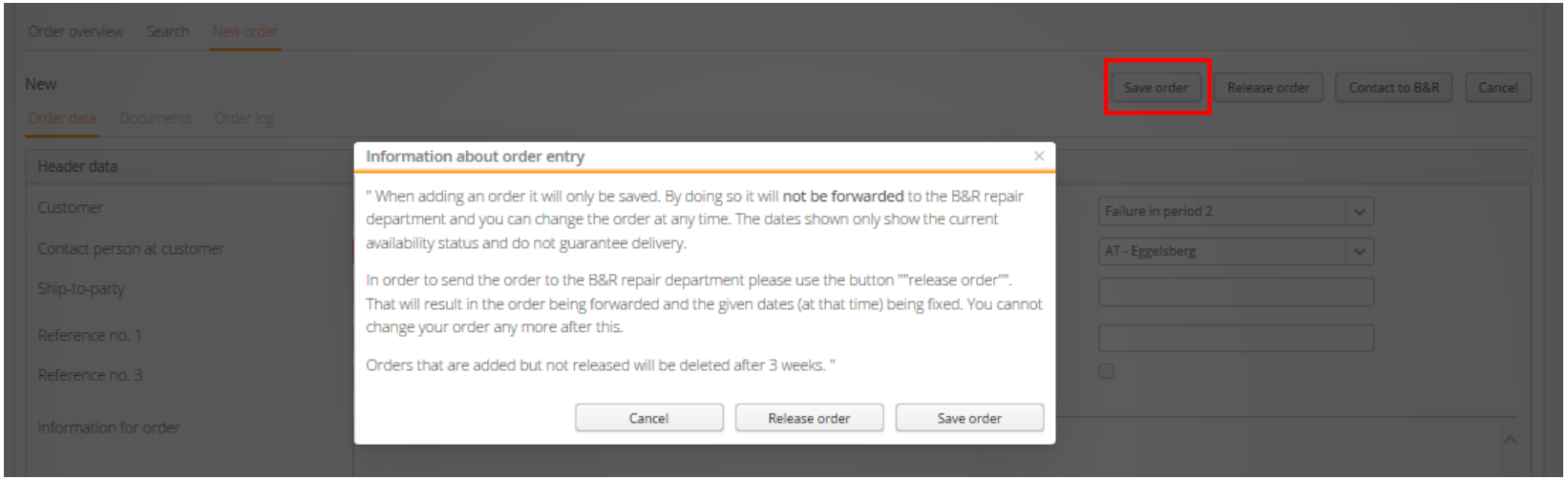
- Button “Add file”
- Open file to add it



- see the attached files



Save order



After entering all header and item data → “Save order”

Note:

Save order: Order will NOT be forwarded to B&R repair (only saved)

Release order: Order will be forwarded to B&R repair

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Change order

How to use the B&R Material Return Portal

Change order

- Click on a material return order in the “Order created” bar
- You can change or delete header and item data in this material return order

- **Note:** material return orders can only be changed when their status is “Order created”. Orders that have been released can no longer be changed

- Click button “Change order” button to apply changes to the material return order
- To undo your changes, click button “Cancel”

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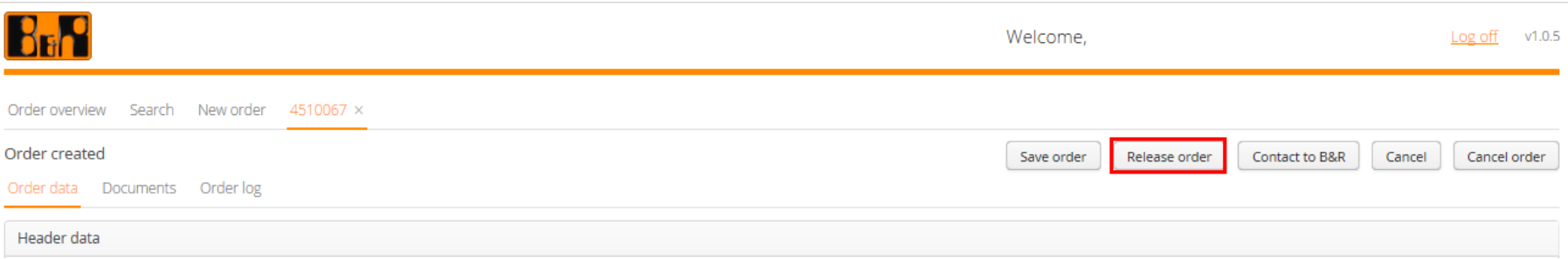
Release order

How to use the B&R Material Return Portal

Release order



- Button “Release order”
- Order will be bindingly sent on to the B&R repair center
- Check or correct the data entered using Order Summary

Order Summary

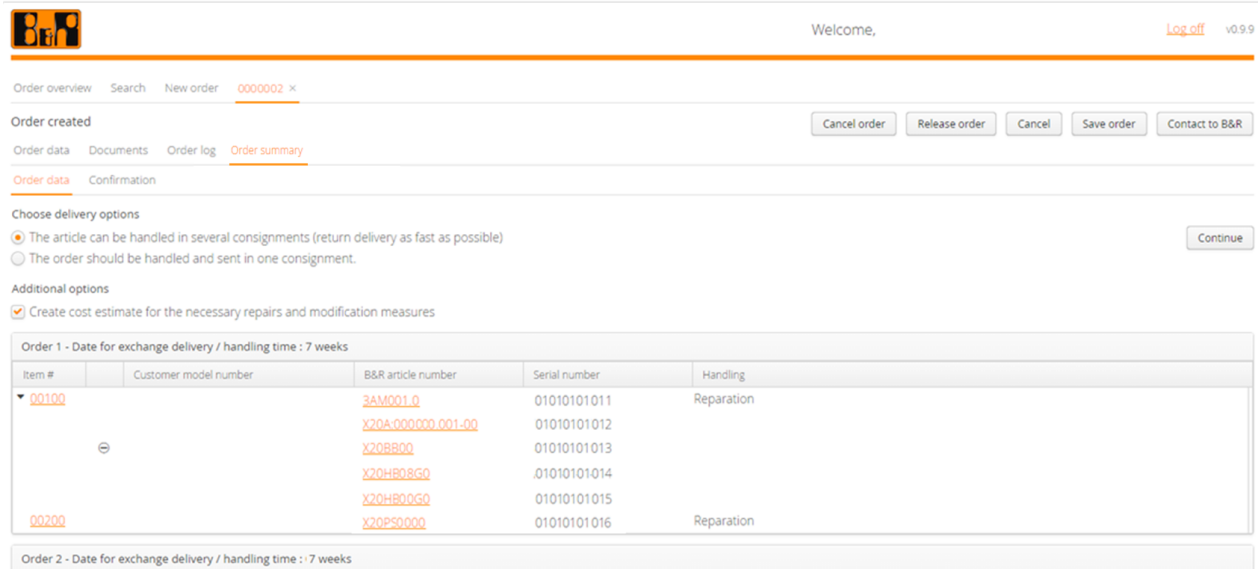
- Check Order data
- Confirm order

→ Check or correct the data entered

Order Summary

Order data

- Delivery options
- Cost estimate
  - Cost estimate will be created
  - **Note: only for repairs and modifications, that are not under warranty**
- Item details

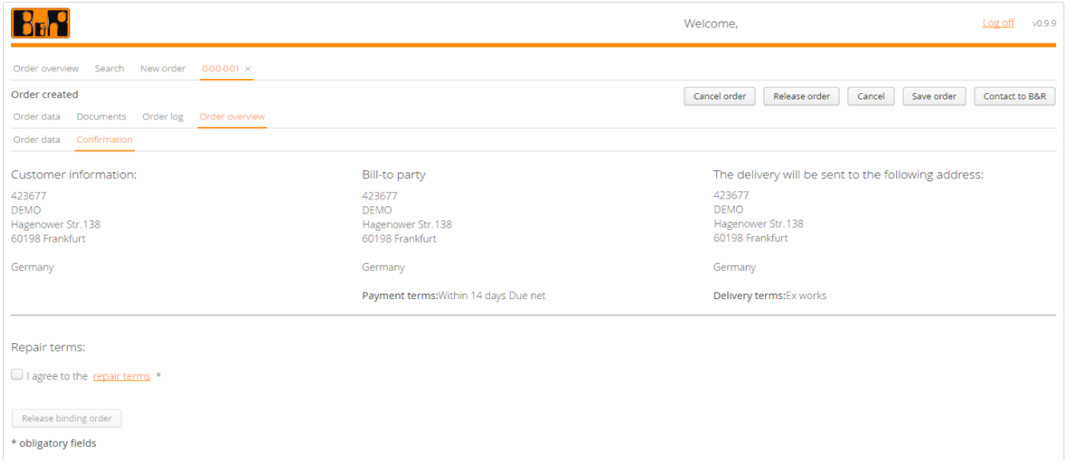


Order Summary

Confirmation

- Header data
- Repair terms
- Release binding order

→ **Note:** Only after clicking the button “Release binding order”, will your order be bindingly sent on to the B&R repair center.



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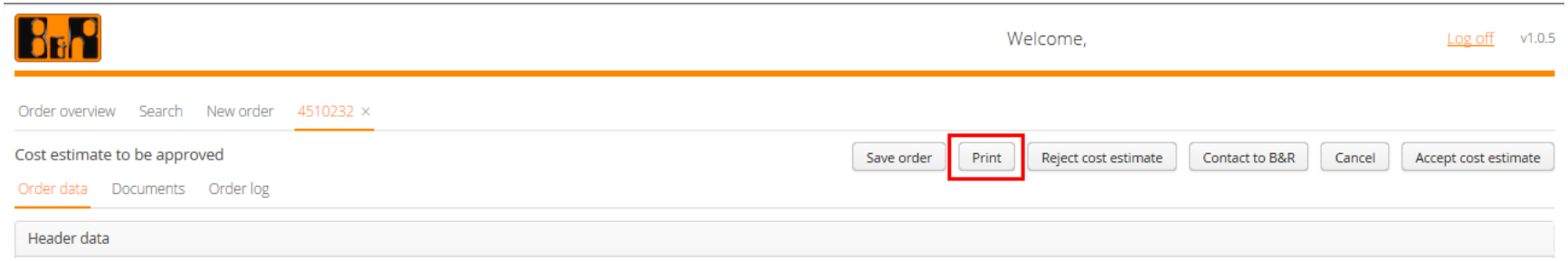
Print delivery note

How to use the B&R Material Return Portal

Print delivery note



- Button “Print”
- **Note:** only possibly for orders with status “Order created“

- Document must be sent with the shipment

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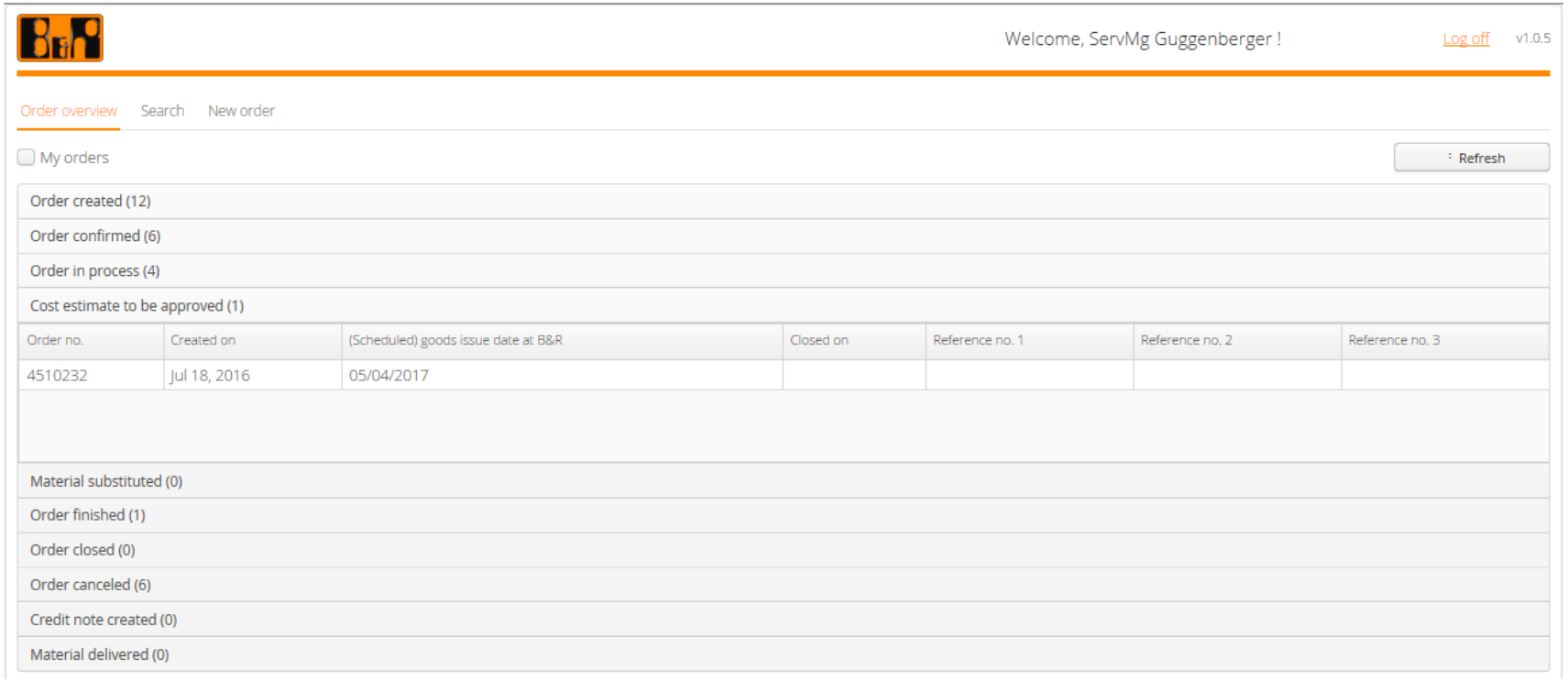
Accept cost estimate

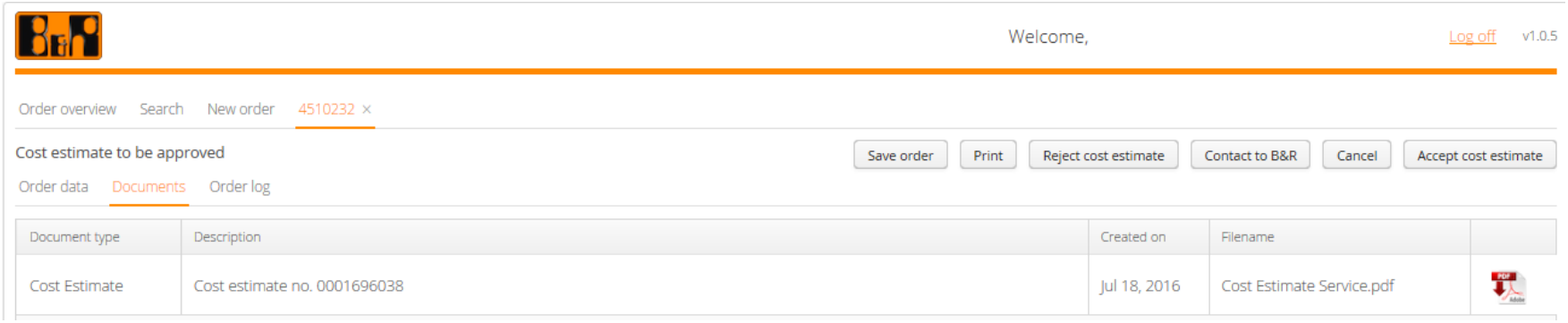
How to use the B&R Material Return Portal

Cost estimate to be approved



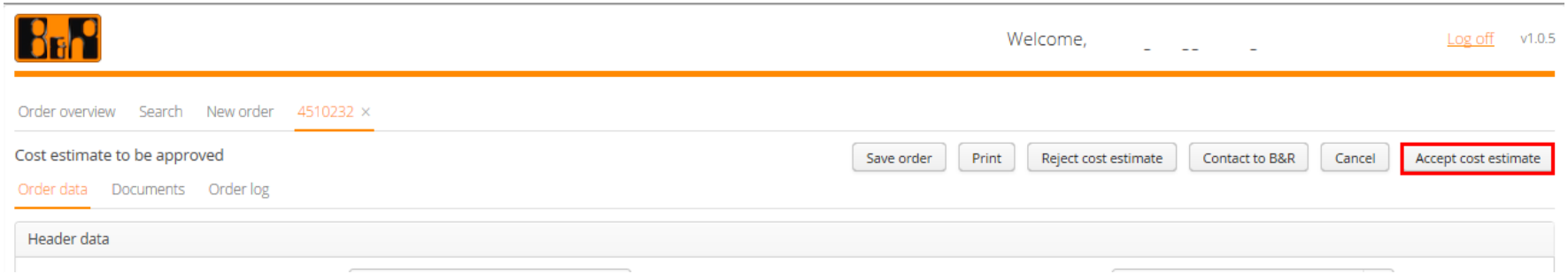
As soon as the cost estimate has been created by the B&R repair center, the order appears in the order overview “Cost estimate to be approved”

Display cost estimate



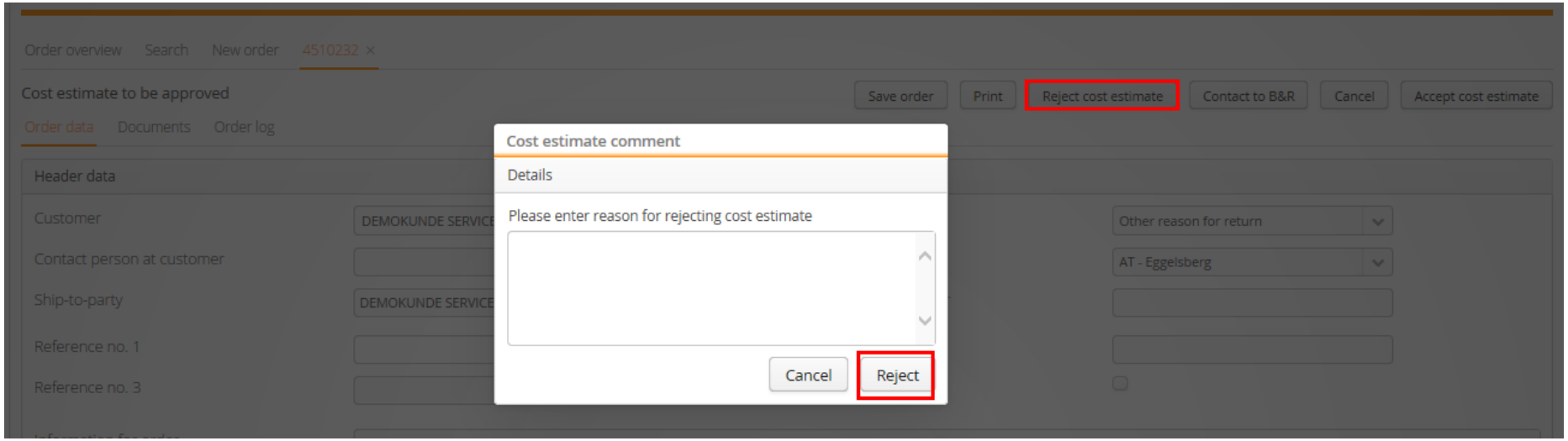
The cost estimate can be found under tab “Documents”

Accept cost estimate



- Button “Accept cost estimate”
- Order will be moved to the “Orders in progress” bar
- Order will be processed further by the B&R repair center

Reject cost estimate



- Button “Reject cost estimate”
- Enter reason for rejecting cost estimate
- Button “Reject”
- Order can be seen in the order overview in the group “Order canceled”
- Order will no longer be processed

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Complete order

How to use the B&R Material Return Portal

Complete order

- By clicking on the button “Complete order” you let B&R know that, in your view, the order has been completed
- As a result the order appears under the group “Order closed”

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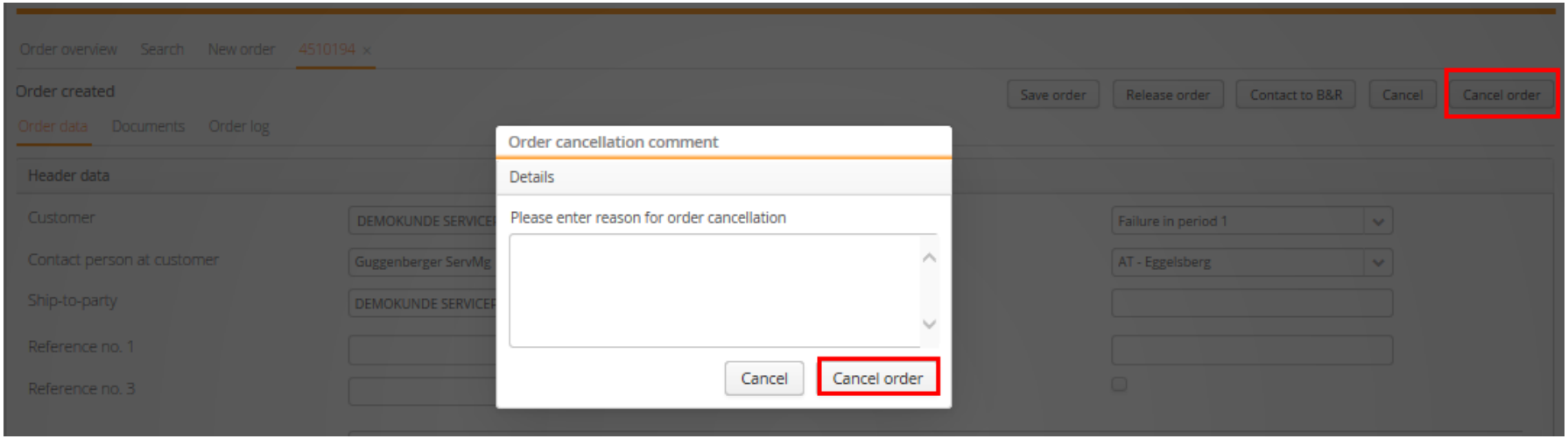
Cancel order

How to use the B&R Material Return Portal

Cancel order



- Button “Cancel order”
- Enter reason for order cancellation
- Button “Cancel order“

Note: Only orders which have status “Order created” can be canceled

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Technical Support

How to use the B&R Material Return Portal

Technical Support

- Button “Contact to B&R”: E-Mail account will open
- E-Mail to support.portal@br-automation.com

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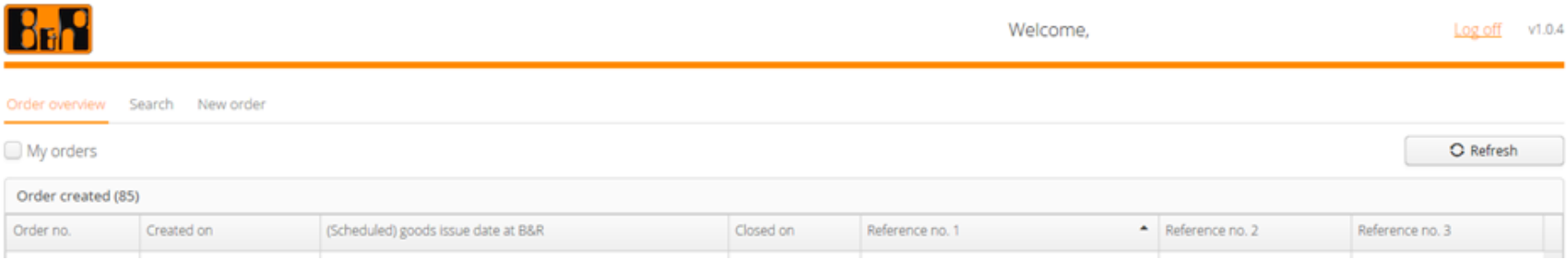
Log off

Log off from B&R Material Return Portal



In order to log out properly from the B&R Material Return Portal click the button “Log off”

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