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

Create order

Release order

Send material to B&R

- Repair and Return by B&R
- Modification and Return by B&R
- Exchange by B&R
- Credit by B&R
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**
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)
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
Structure of the B&R Material Return Portal
Structure of the B&R Material Return Portal

- Order Overview
- Search
- New Order
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
Search

Structure of the B&R Material Return Portal
• Search according to various criteria
• Start the search by clicking on the “Search” button
• Click once to display details for an order
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
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 Service center 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
All steps of the order
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”
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)
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
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
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”
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
• 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.
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
Accept cost estimate

How to use the B&R Material Return Portal
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”
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
Complete order

How to use the B&R Material Return Portal
• 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”
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
Technical Support

How to use the B&R Material Return Portal
• Button “Contact to B&R”: E-Mail account will open
• E-Mail to service.portal@br-automation.com
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”
YOUR GLOBAL PARTNER FOR AUTOMATION EXCELLENCE