

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.

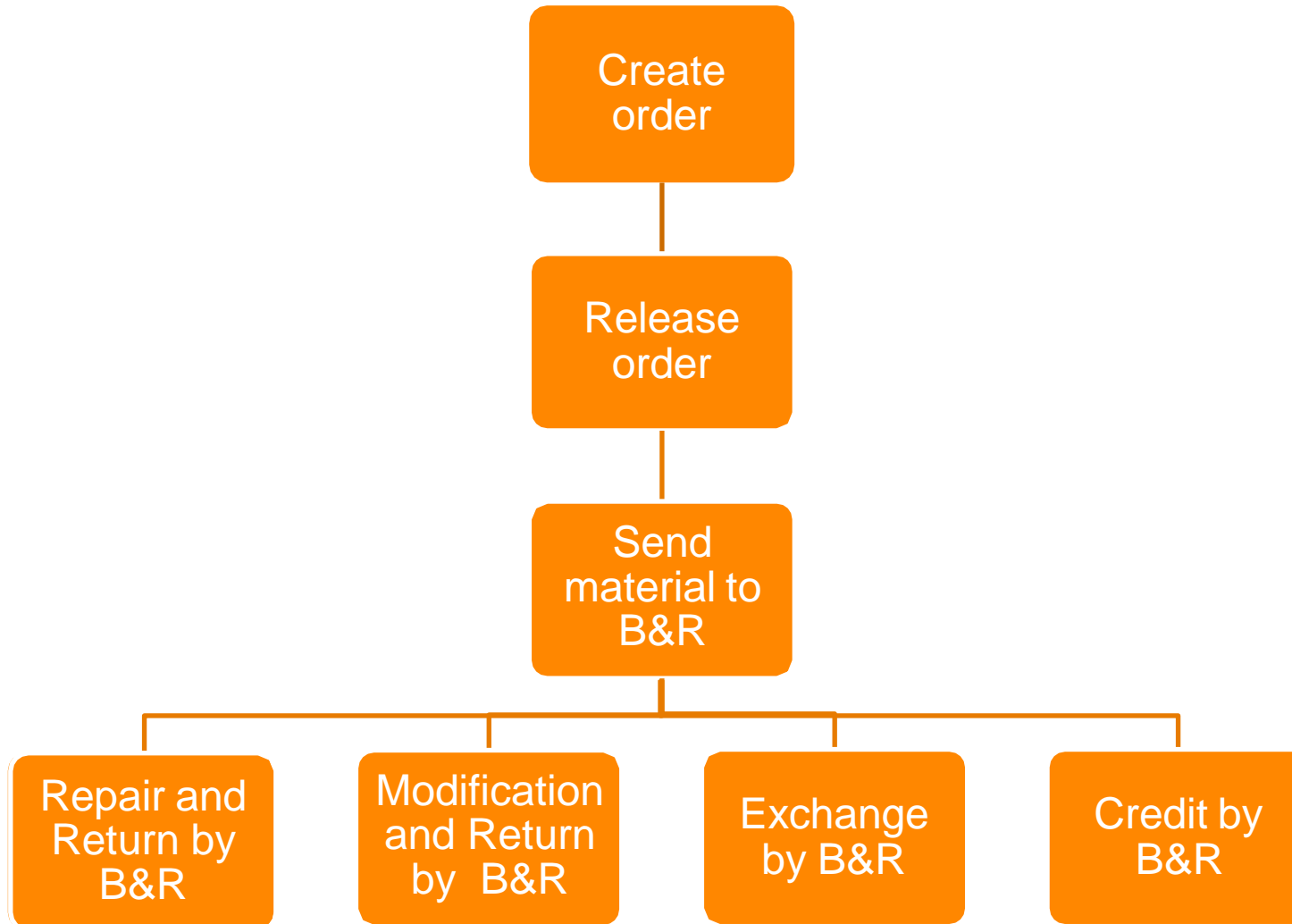
And all this can be accomplished with minimum effort.

- Overview of the workflow
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 - Order overview
 - Search
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 - Print delivery note
 - Accept cost estimate
 - Complete order
 - Cancel order
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- Log off

Overview of the workflow



Overview of the workflow



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

User Management

Service

Support Portal

Modify User Data

Manage Users

Notifications

Material Return Portal

Material Compliance

Engineering Sample Regulations

Product Configurator

ADD NEW USER

User ID	First name	Last name	Web
C003152	Thomas	Schubernig	
C003472	Thomas	Laiminger	
C004758	Reinhard	Kirnstedter	
C004874	Franz	Schweiberer	
C004894	Roman	Krösslhuber	

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

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

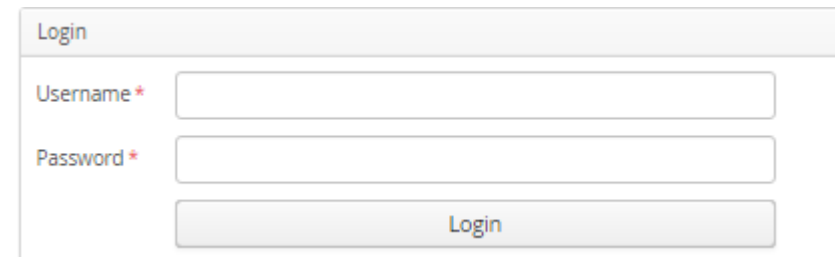
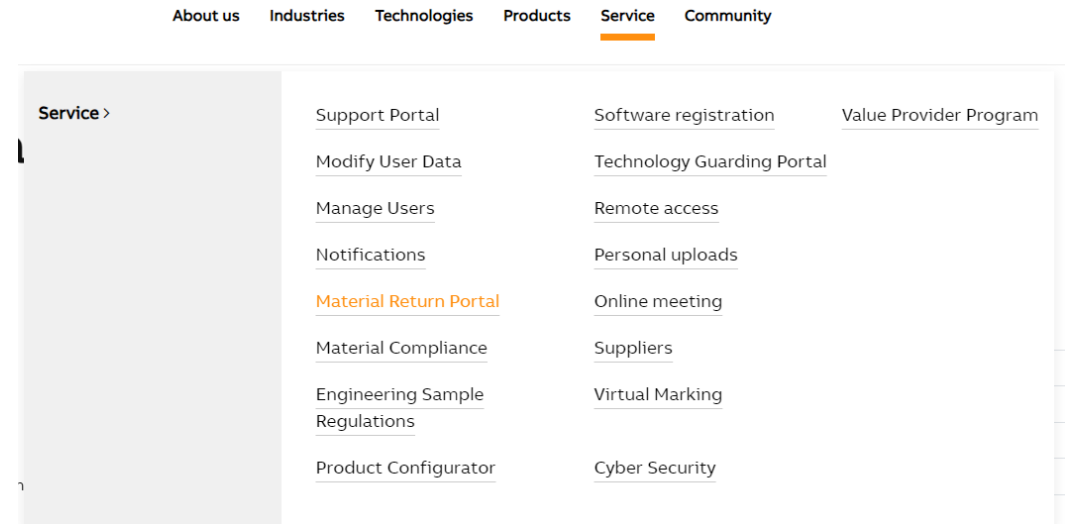
Various user roles:

- **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



The screenshot shows the B&R login form. It has a title 'Login' and two input fields: 'Username *' and 'Password *'. Below the input fields is a 'Login' button.

Forgot password

Home > Login

Login

Forgot your password?

Please enter your username or email address. Instructions for resetting the password will be immediately emailed to you.

Reset Password

Login

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

The screenshot displays the B&R Material Return Portal interface. At the top left is the B&R logo. On the right, it says "Welcome," and "Log off v1.1.2". Below the logo, there are navigation links: "Order overview" (highlighted), "Search", and "New order". A "My orders" checkbox is present, and a "Refresh" button is on the right. The main content area shows 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 is currently empty. Below the table, there is a list of order statuses with their respective counts:

- Order created (0)
- Order confirmed (0)
- Order in process (14)
- Cost estimate to be approved (0)
- Material substituted (0)
- Order finished (146)
- Order closed (169)
- Order canceled (15)
- Credit note created (0)
- Material delivered (0)

Order Overview

Structure of the B&R Material Return Portal

- 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

The screenshot shows the B&R search interface. At the top left is the B&R logo. At the top right, it says "Welcome," and "Log off v1.1.2". Below the logo, there are navigation links: "Order overview", "Search" (which is highlighted), and "New order".

The main section is titled "Search criteria" and contains several input fields:

- Customer number: 220198
- 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] [empty] to [calendar icon] [empty]

At the bottom of the search criteria section, there are two buttons: "Reset" and "Search".

Below the search criteria is a section titled "Search results" 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 table body]										

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

Order data

Header data

Order overview Search New order 0000301 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	Order reason	Failure in period 2
Contact person at customer	CONTACT PERSON	B&R Service center	AT - Eggelsberg
Ship-to-party	SHIP-TO-PARTY	Name of end customer	Endcustomer
Reference no. 1	Reference 1	Reference no. 2	Reference 2
Reference no. 3	Reference 3	E-Mail notification	<input type="checkbox"/>

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		Y20A000000001-00	01010101010	1	Dec 12, 2012	Reparation	In process		

The header data contains data valid for the entire order

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
 - 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

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

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

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	Order reason	Failure in period 2
Contact person at customer	CONTACT PERSON	B&R Service center	AT - Eggelsberg
Ship-to-party	SHIP-TO-PARTY	Name of end customer	Endcustomer
Reference no. 1	Reference 1	Reference no. 2	Reference 2
Reference no. 3	Reference 3	E-Mail notification	<input type="checkbox"/>

Information for order

Information for order

[+ Create item](#)

Items

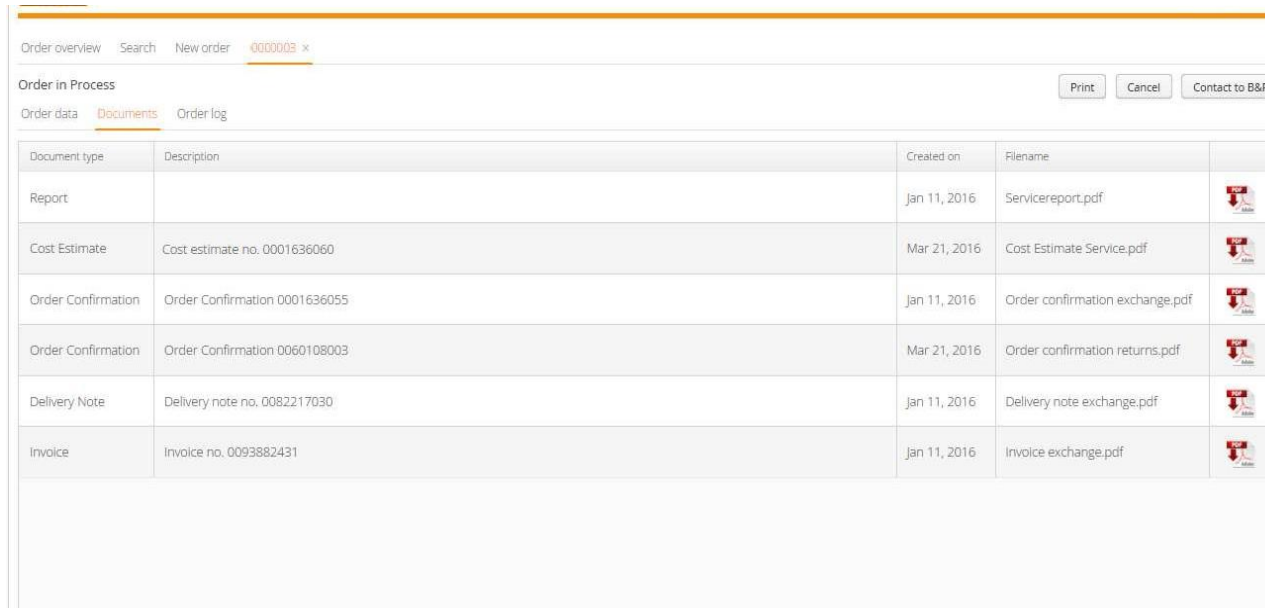
Item #	Customer model number	B&R article number	Serial number	Amount	B&R delivery date	Handling	Status		
00100		x2Da0.00.000.001.00	01010101010	1	Dec 12, 2012	Reparation	In process		

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







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



The screenshot shows a web interface for an order management system. At the top, there are navigation tabs: "Order overview", "Search", "New order", and a dropdown menu for order number "0000003". Below this, the status "Order in Process" is displayed, along with buttons for "Print", "Cancel", and "Contact to B&R". A sub-menu is open under "Order data", showing "Documents" as the active tab, with "Order data" and "Order log" also visible. The main content is a table listing documents associated with the order.

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	

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

Order log

Order overview Search New order 0000004 x

Order in Process

Order data Documents Order log

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

All steps of the order

New Order

How to use the B&R Material Return Portal

New Order

Order overview Search: New order 000001

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

Order data Documents Order log Order overview

Header data

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

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		120450000000100	01010101010	1	Dec 12, 2012	Reparation	In process	0	

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

Add item – Part 1

The screenshot displays a web interface for creating an order item. On the left, a sidebar contains fields for 'Ship-to-party' (SHIP-TO-PARTY), 'Reference no. 1' (Reference 1), and 'Reference no. 3'. Below these is a '+ Create item' button highlighted with a red box. At the bottom left is an 'Items' table with columns 'Item #' and 'Customer moc', containing one row with '00100'. The main area is titled 'Create order item' and has two tabs: 'Search and choose' (active) and 'Article details'. Under 'Search and choose', there is an 'Article search' section with the text 'Please enter a serial number' and an input field labeled 'Enter serial number'. Below the input field are 'Reset' and 'Search' buttons, with the 'Search' button highlighted by a red box. At the top right, there are fields for 'Name of end customer' (Endcustomer) and 'Reference no. 2' (Reference 2).

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

Add item – Part 2

Particularity: structured articles

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	X20A000000.001-00		Jan 30, 2013
	<input type="checkbox"/>	01010101015	X20BR00		
	<input checked="" type="checkbox"/>	01010101014	X20HR00G0		
	<input checked="" type="checkbox"/>	01010101013	X20HR00G0		
	<input checked="" type="checkbox"/>	01010101012	X20PS0000		

- 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)

Create order item

Search and choose [Article details](#)

Item detail X20A-000000.001-00

Files already uploaded:

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	<input type="checkbox"/>		X20A-000000.001-00	01010101010	1.0	Jan 30, 2013	YQ		Reparation
	<input type="checkbox"/>		X20B800	01010101015	1.0				
	<input checked="" type="checkbox"/>		X20H800G0	01010101014	1.0				
	<input checked="" type="checkbox"/>		X20H800G0	01010101013	1.0				
	<input checked="" type="checkbox"/>		X20PS000	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

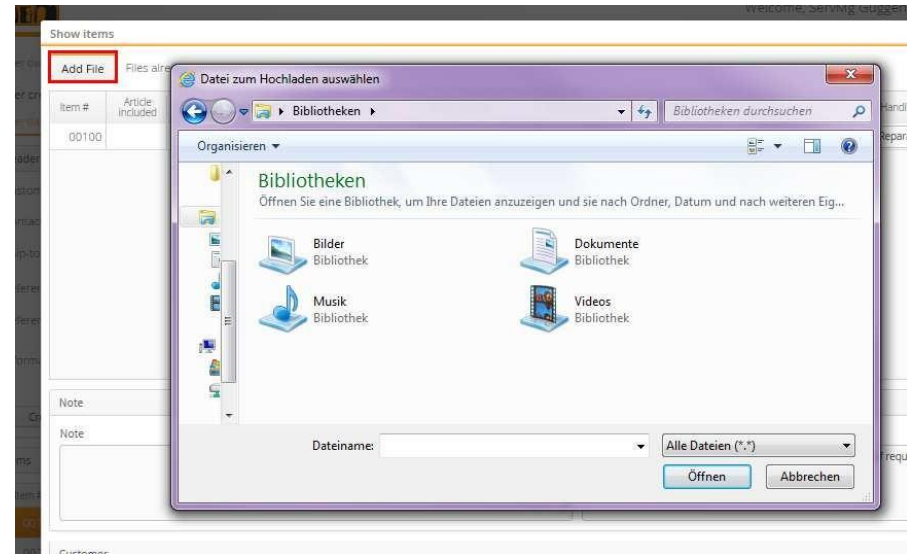
Files

- 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

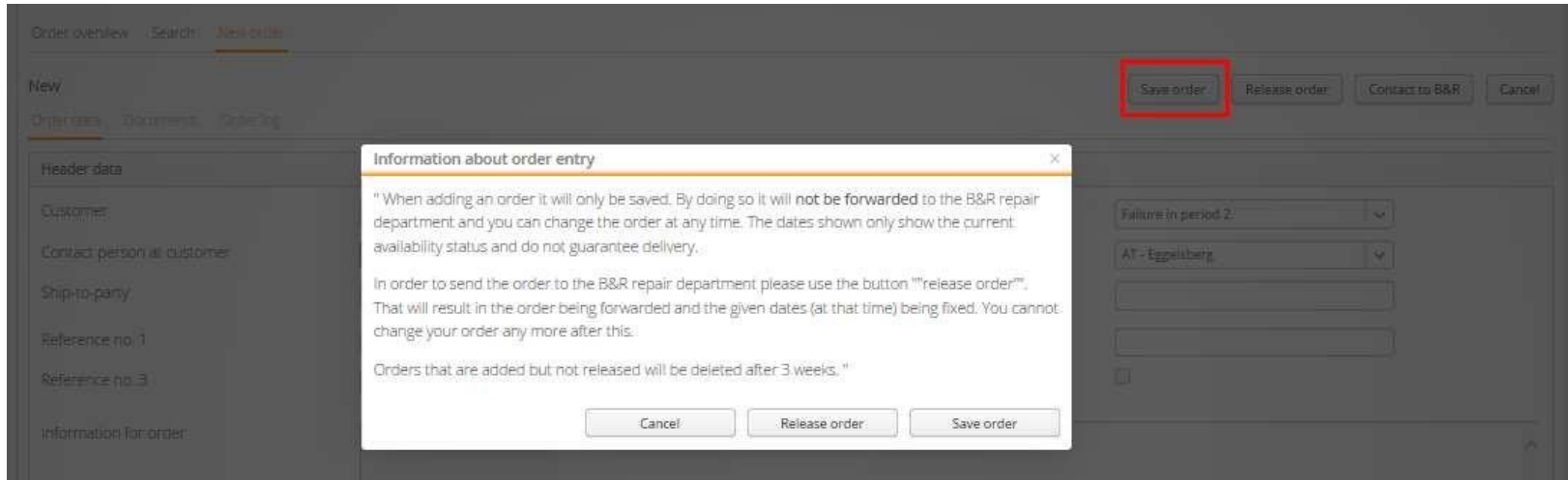
- Button “Add file”
- Open file to add it



- 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

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

Order overview Search New order 4510067 x

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

Order data Documents Order log

Header data

- 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 overview Search New order 0000002 x

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

Order data Documents Order log Order summary

Order data Confirmation

Choose delivery options

The article can be handled in several consignments (return delivery as fast as possible)

The order should be handled and sent in one consignment. Continue

Additional options

Create cost estimate for the necessary repairs and modification measures

Order 1 - Date for exchange delivery / handling time : 7 weeks

Item #	Customer model number	B&R article number	Serial number	Handling
00100		3AM001_0	01010101011	Reparation
		X20A.000000.001_00	01010101012	
		X20B800	01010101013	
		X20HR08G0	.01010101014	
		X20HR00G0	01010101015	
00200		X20PS0000	01010101016	Reparation

Order 2 - Date for exchange delivery / handling time : 7 weeks

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.

Order overview Search New order 000001 ✕

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

Order data Documents Order log Order overview

Order data Confirmation

Customer information:	Bill-to party	The delivery will be sent to the following address:
423677 DEMO Hagenower Str.138 60198 Frankfurt Germany	423677 DEMO Hagenower Str.138 60198 Frankfurt Germany	423677 DEMO Hagenower Str.138 60198 Frankfurt Germany
	Payment terms:Within 14 days Due net	Delivery terms:Ex works

Repair terms:

I agree to the [repair terms](#) *

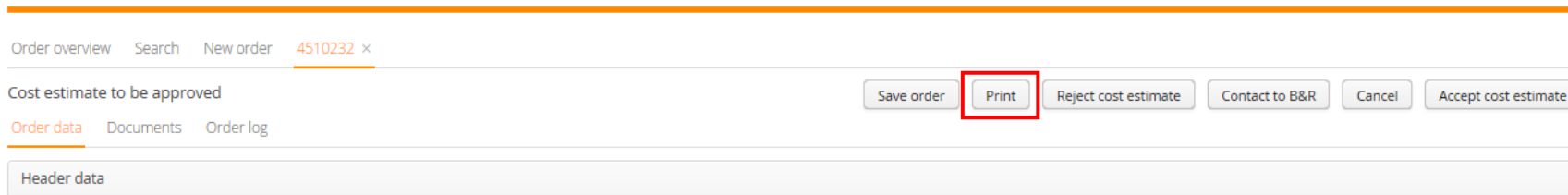
Release binding order

* obligatory fields

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

Cost estimate to be approved

Order overview Search New order

My orders Refresh

Order created (12)						
Order confirmed (6)						
Order in process (4)						
Cost estimate to be approved (1)						
Order no.	Created on	(Scheduled) goods issue date at B&R	Closed on	Reference no. 1	Reference no. 2	Reference no. 3
4510232	Jul 18, 2016	05/04/2017				
Material substituted (0)						
Order finished (1)						
Order closed (0)						
Order canceled (6)						
Credit note created (0)						
Material delivered (0)						


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

Order overview Search New order 4510232 x

Cost estimate to be approved

Order data **Documents** Order log

Document type	Description	Created on	Filename	
Cost Estimate	Cost estimate no. 0001696038	Jul 18, 2016	Cost Estimate Service.pdf	

The cost estimate can be found under tab “Documents”

Accept cost estimate

Order overview Search New order 4510232 x

Cost estimate to be approved

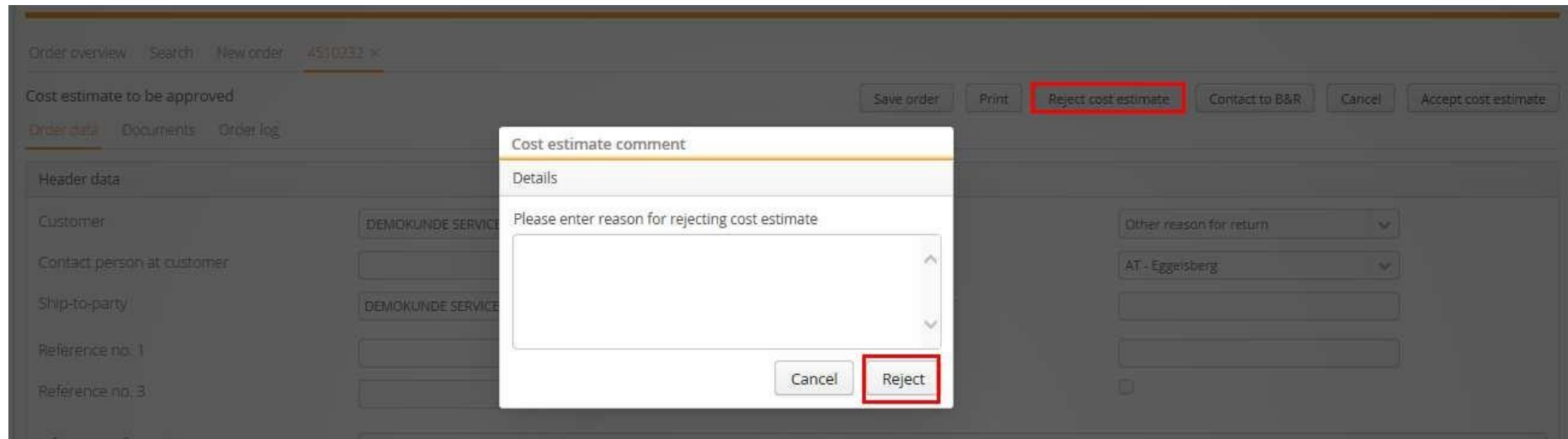
Order data Documents Order log

Header data

Save order Print Reject cost estimate Contact to B&R Cancel **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

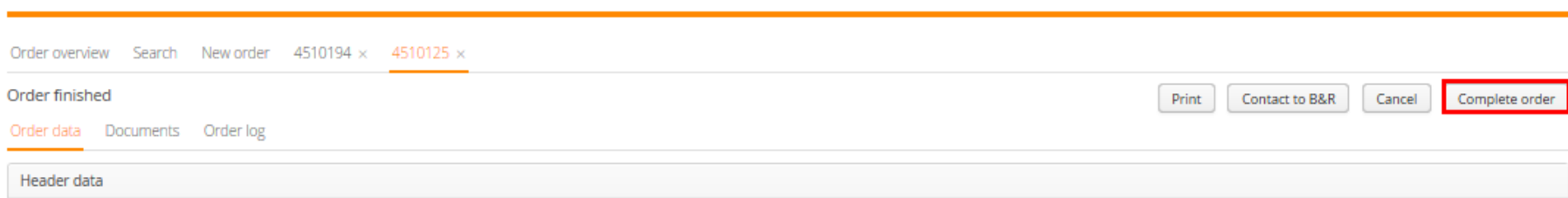


- Button “Reject cost estimate”
- Enter reason for rejecting cost estimate
- Button “Reject”
- Order can be seen in the order overview in the group “Order canceled”
- Order will no longer be processed

Complete order

How to use the B&R Material Return Portal

Complete order

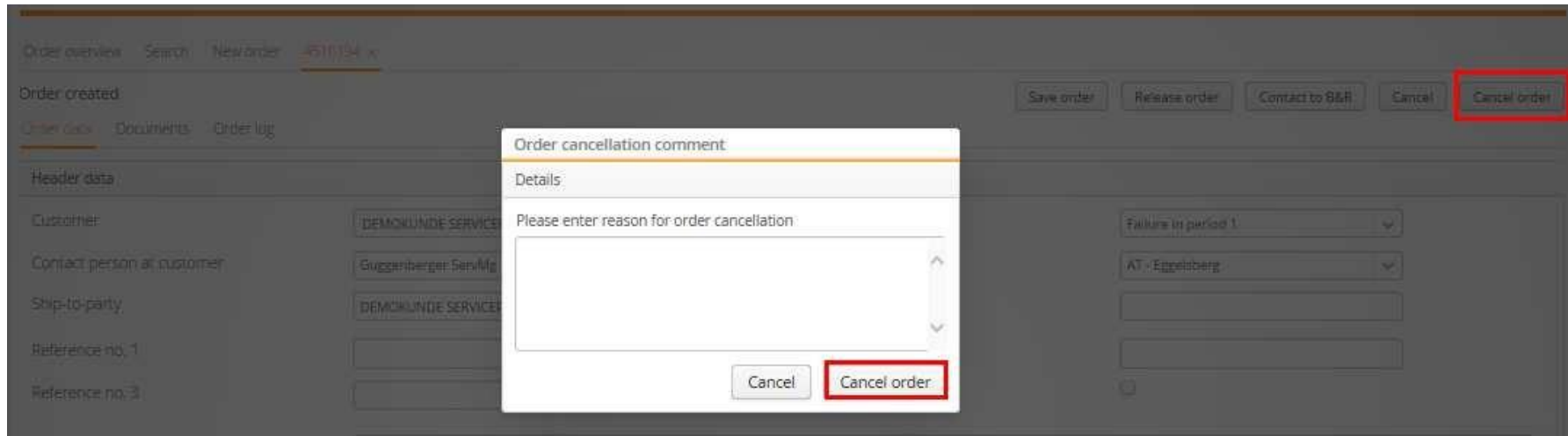


- By clicking on the button “Complete order” you let B&R know that, in your view, the order has been completed
- As a result the order appears under the group “Order closed”

Cancel order

How to use the B&R Material Return Portal

Cancel order



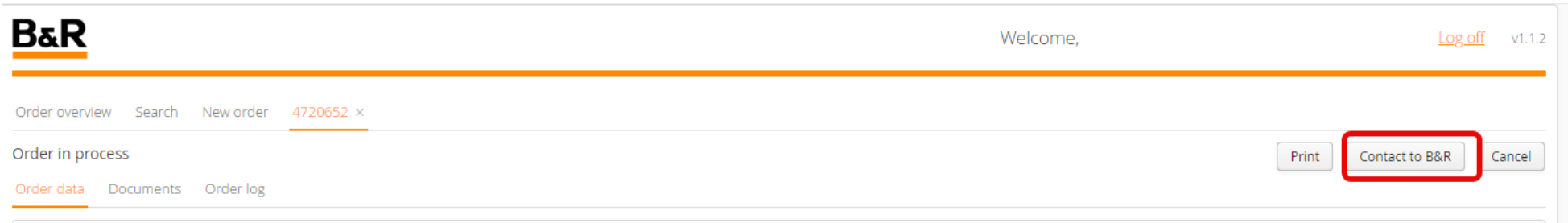
- Button “Cancel order”
- Enter reason for order cancellation
- Button “Cancel order”

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

Technical Support

How to use the B&R Material Return Portal

Technical Support

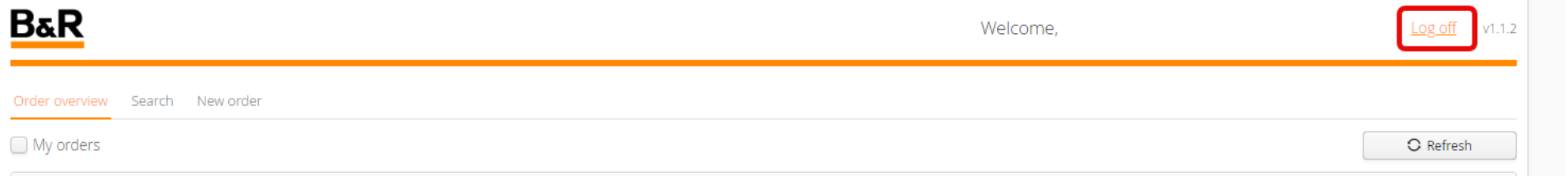


The screenshot shows the B&R user interface. At the top left is the B&R logo. To the right, it says 'Welcome,' followed by a 'Log off' link and the version number 'v1.1.2'. Below this is a navigation bar with 'Order overview', 'Search', 'New order', and a search result '4720652 x'. Underneath, it says 'Order in process'. On the right side of this section, there are three buttons: 'Print', 'Contact to B&R' (which is highlighted with a red box), and 'Cancel'. At the bottom left of this section, there are links for 'Order data', 'Documents', and 'Order log'.

- 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”

A 3D geometric graphic consisting of several orange and white rectangular blocks arranged in a complex, overlapping structure. The blocks are positioned on the left side of the page, with some extending towards the center. The background features a perspective view of a white floor with faint lines receding into the distance.

**YOUR GLOBAL PARTNER FOR
AUTOMATION EXCELLENCE**