USER MANUAL

Business Online for End Customers

Contents

A. Operational instructions for the solution user

1. Requesting access

Account request process has two stages. First step is to request an ABB account under following link: http://www.abb.com. After filling in account request form and accepting Terms and Conditions you will receive an email with account activation link.

When the account will be activated, you will be able to log in to ABB MyPortal. Over there you will have the possibility of requesting access to Business Online in 'Other Services' widget on the right side of the screen (it will be visible in tab 'On Request').

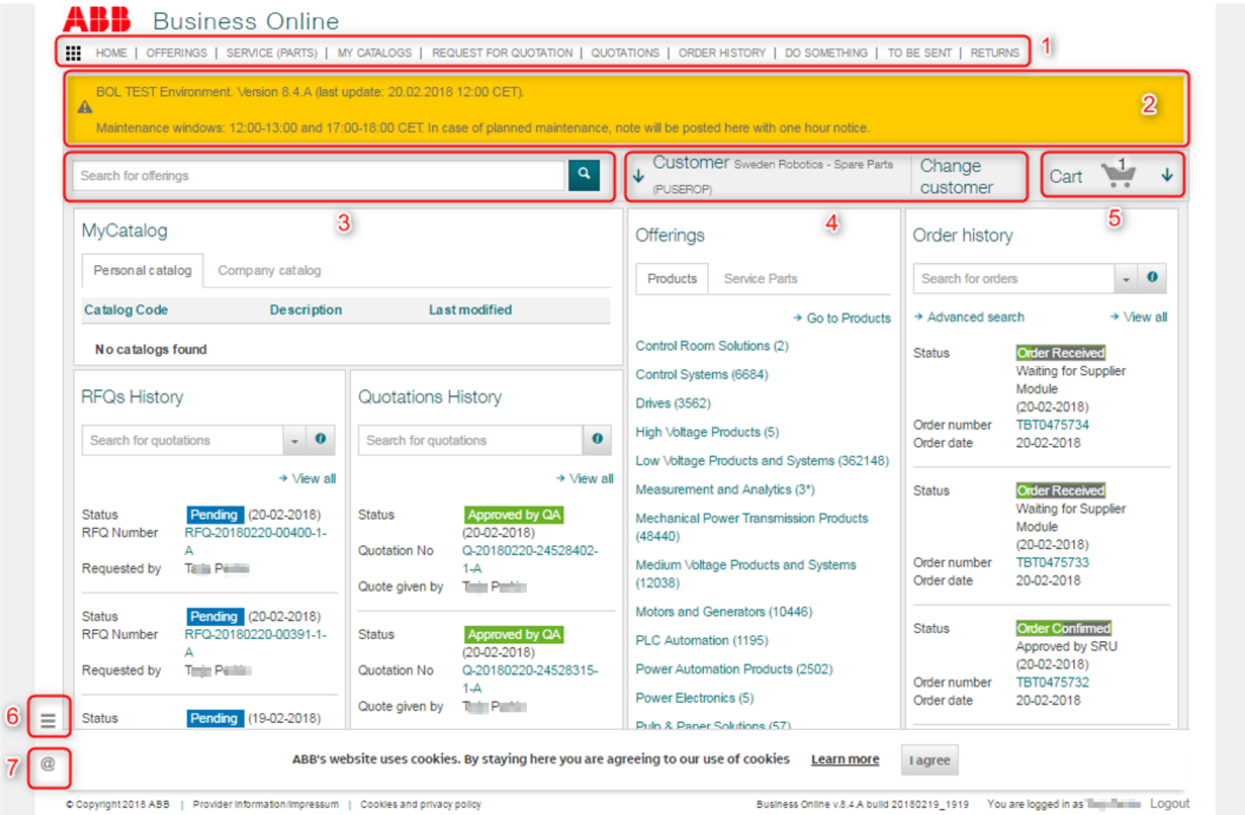
Requesting an account to Business Online will require you to fill in the Registration form. The most important is to choose your country, the business offering and product type you are interested in, as those information will determine where the account request will be routed.

After submitting the account request it will be reviewed by Super Users representing selected business offering, who will create your account in Business Online and assign the appropriate access to the application.

For more information please see: → Video: Requesting an account - External Users.

2. Application Interface

a) Layout



Main elements in the application screen are:

1) **Top Menu** lists the most important modules and functionalities,
2) **System Message** shows important information, e.g. about planned maintenances or any ongoing system issues,
3) **Product Search** allows you to search for products, service parts, installations and view them or add them to the cart depending on settings. See also: → Video: Default toolbar action,
4) **Customer and Change Customer box** shows currently selected organization and allows you to choose another customer for order placing,
5) **Cart** stores products and spare parts, allowing you to proceed to checkout and place an order,
6) **Side Menu** lists all the modules and functionalities available for you,
7) **Contact Us** is a widget which allows you to send a message to Business Online Support or contact any of the suppliers available for you.

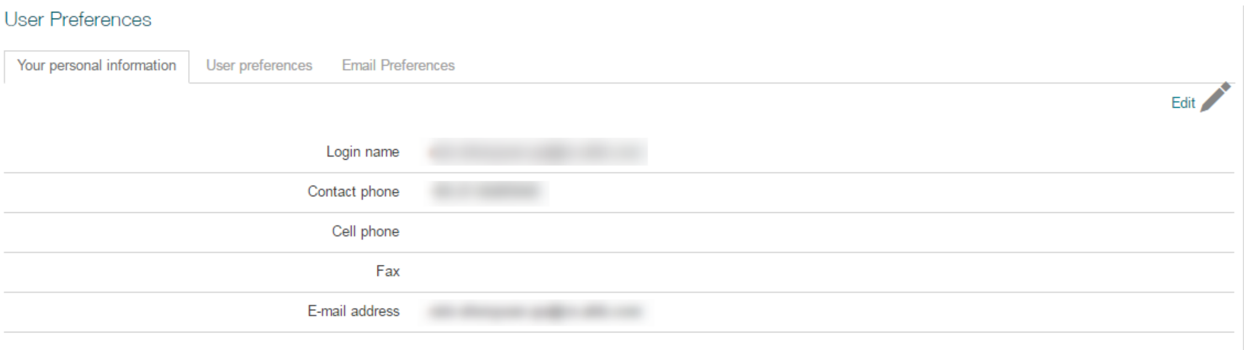
b) User Preferences

User Preferences contains three tabs:

- Your personal information,
- User preferences,
- Email Preferences.

Your personal information

This tab allows you to change your contact information: **Contact phone**, **cell phone** and **Fax**. Information such as 'login name' and 'E-mail address', although visible, are not editable.



User preferences

In this tab you have the possibility to configure Business Online functions such as:

- **Language** used in Business Online,
- **Format of the dates** to match the format in your country,
- **Default customer,** i.e. the customer which will be automatically selected when you log in to Business Online,
- **Order types colors**, allows you to highlight particular order types in Order History using background of chosen color,
- **Default toolbar action**, i.e. whether pressing enter in Product Search adds the item to the cart, or opens product details view,

- **Default action after Adding to Shopping Cart**, i.e. whether to open cart details after adding a product or to stay in current location.

Email Preferences

Here you can define which email notification you wants to receive and which should be blocked by the system.

3. Products and Catalogs

a) Products and Spare Parts

Offering Tree and Spare Parts Tree are the basic way of finding a products in Business Online. You may navigate by product groups and product families or find it directly using

List View and Grid View

You may view products in two different views.

List View allows you to see the products with pricing, if available, and gives easier way of accessing product's availability and availability class. It also gives you the possibility of adding product to the cart/MyCatalog.

Grid View, on the other hand, shows the list of products with their pictures displayed, however pricing, availability and possibility of adding to cart are accessible only after opening the item details.

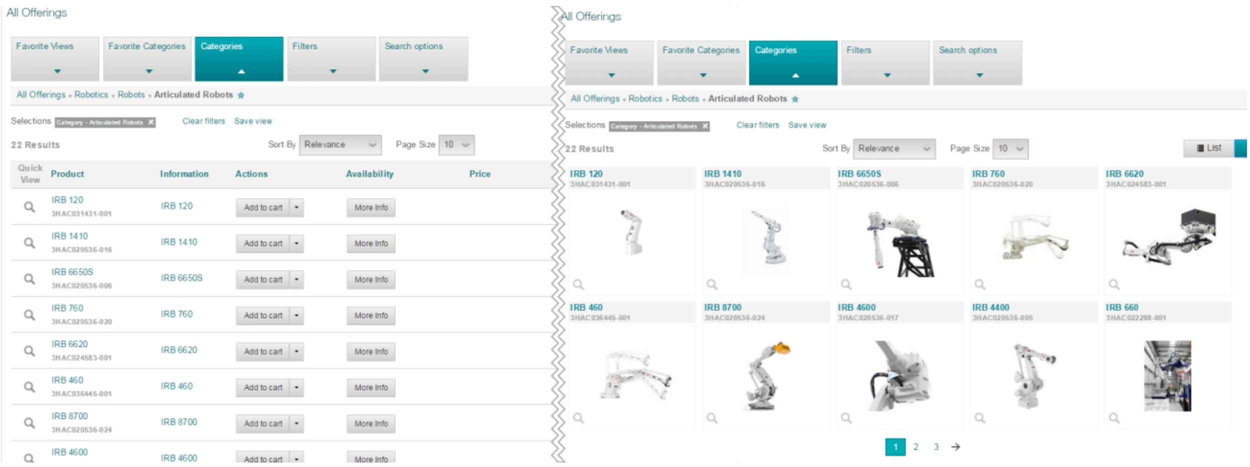
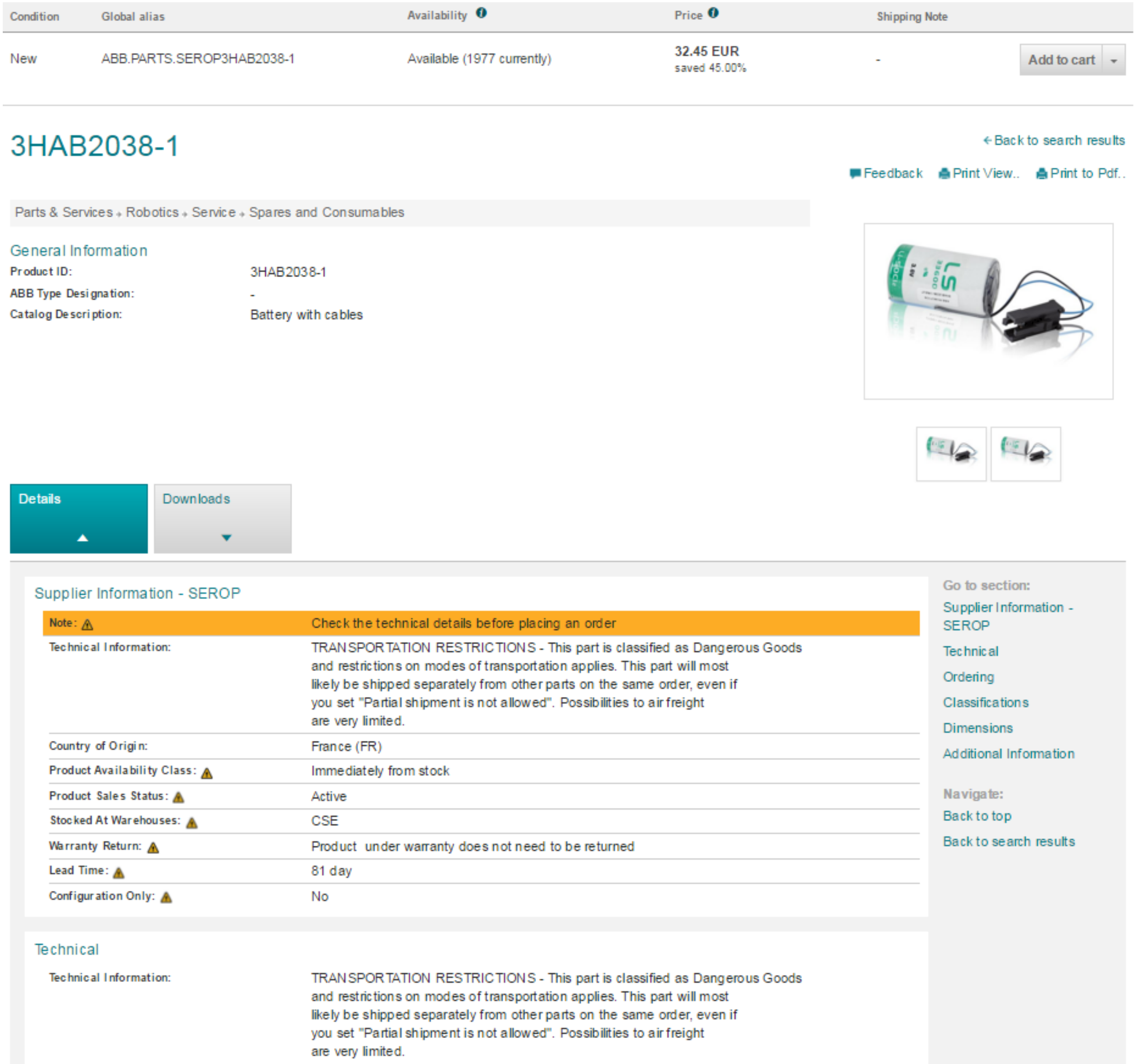


Figure 1: List View (left) and Grid View (right) comparison

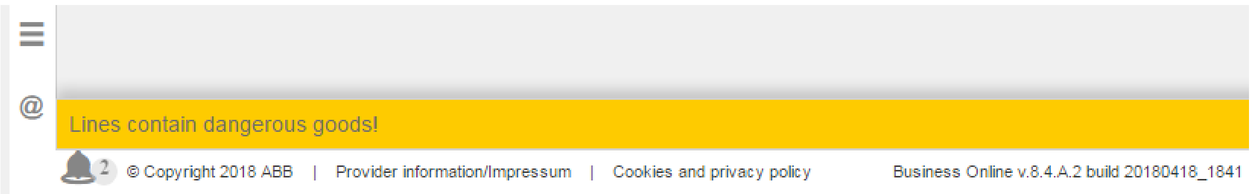
Product Details

After opening a product, you have access to product details as defined for your company or unit. Here you can find information about dimensions of the product, restrictions on ordering (such as minimum/maximum order quantity), Lead Time that is required to manufacture the item, but also Technical Information about the product and information about UN goods classification in case of **dangerous goods**.

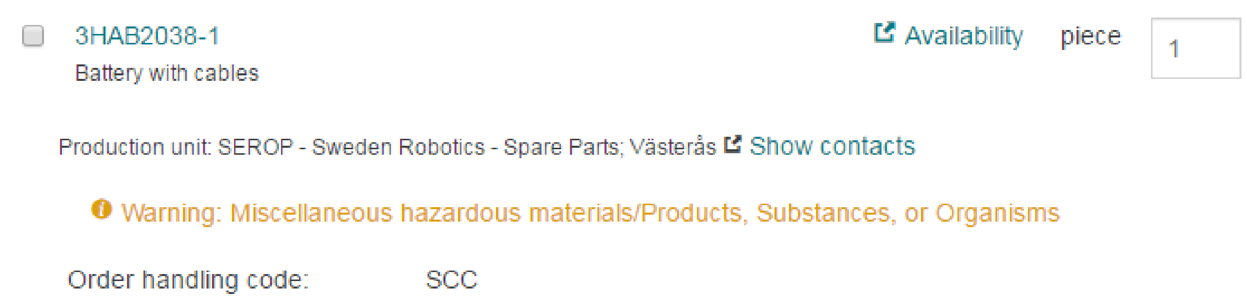


Dangerous Goods

Business Online offers the option of marking goods as Dangerous or Hazardous in any other way. For such products, you will receive a warning message when adding product to the cart:



Also, later on in the cart, warning message will be displayed permanently under the product marked as dangerous:



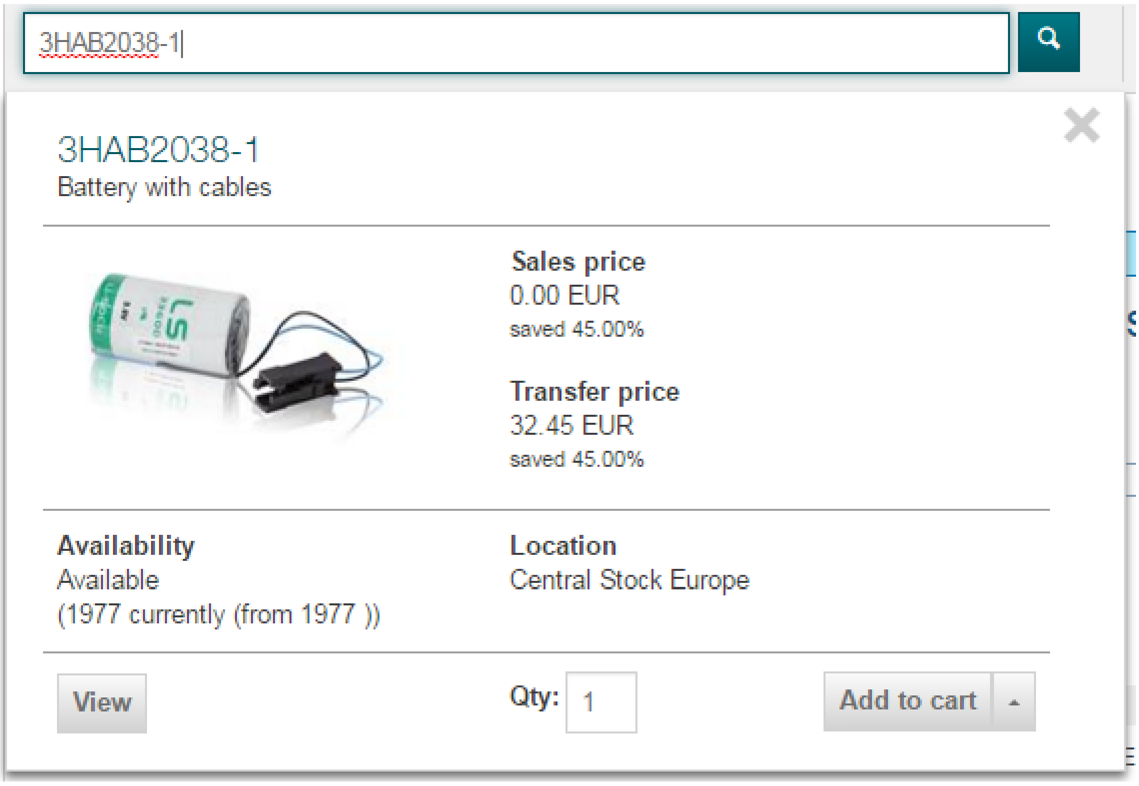
Dangerous goods **cannot be ordered with other products** – the cart will be split automatically on proceeding to checkout. Also, for those kind of goods, special Means of Transport are applied, due to restrictions in transportation.

b) Quick Search and Quick Product View/Quick Order Entry

At every point in Business Online customer has a possibility to search for a parts or offering by using **Quick Search**. It allows to find a part by searching in ABB Part Name, Product Description and Alias Catalog defined by user.

Quick Search is using real-time autocomplete to display top 5 best matching results.

After clicking on specific products, you receive a **Quick Product View**, which presents basic information about a product, such as prices, availability class with available quantity and location where the product is stored. Also, if the product has replacement, the information about replacing part will be also visible in this view.

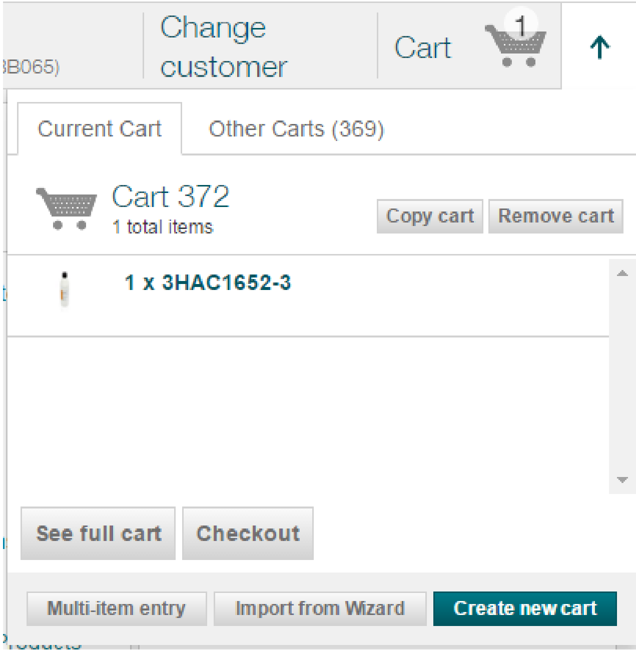


From Quick Product View user can add the item directly to current cart, one of his/her saved carts, to personal/company catalog, or create completely new cart with selected product.

4. Cart

a) Cart Overview

Cart is used to keep products which are to be ordered or submitted to Supplier as a Request for Quotation.

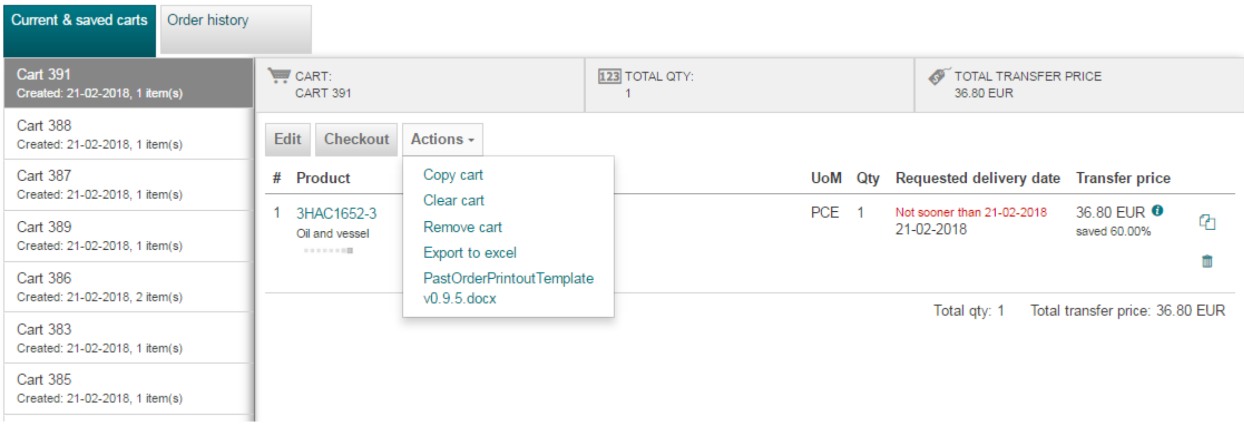


In the main view you can see content of currently selected cart. You- also have the possibility of opening the cart by clicking **See full cart** or proceed to checkout using **Checkout** button to place an order. There are also options to add to cart multiple items by clicking **Multi-item entry** and add product configurations using **Import from Wizard** button.

In the dialog box you can see the number of active carts opened by you (tab Other Carts).

Important: In BOL there is a limit of 999 active carts for user.

In Other Carts tab you can see three latest carts created. There is also a possibility to display all carts by clicking **View all carts**.



In the **View all carts** screen you have access to all carts that are currently open. In the left-hand side menu there is a list of carts including creation date and number of items in each of them. On the right you can see the details of selected cart.

From here there is also a possibility of:

- Copying cart
- Removing all products from cart (by clicking **Clear cart**)
- Removing entire cart
- Exporting cart with all items to Excel spreadsheet
- Printing a cart and its content using available Word template

You have also the possibility of copying and removing lines in cart.

b) Adding (removing) products to (from) cart

There are several ways of adding a product to the cart:

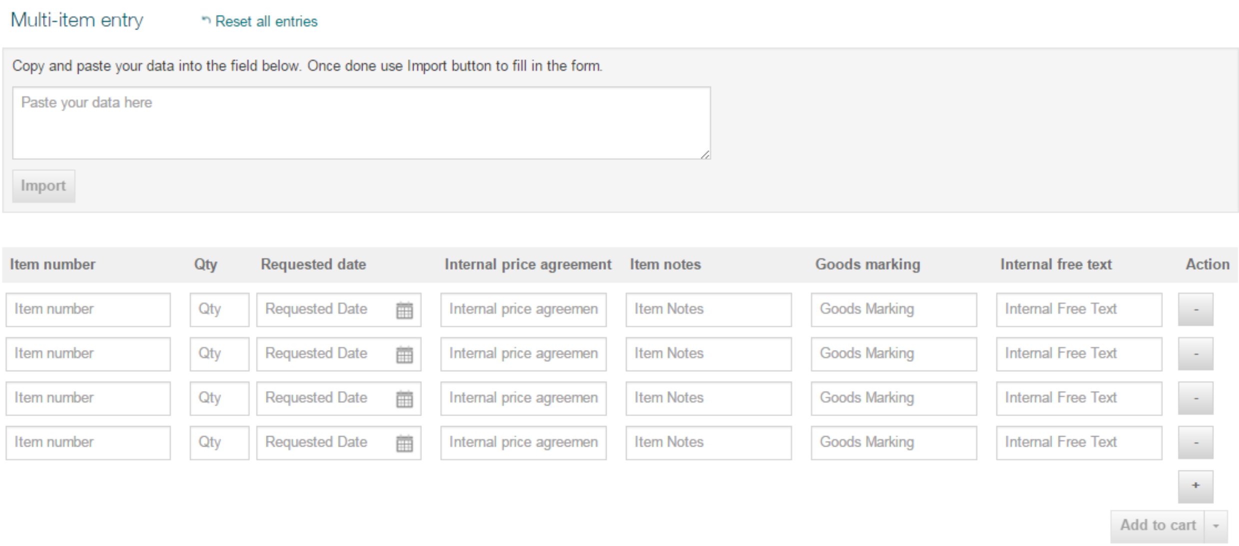
- From the Quick Product View,
- From Product Details,
- From Offerings Tree.

Adding products using the methods above was described in more detail in Products and Catalogs part.

For more information please also see: → Video: Adding products to the cart.

c) Multi-item entry

Multi-item entry allows you to add multiple products to BOL cart for example from Excel spreadsheet.



Product data needs to be pasted into the text box with data in each row separated by tabulation characters. Easy way of creating such a list is to prepare it in Excel file and copy it to the text field in BOL.

If in copied range there is a different number of rows, it will be adjusted automatically when importing data.

When the products are imported, you have a possibility to add products to current cart by clicking **Add to cart** or create completely new cart with listed products by clicking **Add to new cart**.

d) Configuring items

Some of the products may require configuration before ordering. Such products will not be showing information about product availability and price until the configuration is done.

There are different configurators connected to Business Online so the configuration process will be different in each of them, but in general, to configure such products you need to enter the configurator and follow instruction on the screen.

To get more information on configuring products, please see: → Video: Accessing configurators.

5. Placing an order

a) Order Process – overview

There are three basic order processes in Business Online:

- **Sales Order**, by which End Customer is purchasing goods from Sales Unit.
- **Purchase Order**, when Sales Unit buys goods from the Production Unit;
- **Normal Order** which is a combination of two previous order types. In Normal Order process Sales Unit buys goods from the Production Unit (Supplier) on behalf of the customer to sell them to the customer.

Order Process Type	Order Flow	Trade	Prices on Order
Sales Order	End Customer buys from Sales Unit	External	**Sales** Price
Purchase Order	Sales Unit buys from Production Unit	Internal	**Transfer** Price
Normal Order	Sales Unit buys from Production Unit on behalf of End Customer – a combination of Sales and Purchase Order	Internal *(with External)*	Both **Sales** and **Transfer** Price

b) Order Type

Order types can be sometimes confused with order process types. When order process types focus on which units the transaction is being made, order types in Business Online depend rather on the product itself and its handling. For example we have:

- **Normal orders** – buying new product from ABB,
- **PU-warranty** – returning product for repair covered by warranty,
- **Repair orders** – sending a product for repair not covered by warranty,
- **Software** – which is buying software for ABB products and license extensions for the software already bought.

Different order types may require additional fields to be filled in, e.g. PU-Warranty, Exchange, Repair – require filling in Warranty Form, describing fault type on damaged item and item information such as serial number, or Software orders – which may require entering license ID.

c) Placing an order

There are several possibilities of placing an order:

- Copying already placed order (in Order History),
- Placing an order from approved RFQ,
- Converting a quotation from external system (such as CQP) to order,
- Creating order from a scratch by adding products to the cart.

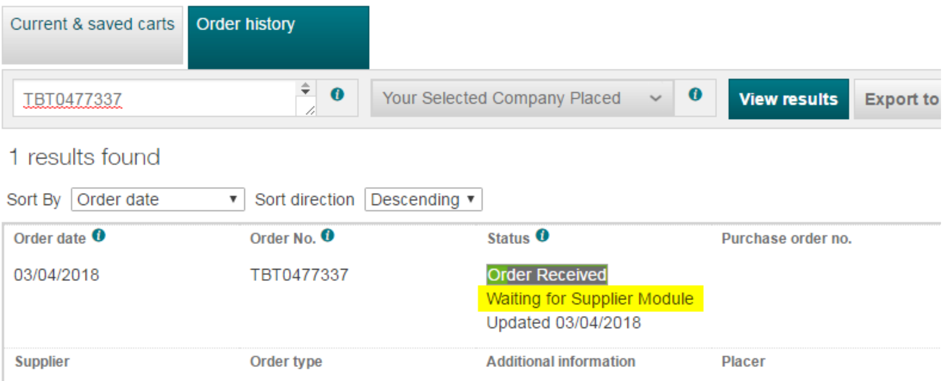
Each of the aforementioned methods creates a cart with products to be ordered. After that you can proceed to order placing by going to **Checkout**, where you can provide all necessary information (called **'Mandatory fields'**). See: → Video: Checkout page.

On Checkout you also have the possibility of choosing appropriate **Order Type**.

Next, you have the possibility to review order details at the Confirmation Page. If all the details are correct and confirming order, you will receive an order number. From this moment order will be visible in 'Order History'.

d) Handling orders in Supplier Module

When order is placed, it is created in supplier's instance of BOL called **'Supplier Module'** and awaits confirmation from the Supplier. Such orders can be seen in Order History with status 'Order Received – Waiting for Supplier Module':



After the order is confirmed by the Supplier, the status will change to 'Order Acknowledged'. If Supplier updates order with new status (e.g. Order Shipped), new status will also be visible here.

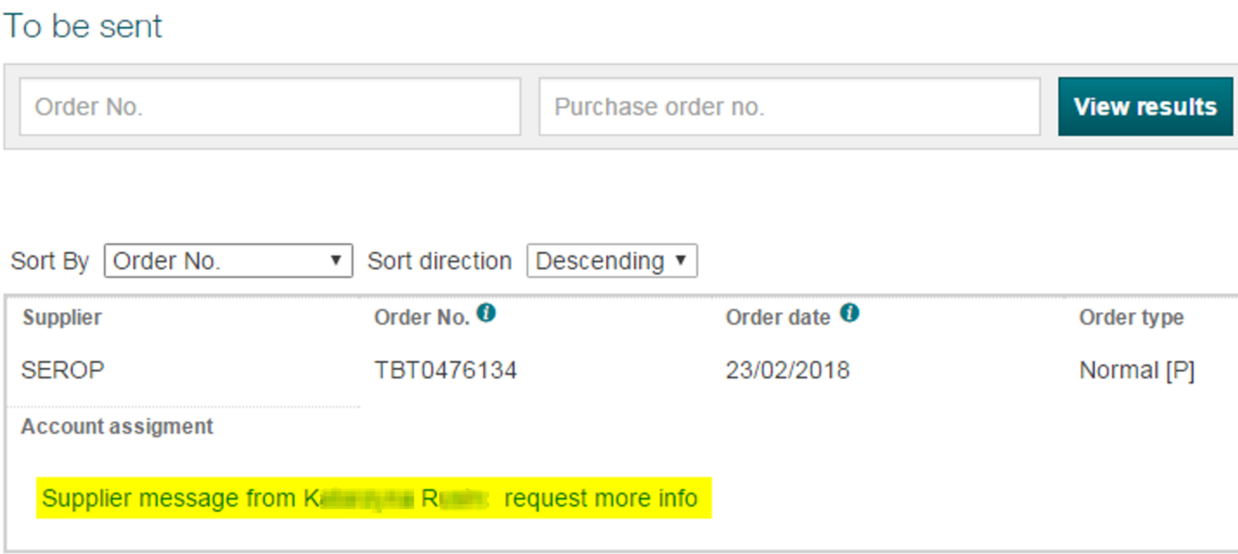
After placing an order, its status and progress can be checked every time in **'Order History'** (also called **'Past Orders'**).

e) To Be Sent

If there is any information needed regarding order that is already placed, such order is returned to **Buyer Module** (also called **To Be Sent**).

Buyer Module gives you also the opportunity to add, remove and modify lines on existing order. For more information, see: → Video: Adding products to parked orders.

If order was returned from Supplier for more information, you will see the appropriate description on order list:



For more information, see: → Video: Request for more information.

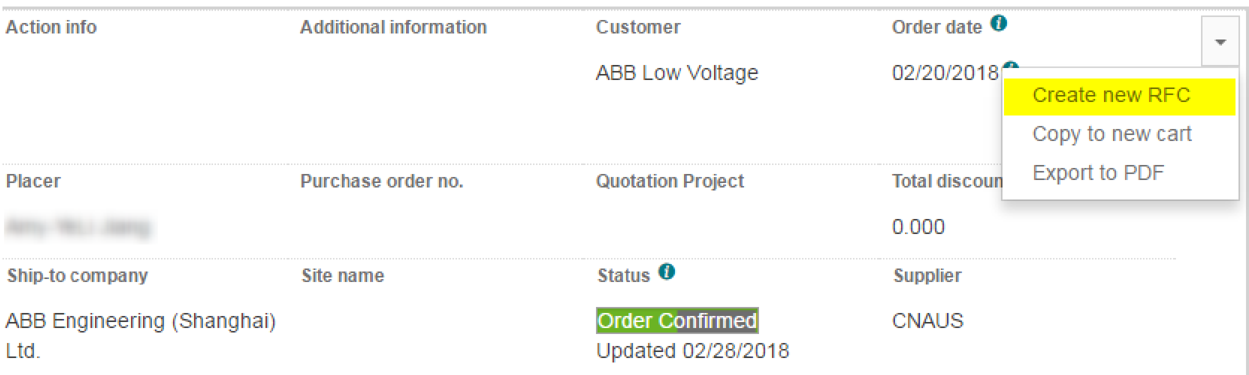
Note: Until the order is sent from To Be Sent and approved by you, the order will not be visible in Order History.

f) Making changes to already placed order (Request for Change)

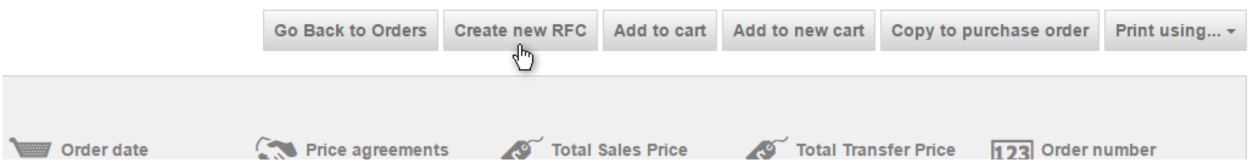
If you want to make any changes to the order that is already placed, you can create a Request for Change. The option to create an RFC will be available for you if:

- You have right ***'Order Change - RFC Create'***,
- **No active RFCs** are created for order, and
- Order is in **appropriate status**, i.e. it is **not**: dispatched, approved/rejected, submitted to AWM and it is not waiting for review in To Be Sent.

If all the aforementioned conditions are met, you will see an option to create RFC available in the drop-down menu:

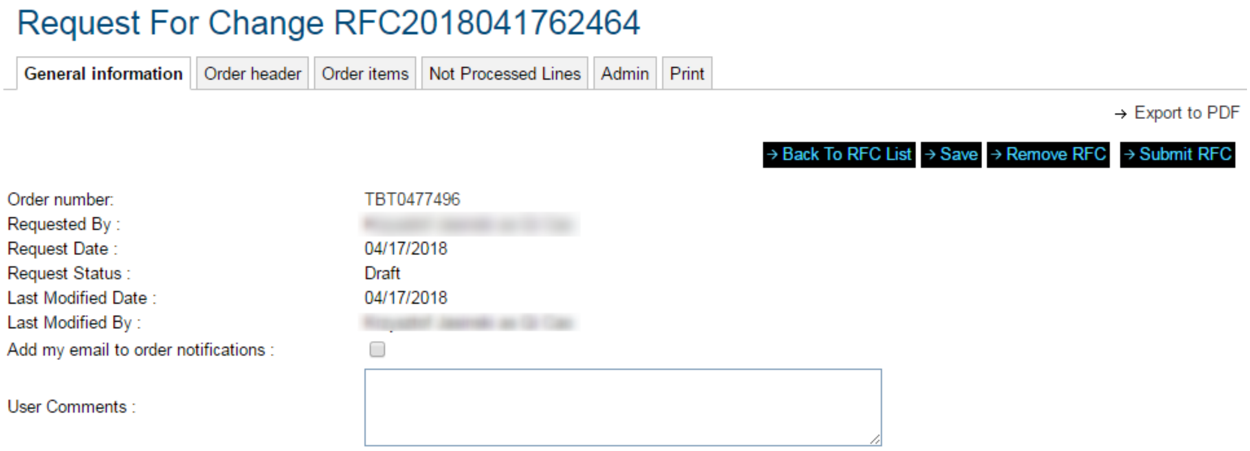


The button will also be available in order details:



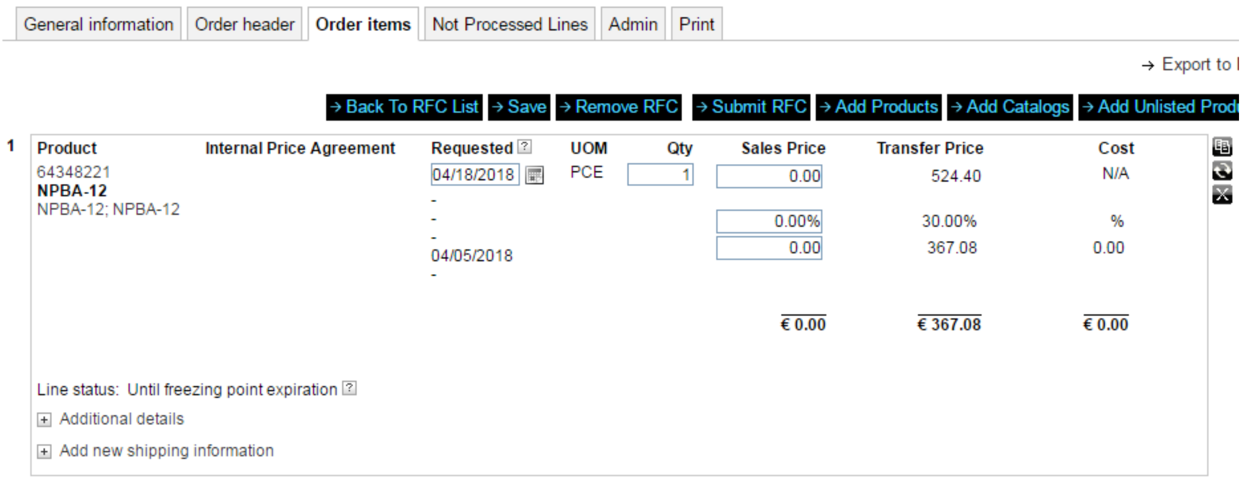
Creating RFC

After creating new document you are redirected to **General Information** page – here you can submit a comment to the Supplier who processes the order:



On **Order Header** you can modify contact information and transport details (means of transport).

Order Items view allows you to edit line information: change quantity, prices, add new shipping information for line, but also remove item(s) and add new ones. Here it is also possible to change product configuration if the product is configurable.



When all the changes are done, you need to submit the document using → Submit RFC button. The RFC will be sent to the Supplier for review and approval.

Note: No changes will be visible on order until Supplier approves the RFC.

Freezing Point

Not all the changes can be done on Request for Change. If the order was confirmed and confirmed delivery date is closing by, the line(s) may be marked as '***frozen***', which means that no changes to quantity or line configuration can be made. In such cases, the appropriate options will be greyed out.

If the freezing point is not defined by the Supplier, the date is calculated automatically using the following formula:

$$Freezing\ Point = Confirmed\ Delivery\ Date - 28\ days$$

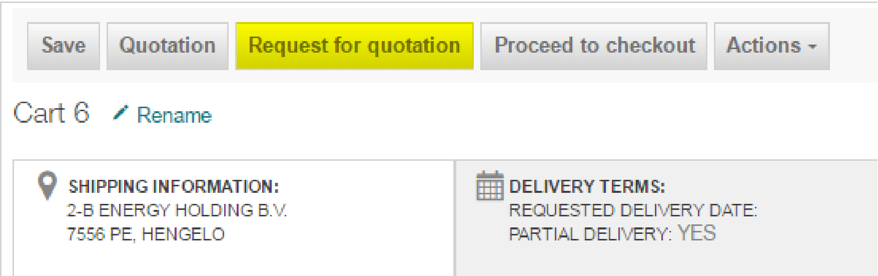
Line can be also frozen when the appropriate status is set on it by the Supplier: “until dispatch” or “until completed”. Those statuses mean that the line was already manufactured by the Supplier and is being shipped to you.

6. Request for Quotation

Creating an RFQ

When you need to buy the product which is not priced by the Supplier or any other factors (e.g. limited availability) make it impossible to order in the traditional way, or you want to get extra discount for the products, you can place a **Request for Quotation (RFQ)** document.

Placing an RFQ is a process which is very similar to creating an order – the only difference is instead of proceeding to Checkout user chooses option **‘Request for Quotation’** :



Request for Quotation module

In Request for Quotation module, you can see the Outgoing queue, where you can check the status of RFQs submitted by your companies. The statuses of outgoing documents can be as follows:

Status	Status description
Submitted	RFQ is submitted to the Supplier for revision
Quote given	RFQ is approved by the Supplier and can be converted to order.
In Progress	RFQ has been picked up by the Supplier and is currently being reviewed.
Closed	RFQ was approved by the Supplier and the order was placed from it.
Rejected	RFQ was rejected by the Supplier. It still can be revised and submitted again by the Customer after making changes.
Pending	RFQ is created by the Customer, but not submitted yet. It still can be modified be-fore sending to the Supplier.

Also, you can create **Revision of the RFQ** if it is needed.

Placing an order from RFQ

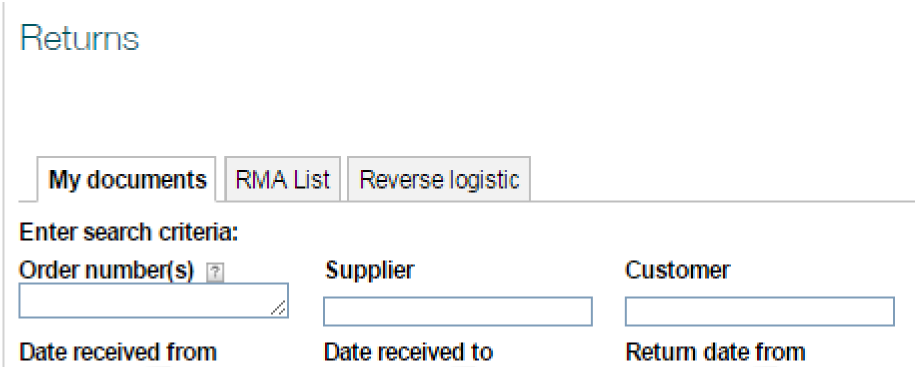
When RFQ is approved (i.e. in status Quote given), you can convert it to order. It can be simply done by clicking **Add to cart** in an RFQ object in Incoming tab.

Then, you will be redirected to cart and asked to complete ordering process.

Depending on the settings, you may be allowed to add or remove items, or to modify the quotation in predefined range (when option: 'Allow changes within percent' is set). However, Supplier may also restrict making any changes to given quotation – in this case you won't be allowed to make any changes to the document.

7. Returns

Returns, also called **Reverse Logistics**, is a module designed to support the process of returning goods from Customer to the Supplier (or Repair Center) in repair/warranty process.



Returns contain three tabs:

- **My documents** – a tab containing list of orders for which user is assigned as CSR.
- **RMA List** – a view dedicated to Customer which contains a list of RMAs for the orders Customer created,
- **Reverse Logistics** – which is a view dedicated to Supplier, containing RMAs for orders submitted to his/her units.

RMA – Return Merchandise Authorization

RMA (Return Merchandise/Material Authorization) is the document created and handled in Returns. It is visible for both Supplier and Customer – which allows to update status of delivery and see the changes on the document with a minimum delay.

RMAs are also synchronized automatically with Supplier's SAP by a background job called eRepairJob. The synchronization takes place every 10 minutes.

B. How To's and Frequently Asked Questions

1. How To's

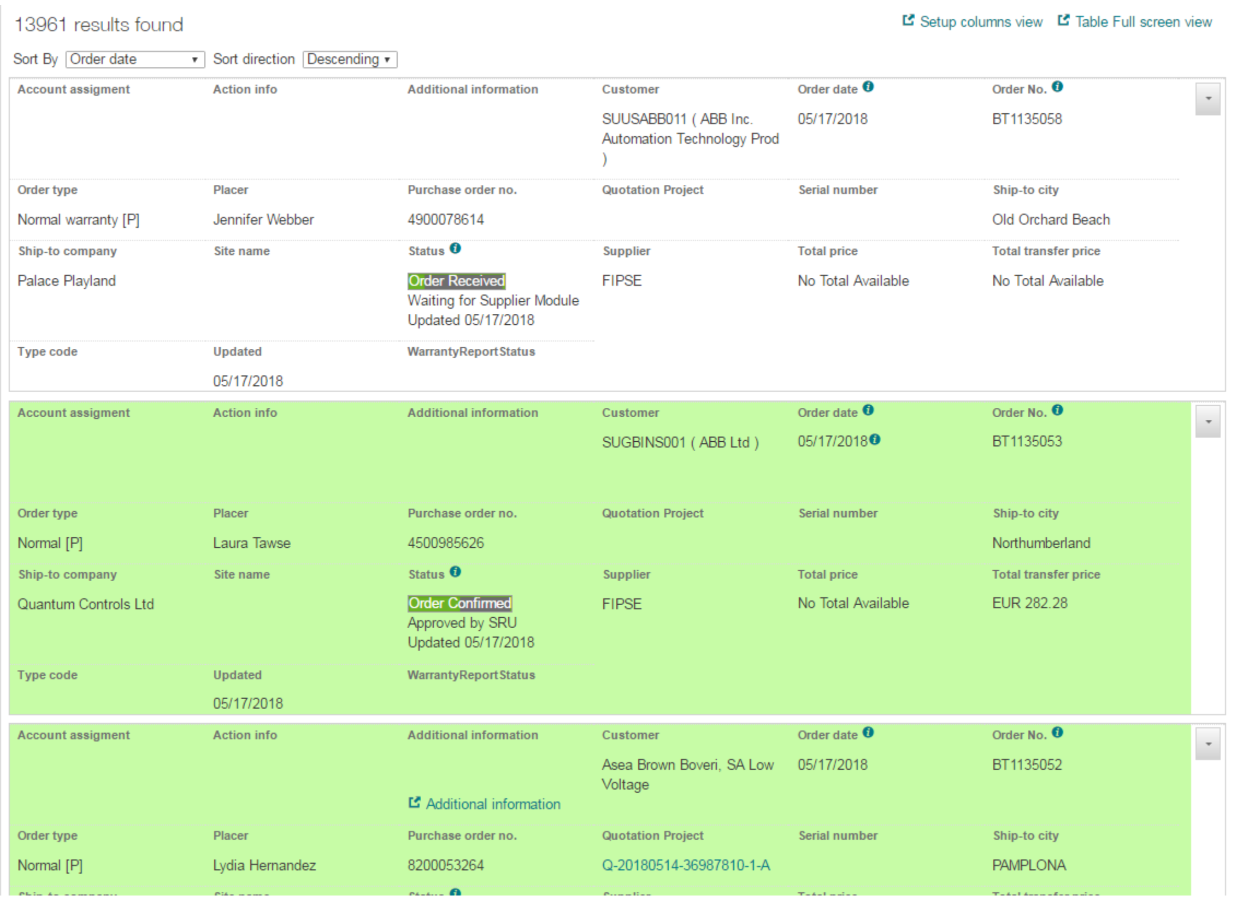
How to change the language in Business Online

Business Online is accessible in several different language versions. To change the language, please do the following:

1) Go to User Preferences accessible in BOL Menu: ≡
2) Change tab to 'User preferences' and enter 'Edit' mode.
3) Select the desired language from the drop-down list.

How to assign colors to orders

Business Online offers the possibility to 'paint' orders to different colors in Past Orders view and in Do Something. This functionality can be enabled in User Preferences. For more details, see → Video: Paint your orders view.



2. Frequently Asked Questions

Q: Is it possible to add more than one item to cart?

A: Business Online allows adding to the cart multiple items at once using Multi-item entry. For more details, see → Multi-item entry section.

Q: I do not see any prices in cart, only after proceeding to checkout prices are visible.

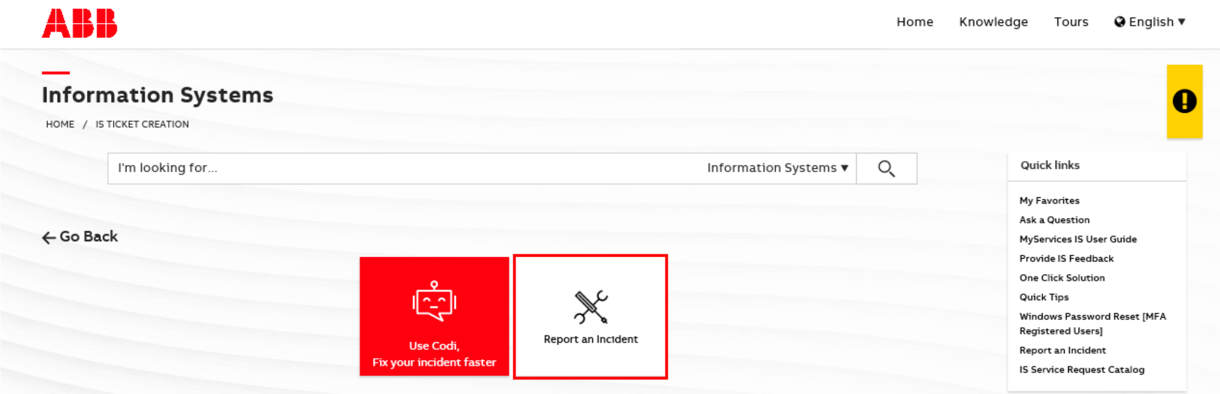
A: Make sure that you have Preliminary prices for cart enabled in your user preferences. To do that, do the following:

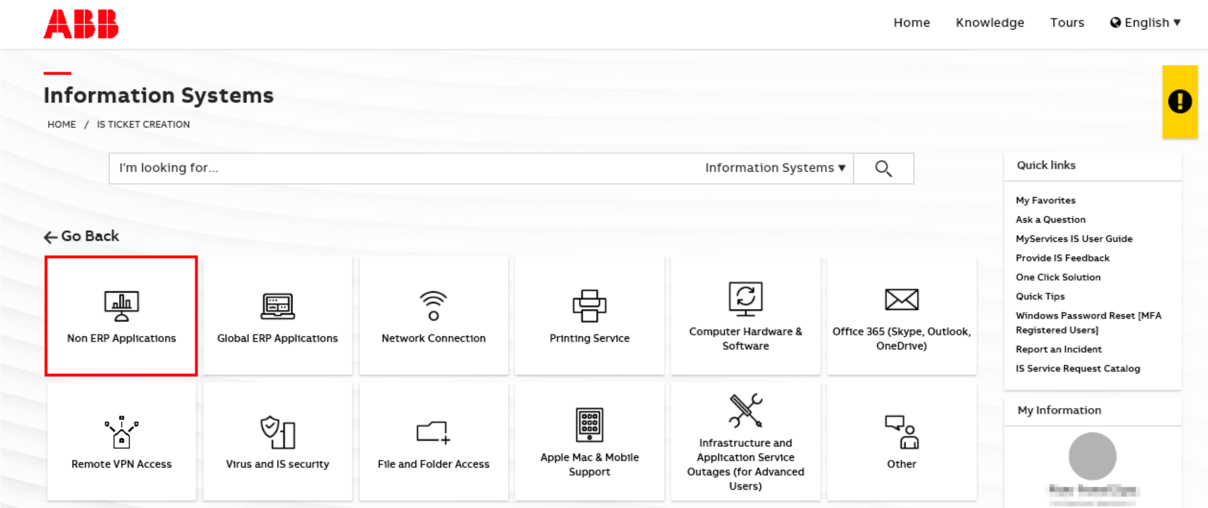
1) In the application menu go to User Preferences.
2) Open 'User preferences tab'
3) Go down to 'Cart' section and set 'Enable Preliminary Pricing for Shopping Cart'.

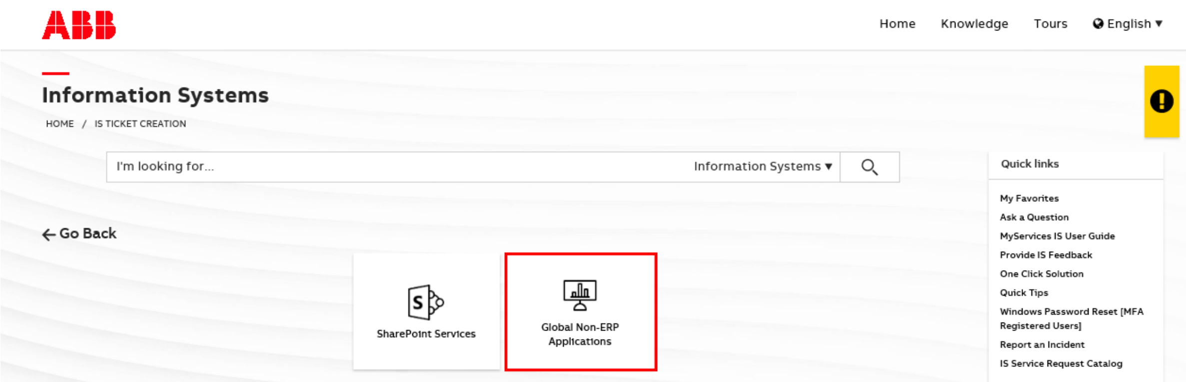
If that does not help, please report the issue to BOL Support.

Q: How do I report that something is not working?

A: Use MyIS (link: https://abb.service-now.com/myservices/?id=is_ticket_creation) to report incidents regarding BOL. The option is available in **Report an incident > Non ERP Applications > Global Non ERP Applications**:







C.Glossary

AWM – Approval Workflow Module – a module in Business Online used for validation of objects (RFQs, Quotations, Orders) and implementing an approval process for them.

AWM Stop Rule – See: **Stop Rule**

BM – Buyer Module (also referred to as **'To Be Sent'**) – a module in Business Online designed to obtain information from end customer, either by stopping orders placed outside Business Online, or performing Request for Information from Supplier Module.

BOL – Business Online – frontend application available to external and internal customers and used for ordering and order handling purposes.

CAM – Common Authorization Management – backend application integrated with Business Online that is used for user account management and configuration of organizations and processes. CAM can be accessed by Super Users and Line Managers; the link is available in Admin menu.

CQP – Common Quotation Platform – integrated application allowing users to request quotations and get pricing from Production/Sales units. Such quotation is in the next step transferred to Business Online to place an order. CQP is using CAM for access management and maintaining setup.

CUX – abbreviation for **Customer User Experience**, refreshed design of Business Online, introduced in June 2016 in 8.0 Major Release of Business Online.

Do Something – See: **SM**

EC – End Customer – non-ABB organization that is using Business Online for purchasing purposes.

EngineX - configurator

eRepair – application designed to simplify repair process for products. The application is using CAM for access management and maintaining setup.

GIS – Global Identification Service – a Group-wide data system designed to uniquely identify customers.

My Catalog – application integrated with Business Online. It allows users creating catalogs – either personal or company-wide – with any products and/or product configurations. The purpose is to store most commonly used products/configurations to speed up the ordering process.

Normal Order – most basic ABB order, being a mix of Sales order and Purchase order. In normal order, Selling Unit places a purchase order to the Production Unit on behalf of end customer.

ODJ – Order Dump Job – background job designed to synchronize orders from OMS (and in consequence from SAP) to Business Online. ODJ is responsible for creation of orders in BM (→Buyer Module) and SM (→Supplier Module). The job runs every two minutes.

OMS – Order Management System – backend application integrated with Business Online used to store price details for products as well as some product information such as availability class. The application also communicates with SAPs to obtain information about availability in the warehouse; OMS also acts as an intermediary between BOL and SAP when placing an order.

PIS – Product Information System –application integrated with Business Online containing all product information. When user is searching for product and reviewing product details, Business Online retrieves all the data from PIS.

Purchase Order Host Organization – an organization (End Customer) configured in CAM using simplified setup. Such organization does not have parent Sales Responsible Unit (it is a parent for itself).

PU – Production Unit – a supplier organization which produces goods and sells them to ABB units.

Purchase Order – order placed by the Selling Unit directly to the Production Unit. It is internal ABB process. In Purchase Order only Transfer Prices are available.

Quotation – an offer for some products created for specific customer.

Quotation for RFQ – an offer given to the customer for the RFQ he/she placed.

Repair Center – an organization which performs repairs of ABB products.

Returns – a module in Business Online that is designed to view and process RMAs for warranty and repair orders. It tracks the shipment of goods from customer to repair center or supplier.

Reverse Logistics – see: **Returns**.

RFC – Request for Change – when customer needs to apply changes to order that is already placed, he/she can use Request for Change.

RFQ – Request for Quotation – a request for offer from specific customer sent to sales or production unit. In response sales or production unit gives **Quotation** for customer, which can be converted to order later.

RMA – Return Merchandise Authorization (or **Return Material Authorization**) – a document used to track the shipment of returned goods from customer to the repair center or supplier. RMA is usually generated automatically in Supplier Module for warranty and repair orders.

Sales Order – order placed by End Customer to the Selling Unit. It is a transaction between an external party and internal ABB unit. In Purchase Order only Sales Prices are available.

Sales Price – price given by the Selling Unit to End Customers.

SM – Supplier Module (also referred to as **'Do Something'**) – a module in Business Online designed to process

SOAP Messages – abbreviation for Simple Object Access Protocol – messages used in communication between Business Online and backend systems, e.g. OMS, to send and receive information about prices, products, orders. SOAP Messages are available for viewing in Admin menu for Super Users, Line Managers and IT Users.

SSO – Single Sign-On – authentication method allowing internal ABB users to access the application without providing username and password. The credentials are obtained automatically from user's computer account and validated on SSO server side.

SRU – Sales Responsible Unit – an organization representing 'Selling' function of Selling Unit in CAM. This is a virtual unit which corresponds to existing Selling Unit. It should never be used for ordering purposes and to avoid confusion and user errors should be always inactive in CAM.

SU – Selling (Sales) Unit – an ABB unit which uses Business Online to purchase goods from Production Units to sell it to End Customers.

SU2SU - Sales Unit to Sales Unit – process designed for Regional Sales Distribution Centers (RSDCs) to simplify ordering. Process allows copying orders and RFQs/Quotations with delivery relation and implements automatic update of copied orders without the necessity of manual copying the data.

Stop Rule – predefined conditions that, when met, will stop the order for review in one of the modules: Buyer Module, Supplier Module or AWM. Different stop rules are defined for each application.

To Be Sent – see: **BM**

Transfer Price – internal ABB price between Production Unit and Selling Unit. Those prices are never visible for External users.

Warranty Module – module in Business Online designed for handling Warranty Reports for warranty orders.

WM – see: **Warranty Module**

Wizard – desktop application used for configuration of products and parts, obtaining prices for such created configurations and transferring them to Business Online for order placing.

Change Log

Date	Version	Author	Description
2018-05-16	1.0	Krzysztof Jasiński	Document creation
2020-08-03	2.0	Piotr Żyta	Review