



User Documentation

Material Return Portal

We reserve the right to change the content of this manual without prior notice. The information contained herein is believed to be accurate as of the date of publication, however, B&R makes no warranty, expressed or implied, with regards to the products or the documentation contained within this document. B&R shall not be liable in the event if incidental or consequential damages in connection with or arising from the furnishing, performance or use of these products. The software names, hardware names and trademarks used in this document are registered by the respective companies.

I Table of Contents

1 Basics of the Material Return Portal	3
2 Requirements for the B&R Material Return Portal.....	4
2.1 Technical requirements for using the B&R Material Return Portal	4
2.2 Authorization for the B&R Material Return Portal	4
3 Functions of the B&R Material Return Portal	5
3.1 Log in and log out	5
3.2 Order overview.....	7
3.3 Order search	8
3.4 Orders	10
3.4.1 Order status and functions	10
3.4.1.1 Save order.....	11
3.4.1.2 Release order.....	11
3.4.1.2.1 Order data	11
3.4.1.2.2 Confirmation	12
3.4.1.3 Cancel Order.....	14
3.4.1.4 Accept/reject cost estimate	14
3.4.1.5 Print.....	14
3.4.1.6 Complete order	14
3.4.1.7 Cancel	14
3.4.1.8 Contact to B&R	14
3.4.2 Order data.....	15
3.4.2.1 Header data	15
3.4.2.2 Item data	17
3.4.3 Order documents	18
3.4.4 Order log.....	19
3.5 Order change	20
3.5.1 Add item.....	21
3.5.2 Edit item	25
3.5.3 Delete item.....	25
3.6 New order.....	26
4 Support for the B&R Material Return Portal.....	27
4.1 Contact button in the B&R Material Return Portal	27
4.2 Contacting via support.portal@br-automation.com	27

1 Basics of the Material Return Portal

With the B&R Material Return Portal, B&R customers can create, process and follow claims and repair cases. And all that with the minimum of effort.

The goal of this documentation is to offer an overview of the process in the Material Return Portal. As a result the functions and possibilities of the Material Return Portal will be described.

No difference will be made in this documentation between customers that have a credit agreement and customers that use the standard procedure.

2 Requirements for the B&R Material Return Portal

2.1 Technical requirements for using the B&R Material Return Portal

Please use one of the following web browsers in order to use the Material Return Portal without any problems:

- 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

2.2 Authorization for the B&R Material Return Portal

For each customer or partner it is possible to have one or more users as administrator. These users can add new users for their company or change or delete current users using the appropriate function (tab “Service” on the B&R homepage). As a result, as a customer or partner, you can act independently with regard to the administration of user data.

Necessary settings for each user

The customer user administrator can set one of the following user rights:

- Service technician (rights: add order, change order, print order)
- Service administrator (rights: add order, change order, print order, issue order, approve or decline cost estimate)
- Service manager (rights: add order, change order, print order, issue order, approve or decline cost estimate)

One of these three roles is needed to use the B&R Material Return Portal and the checkbox “Web Access” must be set for the user.

Further functions

If the checkbox “Service order mail info” is set, a mail notification is set as standard when adding an order in the Material Return Portal. As a result the user receives a message when relevant status changes are made (that means a mail is sent if “in process”, “cost estimate for approval” or “order completed”). If necessary, this mail notification can be removed for each order.

If the checkbox “Administrator” is set, the user has administrator rights and can add, change or delete other users, as well as set the rights for these users.

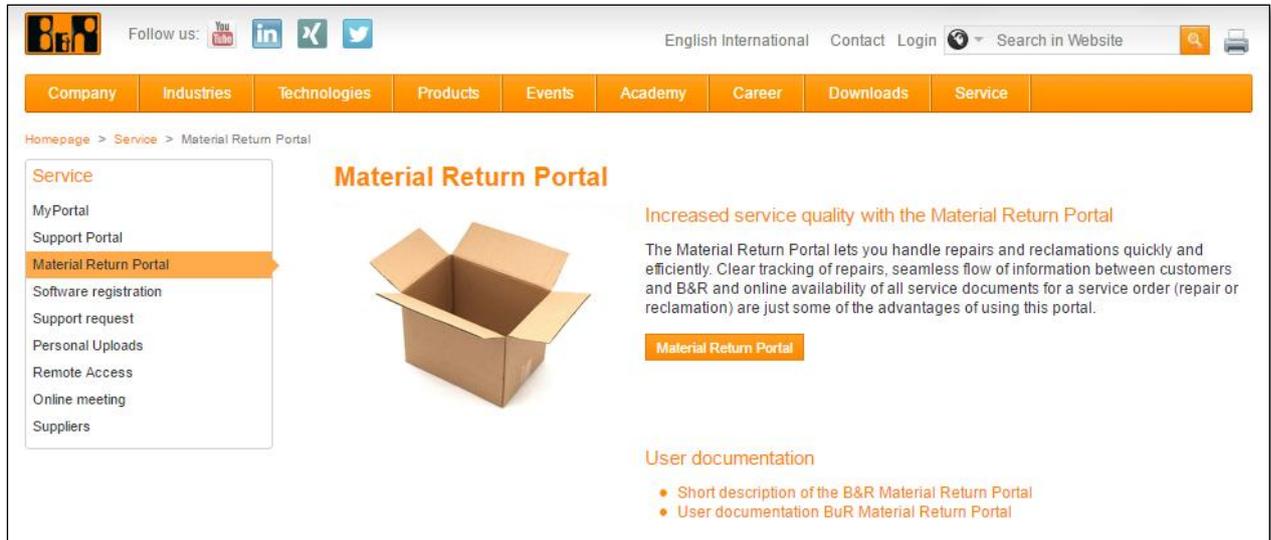
After the left date of the user has been both set and reached, the user will no longer have access to the Material Return Portal. Thus, if a person leaves the customer’s company, their access to the Material Return Portal can be revoked immediately.

If you do not have user administration rights or need a login for the first time to MyPortal on the B&R Homepage, please contact your responsible customer representative at B&R.

3 Functions of the B&R Material Return Portal

3.1 Log in and log out

In order to log in to the B&R Material Return Portal go to the “Service” area on the B&R Homepage.



After clicking on the button “Material Return Portal” the login window for the B&R Material Return Portal opens in a new window.

The screenshot shows the login window for the B&R Material Return Portal. It has a title bar that says 'Login'. Below the title bar, there are two input fields: 'Username *' and 'Password *'. The 'Username *' field is highlighted with an orange border. Below the input fields, there is a 'Login' button.

The access data for the B&R Material Return Portal are the same as the login data used for the B&R Homepage www.br-automation.com .

After entering the username and the appropriate password you will see the start page of the B&R Material Return Portal.

If you are already logged in to the B&R Homepage it is not necessary to enter the user data again. In this case you are simply redirected to the start page of the B&R Material Return Portal.

The screenshot displays the B&R Material Return Portal interface. At the top, there is a header with a logo on the left, the text "Welcome," in the center, and a "Log off" button with the version number "v1.0.4" on the right. Below the header, there is a navigation bar with "Order overview" (underlined), "Search", and "New order". A "My orders" checkbox is present on the left, and a "Refresh" button is on the right. The main content area shows a list of order statuses with counts:

- Order created (85)
- Order confirmed (207)
- Order in process (118)
- Cost estimate to be approved (4)
- Material substituted (2)
- Order finished (56)
- Order closed (10)
- Order canceled (59)
- Credit note created (4)
- Material delivered (0)

The "Order created (85)" section is expanded to show a table with the following columns: Order no., Created on, (Scheduled) goods issue date at B&R, Closed on, Reference no. 1, Reference no. 2, and Reference no. 3. The table contains 15 rows of data:

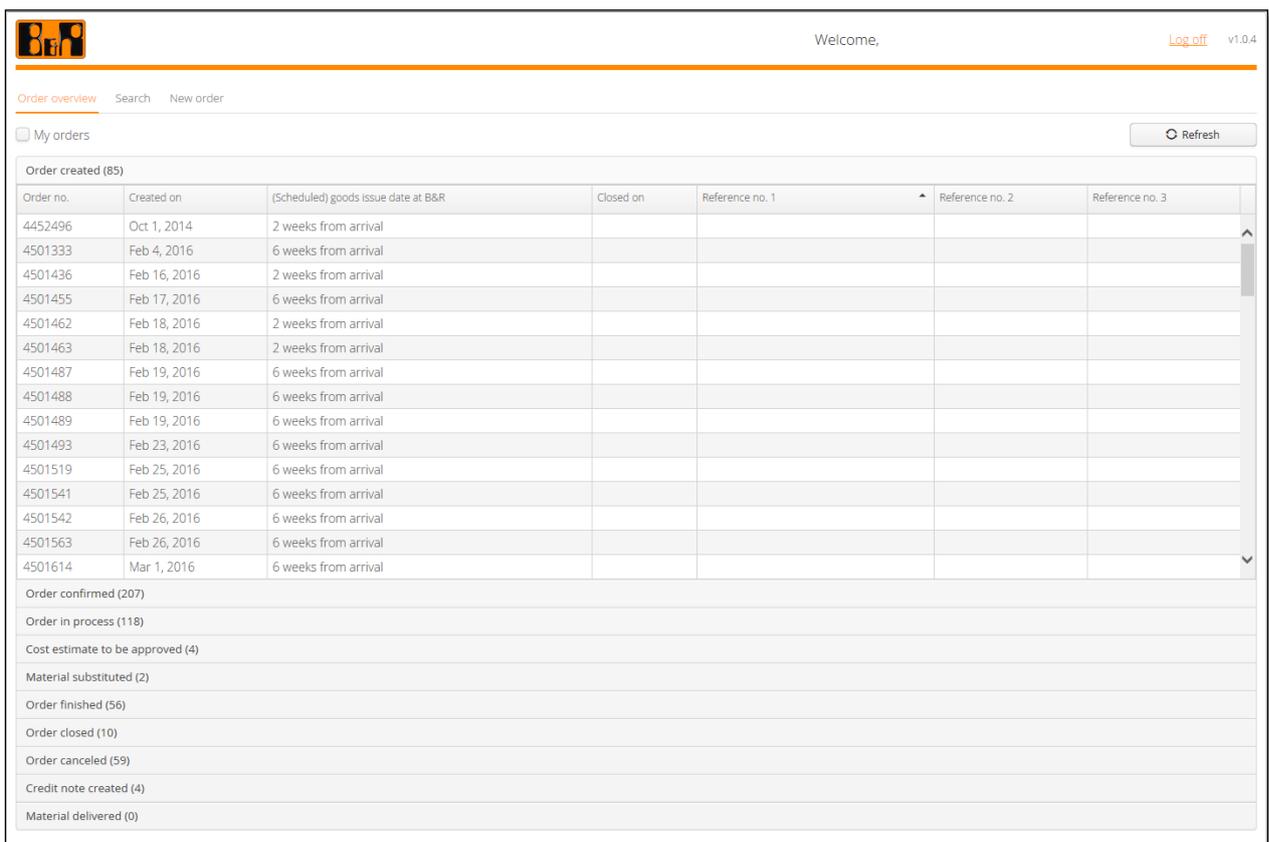
Order no.	Created on	(Scheduled) goods issue date at B&R	Closed on	Reference no. 1	Reference no. 2	Reference no. 3
4452496	Oct 1, 2014	2 weeks from arrival				
4501333	Feb 4, 2016	6 weeks from arrival				
4501436	Feb 16, 2016	2 weeks from arrival				
4501455	Feb 17, 2016	6 weeks from arrival				
4501462	Feb 18, 2016	2 weeks from arrival				
4501463	Feb 18, 2016	2 weeks from arrival				
4501487	Feb 19, 2016	6 weeks from arrival				
4501488	Feb 19, 2016	6 weeks from arrival				
4501489	Feb 19, 2016	6 weeks from arrival				
4501493	Feb 23, 2016	6 weeks from arrival				
4501519	Feb 25, 2016	6 weeks from arrival				
4501541	Feb 25, 2016	6 weeks from arrival				
4501542	Feb 26, 2016	6 weeks from arrival				
4501563	Feb 26, 2016	6 weeks from arrival				
4501614	Mar 1, 2016	6 weeks from arrival				

In order to log out properly from the B&R Material Return Portal click on the button “Log off”. You will subsequently be redirected to the start page of the B&R Homepage.

3.2 Order overview

In the order overview the orders are categorized according to their status:

- Order created
- Order confirmed
- Order in process
- Cost estimate to be approved
- Material substituted
- Order finished
- Order closed
- Order cancelled
- Credit note created
- Material delivered



Order no.	Created on	(Scheduled) goods issue date at B&R	Closed on	Reference no. 1	Reference no. 2	Reference no. 3
4452496	Oct 1, 2014	2 weeks from arrival				
4501333	Feb 4, 2016	6 weeks from arrival				
4501436	Feb 16, 2016	2 weeks from arrival				
4501455	Feb 17, 2016	6 weeks from arrival				
4501462	Feb 18, 2016	2 weeks from arrival				
4501463	Feb 18, 2016	2 weeks from arrival				
4501487	Feb 19, 2016	6 weeks from arrival				
4501488	Feb 19, 2016	6 weeks from arrival				
4501489	Feb 19, 2016	6 weeks from arrival				
4501493	Feb 23, 2016	6 weeks from arrival				
4501519	Feb 25, 2016	6 weeks from arrival				
4501541	Feb 25, 2016	6 weeks from arrival				
4501542	Feb 26, 2016	6 weeks from arrival				
4501563	Feb 26, 2016	6 weeks from arrival				
4501614	Mar 1, 2016	6 weeks from arrival				

By clicking on a group, e.g. on “Order in process (118)”, all orders which are currently in process at B&R are shown.

By clicking on the column titles you can change the sorting between ascending and descending.

By activating the checkbox “My orders”, all orders are shown which have been added by your user.

In order to display or change an order, a **simple click** on the line of the order is enough.

In the order overview all orders that are open or in process are shown. Closed and canceled orders will only be shown for 6 months after being closed or canceled. However, if necessary, it is possible to search all orders from the last 3 years using the search.

3.3 Order search

In order to find orders quickly using specific criteria there is a function “Search” in the B&R Material Return Portal.

The screenshot displays the search interface of the B&R Material Return Portal. At the top, there is a navigation bar with 'Order overview', 'Search' (highlighted), and 'New order'. The search criteria section includes the following fields:

- Customer number: 423677
- Order number: [empty]
- Article number: [empty]
- Customer model number: [empty]
- Serial number: [empty]
- Reference no. 1: [empty]
- Reference no. 2: [empty]
- Reference no. 3: [empty]
- Search all reference fields: [empty]
- Creation date from: [calendar icon]
- Creation date to: [calendar icon]

Buttons for 'Reset' and 'Search' are located at the bottom right of the search criteria section. Below this is the 'Search results' section, which contains a table with the following columns:

Order no.	Created on	(Scheduled) goods issue date at B&R	Closed on	Reference no. 1	Reference no. 2	Reference no. 3	B&R article no.	Customer article no.	Serial number	Handling
[Empty search results area]										

It is possible to search using the following criteria:

- Order number
- Article number
- Customer model number
- Serial number
- Reference no. 1
- Reference no. 2
- Reference no. 3
- Search all reference fields
- Creation date

The search can be carried out using the wildcard *. For example, when searching for a material number beginning with “X20”, you can enter X20* in the selection criteria for the field B&R article number.

No orders will be shown using the order search if their completion date is older than 3 years.

In order to start the search, click the button “Search”. The results will be shown underneath the search criteria. By clicking on the column title you can change the sorting between ascending and descending.

Order overview **Search** New order

Welcome, [Log off](#) v0.9.9

Search criteria

Customer number: Reference no. 1:

Order number: Reference no. 2:

Article number: Reference no. 3:

Customer model number: Search all reference fields:

Serial number: Creation date from: to:

Search results

Order no.	Created on	(Scheduled) goods issue date at B&R	Closed on	Reference no. 1	Reference no. 2	Reference no. 3	B&R article no.	Customer article no.	Serial number	Handling
4501023	Jan 11, 2016			Referenz 011	Referenz 022	Referenz 033	X20BM01		72450183925	Reparation
4501029	Jan 11, 2016						X20BM11	KUNDENMATERIALNUMMER阿 ><	7246BE82655	Reparation
4501033	Jan 11, 2016						X20BB81		80780187493	Substitution
4501036	Jan 11, 2016						X20BM11	KUNDENMATERIALNUMMER阿 ><	72464074904	Modification
4501037	Jan 12, 2016			Bestellnummer KD(Ref	test test	KD-Ref3	X20BM11	KUNDENMATERIALNUMMER阿 ><	7246BE82655	Reparation
4501038	Jan 12, 2016						X20BM11	KUNDENMATERIALNUMMER阿 ><	7246BE82656	Reparation
4501039	Jan 12, 2016						X20CP1484		91250281437	Reparation
4501040	Jan 12, 2016			Bestellnummer KD(Ref	KD-Ref2 test test	KD-Ref3	X20BM11	KUNDENMATERIALNUMMER阿 ><	7246BE82656	Reparation
4501041	Jan 12, 2016			Bestellnummer KD(Ref	KD-Ref2	KD-Ref3	X20BC80G3		AEC20168424	Substitution
4501045	Jan 13, 2016			Referenz 1	Referenz 2	Referenz 3	X20BM11	KUNDENMATERIALNUMMER阿 ><	7246BE82651	Reparation
4501046	Jan 13, 2016			Referenz 1	Referenz 2	Referenz 3	X20BM11	KUNDENMATERIALNUMMER阿 ><	7246BE82652	Reparation
4501047	Jan 13, 2016			Referenz 1	Referenz 2	Referenz 3	X20BM11	KUNDENMATERIALNUMMER阿 ><	7246BE82650	Reparation
4501048	Jan 13, 2016			Referenz 1	Referenz 2	Referenz 3	X20BM11	KUNDENMATERIALNUMMER阿 ><	7246BE82650	Reparation
4501049	Jan 13, 2016			Bestellnummer KD(Ref	KD-Ref2	KD-Ref3	X20BM11	KUNDENMATERIALNUMMER阿 ><	7246BE82650	Reparation
4501050	Jan 13, 2016			Referenz 1	Referenz 2	Referenz 3	X20BM11	KUNDENMATERIALNUMMER阿 ><	7246BE82650	Reparation

In order to show or change an order, a **simple click** on the line of the order is enough.

In order to reset the search criteria and delete the results list, click on the button “Reset”.

3.4 Orders

An order in the B&R Material Return Portal consists of

- Order status
- Order functions (z. B. save order)
- Order data
 - Header data
 - Item data
- Order documents
- Order log



3.4.1 Order status and functions

For each order the corresponding order status and the available functions for the order are shown in the detail view.

The following functions are available to the corresponding roles for each order status:

	Save order	Release order	Cancel Order	Print	Accept cost estimate	Reject cost estimate	Cancel	Complete order	Contact to B&R	
New order		S/A					T/S/A		T/S/A	
Order created	T/S/A	S/A	S/A				T/S/A		T/S/A	
Order confirmed				T/S/A						
Order in process										
Cost estimate to be approved					S/A	S/A				
Material substituted										
Credit note created										
Material delivered										
Order finished								S/A		
Order closed										
Order canceled										

Key:

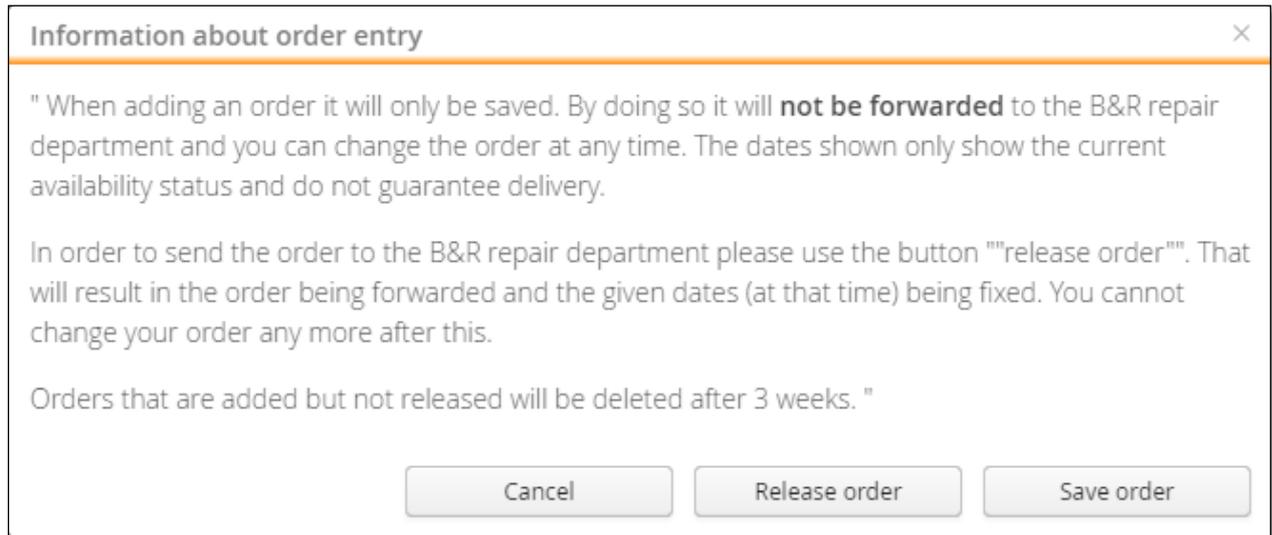
- T= Service technician (Profile = "T")
- S = Service administrator (Profile = "S")
- A= Service manager (Profile = "A")

The functions are described below in detail.

3.4.1.1 Save order

After entering or changing header or item data, a new order can be added or saved. By clicking on the button "Save order" all entries made are saved. The order will, however, not yet be sent to the B&R repair center. Only once the button "Release order" is clicked, is the order bindingly saved and sent to the B&R repair center.

If you only want to save the first steps of the order, click the button "Save order" and confirm in the information notification by clicking the button "Save order".



Note: Please only return orders which have been released since we cannot guarantee the dates and data entered and possibly cannot complete the order as requested.

3.4.1.2 Release order

New or existing orders can be released by the customer. Release means in this sense, that the order will be sent to the B&R repair center and that the further processing by B&R will be started.

To release existing or new orders click on the button "Release order".

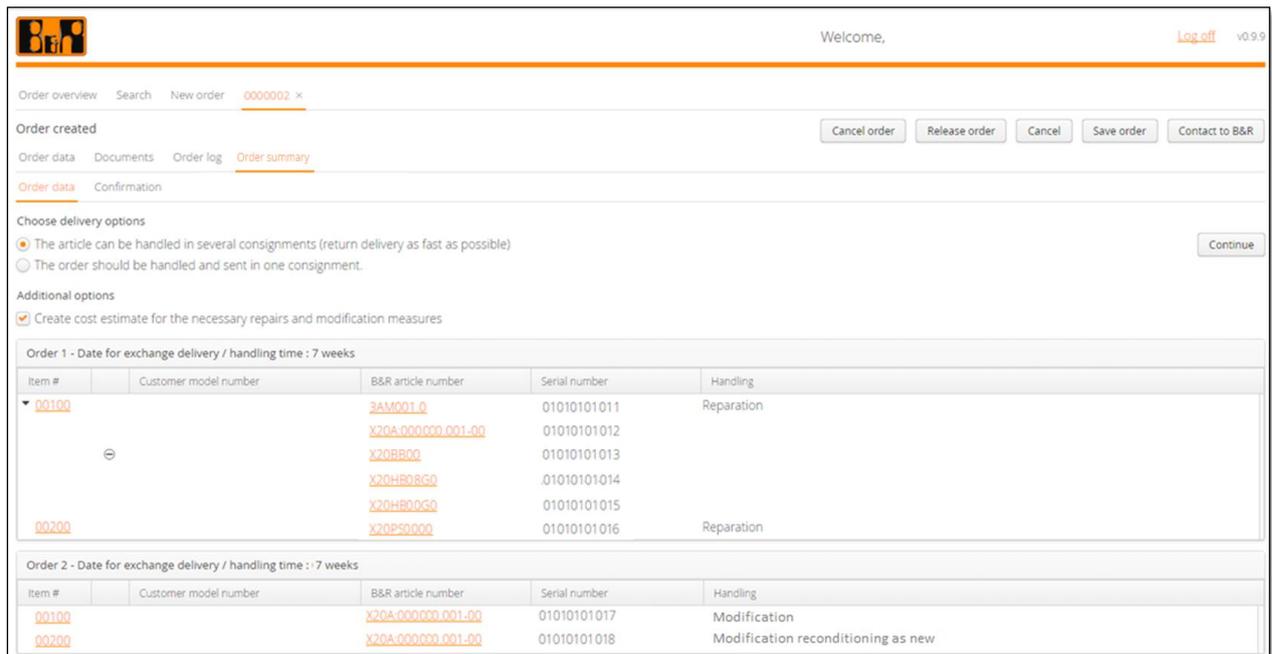
Note: if the order has already been released it can no longer be changed.

After clicking on the button "Release order" you are sent back to the order summary. Here you have the possibility to check or correct the data entered.

3.4.1.2.1 Order data

The order summary is started in the tab "Order data". Here you have the following options:

- Choose delivery options
- Additional options
- Edit items



When choosing the shipment option “The article can be handled in several consignments (return delivery as fast as possible)” your order will be divided into several consignments, if necessary, in order to make the shipments as fast as possible.

When choosing the shipment option “The order should be handled and sent in one consignment” your order will be divided into the least amount of consignments possible.

In the additional options you have the possibility of requesting an estimate for the repairs and reconditioning measures. The creation of a cost estimate is free of charge if the subsequent repair or reconditioning work is then carried out. If you do not want the repair or reconditioning work to be carried out after the estimate has been made you can still reject it and decide to not have the work carried out. In case of a return delivery an invoice will be issued for the estimation charges.

In the order data area you see an overview of the items. By clicking on the item number you have the possibility of editing the items again. The possible resulting orders are shown in advance. Thus in the example above after bindingly releasing the order, two new orders are generated.

3.4.1.2.2 Confirmation

In the “Confirmation” tab you see an overview of your customer data to the order. If you want to change the ship-to-party for the goods again, you can change back to the header data of the order and change the data.

The screenshot shows the 'Order overview' page for order 000001. At the top, there is a navigation bar with 'Order overview', 'Search', and 'New order' options. Below this, the order status is 'Order created'. A row of buttons includes 'Cancel order', 'Release order', 'Cancel', 'Save order', and 'Contact to B&R'. The main content area is divided into three columns: 'Customer information', 'Bill-to party', and 'The delivery will be sent to the following address:'. Each column contains the same address details: 423677 DEMO, Hagenower Str. 138, 60198 Frankfurt, Germany. Below this, there are 'Payment terms: Within 14 days Due net' and 'Delivery terms: Ex works'. A 'Repair terms' section follows, with an unchecked checkbox for 'I agree to the repair terms *'. A 'Release binding order' button is located below the checkbox. A note '* obligatory fields' is at the bottom of the form.

As soon as all the order data has been checked and, if necessary, changed, we ask you to read and accept our repair terms. Only when you have done this can you release the order bindingly. After clicking on the button “Release binding order”, if necessary, your order will be divided up into several individual orders and bindingly sent on to the B&R repair center. The PDF file with all the data from the order summary will be attached to all the orders added in succession and can be seen in the tab “Documents”.

After releasing, the orders will appear in the group “Order Confirmed”.

3.4.1.3 Cancel Order

If it is necessary to cancel an order, use the button “Cancel order”.

If an order is canceled using the button “Cancel order” we ask you to add a reason for canceling. After entering the reason the order is closed and can no longer be changed. For documentation reasons the order remains visible and can be seen in the order overview under the group “Order canceled”.

Note: Only orders which have a status can be canceled. Orders with the status released have already been sent to B&R and can no longer be canceled.

3.4.1.4 Accept/reject cost estimate

If a cost estimate is required for a repair case, the order appears in the group “Cost estimate to be approved” as soon as the cost estimate has been created by the B&R repair center.

Using the buttons “Accept cost estimate” and “Reject cost estimate” you have the possibility of accepting or rejecting the cost estimate. If there is no reply within 4 weeks of the creation of the cost estimate the repair order will automatically be accepted. The repair will be carried out and invoiced.

If the order is rejected using the button “reject cost estimate”, we ask you to add an appropriate reason. After entering the reason the order can be seen in the order overview in the group “Order canceled” and can no longer be edited. In case of a return delivery an invoice will be issued for the estimation charges. A disposal at B&R is free of charge.

If the order is accepted using the button “Accept cost estimate”, the order appears in the order overview under the group “Order in process” and will be processed further by the B&R repair center. You will not be invoiced in this case for the estimation costs.

3.4.1.5 Print

As soon as orders (using the button “release order”) have been bindingly sent to the B&R Repair Center, the delivery note for the shipment can be printed.

This document must be sent with the shipment. By doing so the logistics process is not only made easier for you but also for the B&R order processing department.

3.4.1.6 Complete order

Orders which, in the view of the B&R Repair Center, have been closed are shown in the order overview under the group “Order finished”.

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” and can no longer be edited.

3.4.1.7 Cancel

By clicking on the button “Cancel” you can stop the display or changing of an order. Any changes made to this order will not be saved in this case.

3.4.1.8 Contact to B&R

If a technical problem should occur when using the B&R Material Return Portals please click on the button “Contact to B&R”.

After clicking on the button your E-Mail account will open and you can enter and send your mail to B&R. Data from the order will be automatically copied to the E-Mail body. Please do not remove this data from the E-Mail body.

3.4.2 Order data

3.4.2.1 Header data

The header data contains data which are valid for the entire order.

Order overview Search New order 0000001 x

Order created Cancel order Release order Cancel Save order Contact to B&R

Order data Documents Order log Order overview

Header data

Customer: DEMO
 Contact person at customer: CONTACT PERSON
 Ship-to-party: SHIP-TO-PARTY
 Reference no. 1: Reference 1
 Reference no. 3: Reference 3
 Order reason: Failure in period 2
 B&R Service center: AT - Eggelsberg
 Name of end customer: Endcustomer
 Reference no. 2: Reference 2
 E-Mail notification:

Information for order: Information for order

+ Create item

Items

Item #	Customer model number	B&R article number	Serial number	Amount	B&R delivery date	Handling	Status
▶ 00100		X20A000000001-00	01010101010	1	Dec 12, 2012	Reparation	In process

Contact person at customer

The administrator at the customer end is the employee at the customer, who is responsible for the repair case. This person receives – assuming the E-Mail address has been entered and the Mail notification has been activated – information via E-Mail. The administrator and other data such as E-Mail address can be administered by the user administrator.

Ship-to-party

After successfully repairing the article it is sent to the address of the sold-to-party entered.

Reference no. 1 – 3:

In these fields customer's own references can be entered, e.g. repair number, notification number and delivery note number. The customer references will be shown on all documents (cost estimate, order, report, delivery note and invoice).

You have the possibility of choosing your own descriptions for the references. To have these changed please send an E-Mail to service.portal@br-automation.com with your requirements, e.g. order number instead of reference 1.

Information for order

In this field general descriptions or comments to the order can be added (e.g. in which environmental conditions did the error occur).

Order reason

The trigger/reason for creating the order can be added here. You can decide between the following options:

- Transport damage: the article was damaged during transport
- Warranty claim during installation: the module stopped working during installation
- Warranty 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

B&R Service center

You will send the article to this B&R site.

Name of end customer

In this field you can enter the name of the final customer, from whom the article to be repaired originally came.

E-Mail notification

By choosing this checkbox the chosen contact person will receive an automatically generated E-Mail as soon as the status of the order changes as follows:

- Order in process (B&R has received the article)
- Cost estimate to be approved (B&R has created a cost estimate)
- Order finished (B&R has sent the repaired article)

The mail notification can, as already mentioned, be prefilled in the user settings.

3.4.2.2 Item data

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

Item #

Shows the B&R item number which applies for the rest of the process. The item number will be shown on all documents (cost estimate, order, report, delivery note and invoice).

Customer model number

Shows your article number for the item. The customer article number will be shown on all documents (cost estimate, order, report, delivery note and invoice).

B&R article number

Shows the article number for the item which applies at B&R. The B&R article number will be shown on all documents (cost estimate, order, report, delivery note and invoice).

Serial number

Shows the serial number for the item. The serial number will be shown on all documents (cost estimate, order, report, delivery note and invoice).

Amount (item)

Shows the amount in pieces for the item. The amount will be shown on all documents (cost estimate, order, report, delivery note and invoice).

B&R delivery date

Shows the original delivery date of the serial number by B&R.

Handling

Shows the handling type chosen for the item.

Status

Shows the status of the item. It differentiates between:

- Open: Item in process
- Closed: Item is completed
- Irreparable: Item is not repairable

3.4.3 Order documents

The following documents can be found – as long as they are available for the order – in PDF format for each order in the “Documents” tab:

- Report
- Cost estimate
- Order confirmation
- Delivery note
- Invoice

Order overview Search New order **0000003** x

Order in Process Print Cancel Contact to B&R

Order data **Documents** Order log

Document type	Description	Created on	Filename	
Report		Jan 11, 2016	Servicereport.pdf	
Cost Estimate	Cost estimate no. 0001636060	Mar 21, 2016	Cost Estimate Service.pdf	
Order Confirmation	Order Confirmation 0001636055	Jan 11, 2016	Order confirmation exchange.pdf	
Order Confirmation	Order Confirmation 0060108003	Mar 21, 2016	Order confirmation returns.pdf	
Delivery Note	Delivery note no. 0082217030	Jan 11, 2016	Delivery note exchange.pdf	
Invoice	Invoice no. 0093882431	Jan 11, 2016	Invoice exchange.pdf	

3.4.4 Order log

In order to be able to follow every step of the order, all relevant changes made by the customer or B&R employees can be found in the order log.

The screenshot displays the 'Order log' for order 0000004. The interface includes a navigation bar with 'Order overview', 'Search', and 'New order' options. The 'Order in Process' section contains buttons for 'Print', 'Cancel', and 'Contact to B&R'. The 'Order log' table is as follows:

Action	Date	Creator
Order created on	Jan 11, 2016	First Name Last Name
Order released on	Jan 11, 2016	First Name Last Name
Order in progress since	Jan 11, 2016	Max Mustermann , Abt.AT - Eggelsberg - Service
Cost estimate created on	Jan 11, 2016	Max Mustermann , Abt.AT - Eggelsberg - Service
Cost estimate accepted on	Jan 11, 2016	First Name Last Name
Cost estimate rejected on	Jan 11, 2016	First Name Last Name
Material substituted on	Jan 11, 2016	Max Mustermann , Abt.AT - Eggelsberg - Service
Credit note created on	Jan 11, 2016	Max Mustermann , Abt.AT - Eggelsberg - Service

3.5 Order change

As long as the orders have been started but not yet released, you can continue to edit and change them.

As soon as you have released an order, the order will be sent bindingly to the B&R repair center and changes to the order are no longer possible.

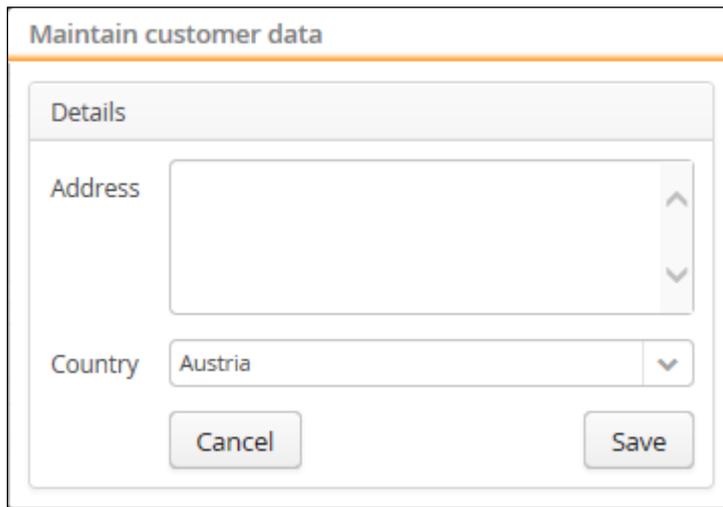
You can change all header data in the order until the order has been released. To change any information in the fields administrator, the sold-to-party, the order reason or the service center, choose the appropriate entry in the dropdown list.

For the sold-to-party you have the possibility of choosing a possible sold-to-party using the  button by searching for name, zip, city, street and country.

Sold-to-party search

Name	Zip	City	Street	Country
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
A-FORM AG	09456	Mildenau	Gewerbegebiet Nord 7	Germany
ANKURO Int. GmbH	18059	Rostock	Voss-Str. 31a	Germany
Aleo Solar AG	17291	Prenzlau	Krummer Weg 1	Germany
Astro- und Feinwerktechnik	12489	Berlin	Albert-Einstein-Str. 12	Germany
Boehringer Ingelheim	88400	Biberach	Hubertus-Liebrecht-Str....	Germany
DEMOKUNDE SERVICEPORTAL 阿 & ><	60198	Frankfurt	Chinesisches Zeichen 阿...	Germany
Elektrowerkzeuge GmbH Eibenstock	08309	Eibensto...	Auersbergstr. 10	Germany
Jacobsen Röntgentechnik GmbH	19061	Schwerin	Hagenower Str. 73	Germany
KGL GmbH	17033	Neubran...	Nemerower Str. 12	Germany
KNUTH-Neutec Handelsges. mbH	15366	Neuenh...	Zum Mühlenfließ 8	Germany

If the article being sent back originates from one of your end customers, you can enter the name of the corresponding customer in the field "end customer name". Additionally you can enter the corresponding address data – by clicking on the button .



The screenshot shows a dialog box titled "Maintain customer data". It has a "Details" section with two input fields: "Address" (a text area with scrollbars) and "Country" (a dropdown menu currently showing "Austria"). At the bottom, there are two buttons: "Cancel" and "Save".

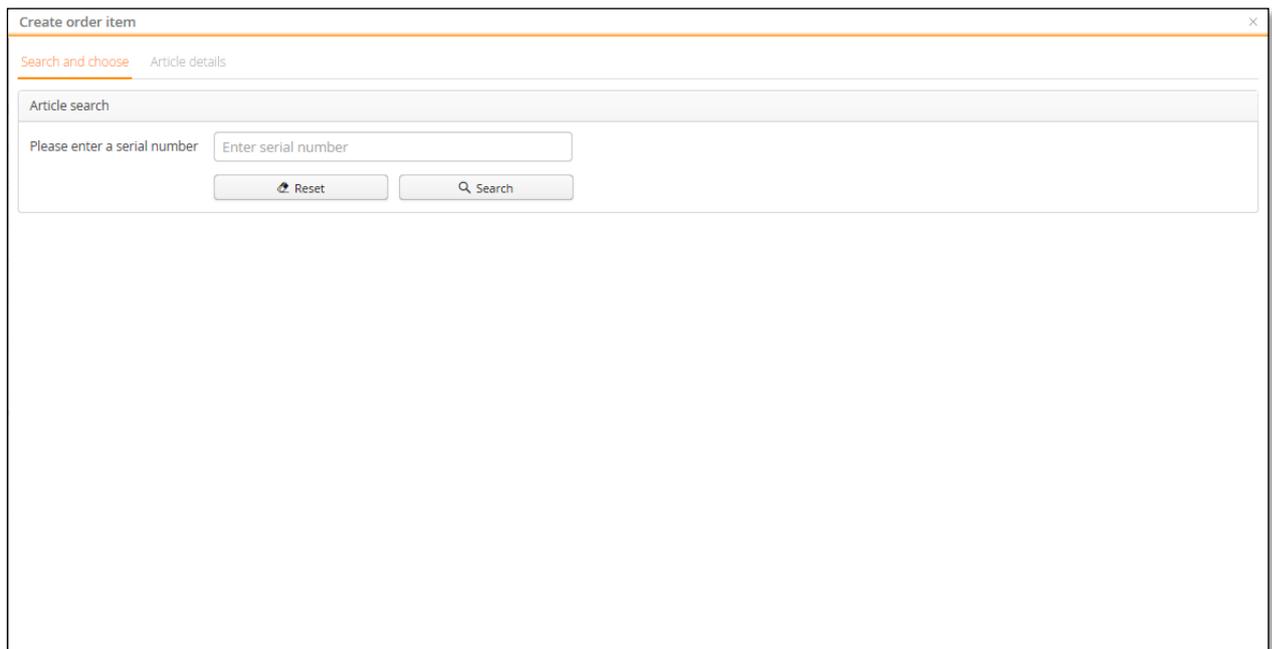
For creating item data you have the following possibilities:

- Add item
- Edit item
- Delete item

3.5.1 Add item

Using the button "Create item" you have the possibility of creating further items for the order.

After clicking on the button a window will open where you have to enter the serial number.



The screenshot shows a dialog box titled "Create order item". It has two tabs: "Search and choose" (selected) and "Article details". Under "Search and choose", there is an "Article search" section with a text input field labeled "Please enter a serial number" containing the placeholder text "Enter serial number". Below the input field are two buttons: "Reset" and "Search".

The entry of a serial number has to be confirmed using the button "Search".

If the article entered is a structured article or part of a structured article, you will receive an overview of the components included.

For structured articles you have the possibility of selecting components which you would like to return.

Create order item
✕

Search and choose
Article details

Article search

Please enter a serial number

Serial number entered is part of an assembly

Item #	Article included	Serial number	B&R article number	Customer model number	B&R delivery date
▼ 00100	<input checked="" type="checkbox"/>	01010101010	X20A-000000.001-00		Jan 30, 2013
	<input type="checkbox"/>	01010101015	X20BB00		
	<input checked="" type="checkbox"/>	01010101014	X20HB00G0		
	<input checked="" type="checkbox"/>	01010101013	X20HB00G0		
	<input checked="" type="checkbox"/>	01010101012	X20PS0000		

After choosing the components you will be taken to the article details by clicking the button “Save”.

In the article details the following data will be shown:

Create order item
x

Search and choose Article details

Item detail X20A:000000.001-00

Add File Files already uploaded: 0 emergency repair

Item #	Article included	Customer model number	B&R article number	Serial number	Amount (item)	B&R delivery d	Info	Expected delivery	Handling
▼ 00100			X20A:000000.001-00	01010101010	1.0	Jan 30, 2013	YQ		Reparation
	<input type="checkbox"/>		X20BB00	01010101015	1.0				
	<input checked="" type="checkbox"/>		X20HB00G0	01010101014	1.0				
	<input checked="" type="checkbox"/>		X20HB00G0	01010101013	1.0				
	<input checked="" type="checkbox"/>		X20PS0000	01010101012	1.0				

Note

Note

Information

When choosing a Reparation your goods will be inspected and, if required and desired, repaired and subsequently sent back to you.

Customer

Description

Additional requirements / information

B&R

Report

Comments

Details

Claim recognized

Attachment Files 0

Cancel Save

Item #

Shows the B&R item number which applies for the rest of the process. The item number will be printed on all documents (cost estimate, order, report, delivery note and invoice).

Article included

Shows the selected articles which are to be returned.

Customer model number

Shows your article number for the item. The customer material number will be printed on all documents (cost estimate, order, report, delivery note and invoice).

B&R article number

Shows the article number for the item which applies at B&R. The B&R article number will be printed on all documents (cost estimate, order, report, delivery note and invoice).

Serial number

Shows the serial number for the item. The serial number will be printed on all documents (cost estimate, order, report, delivery note and invoice).

Amount (item)

Shows the amount in pieces for the item. The amount will be printed on all documents (cost estimate, order, report, delivery note and invoice).

B&R delivery date

Shows the original delivery date of the serial number by B&R.

Info

Further details about the article, for example information about the guarantee. This information can limit the possibilities for further processing. For example, it is not possible to exchange a (at B&R) last-order article. In this case it is only possible to offer a repair.

Further details to the contents of the field are offered if you click on the underlined contents in orange.

Expected delivery

Shows the expected delivery date of your article after delivery to B&R.

Handling

Depending on the article and the customer type (standard customer or credit customer) there are different types of handling available.

Note

Shows the intended work for the article entered – assuming “repair” or “recondition” was chosen.

Information

Shows the details for the chosen type of handling.

Description

Field for you to enter the best possible error description, in order to increase the speed of the repair.

Additional requirements/ information

Field for you, in the case of reconditioning, to enter the best possible error description, in order to increase the speed of the repair.

Report

Shows the cause of error – determined by B&R – after it has been received by B&R

Comments

Shows comments about the error, after it has been received by B&R

Details

Shows the place of the error – determined by B&R – after it has been received by B&R

Claim recognized

If the checkbox has been checked the claim has been recognized by B&R.

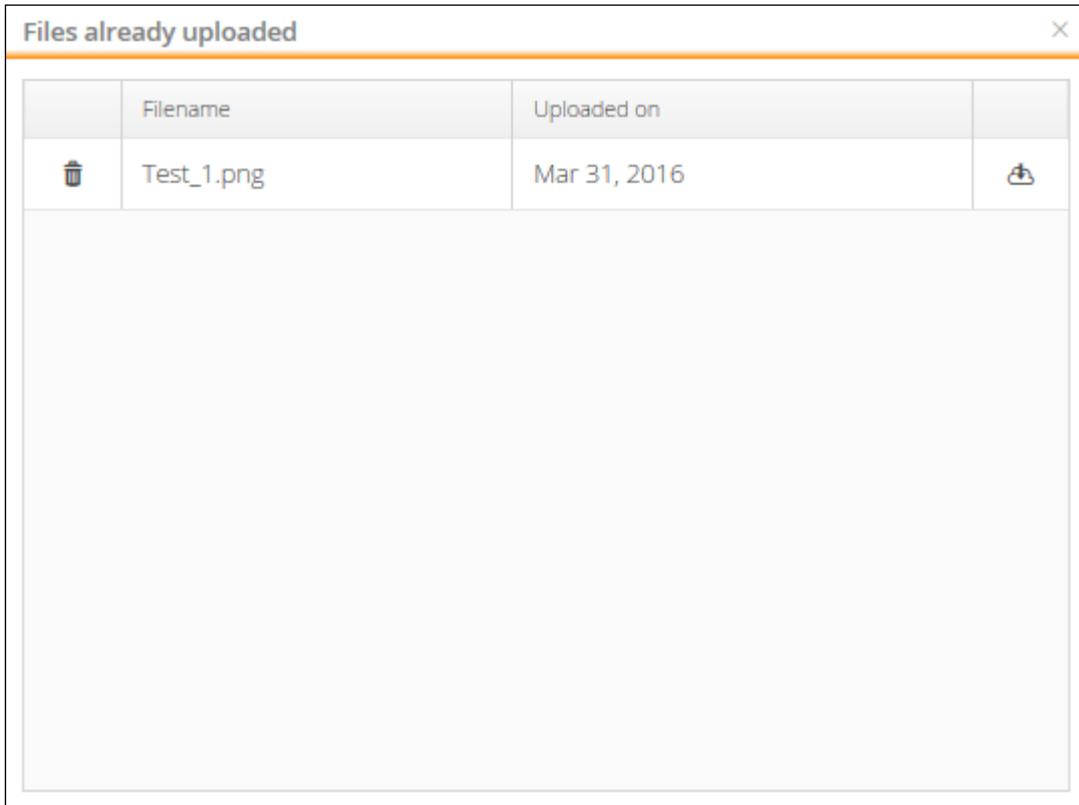
Add File

Using this button you can add files to the items.

To do so click on the button “Add file”. A window will open where you can choose the file.

After choosing the file and confirming the message the file will be attached.

In the display “Files already uploaded” the number of the files already attached is shown. After clicking on the number of attachments for the item the attachments are shown and can be removed if necessary.



	Filename	Uploaded on	
	Test_1.png	Mar 31, 2016	

If the file has been successfully added it will be shown in the item data for the order.

After entering all necessary data you can add the item to your order by clicking the button “Save”.

3.5.2 Edit item

In order to edit or show an item, a **simple click** on the line in the item data is enough.

To edit the window “Show items” opens. The functions available are the same as when adding a new item. For further details about that see chapter 3.5.1 in the description for window “article details”.

3.5.3 Delete item

In order to delete an existing item, a simple click on the button  is enough.
If needed, a deleted item can be undeleted at any time.

3.6 New order

Using the tab “New order” you can add new orders.

Several fields of the header data are already filled out for you, which you can change if needed.

In a new order you have the same options as when you are editing an existing order.

For details of this see: 3.6 Order changes

The screenshot shows the 'New order' interface. At the top, there is a navigation bar with 'Order overview', 'Search', and 'New order' (highlighted). Below this, there are buttons for 'Release order', 'Cancel', 'Save order', and 'Contact to B&R'. The main form is divided into 'Header data' and 'Items' sections.

Header data:

- Customer: DEMO
- Contact person at customer: CONTACT PERSON
- Ship-to-party: SHIP-TO-PARTY
- Order reason: Failure in period 2
- B&R Service center: AT - Eggelsberg
- Name of end customer: [Empty field]
- Reference no. 1: [Empty field]
- Reference no. 2: [Empty field]
- Reference no. 3: [Empty field]
- E-Mail notification:

Information for order: [Empty text area]

Items:

Item #	Customer model number	B&R article number	Serial number	Amount	B&R delivery date	Handling	Status

4 Support for the B&R Material Return Portal

4.1 Contact button in the B&R Material Return Portal

If a technical problem should occur when using the B&R Material Return Portals please click on the button “Contact to B&R” on the top right of the order header.

After clicking on the button your E-Mail account will open and you can enter and send your mail to B&R. Data from the order will automatically be copied to the E-Mail body. Please do not remove this data from the E-Mail body.

4.2 Contacting via support.portal@br-automation.com

We kindly ask you to use the button “Contact to B&R” if technical problems occur. If, for any reason, you do not have the Support button or cannot use it, and still have questions about the process or have problems with the application in spite of this documentation, we ask you to send an E-Mail to support.portal@br-automation.com. Your request will be sent to B&R and a support employee for the portal will handle your request.