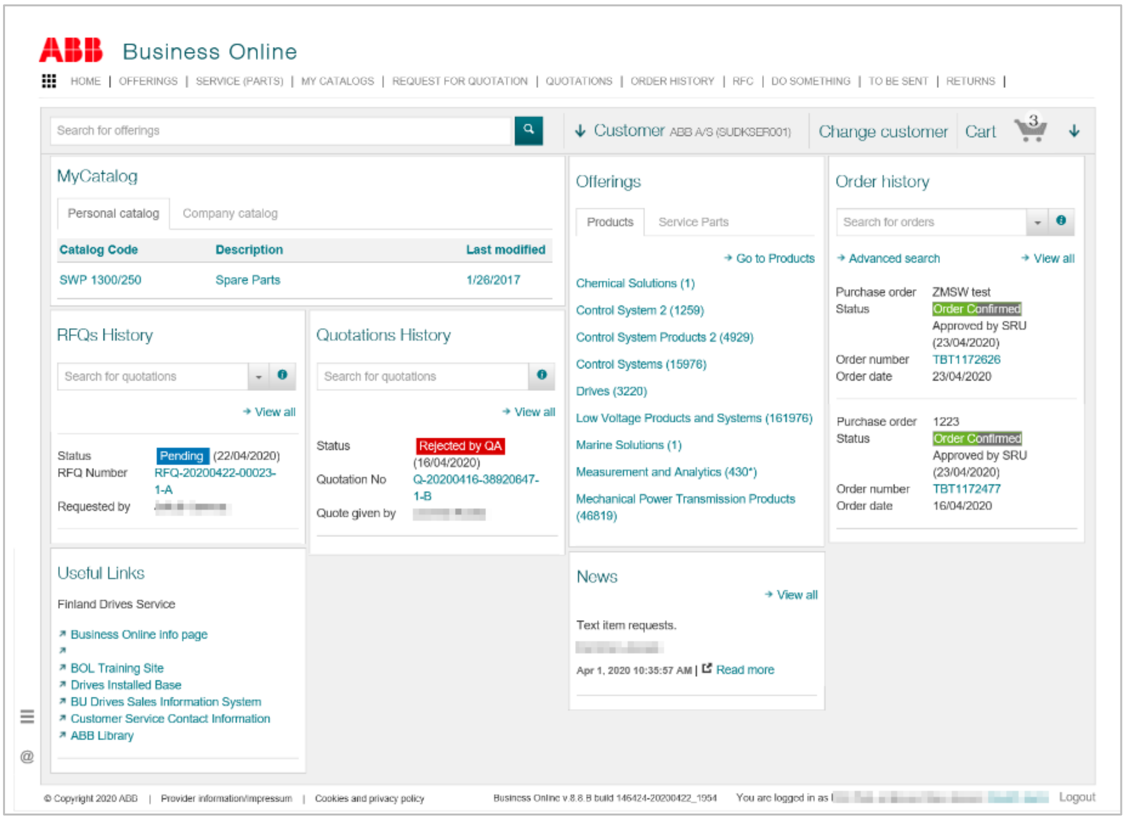
USER MANUAL

Business Online for Internal Users

Contents

1 Layout

The Business Online (BOL) site home view is a summary of actions that can be taken by the user. Relevant news are shown here, it provides a general view of pending tasks, orders and quotations in short lists and shows useful links to other BOL sections.



1.1 Top menu

Here you will find the links that allow you to navigate to other application modules. Shortcut links are located in the header, which makes them accessible from every site in BOL.

1.2 Product search

The product search field allows you to find a specific product by its product code.

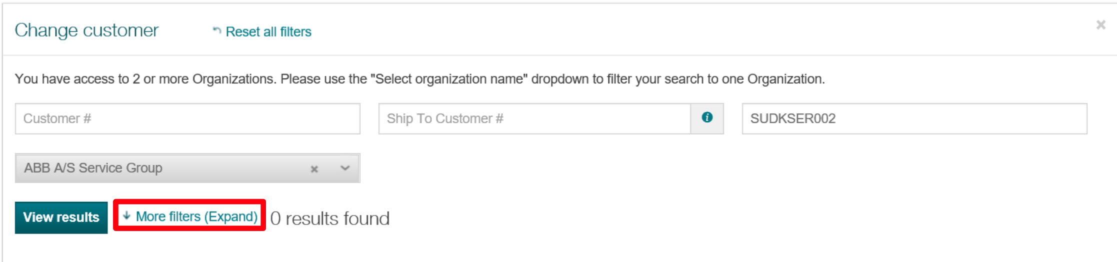
1.3 Current customer

The **Customer** drop-down menu allows you to check a customer and an organization parameters.

1.4 Customer selection

The **Change customer** pane allows you to search for the organizations available to you and choose the one you want to use.

You can find the desired customer organization by using filters. The list of filters is expandable.

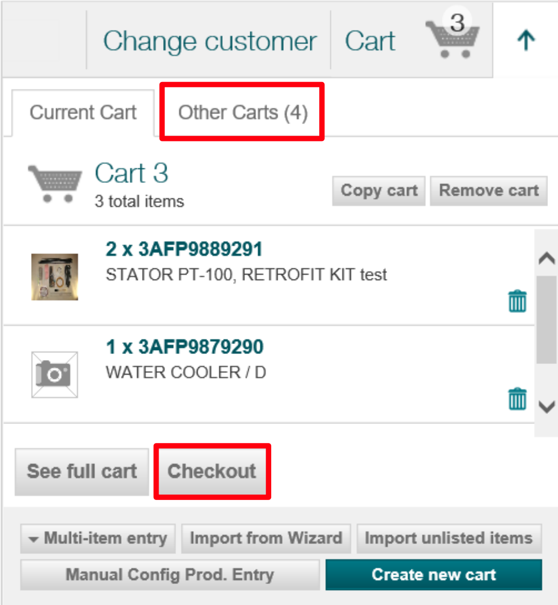


1.5 Current cart

The **Cart** button takes you directly to the cart editing menu. It's possible to edit the cart there, save it or proceed to checkout with it.

1.6 Cart selection

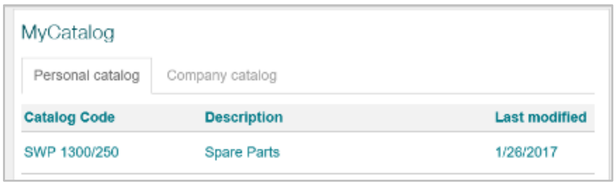
The cart selection dropdown shows you the summary of the current cart and all the other carts you have created previously. It's possible to move directly to **Checkout** from the cart menu.



All the previously used carts are available in the **Other Carts** tab.

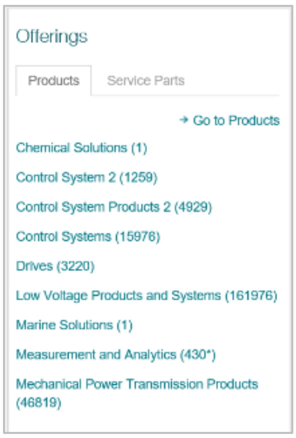
1.7 Catalogs

Through the **MyCatalog** pane you can access to both your personal and company catalogs.



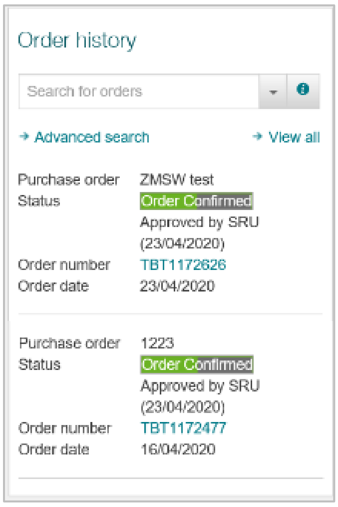
1.8 Product browsing

The **Offerings** pane allows you to browse the products available on ABB site by the visible categories. Clicking any of the category name will take you to the corresponding products page, where you will be able to narrow down the search parameters.



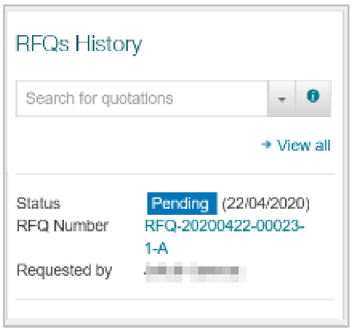
1.9 Order history

In the **Order history** pane, the last five orders placed or the first five search results are visible You can access the full order history by clicking **View all** or through the shortcuts links.



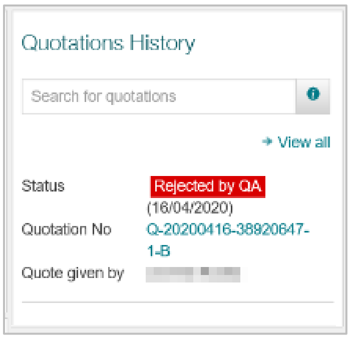
1.10 RFQs history

In the **RFQs History**, the last five RFQs created or the first five search results are visible. You can access the full RFQs history by clicking **View all** or through the shortcuts links.



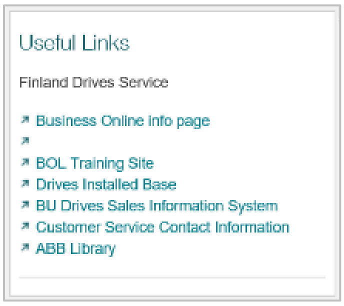
1.11 Quotations history

In the **Quotations History**, the last five Quotations created or the first five search results are visible. You can access the full Quotations history clicking **View all** or through the shortcuts links.



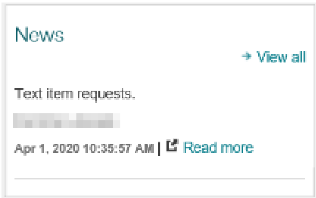
1.12 Useful links

Through the **Useful Links** pane you have access to links which may be helpful during using Business Online, such as BOL Info page or ABB Library.



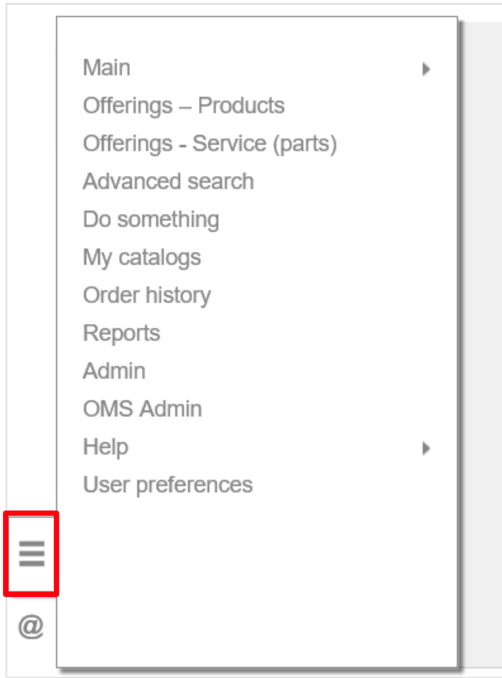
1.13 News

The latest news, appropriate for your news group, will be visible in the **News** pane. It lists the news headlines relevant to your businesses.



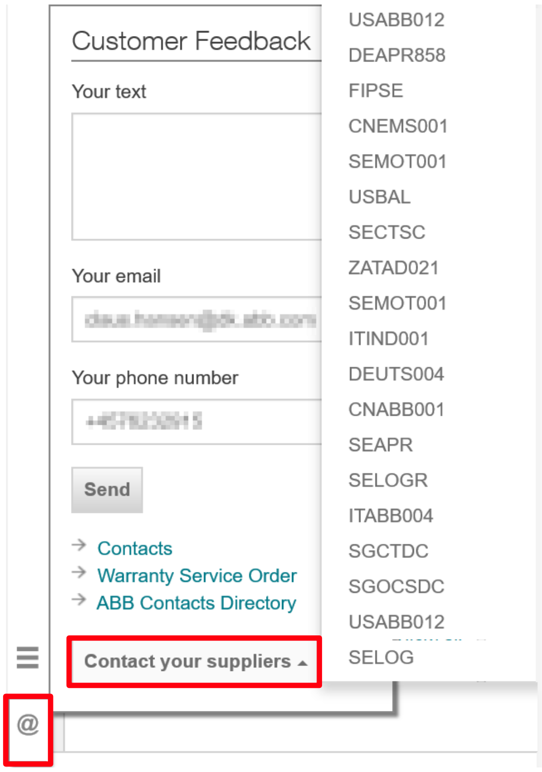
1.14 Quick access menu

Depending on your customer setup, the **Quick access** menu can have different links enclosed. Some of those will take you to the old BOL interface.



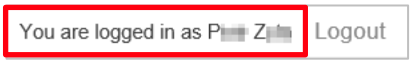
1.15 Customer feedback

The **Customer Feedback** form allows you to contact with the BOL Support and Maintenance. Also, if your suppliers have the default contact defined, the contacts are accessible through **Contact your suppliers** dropdown list.



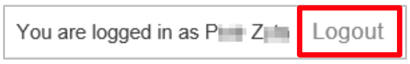
1.16 Login data

Your current username is visible in the lower left corner of the website.



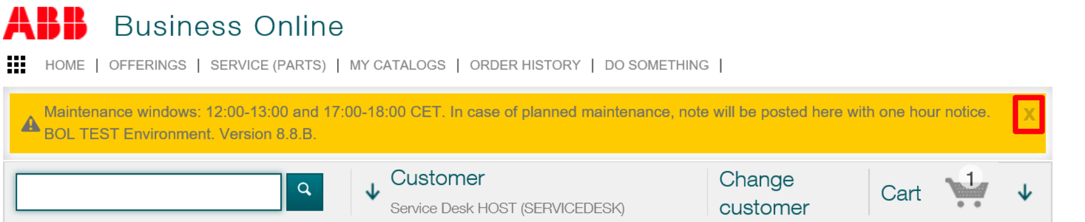
1.17 Logout link

To leave the Business Online site, follow the **Logout** link, which is in the lower left corner of the website.

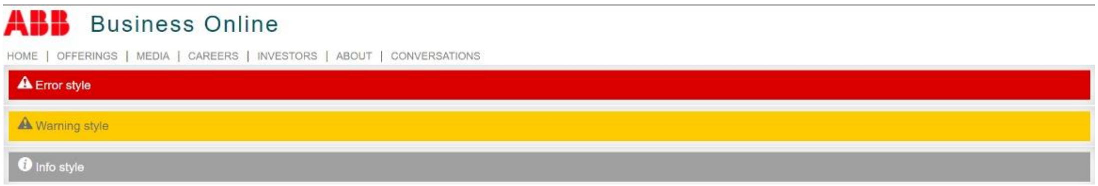


1.18 System messages

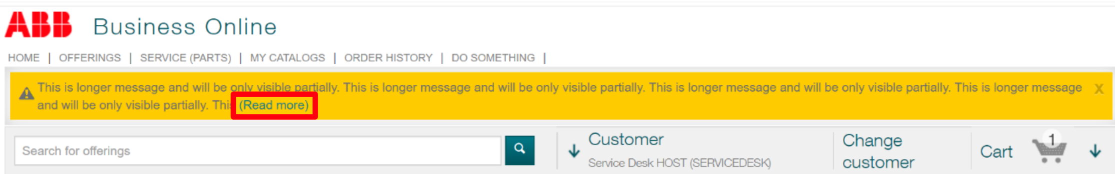
System messages are displayed on the top of the BOL website, when added. You can close them by clicking on the X button.

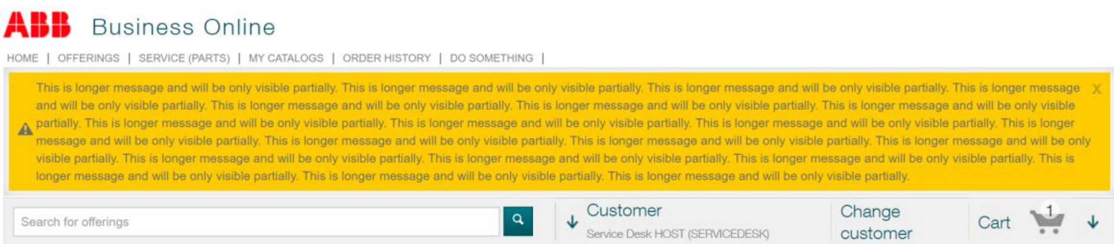


There are 3 styles of **System messages:** Error Style, Warning style and Info style.



Longer messages initially are only partially displayed. You can expand them by clicking on **(Read more)**.



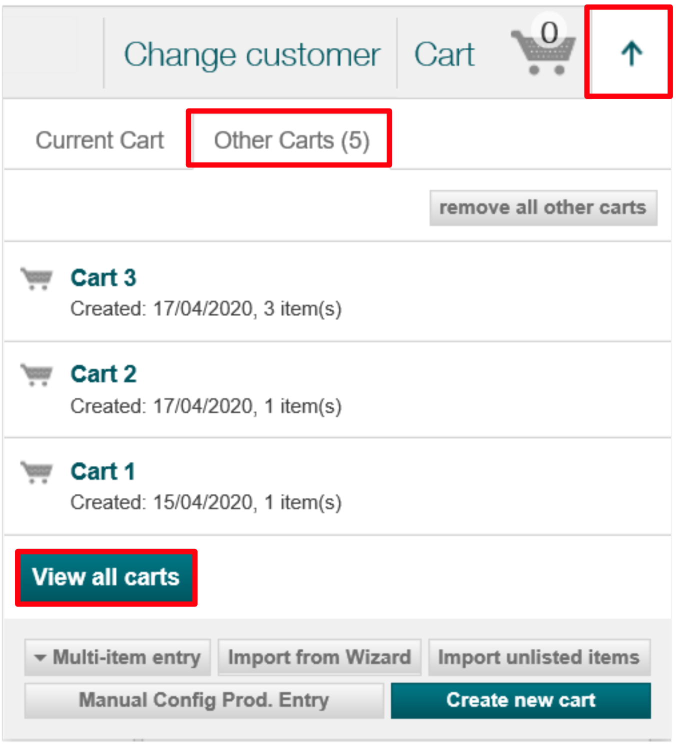


2 Shopping cart

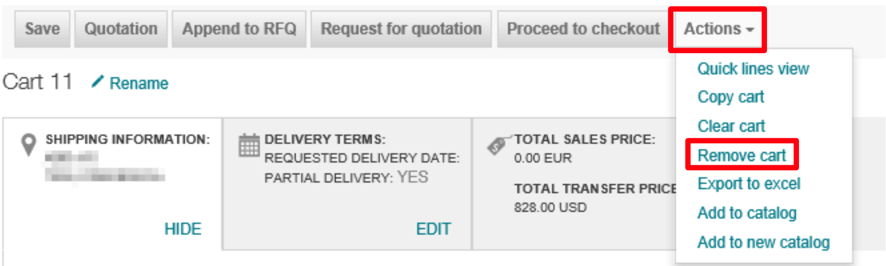
To place an order or a quotation, etc. you need to add products to cart .The shopping process is intuitive and there are plenty of visual elements to assist the user.

2.1 Managing your carts

In order to switch from one cart to another, click **Other Carts** tab. The three last used carts are available in the list and you can access all the created carts by clicking **View all carts**.

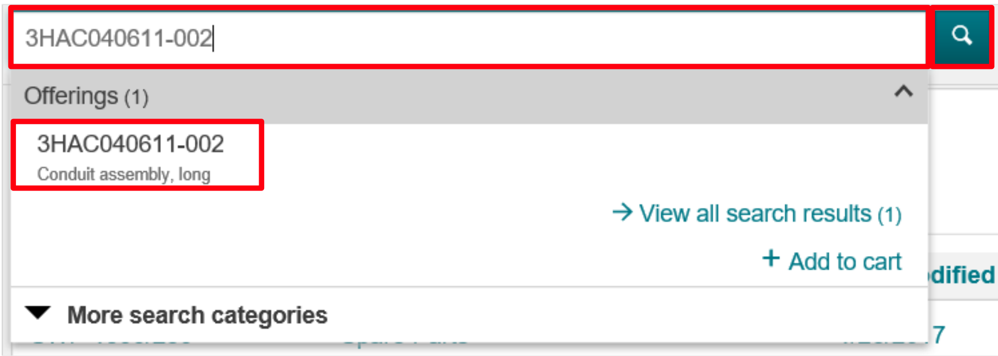


Carts can also be easily deleted once they are not needed anymore. This option is available in the cart details page, which you can open by clicking on cart name.

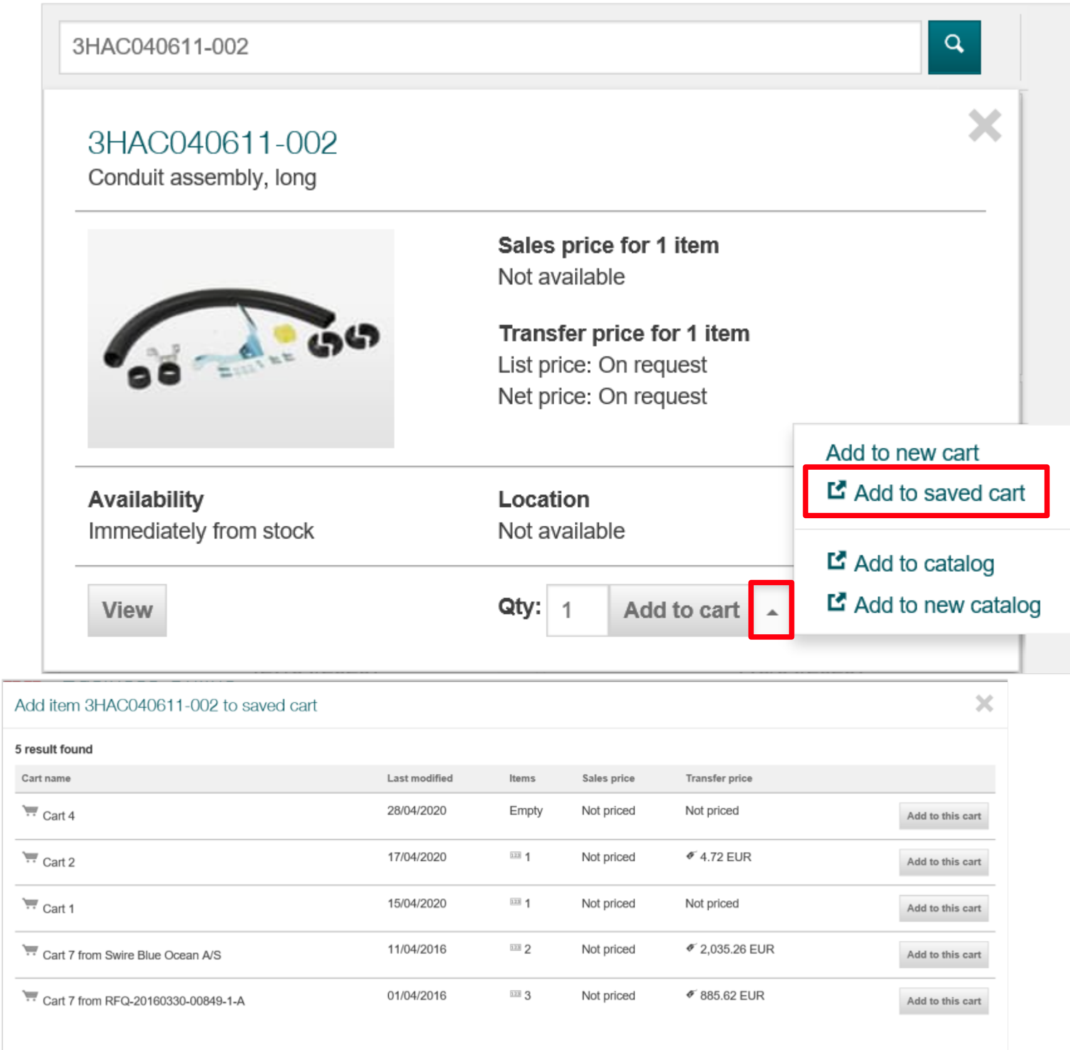


2.2 Adding products

The easiest way to add products is to search for the product using the known name, code or short product description. The value can be entered into the Search for offerings field. After you click the search icon an instant search window will open, displaying you immediate results from the extensive product database.



Then it’s possible to add a product to any of the saved carts or the current one.

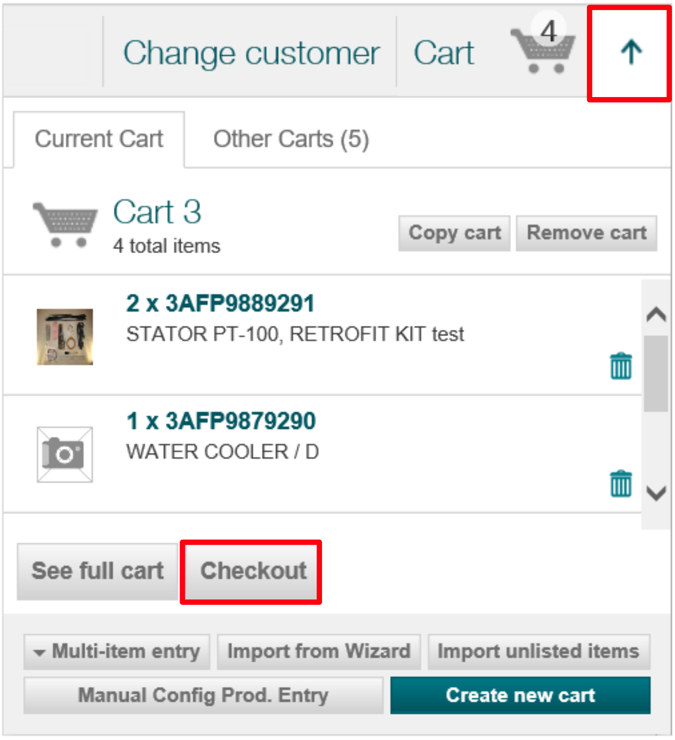


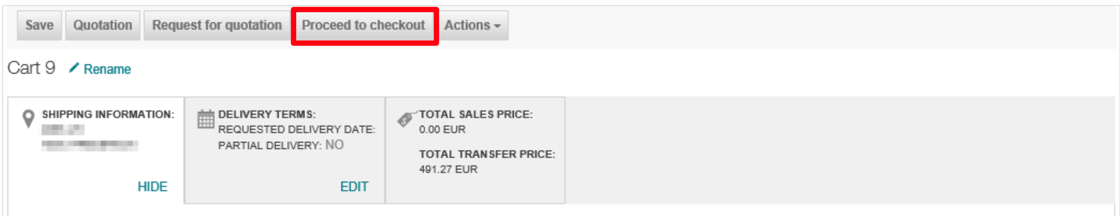
After you add a product to the cart, it becomes immediately available in the selected cart and confirmation message is displayed:

You can add products one after another as long as you need to do so.

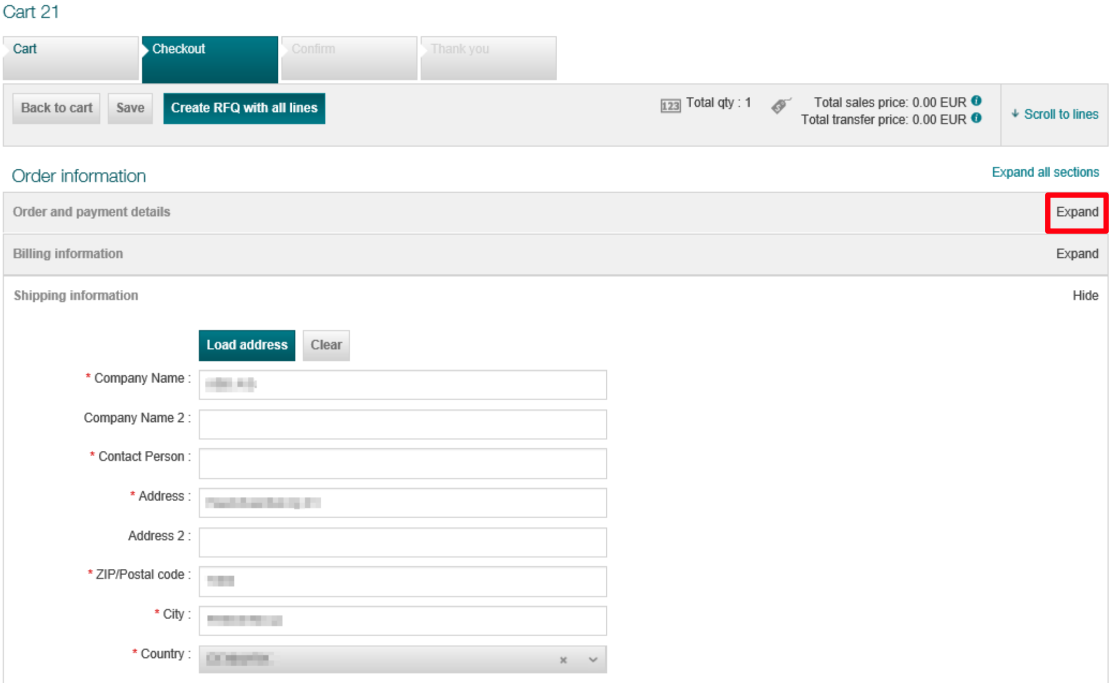
2.3 Proceed to checkout

When all the necessary items are in the cart, you can proceed to checkout. **Checkout** button is available in **Current Cart** tab of cart summary. or You can proceed to checkout also through the cart details page.



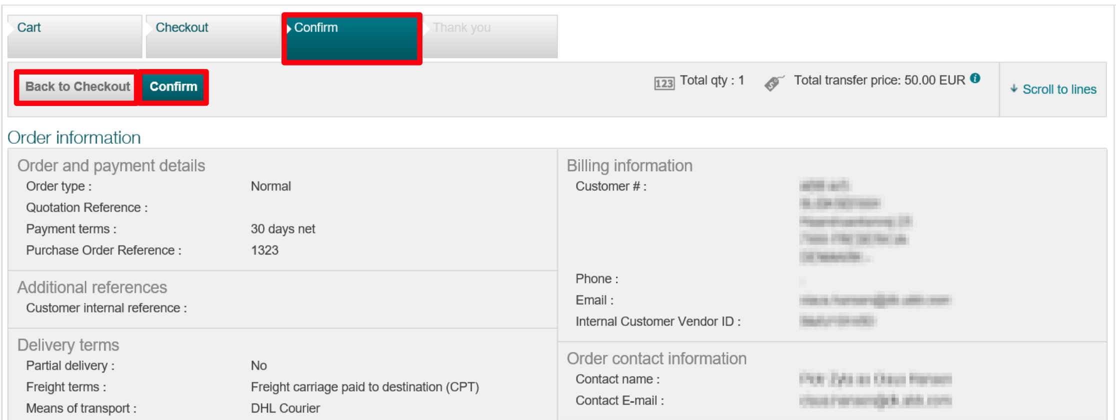


You can change and add order information in the **Checkout** tab. In order to do so, you need to expand the respective section. The sections of the form which contain unfilled mandatory fields are expanded by default. All mandatory fields are marked with the red asterisks.



2.4 Order confirmation

All the gathered information is later visible in the **Confirm** tab. You can change the data on the order by clicking **Back to Checkout** and returning to **Checkout** tab.

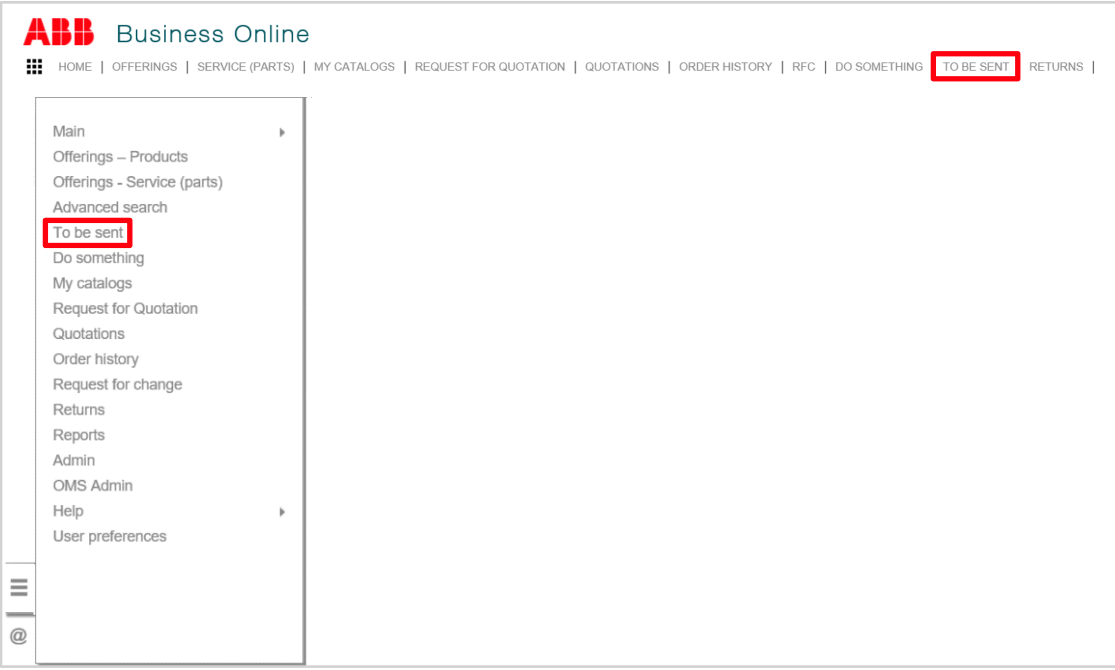


You can place the order by clicking **Confirm** once you have checked the Order information.

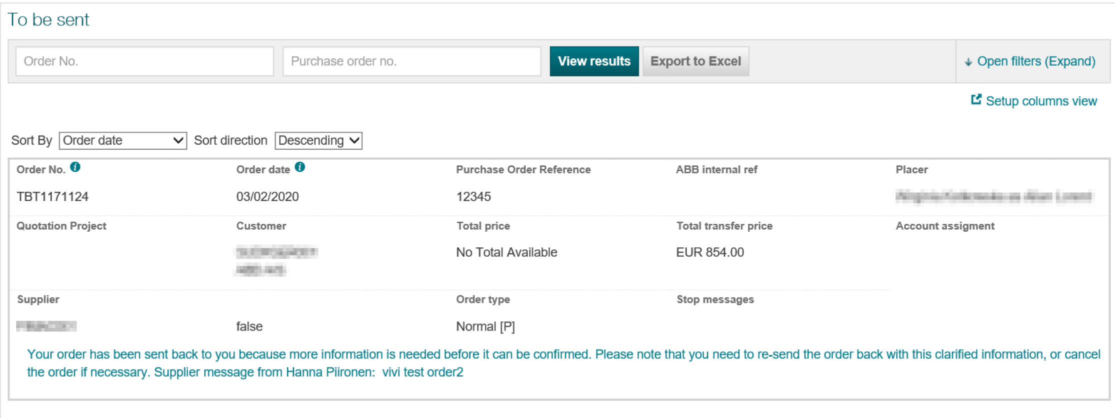
Once this is done, you will be moved to **Thank you** tab where the Order number and Order date are provided.

3 Buyer Module

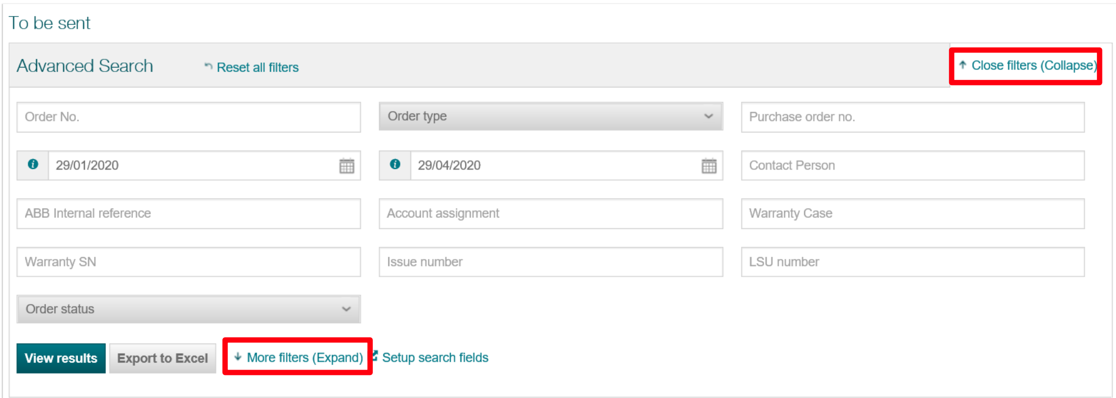
You can access the Buyer Module using **Quick access** menu or shortcut links**.** In this module you can manage the orders you have placed.



When you click **To be sent** shortcut link, you will see a list of orders displayed according to the search filter settings.

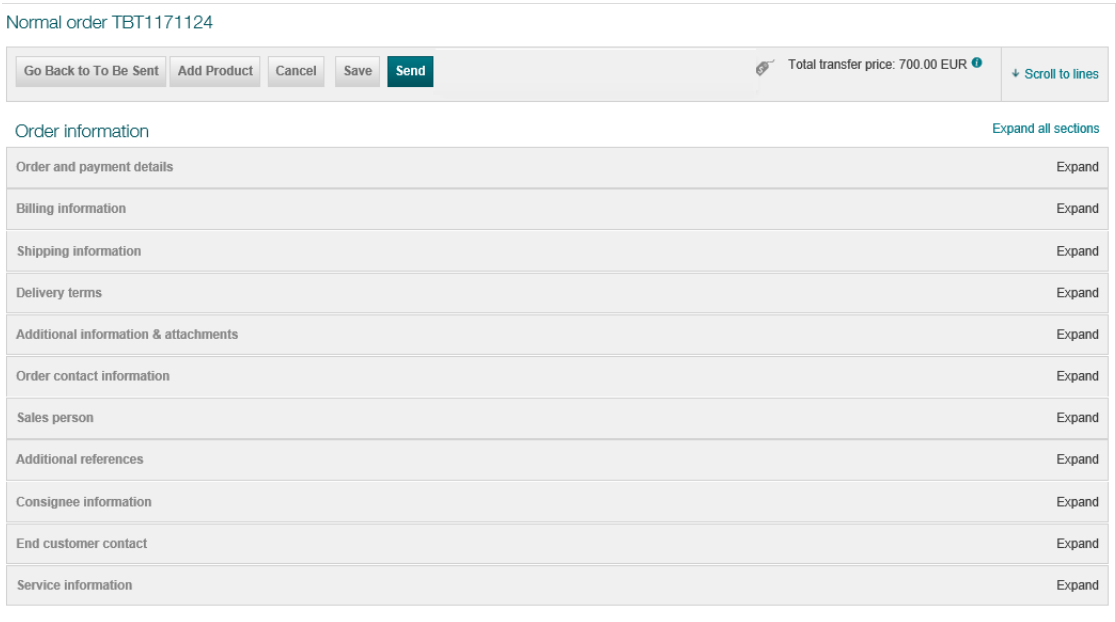


When you change the search criteria different orders will be displayed on the current view. List of filters is expandable.



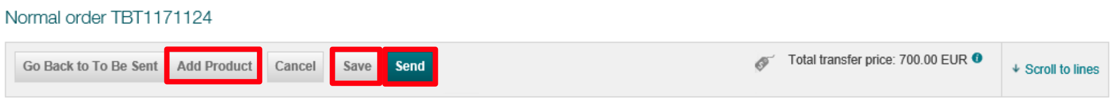
3.1 BM Order Details

You can click any of the lines to open the order details page, where everything related to that order can be found. This page is organized in expandable sections:



3.2 BM Order Management

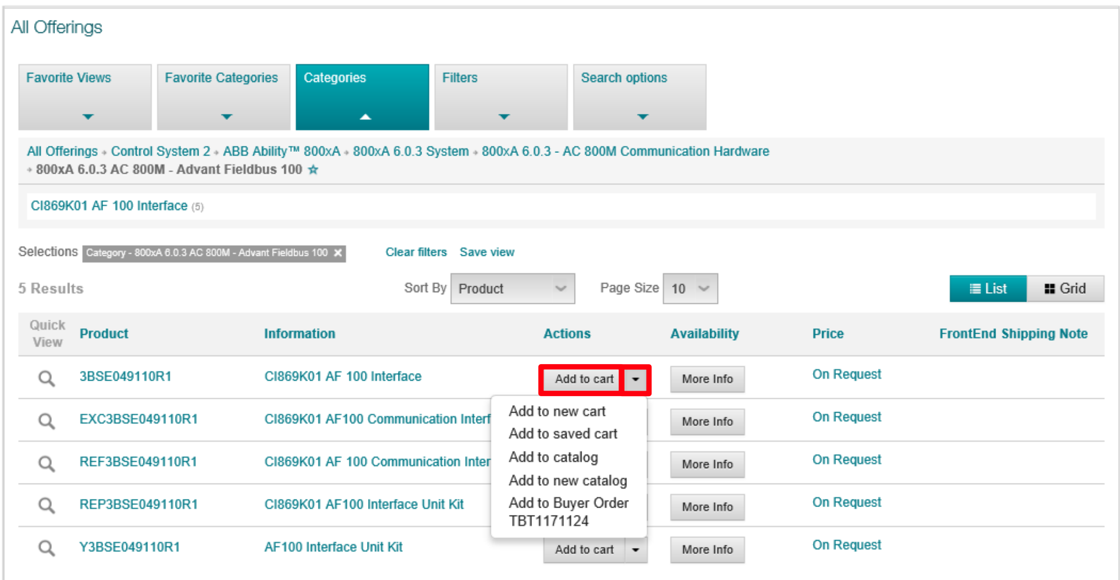
You can choose between several options when managing your order:



Save: This option will save the order information for later actions.

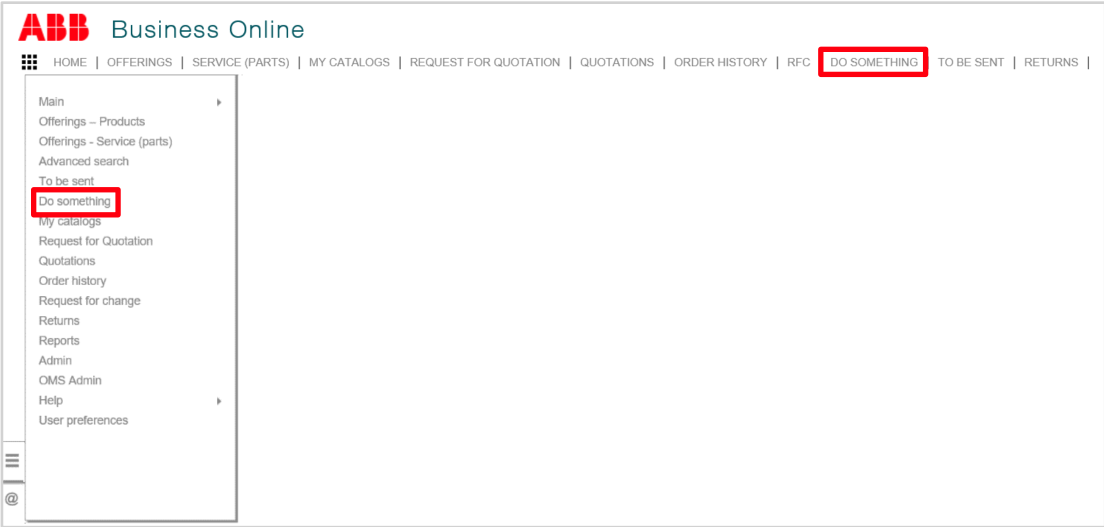
Send: This option will send the order.

Add Product: This option will take you to the **Products** page where you can add any product directly to the current order:



4 Supplier Module

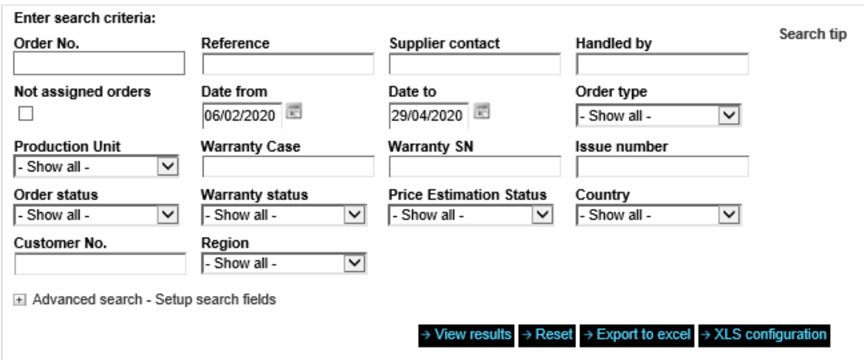
You can access the Supplier Module using **Quick access** menu or shortcut links. In this module you can manage the orders sent by your customers.



4.1 Views

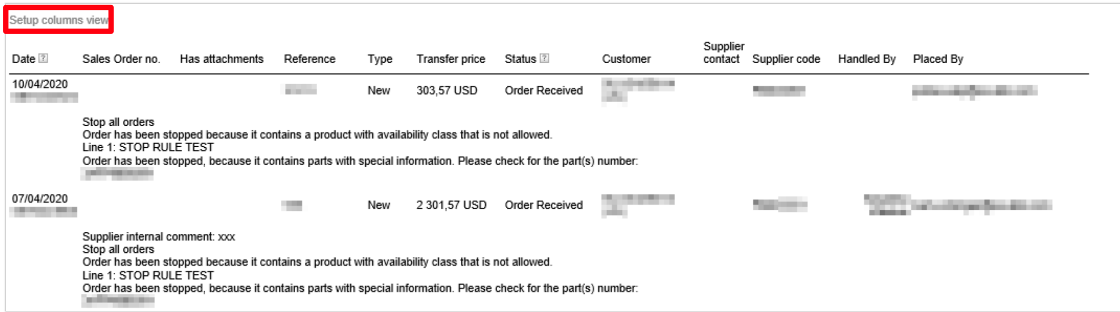
You can view each order in **Do something** in one of the eight views.

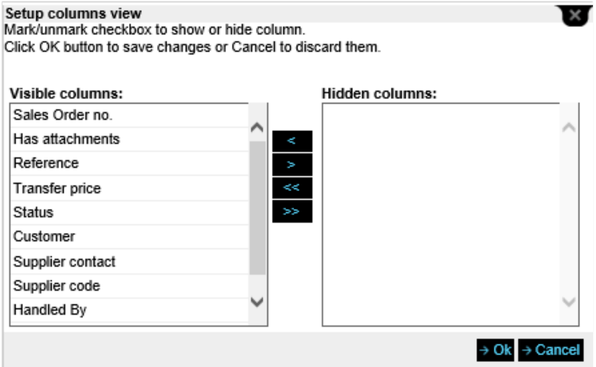
When you click any of the tabs, you will see a list of orders displayed according to the search filter settings:



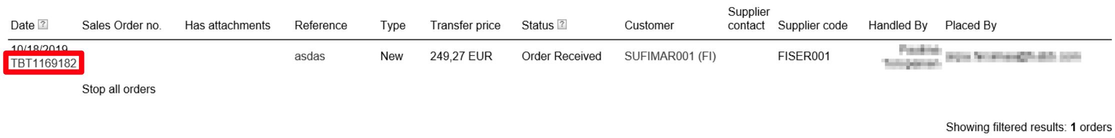
When you change the search criteria, different orders will be displayed on the current view. In each line, besides the usual order information, there will be also the Stop information, which states the reason for this order to be displayed in **Do Something** tab. This is related to the Stop Rules and the Rules Engine.

You can configure the columns shown in the search results by clicking **Setup columns view**:

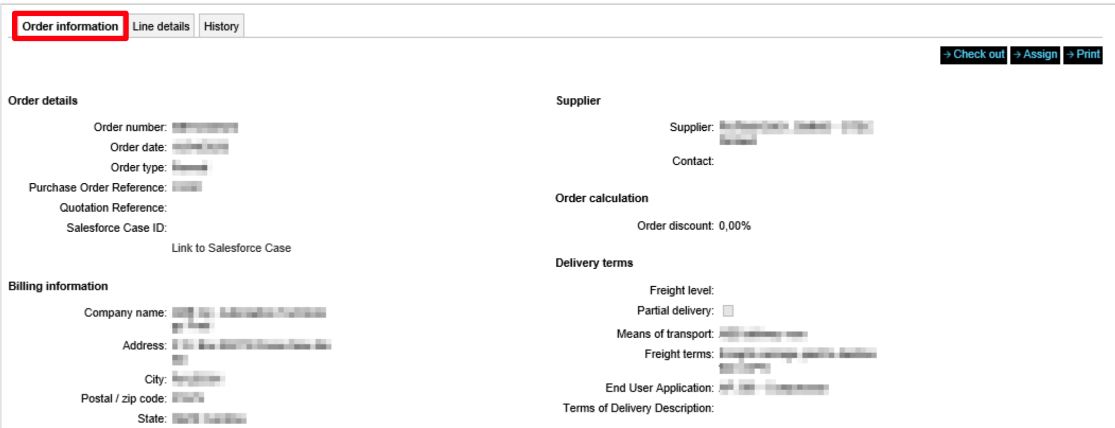




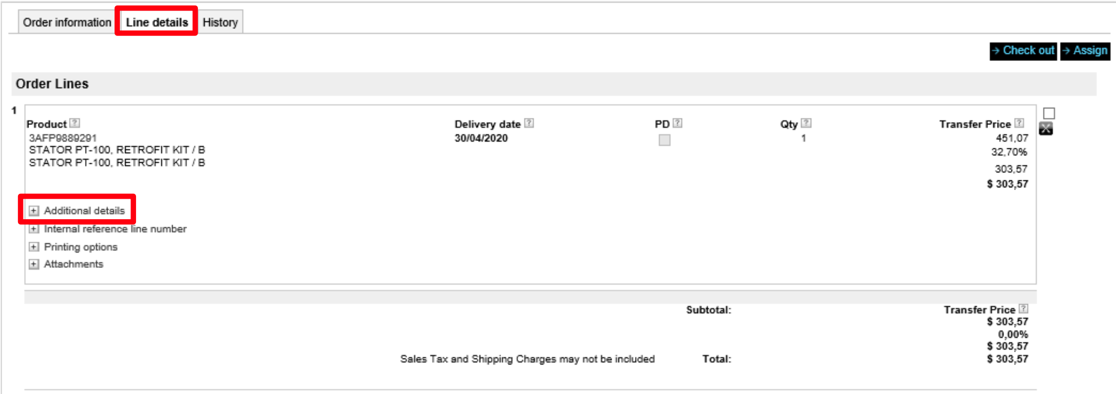
You can access the order details by clicking on the order ID. The information is organized in three different tabs: **Order information**, **Line details** and **History**.



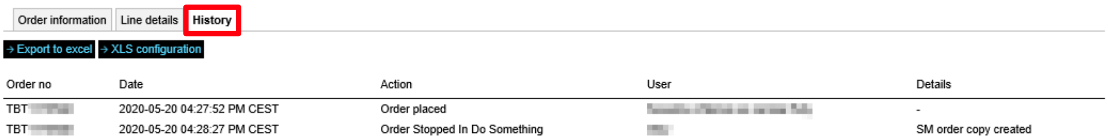
The **Order information** tab displays all the items data:



The **Line details** tab displays information specific to each of the different products in the order. Most of this information is displayed in expandable sections to make it easier to read:



The **History** tab displays all the actions taken on the order.

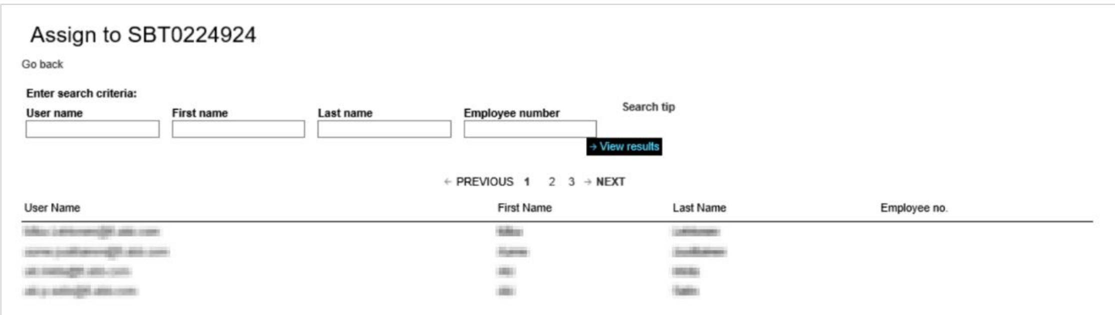


4.2 Supplier Module Order Management

To make changes to an order that's waiting in **Do Something tab**, it has to be either checked out, if you are going to do the changes, or assigned to a different user, if you just want to delegate these changes.

Once the order is checked out, it is locked for any users other than the one who did the check out and a new set of buttons is available, offering a wide array of options.

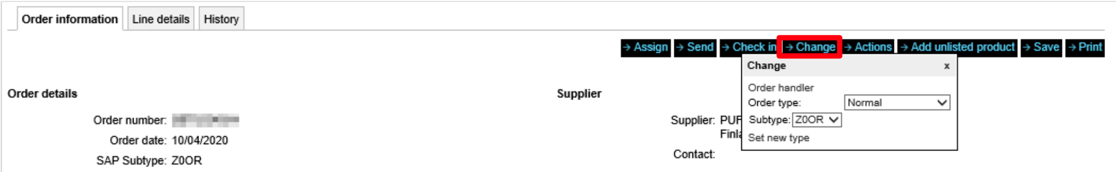
Assign allows you to assign the order to a different user who can proceed with any actions regarding that order. The order assigned the a new user become automatically check out for that specific user.



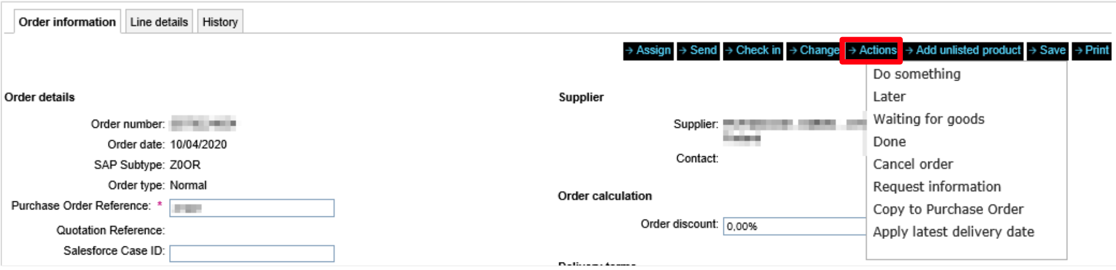
Send will send the order from **Do Something** to **Done**.

Check in will unlock the order so that other users can check it out.

Change allows changes in the order type and subtype.



Actions allows you to change the status of the order (**Do something**, **Later**, **Waiting for goods**, **Done**), cancel it, request for extra information, copy it to a new order or apply the latest delivery date.



Add unlisted product allows you to add products that are not in the products database:

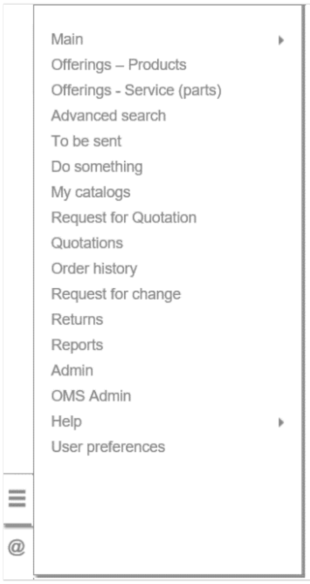
Save will update the changes you have done in the database.

Print allows you to access the order printout, where all the relevant information is summed up and ready to be printed.

A **Short version** option removes from this view the fields that are empty, making it more concise

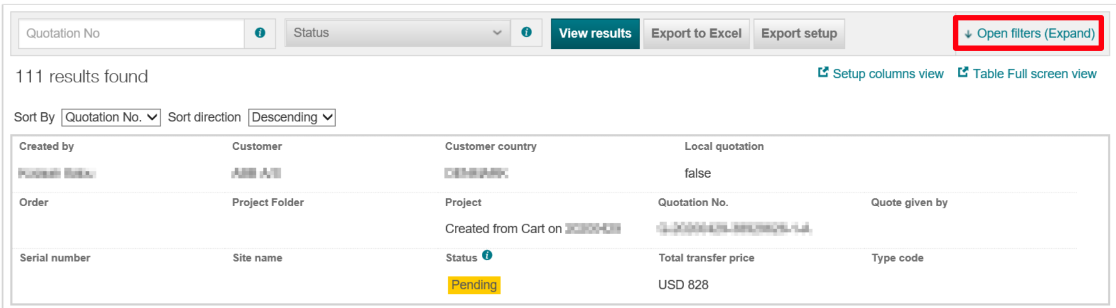
5 Quotations

A quotation is a business process which allows a potential buyer to see what costs would be included in an offer presented by a supplier.



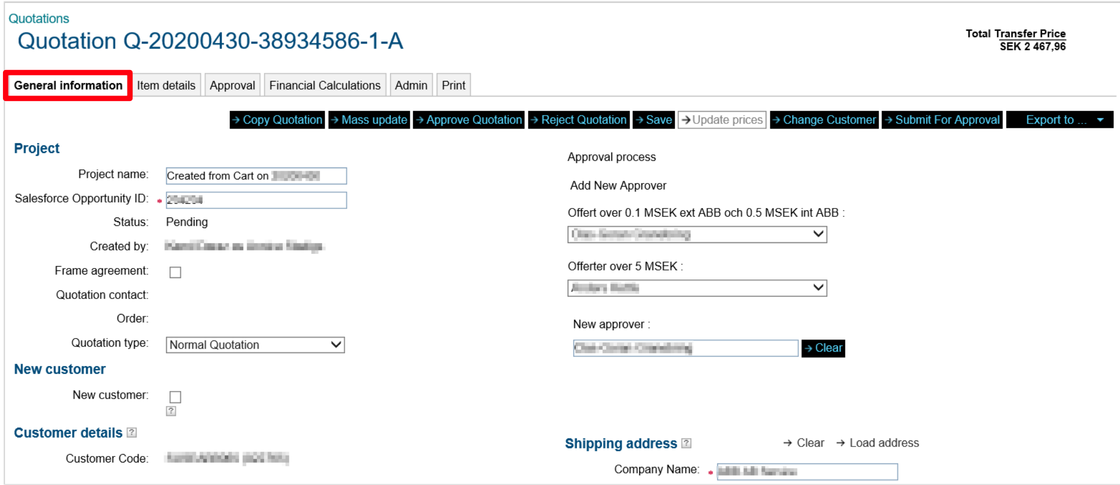
You can access the Quotations module using **Quick access** menu.

After you click **Quotations**, you will see a list of orders displayed according to the search filter settings. Clicking **Open filters** displays additional filtering fields, which enables you use advanced search option.

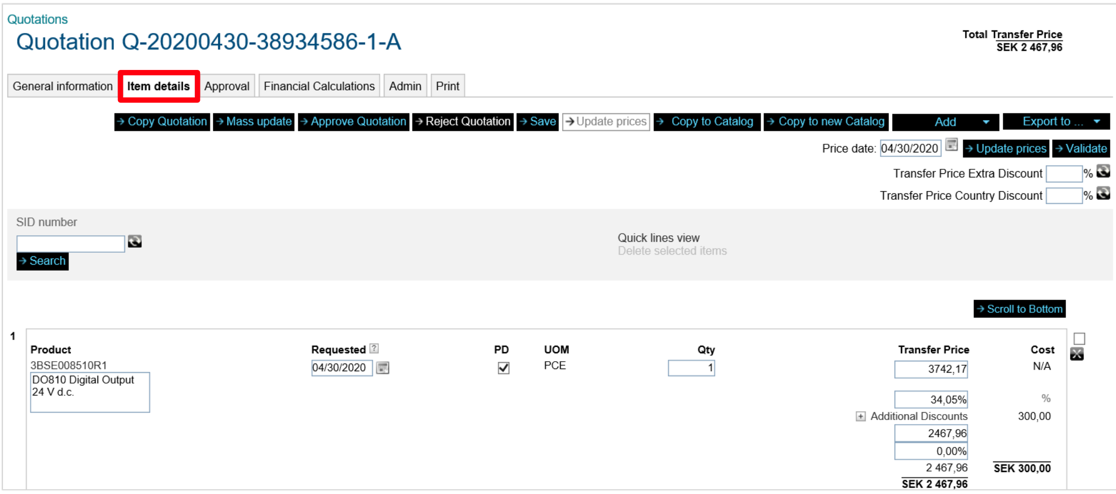


5.1 Quotation details

You can access quotation details by clicking on any Quotation ID. The information is organized in tabs.



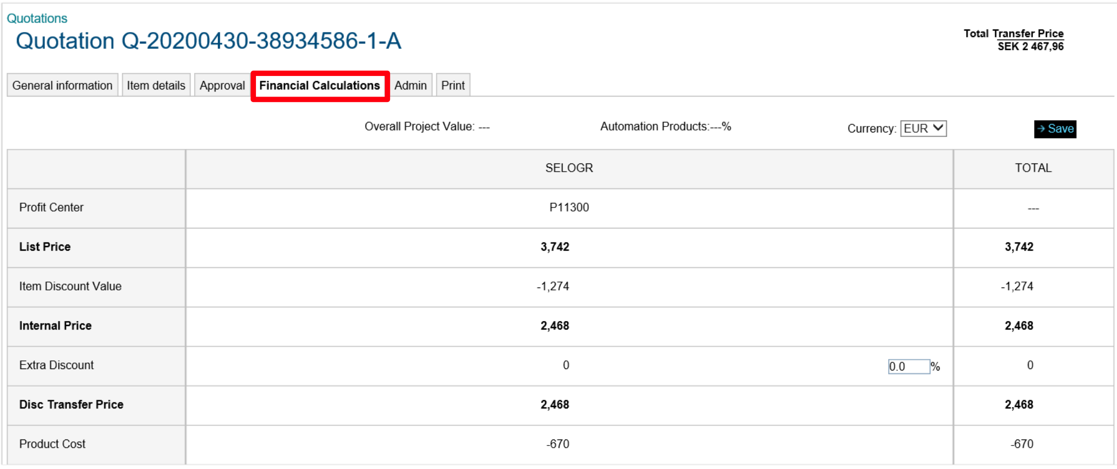
The **Item details** tab gives extra information on each of the products included in the Quotation:



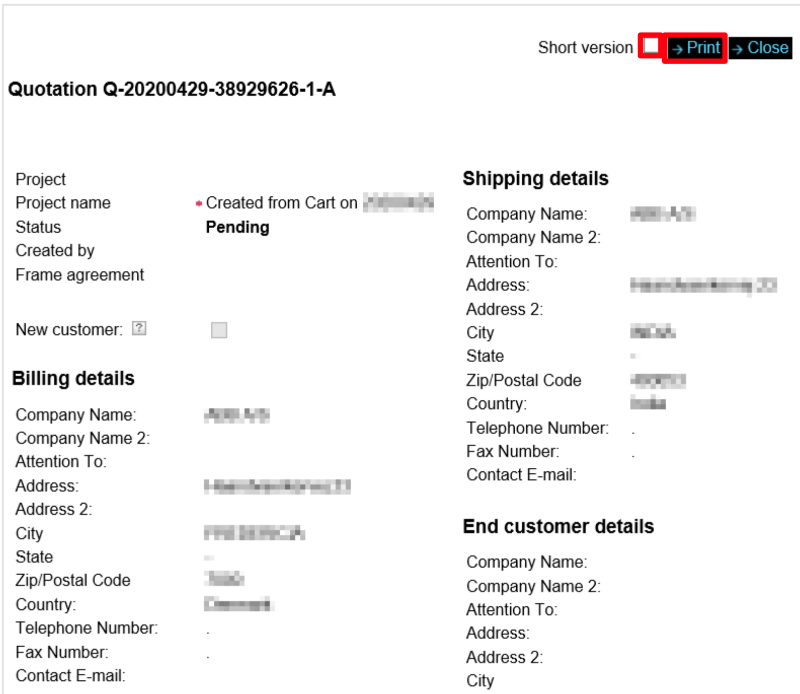
The **Admin** tab allows you to check **Log history** and **Notification emails debug** section. After you click **Log history**, the history of events will be displayed for this quotation:

The **Approval** tab gives you the access to the approval process details.

The **Financial Calculations** tab gives you the access to the details about financial aspect of Quotation. There you can check List Price, Net Profit and many other calculations.



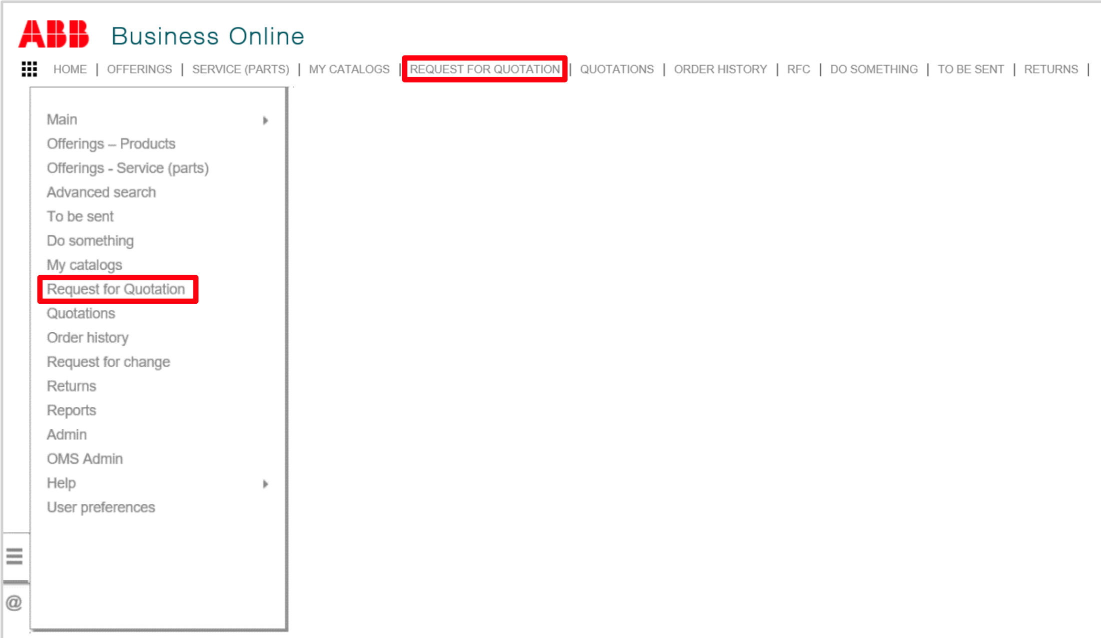
In the **Print** tab you can generate a printout in HTML or PDF format. A **Short version** option removes from this view the fields that are empty, making it more concise.



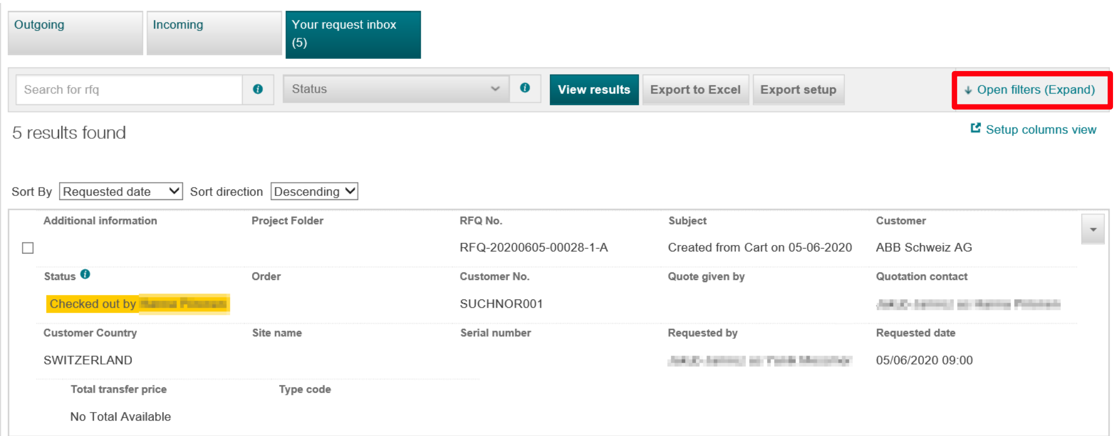
6 Requests for Quotation

A **Request For Quotation** (**RFQ**) is a business process which purpose is to invite suppliers into a bidding process to bid on specific products or services.

You can access the Supplier Module using **Quick access** menu or shortcut links.



After you click **Request for Quotation**, you will see a list of orders displayed according to the search filter settings. Clicking **Open filters** displays additional filtering fields, which enables you to use advanced search option.



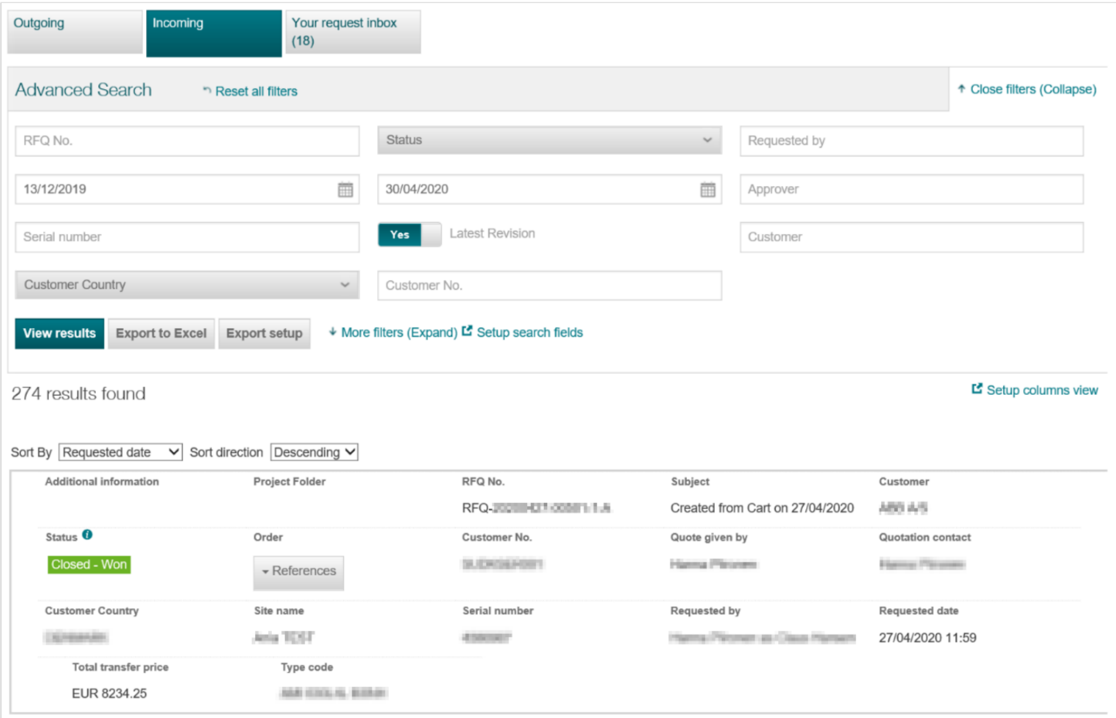
These RFQs will be organized in three different tabs: **Incoming**, **Outgoing** and **Your request inbox**.

Tabs have the same search criteria, but the search results and actions that you can take are different.

6.1 Incoming

RFQs in this tab require action taken by the user or another user in the organization. The RFQs shown have been created by other business units that are waiting for input.

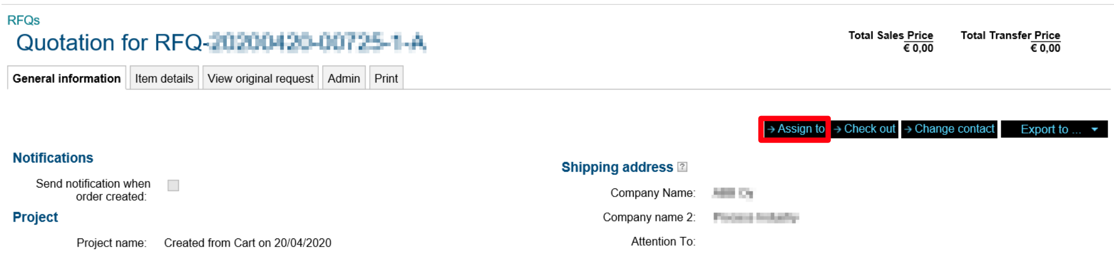
You can expand or collapse additional filtering options by clicking **Open filters/ Close Filters** and **More filters/Less filters**. To exequte search, click **View results**. The search results are displayed below filters section.



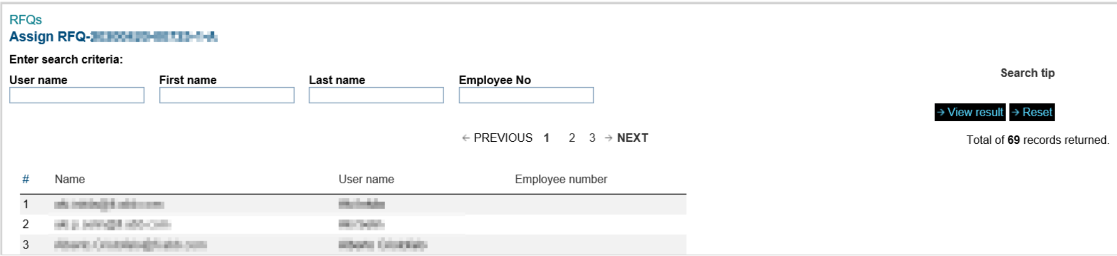
You can also export your search results to Excel. You can customize colums view on the Excel file clicking **Export setup**.

When you click on any RFQ details the **Quotation for RFQ** view will be displayed.

When the RFQ is unprocessed, **Assign to** button become visible.

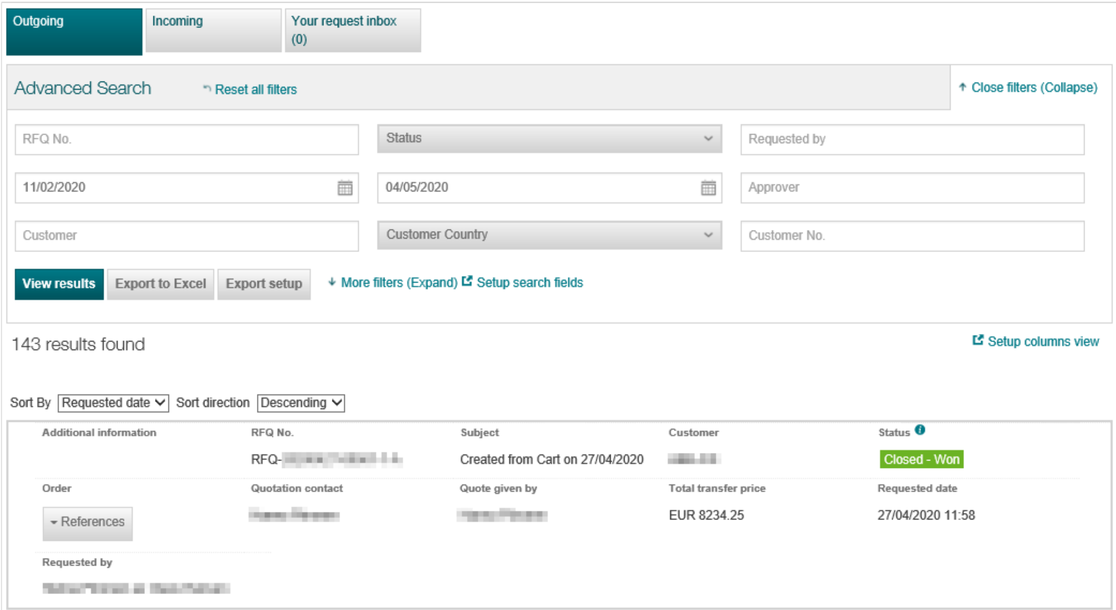


After you click **Assign to** button, you will see search pane, where you can find and select the user who will be in charge of this RFQ:



6.2 Outgoing

RFQs in this tab have been created by users in the same organization and are either finished or awaiting for input from someone from a different organization.



6.3 Your request inbox

In this tab you will find a list of RFQs, for which your action is needed. The same information can be found in one of the other two tabs, but this is an easy way to keep track of documents that might need direct input from you.

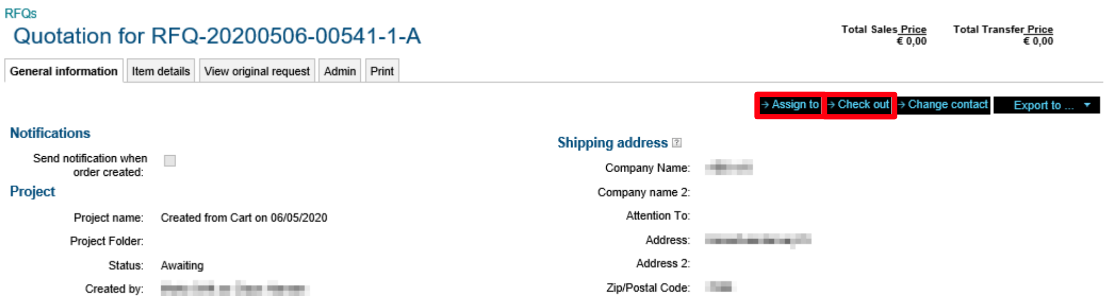
6.4 RFQ details

When you click any of RFQ IDs, you will see the RFQ details. There are a few tabs and they differ depending on whether the RFQ is in the Incoming or the Outgoing tab.

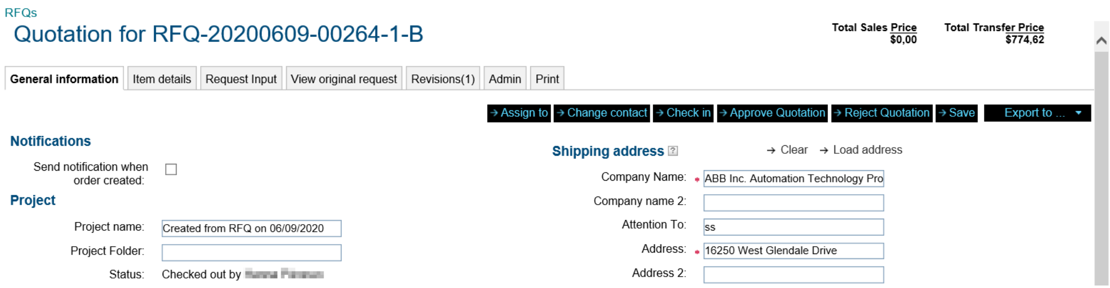
6.4.1 Incoming

Six tabs are available for Incoming RFQs: **General information**, **Item details, Request input**, **View original request, Admin** and **Print**.

You can find the data that is common to all the items in **General information** tab. Also, here you can check out or assign the RFQ to another user by clicking on one of the two buttons: **Assign to** and **Check out**.



When you check out the RFQ, the quotation will be locked for the other users and allow you to perform a number of additional actions:



Assign to: This button assigns the RFQ to a different user.

Change contact: This button changes the contact person assigned to the RFQ.

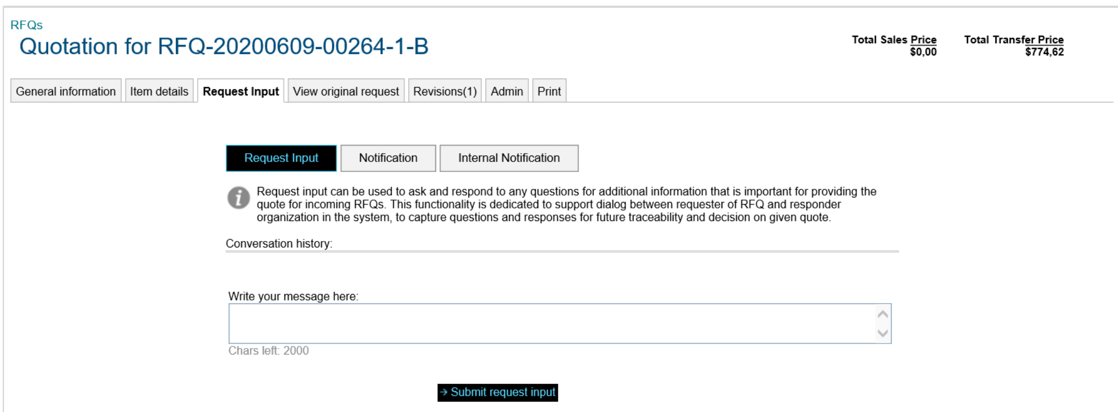
Check in: This button reverts the RFQ to the status previous before the Check out. This will prevent any further manipulation of the RFQ by the user until it's checked out again.

Approve Quotation: This button approves the Quotation.

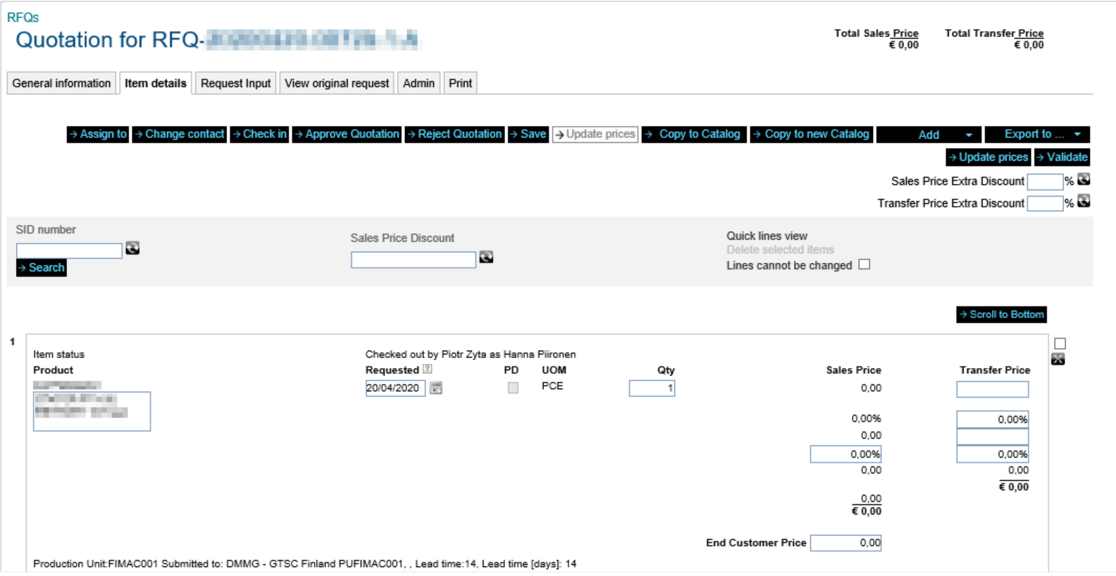
Reject Quotation: This button rejects the Quotation.

Save: This button saves the information that was updated in the RFQ.

The **Request Input** tab allows you to ask questions to the user who created the RFQ.



The **Item details** tab gives extra information on each of the products included in the RFQ.



There are many actions that can be taken:

Assign to: This button assigns the RFQ to a different user.

Change contact: This button changes the contact assigned to the RFQ.

Check in: This button reverts the RFQ to the status before the check out. This prevents any further manipulation of the RFQ by the user until it's checked out again.

Approve Quotation: This button allows you to approve the Quotation.

Reject Quotation: This button allows you to reject the Quotation.

Save: This button saves the information that was updated in the RFQ.

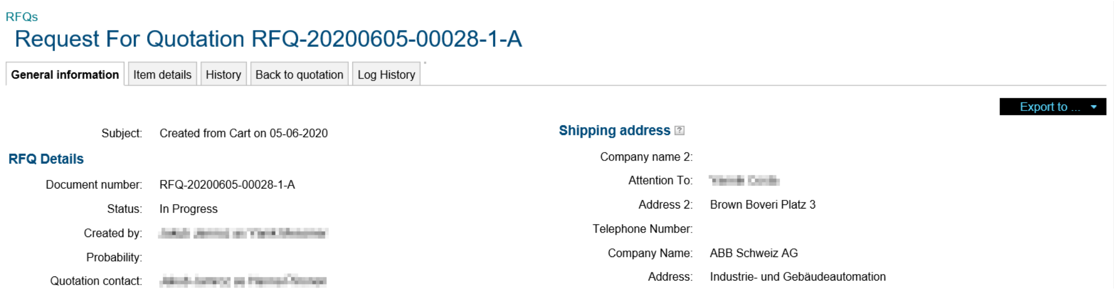
Add: This drop-down list allows you to add a new product to the RFQ, including unlisted products.

Update prices: This button updates the prices of those lines selected. You can select the lines by clicking on the check box located to the right of the line.

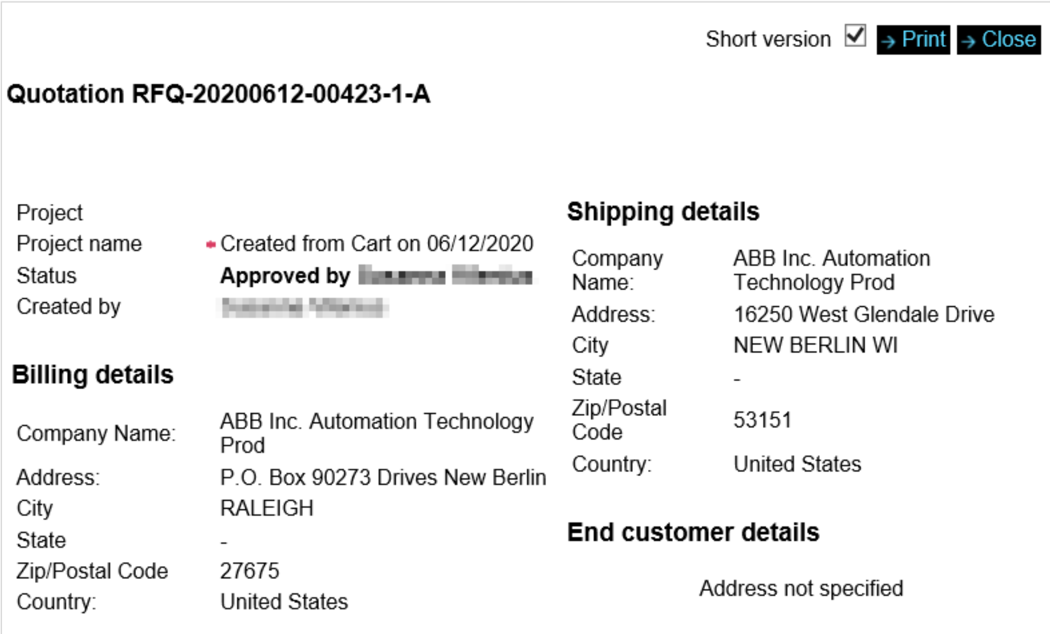
Validate: This option validates the items.

The **Admin** tab allows you to check **Log history** and **Notification emails debug** section.

The **View original request** tab shows you the first RFQ that was sent, before any changes were made to it. In some cases it will be the same but if there have been updates to the RFQ, this tab will not show them.



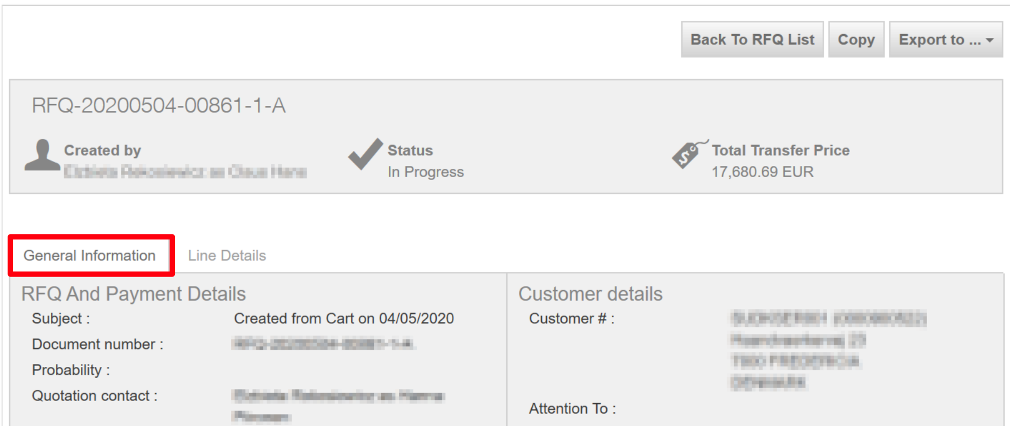
The **Print** tab gives you the possibility to print all the RFQ information in single page.



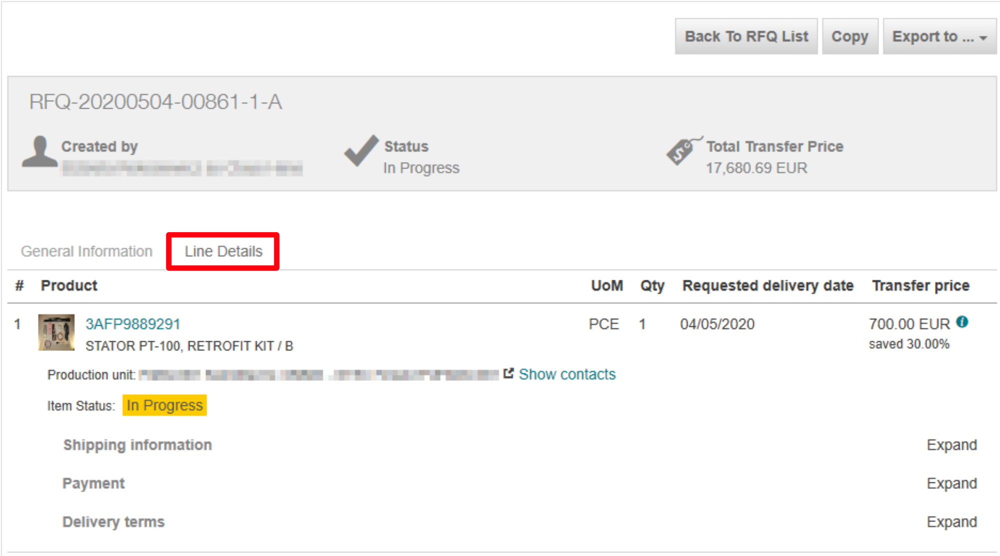
6.4.2 Outgoing

Two tabs are available for Outgoing RFQs: **General information and Line details**.

In **General information** tab, you can find the data that is included in request. You can also copy the RFQ into a new cart and then eventually convert it into an order.



In the **Line details** tab you can find information about each of the items in the RFQ:



6.5 RFQ Statuses

In each tab you can check the status of the RFQ. The statuses of documents can be as follows:

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 before sending to the Supplier.

Requested Input – The Supplier needs more information from the RFQ creator.

Quote expired – The quote given for the RFQ has already expired.

Submitted to CQP – RFQ is submitted to the Common Quotation Platform

Removed by approver – Quotation item from RFQ has been removed by approver

Assigned to - RFQ is assigned to the approver

AWM pending – RFQ is pending Approval Workflow Module approval

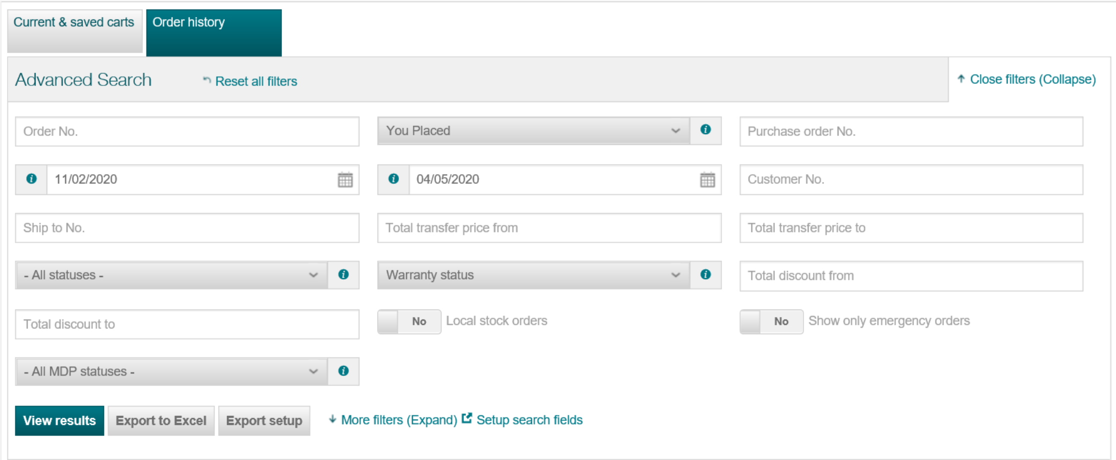
Awaiting – RFQ is awaiting to be reviewed by customer service representative

Request information – Approver requested information on RFQ chat

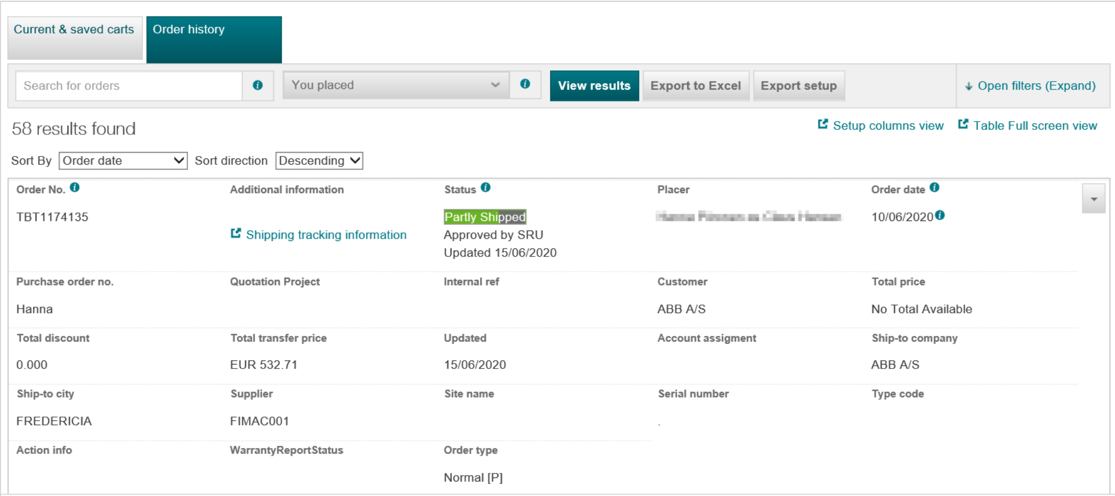
7 Orders

An order is an intention of engaging in a commercial transaction for specific products.

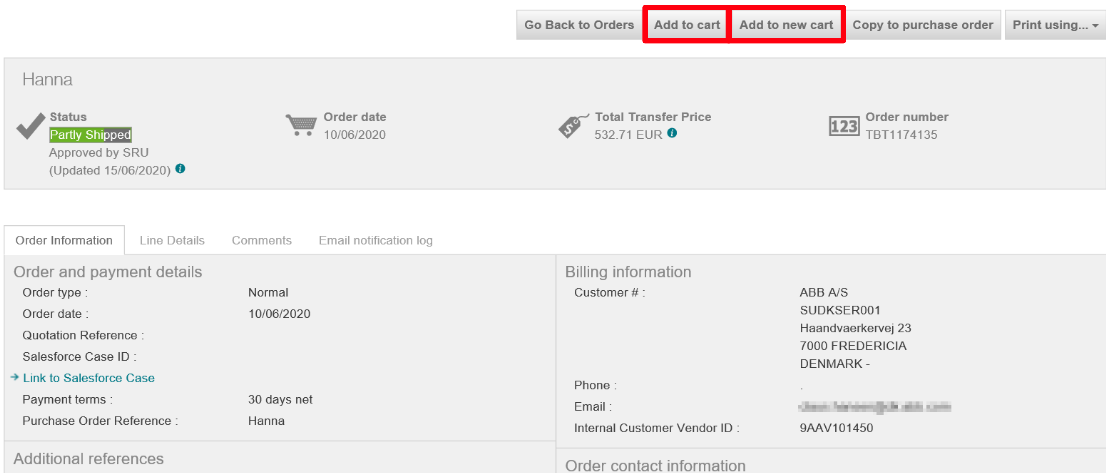
In the **Order History** module you can find all the previous orders connected to the organizations available for you. You can filter the orders by the specific organization or by the order creator. All the necessary filters are accessible through the expandable search section:



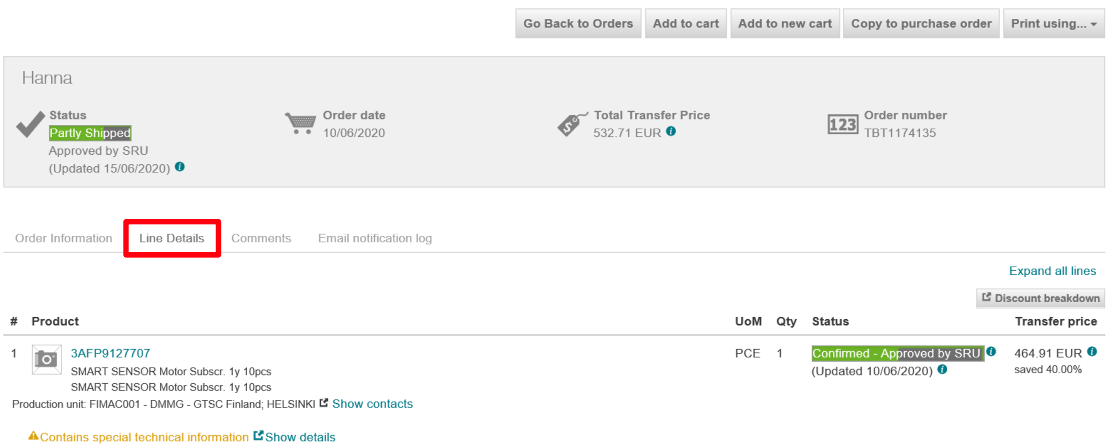
You can access the order details by clicking on the order.



Once you have opened the **Order information** page, you have access to where additional details are shown. The order summary is visible in the first section, while all the information set during checkout are visible in the main part of the window. The order details page also allows you to copy the order items to the cart (or to a new cart) through the relevant buttons.

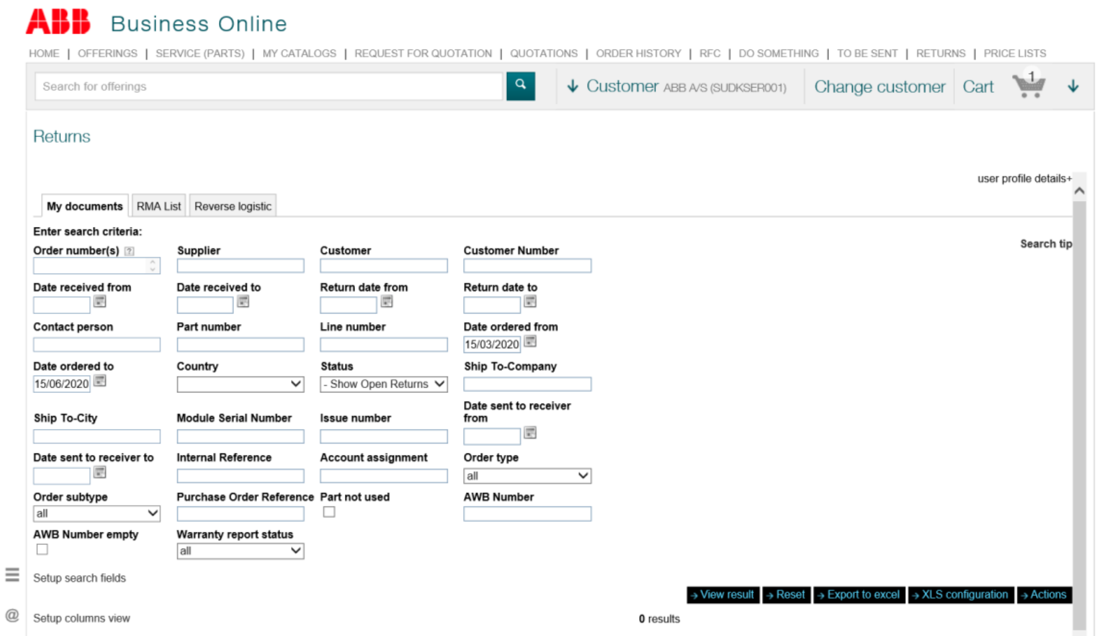


The **Line Details** tab takes you to the items that are a part of the order.



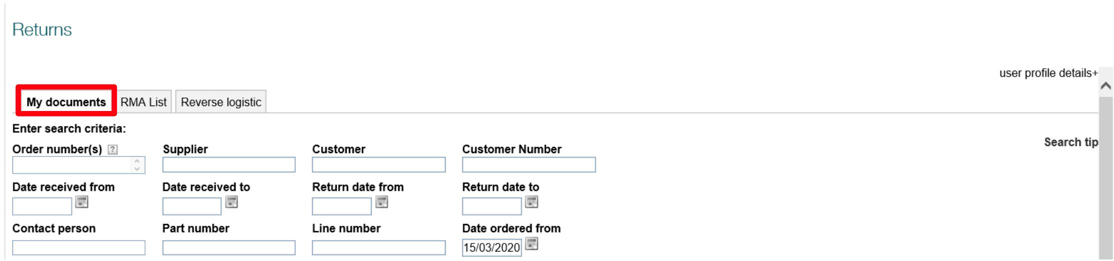
8 Returns

The **Returns** module stands for all operations related to the reuse of products and materials. It includes the management and sale of returned equipment and machines from the **Production Units**.



8.1 My documents

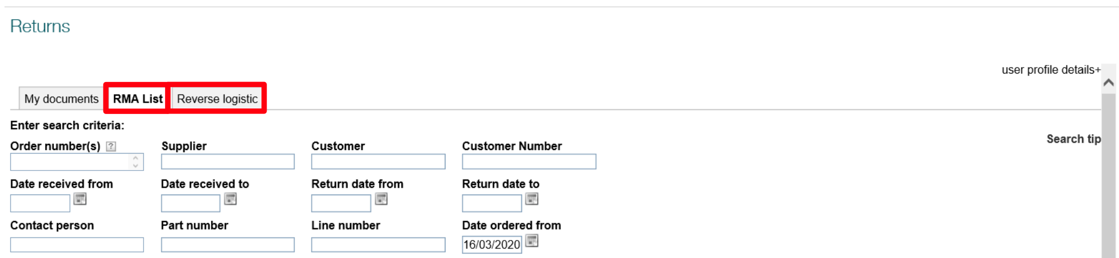
In this tab you can find a list of return documents you are in charge of. You can also find the same information in one of the other two tabs, but this is an easy way to keep track of documents that might need direct input from you.



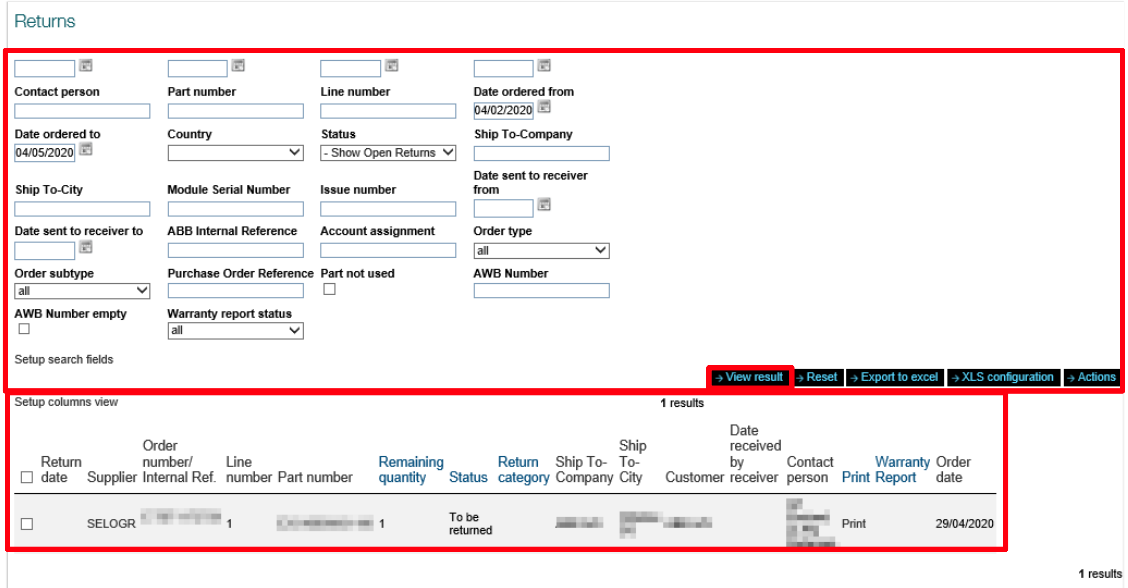
8.2 RMA List and Reverse Logistics

The **Return Material Authorization (RMA) List** tab deals with the returns that occur between the End Customer and the Sales Unit.

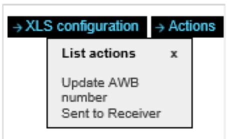
Reverse Logistic tab deals with the returns that occur between the Sales Unit and the Production Unit.



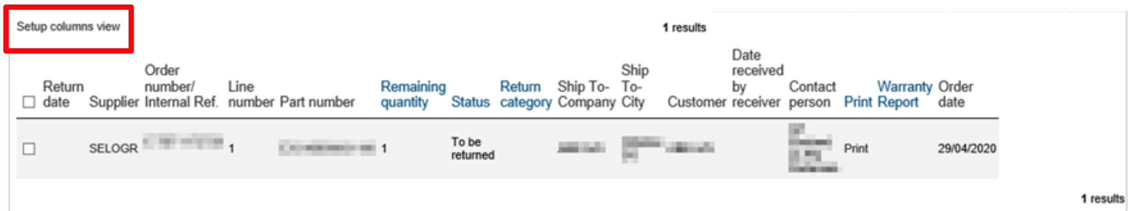
Both tabs can be clearly divided in two sections: the search criteria and the search results:



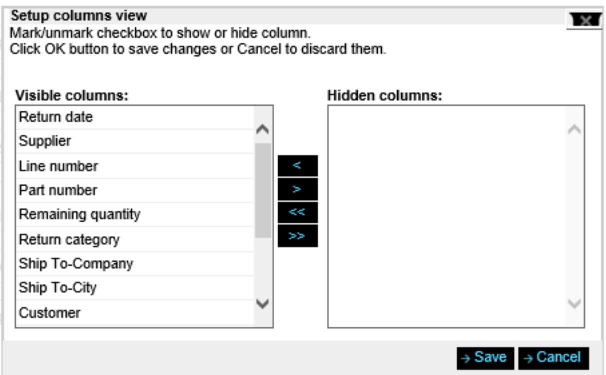
The functionality is similar in both cases. In the search results section you are able to perform multiple selection actions. For instance, after selecting a couple of orders the **Actions** button becomes available with the following options:



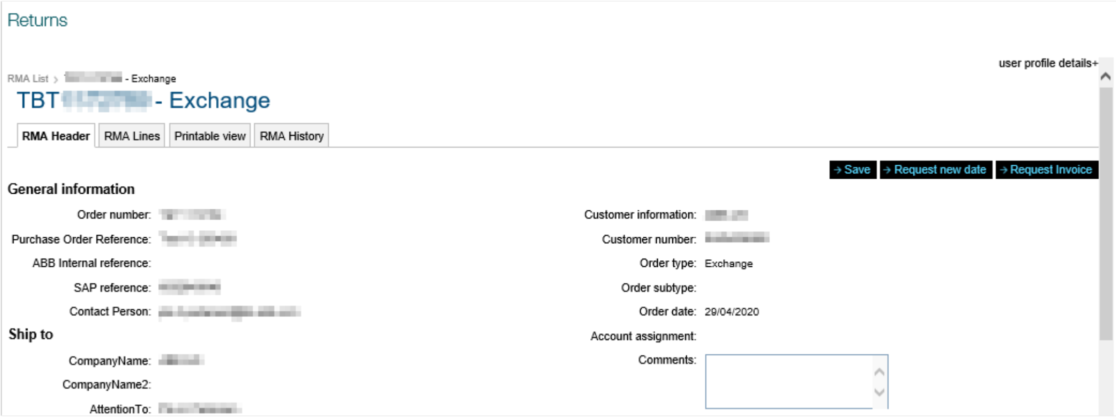
As in other modules in BOL, the format of the search results section is customizable and allows you to select the columns that are visible. You can customize that by clicking on the **Setup columns view** link.



A new window opens, where you can do the selection:

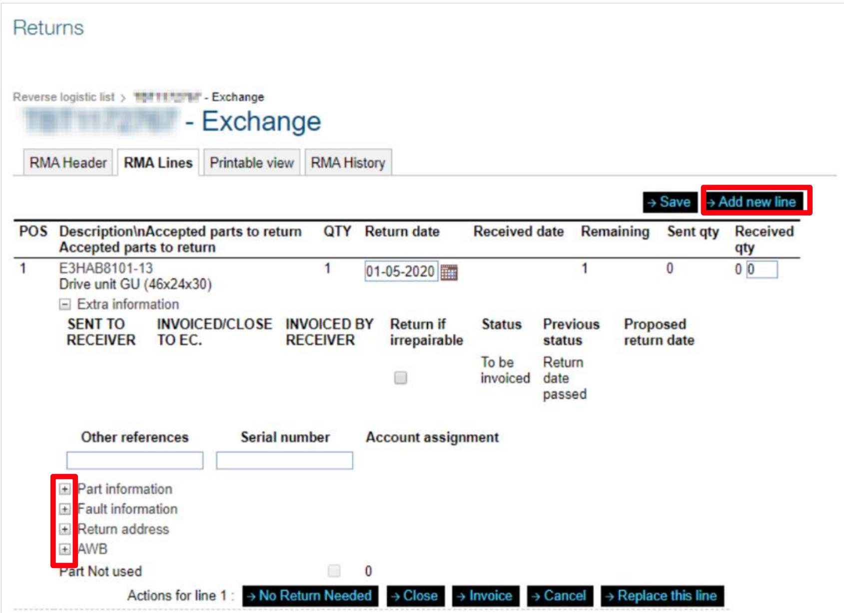


You can open each search result in a new window, which displays additional information about the document. This information is organized in two different tabs: The RMA Header and the RMA Lines. In the RMA Header tab you can find general information about the return order.

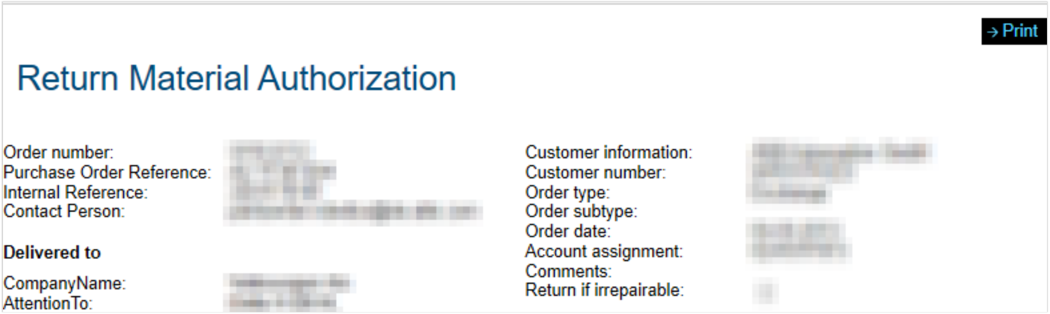


In RMA Lines tab you can find information about specific item.

You can also add new items to the document by clicking **Add new line**. Additional information about return order is available in expandable sections such as Part Information, Fault Information, Return Address and AWB (AirWay Bill).



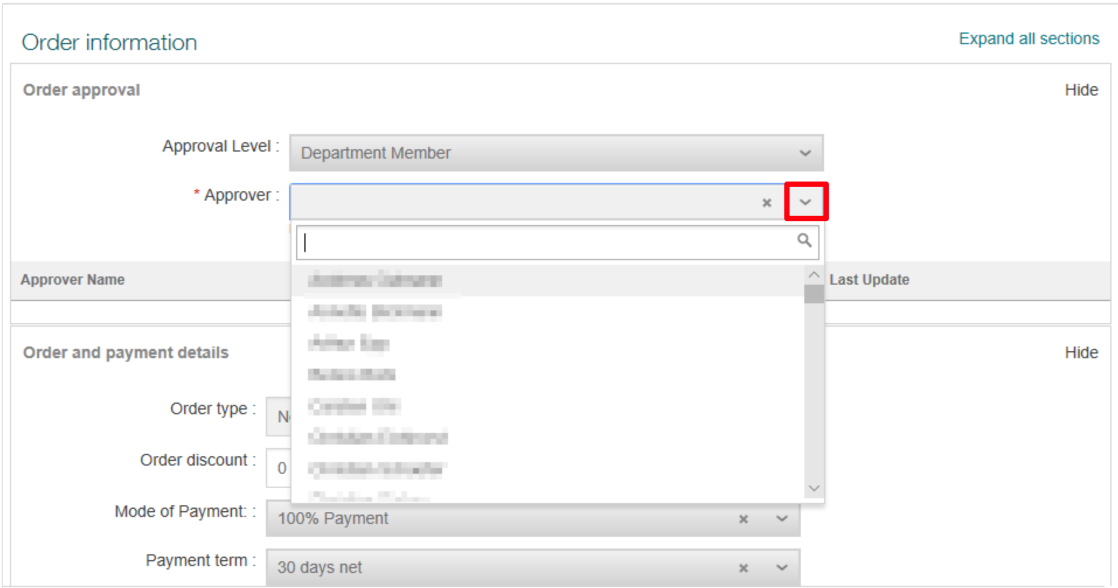
The third tab, **Printout**, allows the user to prepare the document for printing:



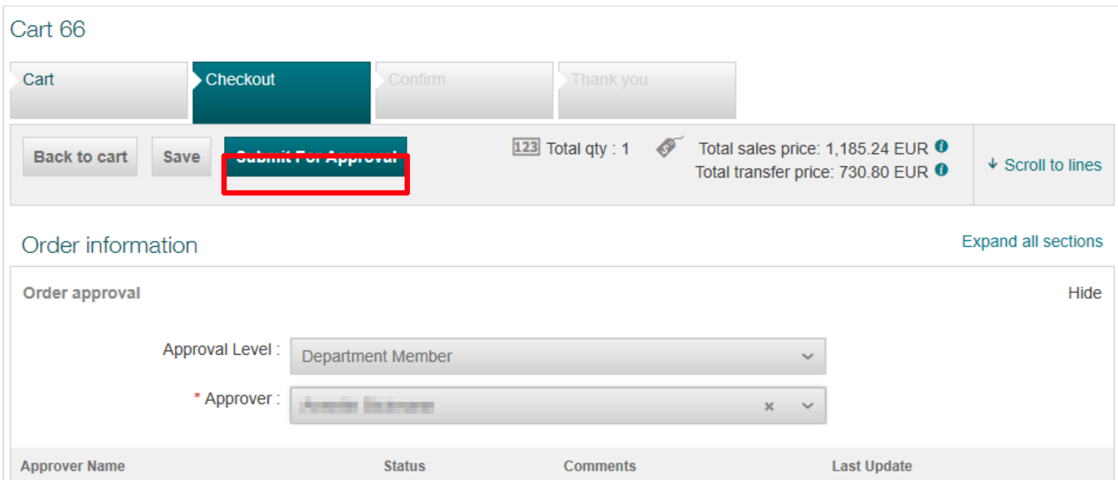
9 Internal approval process

Internal Approval process can be set in BOL so that specified users, known as approvers, need to approve a document (Order, RFQ, etc) before it can be sent.

This process begins after filling in the information on the document details page. After proceeding to check out, Order approval section is displayed.



You must select an approver and then send the order for approval.

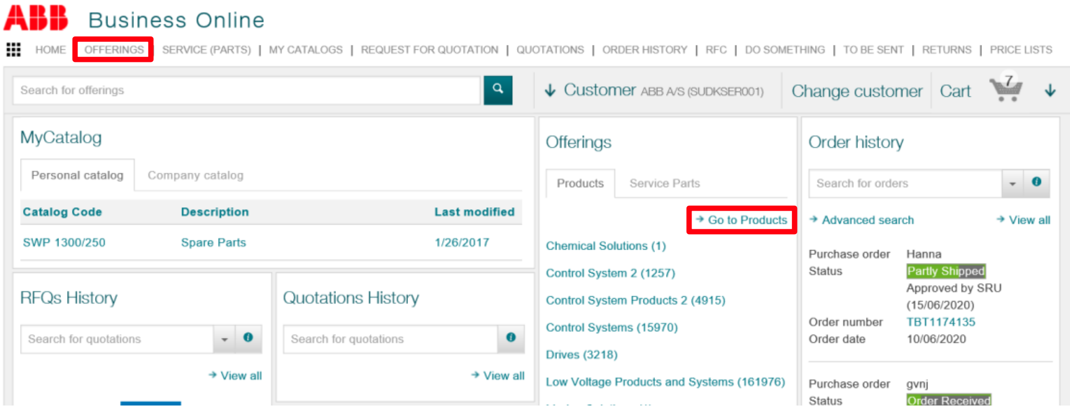


Next, The approver receives this document, approves it, rejects it or sends it to someone else for approval. as After the approval process is finished, the status is set to either approved or rejected.

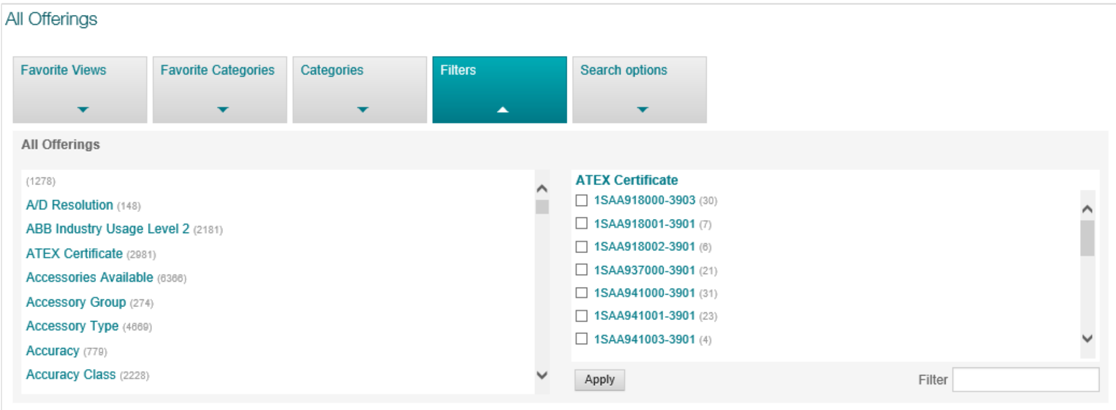
If the document is approved, after the process completion, you are not able to change anything in it header or the line details, but you have a possibility to send it.

10 Products

The **Products** module is available from the **Offerings** pane and through the **Offerings** shortcut link at the top of the BOL page.



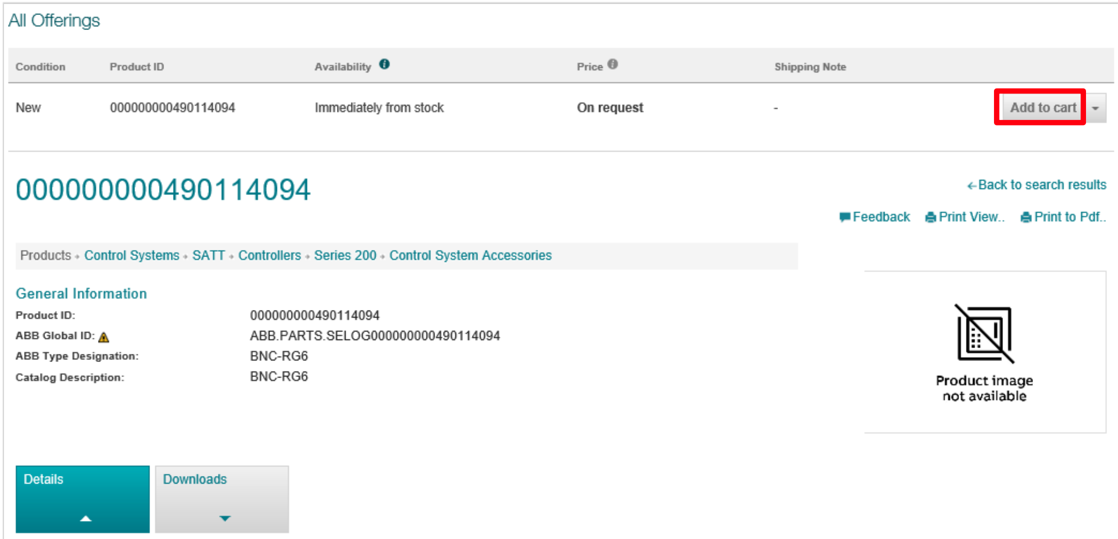
It allows you to do a quick and efficient search of existing products. You can search by the name of the product or its code or browsing through the categories. You can sort the results by a number of fields and filter them.



The search results can be shown as a product grid – with product photos, if available, visible as tiles – or as a product list. The product list allows you to take a number of actions for products directly from the page.

Every product has an information page with all the product details, with a summary shown in the quick view window.

The page contains all the information on the product: General Information, Spare Part Supplier Information, Additional Information and product images. You can also add the product to the cart using the **Add to cart** button.

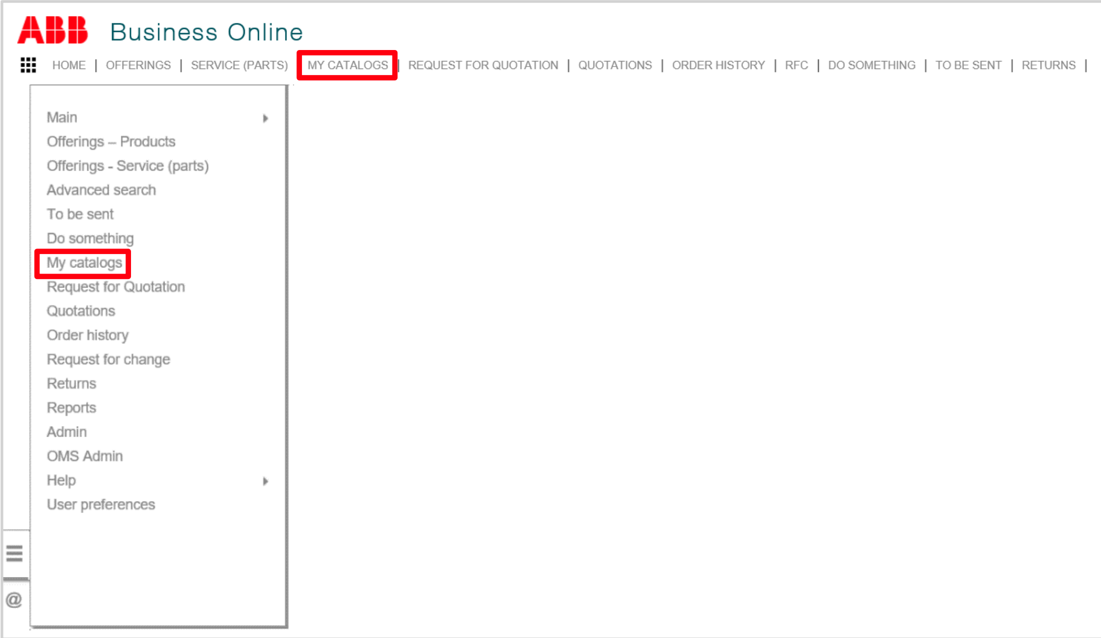


11 My catalogs

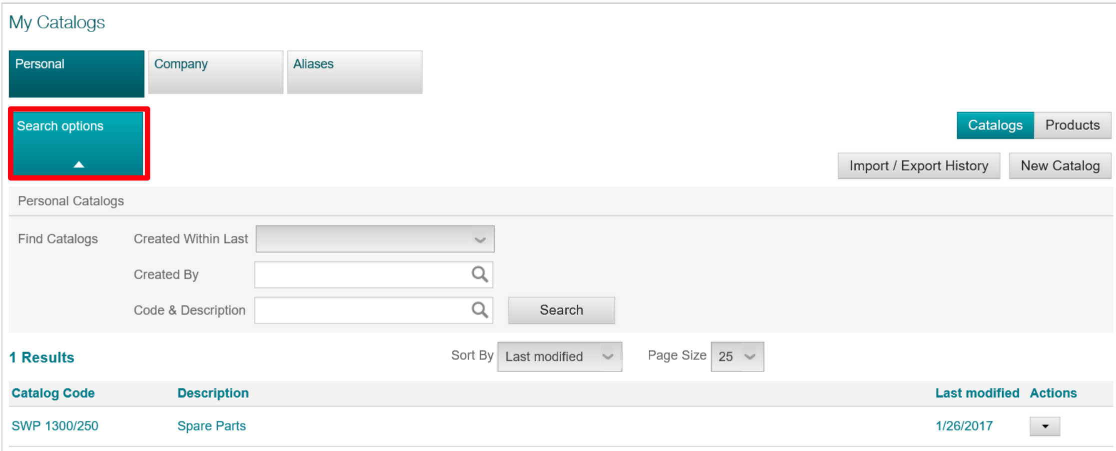
The **MyCatalogs** option allows you to save predefined lists of products and their configurations.

You can create new catalogs by clicking **New Catalog** in any of the tabs. Selecting one of the existing catalogs opens the details an allow you to add or remove products.

You can access the **My catalogs** module using **Quick access** menu or shortcut links.



The **My catalogs** page allows you to filter all the catalogs available to you by the creation date, creator or name.

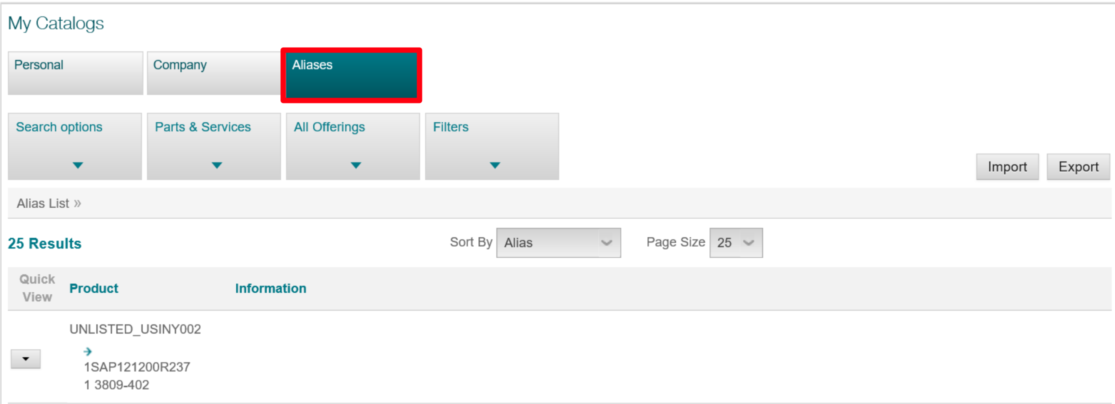


You can add these catalogs to a cart, or you can add specific products individually from each catalog to the cart instead.

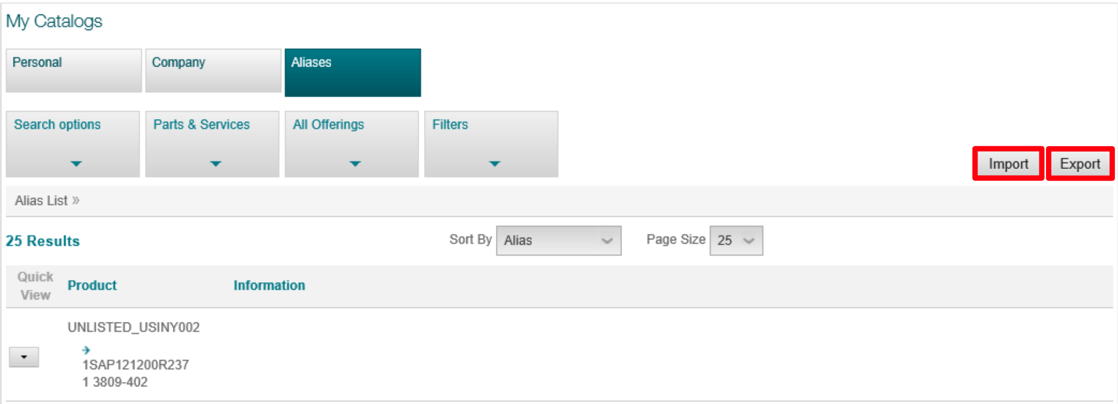
Catalogs are organized in three different tabs: **Personal**, **Company** and **Alias**.

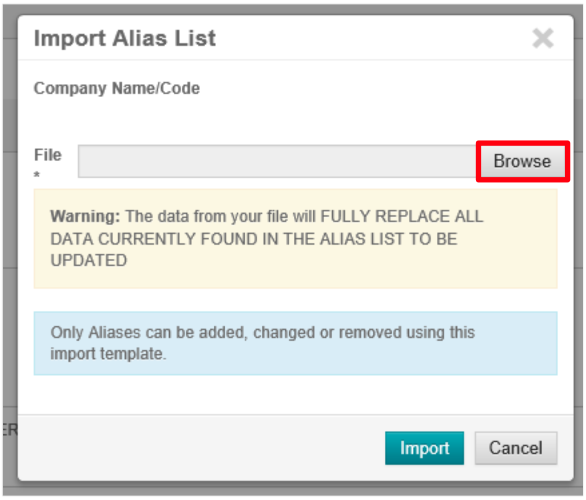
11.1 Alias catalog

The organization catalog is your view into ABB's ordering system and allows you to set your Product IDs to ABB Product IDs. Thus creating aliases for the ABB Products is something that you and your organization can better relate to. Then you can place orders in ABB Business Online using your Aliases.



You can import an alias list from an .xls file.

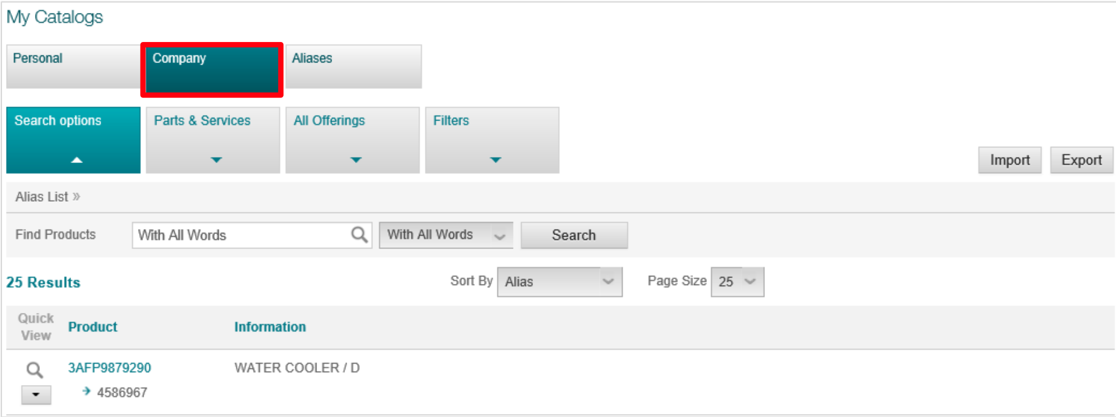




You can also export an alias list. The .xls file will save on your computer.

11.2 Company catalog

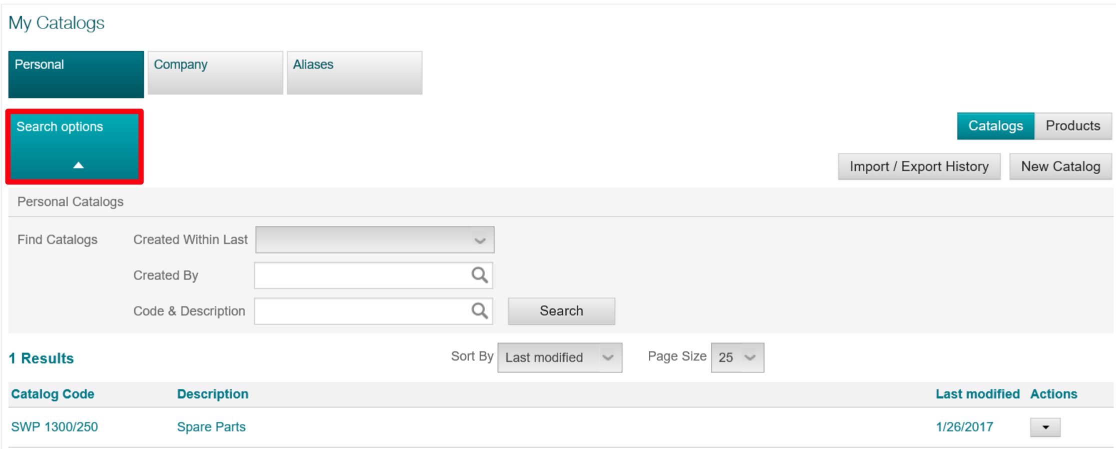
Company catalogs are designed to be shared with users from your company/organization. An unlimited number of company catalogs can be created and shared.



11.3 Personal catalog

Personal catalogs are designed to be accessed only by the catalog creator and are not shared with other users. You can create an unlimited number of catalogs for your personal use.

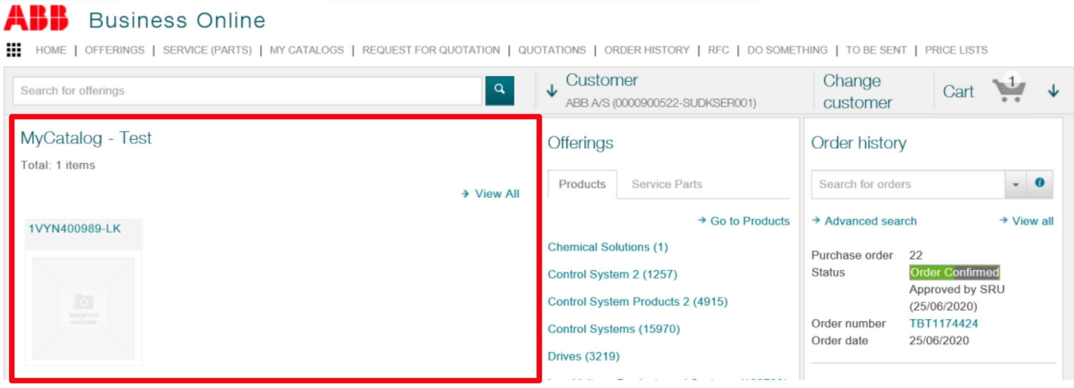
You can filter the available catalogs using **Search options** tab You can narrow down the catalog list using creation date, creator, catalog code and description search criteria.



11.4 Favorite catalogs

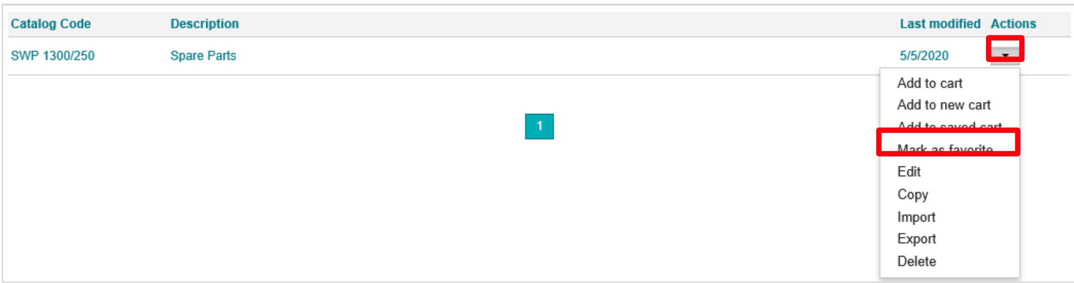
On **My Catalogs** page, if you are using a particular catalog more often than others, you can mark this catalog as favorite. This catalog is shown as first on the catalogs list on **My Catalogs** page.

Also, **My Catalogs** widget on **Home** page will be showing this favorite catalog's items instead of catalogs list.



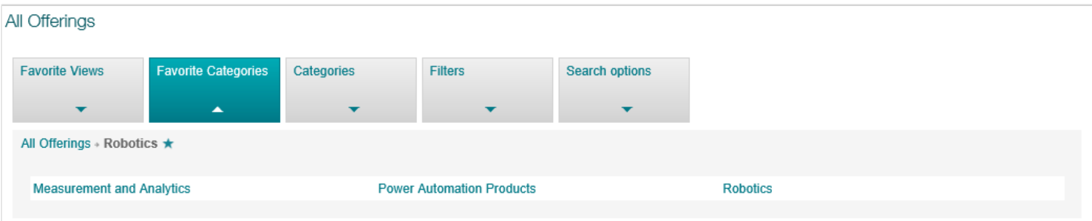
To mark catalog as favorite, use **Actions** menu available for every catalog.

You can mark only one catalog as favorite.



11.5 Favorite offerings categories

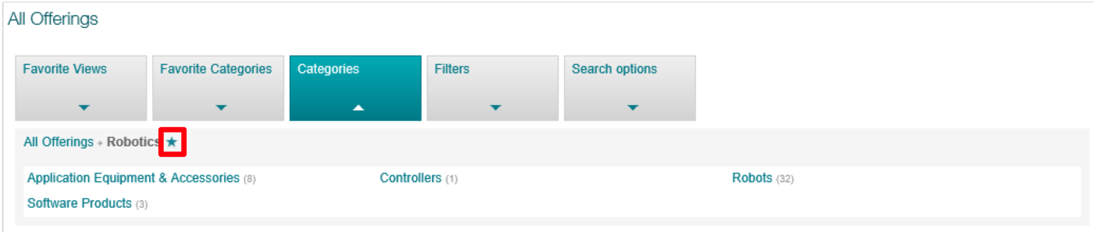
If you often use the same offering categories, you can mark those categories as favorite. Then you can easily find them on Offering page under **Favorite Categories** tab.



To mark category as a favorite, go to Offerings page, click **Categories** tab and find category (or subcategory) you would like to mark, e.g.: category Robotics. Below the navigation tabs you can find breadcrumbs path followed by the ☆ sign.

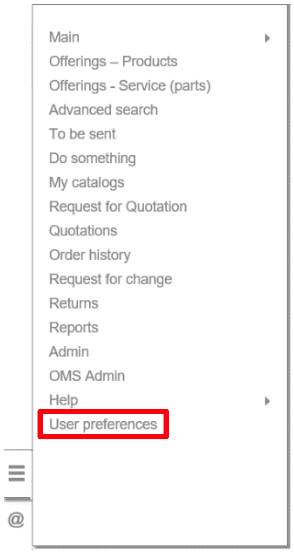
Clicking ☆ icon, marks the category as favorite. You can find it under **Favorite categories** tab.

If you want to unmark category as **Favorite,** go to this category and click ★ sign at the end of the breadcrumbs path.



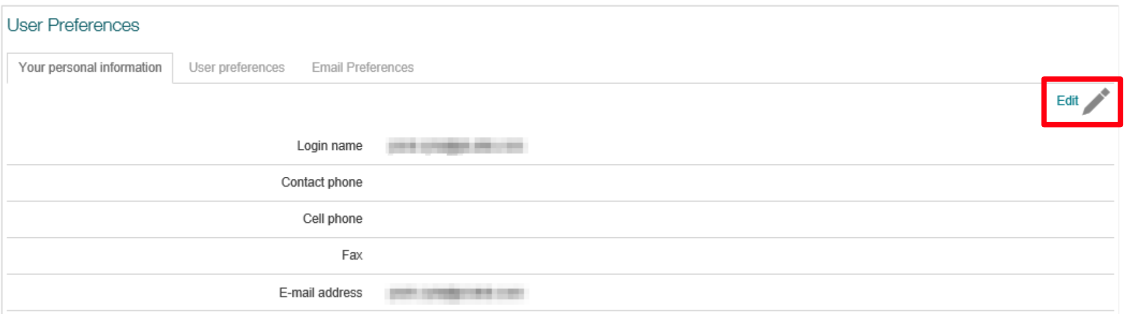
12 User preferences

The **User Preferences** page defines the user profile. It contains information about the user and also preferred settings that may modify layout of BOL in certain sections. You can access it through the **Quick access menu**.



12.1 Personal information

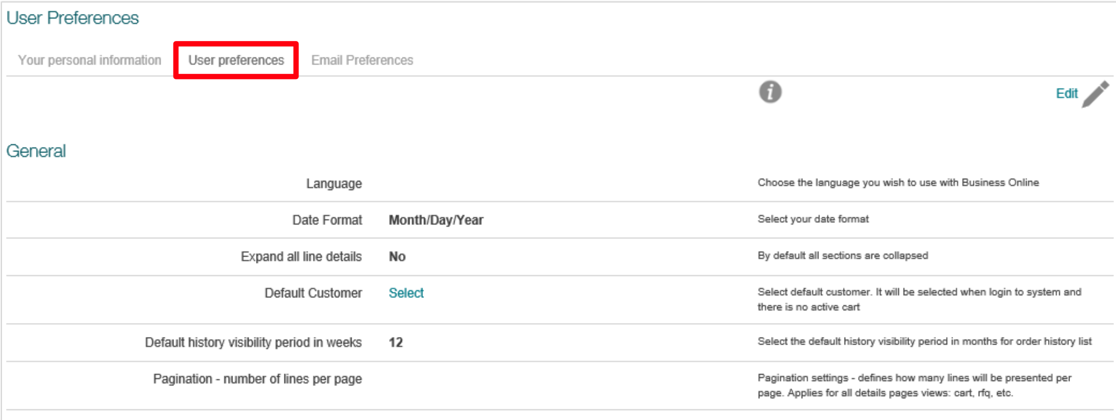
The Personal Information tab contains basic data: login name, phone numbers, email address. In this tab external users can change their password.



You can change all the data by clicking **Edit** button.

12.2 User preferences

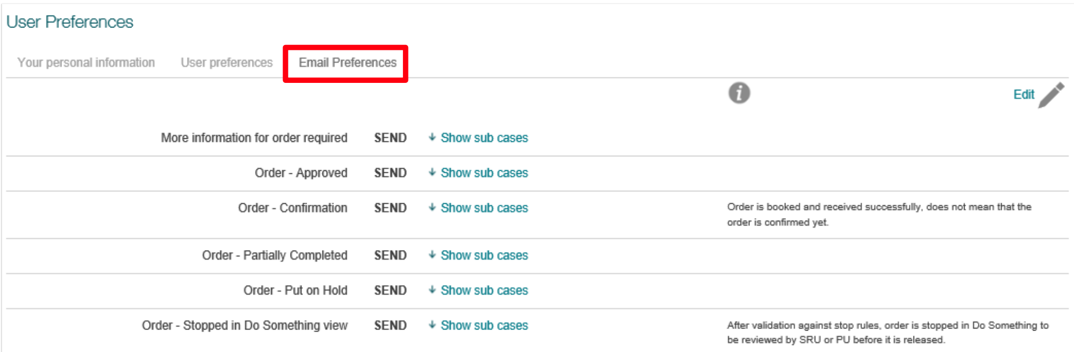
There is a long list of options that personalize the way BOL presents information or acts in certain situations.. Each user can have a different set of preferences and it won't affect the rest of the users.



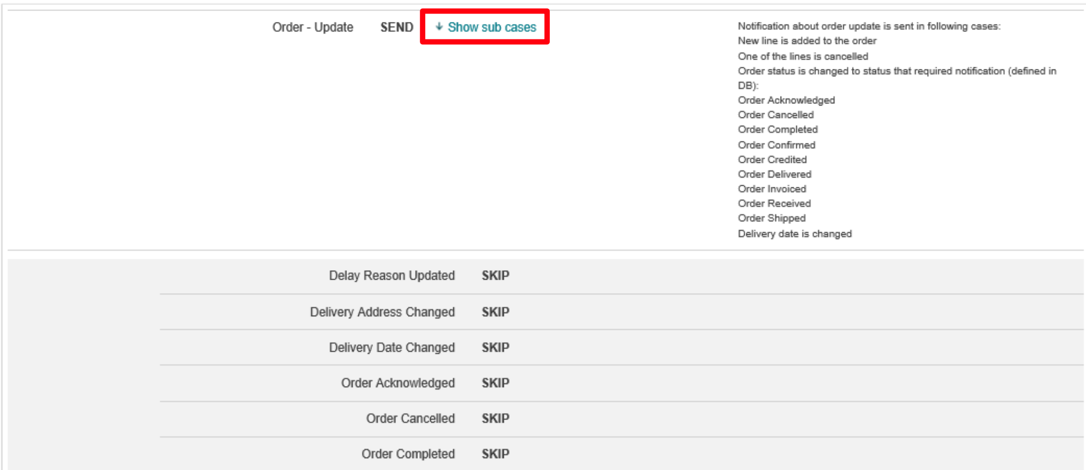
The user preferences are all listed with a short descriptions, which explain their functionalities.

12.3 Email preferences

The email preferences allow you to choose the notification emails you would like to receive. The list of options is wide and allows you to choose all the necessary notifications.



The **Order – Update** option has many sub cases that allow you to choose many specific reactions to a changed order. The setup summary is shown in the information field.



13 Technical support

13.1 Super users and service desk

To contact **Service Desk**, send an email to Group Applications. Before sending it, consider contacting your super user.

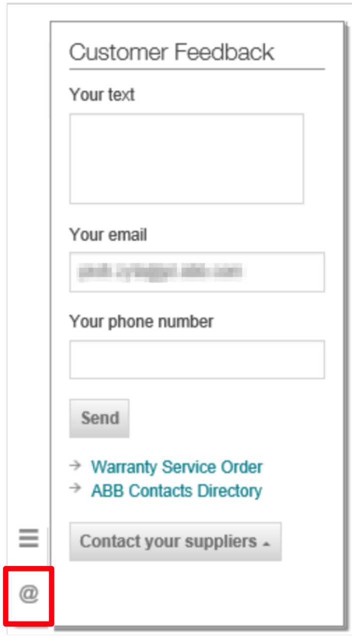
Contact information: ABBGlobalServiceDesk@abb.com

Phone – depends on country: https://go.insideplus.abb.com/information-systems/gf-is/about-is/end-user-support

You can contact Service Desk also by myIS side: https://abb.service-now.com/myservices/?id=is_ticket_creation

13.2 Customer feedback

To send your feedback use the **Customer Feedback** button in the lower left corner of the BOL site. The button opens the contact form. You can use it to present your ideas about possible improvements in BOL.



All communications done through this form will be handled by Service Desk directly and then escalated if necessary.

14 Revision History

Date	Version	Description	Author
20120528	1.0	BOL 7.1 Release	Ricardo Lopez
20140703	1.01	BOL 7.5 Release	Malgorzata Bogacz
20150211	1.1	Favorite Catalog and Favorite Offerings sections added	Ricardo Lopez
20200505	2.0	BOL 8.8A Release	Piotr Zyta