Mosaico E-Business - User Guide

Contents

1. Log In

There are two ways of accessing the new Mosaico portal

1. Click on the Bonfiglioli website and go to the session **Business Area ➔ Industrial ➔ Customer Support**:
   http://www.bonfiglioli.com/en/industrial/customer-support/mosaico-e-business/
2. Use the link https://mosaico2.bonfiglioli.com

Note: To avoid any mistake during the navigation, Bonfiglioli suggests using **Google Chrome**.

To access the new portal, you should have
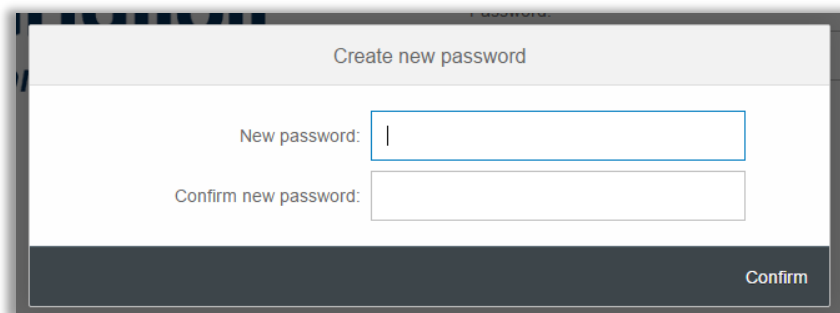
- E-mail
- Password

provided by Bonfiglioli Customer Support via e-mail or obtained during on-line registration.

The portal access procedure is as follows:

1. Click on the Mosaico link to open the Log In page
2. Enter the *e-mail* and *password* in the provided fields
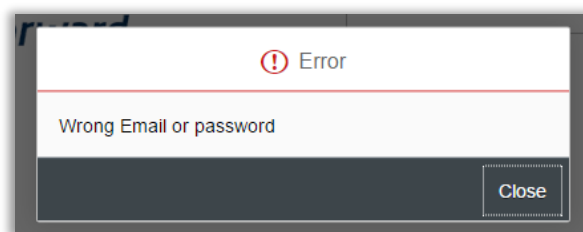3. Click on the *Login* button

When you will access for the first time, Mosaico will ask you to set your desired password

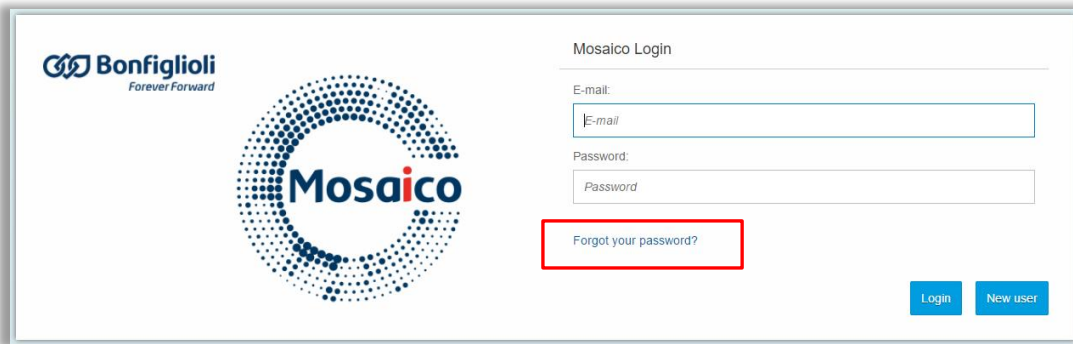If the username or password are incorrect, the following message will displays

When you have completed the log in procedure, you will access to the Mosaico Launchpad on which you will display all the Apps that you can use:
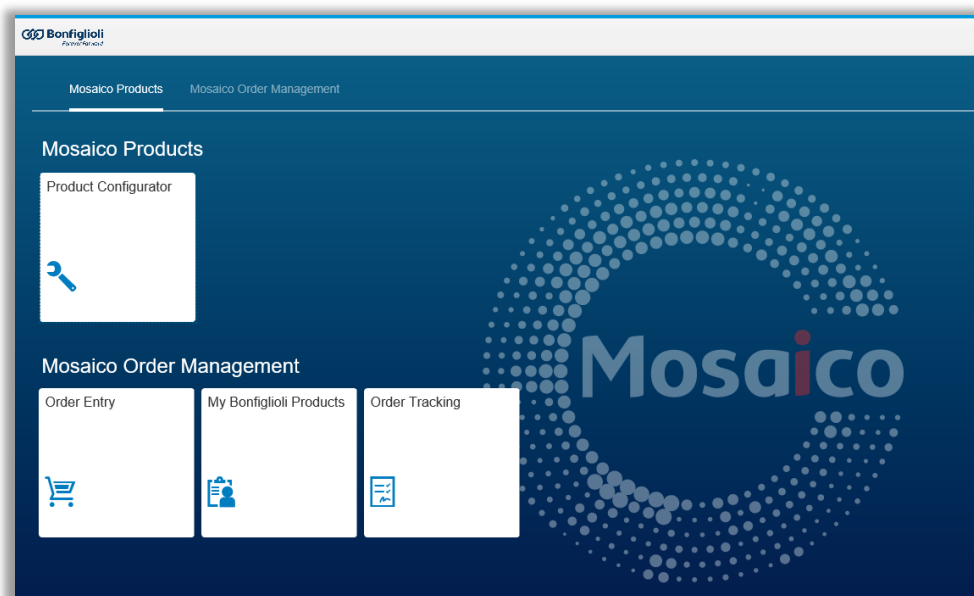
1.1.   Modifying the on-line password
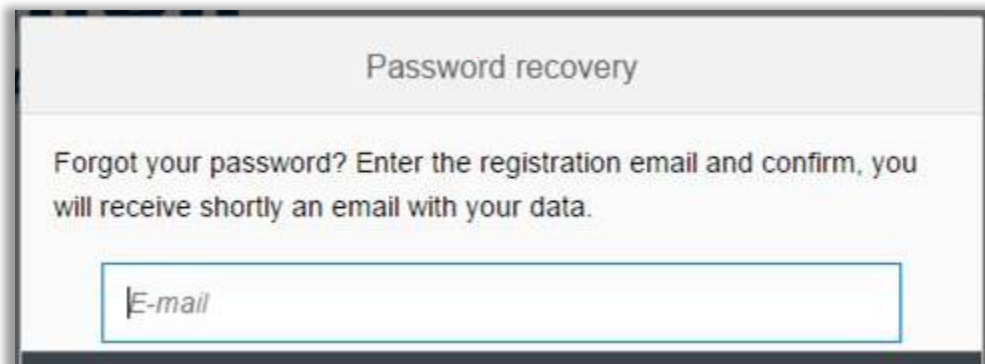
If you forgot your password or just wants to reset it

1. Click on "**Forgot your password**?"

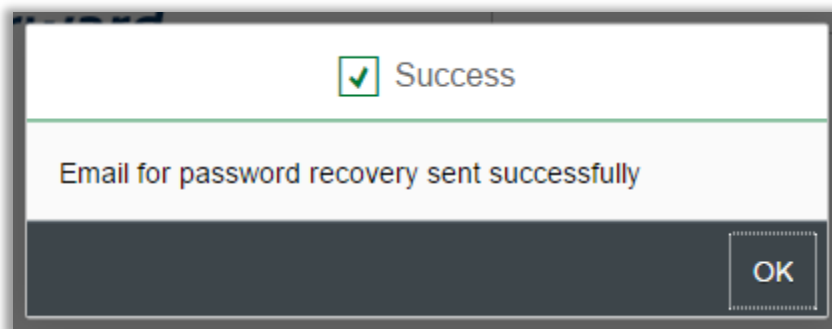If the procedure terminates successfully, the following message appears:

2. Enter the e-mail to which the password recovery procedure will be sent
3. Click on Confirm to receive the password reset e-mail

If the procedure terminates successfully, the following message appears:

The user will receive in 5 minutes, the following message at the e-mail address indicated in step 2

- **From:** "noreplay@bonfiglioli.com"
- **Re:** "Mosaico: Reset password"
- **Text:**

  Hi "username"
  You recently requested to reset your password for your Mosaico app.

  The new password is: aiNasUBO.

  Thanks

  Bonfiglioli Team

If the e-mail is not registered in the Mosaico database, the following error message will display:
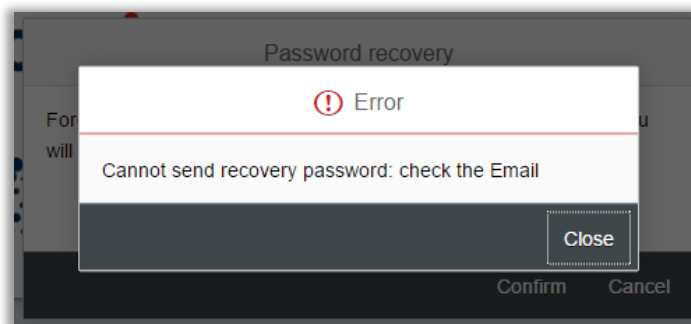
2. APP Product Configurator

With the App Product Configurator Bonfiglioli makes available the PTS and MDS products catalogue and gives the opportunity to download drawings to all the person interested on it.

To access to the app, click on the icon "Product Configurator"

To configure a product, you must first:

1. **Select a product technology**
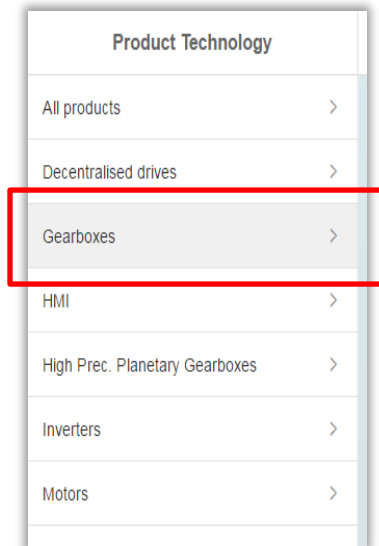
2. **Select a product type**

The APP will then display all the configurable series belonging to the selected product technology and type.
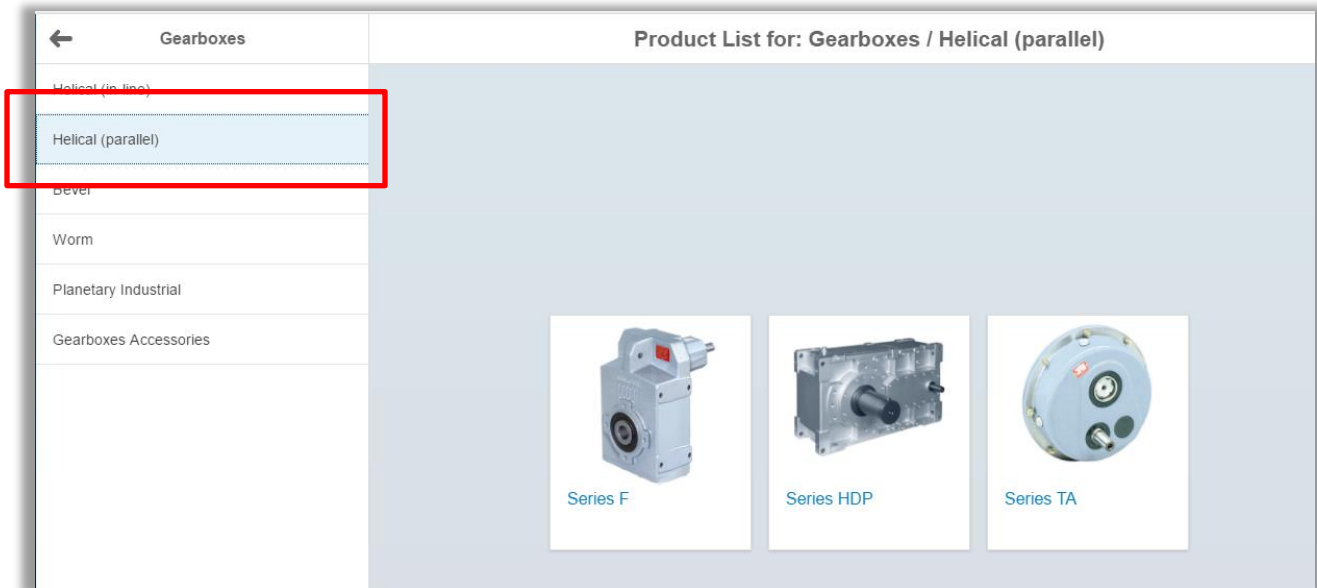
3. Click on the image of the product you want to configure

3.1. If any associated series exist, the following message displays:
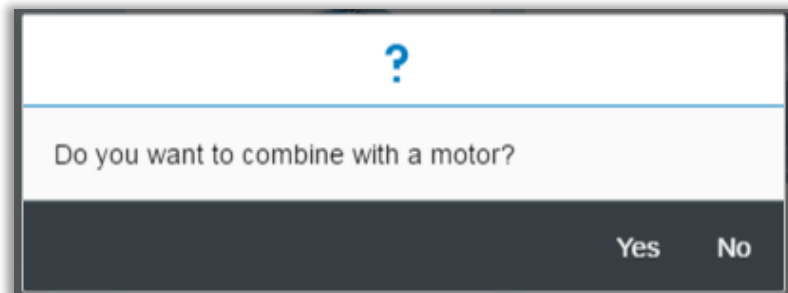
- Select **"No"** to continue configuring the individual product
- Select **"Yes"** to continue configuring the combined product
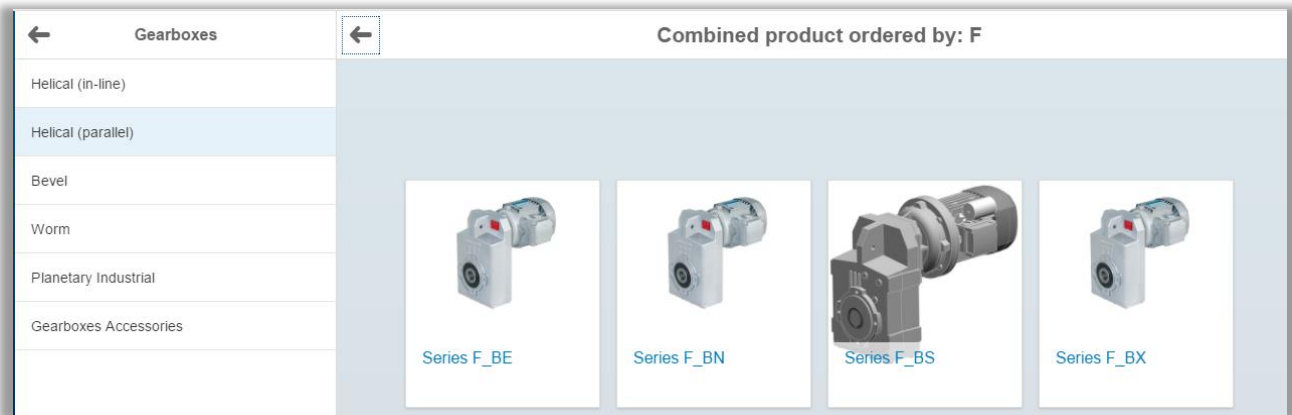
4. Once the single or combined product has been selected, the system will display a list of configuration characteristics, in separate tabs:

- **Main characteristics tab** (e.g. "Gearbox" for gearboxes) where all characteristics marked with "*" must be specified

- **Options tab** that contains the product's supplementary characteristics (e.g. coatings, certifications, etc.)

- **Technical data tab** where if you choose the "Measurement International System" and the "n1" characteristics , the system will calculate all the other technical data

When you have specified all mandatory characteristics, the configuration status changes from "incomplete configuration" (red) to "Validated product" (green).

In **"Validated product"** status, the "Download Technical Drawings" function become available

2.1.   On-line Help functions

Two levels of help with product characteristics are available during the configuration process:

1.   The **Help** button for individual **characteristics**:

2. The **Help** button for the **values of the characteristics**:
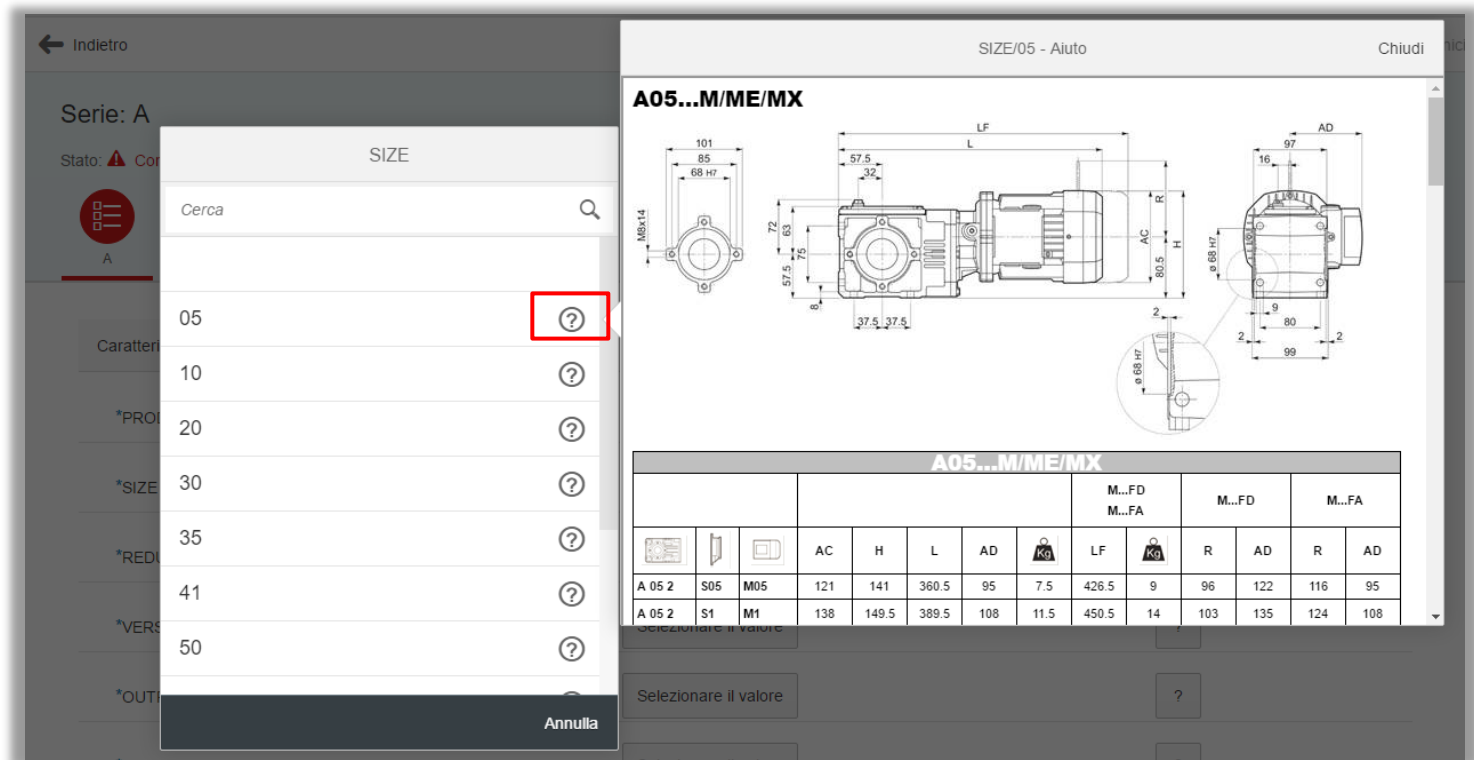
The Help on line corresponds to information available in Bonfiglioli Product catalogues.

2.2. Download Technical Drawing function

The **"Download Technical Drawings"** function is available to all users, but is only enabled when the configuration is complete - i.e. when the status displays as "valid configuration" in green.

1. Click on **Download Technical Drawing** to generate the drawing
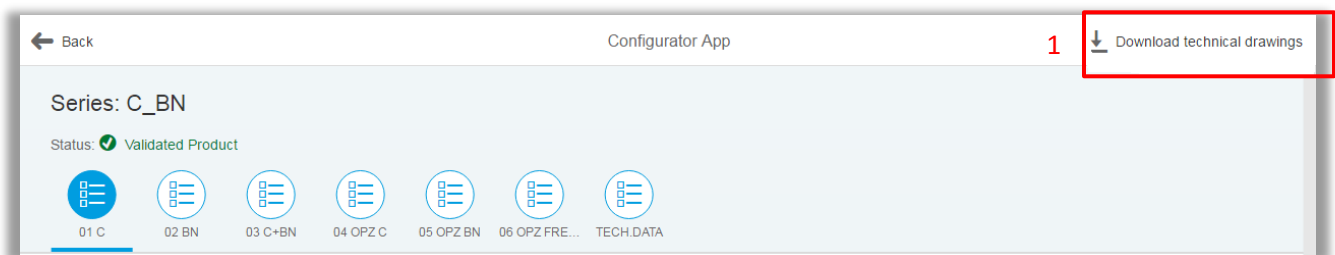
2. The system calls the Teamcenter (Bonfiglioli technical drawing tool) to

a. provide the drawing of the configuration in JT format

2 a
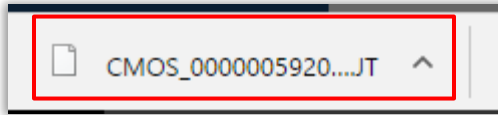
b. provide a list of file formats in which the drawing can be downloaded
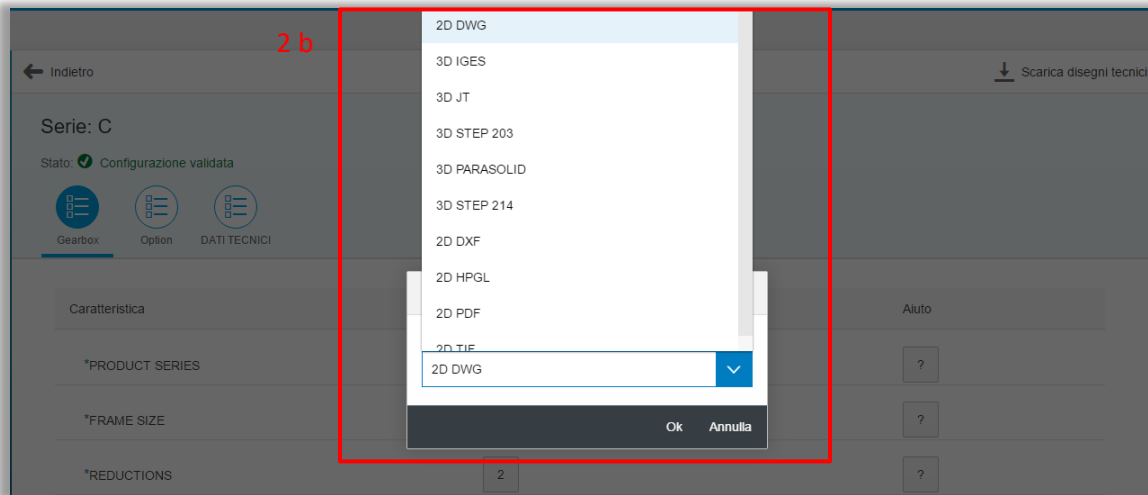
3. From the drop down menu, select the desired file format and click on OK: the system will convert the JT file (step 2) into the new format and will save a .zip version on your PC.
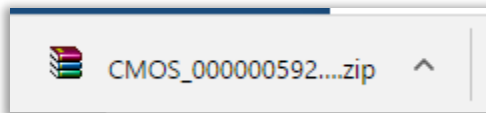
N.B. If an error occur during the download of the drawings (because drawings is not available or because systems are taking too much time) will be displayed the following message
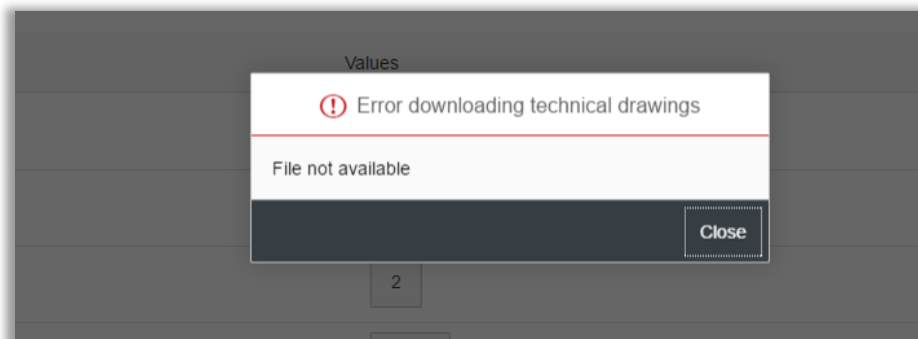
For more details, please refer to the Bonfiglioli catalogue.

3. APP Order Entry

The APP Order Entry provides the following functionalities:

- Enter an Order
- Enter a Template
- Enter an Order from Template
- Enter an Order from an XML

3.1.   Enter an order or a Template

To enter your Purchase Order

- Click on the APP **"Order Entry"** on your Launchpad.
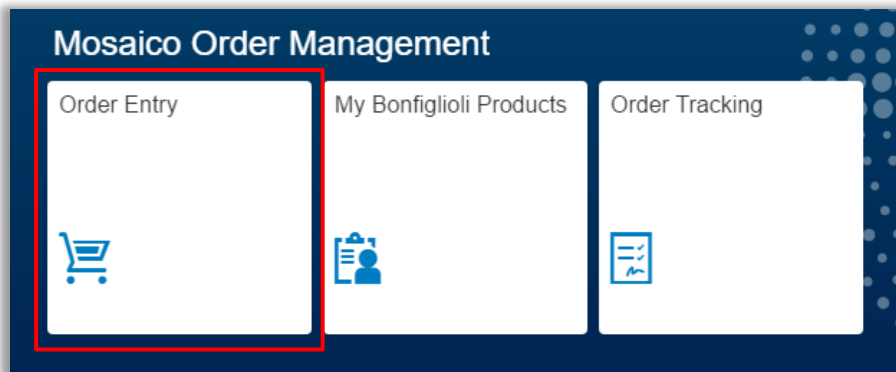
- If your userid is assigned to more than one Customer code, the window "Customer" will open and you can select or search the customer for which you would like to enter the order

- Then, if for the selected Customer you have authorization to work with multiple Bonfiglioli Sales Organization (e.g. IT03 and B001), the window **"Bonfiglioli Sales Organization"** will appear and you can select the sales org for which enter the order.

- After the selection of the Customer and the Bonfiglioli Sales Org., the "Order Entry" window will appear. This windows is organized in two areas
    1. Header data
    2. Position data

The **Header area** includes the following information:

- **Code** and **description of the Customer** (Sold To)
- **Customer address**
- **Code and description of the Bonfiglioli Sales area**
- **Net total** for the order (it appears on the right corner of the windows when the order is saved)

Info that should be entered by you

- **PO Number**

- • **PO Date**
- • **Ship - to :** the address of the plant where you want receive the goods
- • **Req. Delivery Date :** the date in which you desire to receive the goods or you want the goods is shipped (depends from INCOTERMS agreement)
- • **Urgency Procedure:** for urgent shipment. In use only from Bonfiglioli IT03

N.B.:

 - *the **Req. Delivery Date*** by default is blank and should be filled with date higher of the current date.

*- **Urgency Procedure** only displays to users authorised to manage it.*

The **Position area** allows to enter the goods you want to purchase.

To add a product code to the sales order, click on the "+" button at the bottom right of the header data

ID pos.	Material	Config.	Description	Customer Prod. Code	*Quantity	*Request date	Delete	Ext. Desc...
10	610001582	⚙	HOLLOW INPUT SHAFT WR75/86 P80 Z28 1/3		1	20.02.2017	🗑	i
20	2T300L10070015	⚙	3 00 L 1 7.20 FZ SF T4AA O T4AA		1	20.02.2017	🗑	i

Per each position, the user can enter:

- • **Material ➔** is the Bonfiglioli product code. If you do not know this information, you can:
  - o Launch a configuration by entering the series of the configurable (e.g. C, C_BN, A, etc.) directly from this field
  - o Select an existing material with match code
- • **Customer Material Code ➔** is your product code that can be already linked to a Bonfiglioli product (i.e. you can display it in the APP "My Bonfiglioli Product")
- • **Quantity**
- • **Group ➔** This field is used only from IT03 and IT05 Sales Org. It is a numerical field. If more than one row contains the same "Group" value, then the shipment of these rows will performed together.
- • **Req. Delivery Date** the date in which you desire to receive the goods or you want the goods is shipped (depends from INCOTERMS agreement)
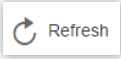
If you select one of the above fields and click on enter, the APP will update the data with the corresponding SAP data:

- • **Descriptions** of the material
- • **Net Tot**

N.B.: the Net Tot**.** column displays only if Bonfiglioli decided that prices can be displayed for the Bonfiglioli Sales Org. in question

Once the positions are completed, you can update the data and save the order using the options at the top right corner of the APP.

16
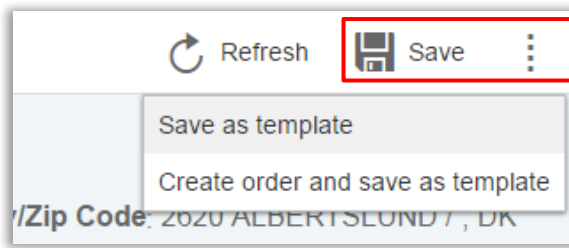
- **Refresh** ➔ Corresponds to the button at the top right of the Order Entry APP, and requests an update with the data from SAP (i.e. prices and descriptions) before the order is saved.

- **Save Order**➔ Corresponds to the button at the top right of the Order Entry App, and creates an order in the Bonfiglioli SAP system.

- **Save Template** ➔ This is an option available when you click on the button at the top right of the Order Entry APP. This action creates only the document Template.

- **Create order and save as template** ➔ This is an option available when you click on the button at the top right of the Order Entry APP. This action creates two documents in Bonfiglioli SAP system: the Order and the Template.

If the selected save action is successful, the APP displays the message

"Temporary order XXXXXX saved. You will receive by e-mail the confirmed order number"
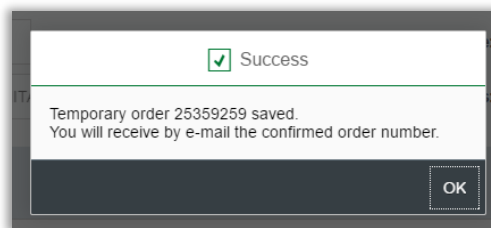
If you click "OK" on the right corner, system displays the **temporary order number** created.

ID pos.	Material	Description	Customer Prod. Code	Quantity	Net value (EUR)	Request date	Group	Delete	Ext. Description
		Order Num.:25359259							0.00 EUR
		Customer: BIESSE GROUP SPA (5130)					**City/Zip Code**: PESARO / 61122, IT		
		Street/Number: VIA DELLA MECCANICA. 16					**Sales Area**: IT03/01/00 - Sales Org. BIT		

PO Number: BACKGROUND saving EN   Urgency proc.:

PO Date: 26.04.2017   Request delivery date: 30.04.2017

Ship-to party: 5130007 - BIESSE SPA - UNITA' INTERMAC   Address: VIA DELL'ECONOMIA PORTA 4 - CHIUSA DI GINESTRETO PESARO / 61122, IT

↑ Upload XML   ↓ Load from Template   +

ID pos.	Material	Description	Customer Prod. Code	Quantity	Net value (EUR)	Request date	Group	Delete	Ext. Description
10	420038	VF 44 A 7 P71 B14 B3 RB		1	62,26	30.04.2017	000	🗑	i

If you would like to enter a new order, you can click on the icon 🗅 on the top left of the window or you can go on the Home page and click again on the Icon App Order Entry.

N.B. Bonfiglioli will send you an e-mail in both case: successful or unsuccessful temporary order processing.

3.1.1. Search for an existing code

If you do not know the material code you want to enter on the order, you can

1. Search for an existing code
2. Configure a product

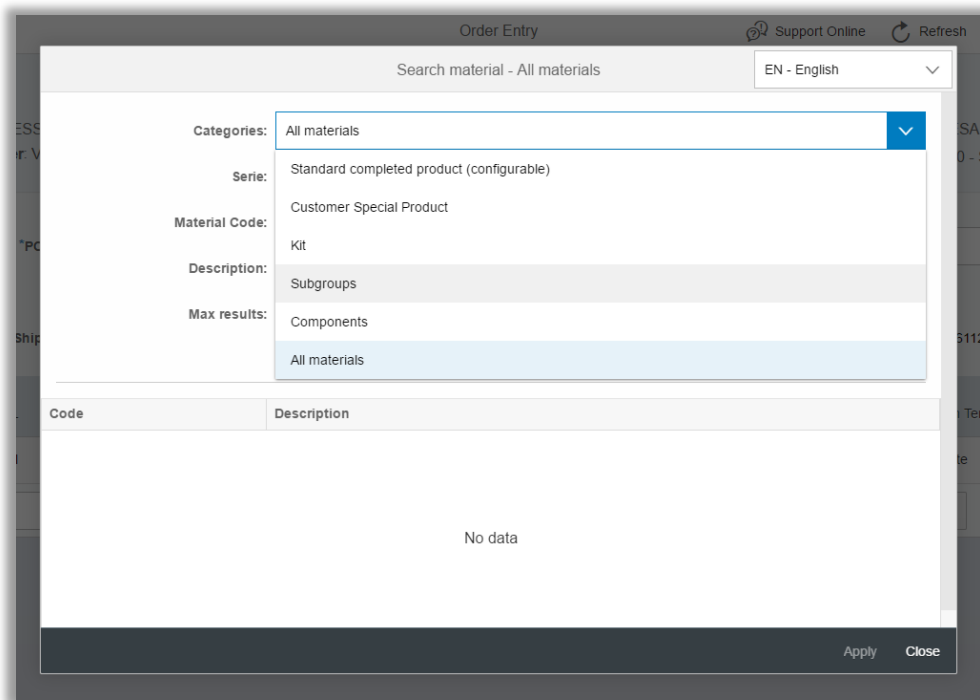You should take into account that Bonfiglioli Products are classified in:

1. Standard finished products (configurable)
2. Special finished products
3. Kits
4. Subassemblies
5. Components

The material search menu in the Order Entry APP, is based on this classification.

- To access to "Material Search" click on the icon on the right of field "Material"

ID pos.	Material	Config.	Description	Customer Prod. Code	*Quantity	*Request date	Delete	Ext. Desc...
10	610001582	⚙	HOLLOW INPUT SHAFT WR75/86 P80 Z28 1/3		1	20.02.2017 📅	🗑	i

- A new page will open where clicking on "Categories" field, you will display 6 possible choice:
    1. Standard finished products (configurable)
    2. Special finished products
    3. Kits
    4. Subassemblies
    5. Components
    6. All materials
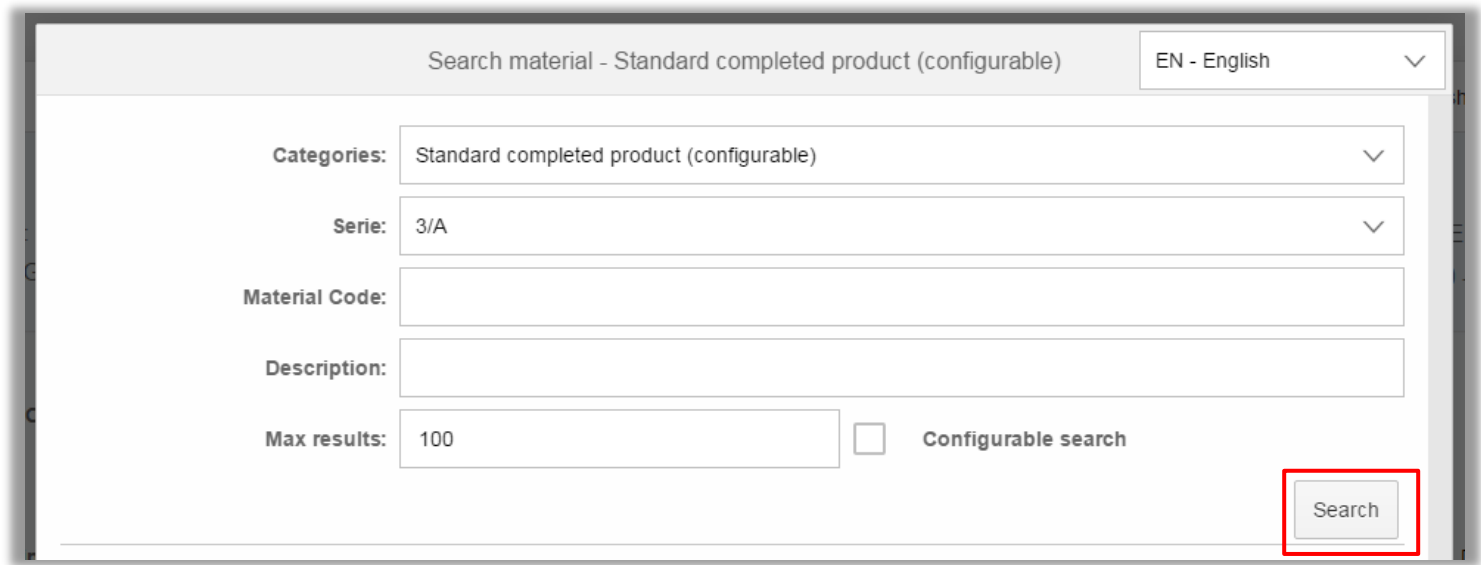
- Select the product category you are interested, then refine the search by entering
    o **Series** if you want to search all the finish product codes that belong to the series selected
    o full or partial **Material code** (do not use the wildcard "*")
    o full or partial **Description** (do not use the wildcard "*")
    o The **flag "Configurable search"** on the bottom right if you want the list of the configurable product to start the configurator.
- Launch the search by clicking on "Search"

N.B.
For category *2. Special finished products*, the search will return only "Special Product" assigned from Bonfiglioli to your APP "My Bonfiglioli Products".
For category *6. All Materials*, the search filters all the types of material in the table. Here pay attention to the "Max. results" number because could be not enough to receive the desired product.

- The search returns one or more codes:

  - To select the code you can
    - Double click on the code itself
    - Click on the code and select button "Apply"

- After the selection, the system will load the code into the Material field in the Order Entry APP.

3.2.   Create order from a template

To create an order from a template, access the Order Entry APP, fill in the header data as shown in par. 2.1, then call up the template by clicking on "Load from Template"

The APP will show a list of all Template documents you have created in the time

- To load data from template, double click on the desired one

- Complete the order by filling in the **Req. Delivery Date** and adding new positions, if you need.
- Save the order (see par. 3.1)

3.3. Creating orders from XML

To create an order from an .XML file proceed as follows

1. Create an XML file on your PC according to the template Bonfiglioli provided (if you do not have it, please ask to your Bonfiglioli referent person). The file should contain the purchase order for import into Mosaico.
2. Access **Order Entry APP** with the customer code and sales organization
3. Click on button **"Upload xml"** to select the XML file created in step 1 on your PC.
4. Mosaico systems load the file into the Order Entry APP and update the data (this step can take time if the xml contains a lot of configured products)
5. If there are errors on some positions, correct them before saving
6. Save the order after checking that the data are correct
7. Display the Temporary order number in the APP

The XML file template to use, is no different from that used in the old Mosaico system.

If you are interested to use this functionality to load quickly your order, ask for the .xml template to your Bonfiglioli reference person.

4. My Bonfiglioli Product APP

The **My Bonfiglioli Product APP** enables to maintain the correspondence between Bonfiglioli codes and your product codes.

Note that

- It is mandatory to enter these products relations only if you work with the xml. Otherwise, you can work directly on the APP Order Entry and if the system finds relations not existing will add them in your My Bonfiglioli APP.
- Each product relation is assigned to a Customer Code and a Sales Organization (e.g. IT03, B001 etc.). Pay attention if you work with more customers and more Bonfiglioli Sales Org.

To launch the My Bonfiglioli Product APP on your Launchpad click on the icon:
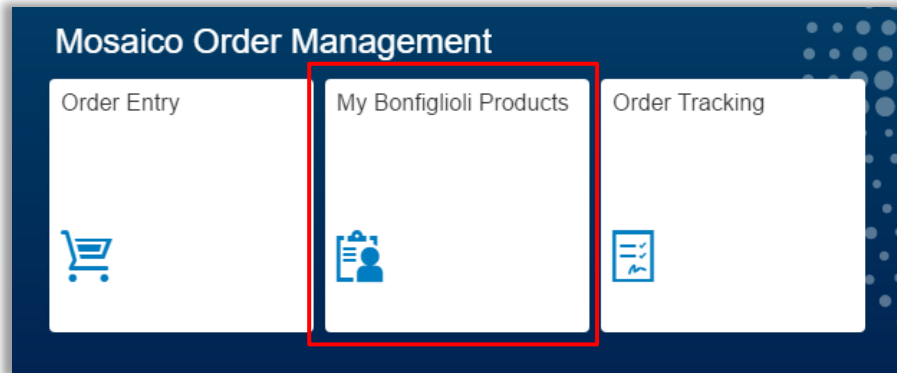

If you are authorised to work with multiple customer codes, the APP will display a Customer pop-up window with a list of customers:

- Search for the customer code using the "Search" field or by scrolling with the grey bar on the right of the window
- Double click on the customer to select it

If you are authorised for multiple Sales Org., the system will display a pop-up list of the sales org. in question:

- Double click on the Sales Org. you wish to use
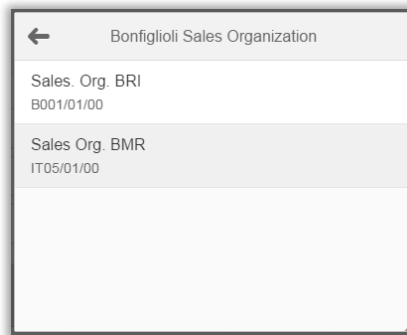
Once you have selected the customer and sales org., the APP will display the list of your codes already linked to Bonfiglioli Products:

On this APP the following functions are now available:

- **Find products**
- **Enter new records**
- **Edit existing records**
- **Add to cart**

4.1. Finding a customer product

To **find a product**, use the field "Find my product"

You can search by

- **Product** ➔ it is the Bonfiglioli Product code. In this case you can enter a partial or complete product code and system will return all your codes associated to Bonfiglioli products that contains your selection.
- **Description** ➔ it is the Bonfiglioli Product Description. In this case you can enter a partial or complete description and system will return all your codes associated to Bonfiglioli descriptions that contains your selection.
- **Customer Product code** ➔ it is your code used in your PO.

Example: to search for Bonfiglioli Product code "BRAKE305"

- Choose "Product"
- Enter "BRAKE" on the search field and click enter

4.2. Entering a new record

To **enter a new record**
   a. Click on the "+" button
   b. in the Material field, search for the Bonfiglioli code with which you want to associate your product
   c. in the Customer Material Code field, enter your product code
   d. save

After saving, the new record will display immediately in the list:

If the new entry fails because there is already a record for the material code entered, the APP will display the message "An entry with same material already exists".

In this case, click on "**Close**" and delete the record you were entering with the ⊗ button.

4.3.   Editing an existing record

To **edit an existing record**
a.   Click on the pencil icon next to the record to be edited
b.   Edit the customer Material Code
c.   Save

The system will immediately display the change done

4.4.   Adding a product to the cart

The **My Bonfiglioli Product APP** facilitate the creation of an order because allow you to select products and add them in the cart.

   a.   To select products, check the box on the left of each product line
   b.   To add them to the cart, click on the cart icon at the top right of the APP

Mosiaco will open the APP Order Entry and you can complete the purchase as described in paragraph 3.1.

5. Order Tracking APP

The **Order Tracking APP** allow you to monitor the status of your orders.

To launch the Order Tracking APP click on the following icon in the Mosaico Launchpad.
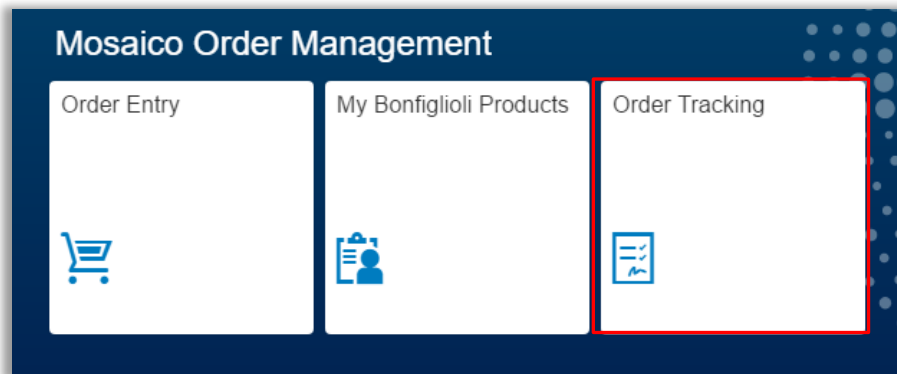
- If your user profile has more than one Customer code, the Customer window will open for you to select the customer for whom you want to enter the order.

- If, for the selected Customer, you are authorised to work with multiple Sales Org. (e.g. IT03 and B001) the Sales Org. window will display for you to select the Customer for whom you wish to enter the order.
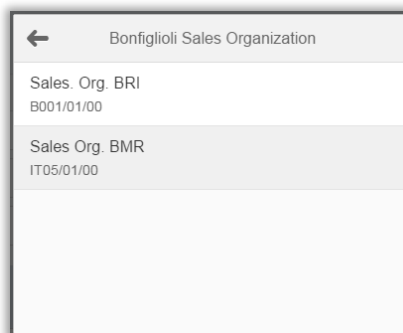
- The APP will now display the list of orders (entered from Mosaico or from Bonfiglioli customer service) for the last 3 months;
- The APP window is organized in 4 areas:

- **AREA 1** contains
    o Customer code
    o Customer description
    o Filters
    o Search order

- **AREA 2** contains the **list of sales orders** which match the selection (by default it shows the list of orders for the last month). For each order in this area, the following fields display
    o Sales order number
    o Purchase order
    o Order net value
    o Currency
    o Order status
    o Creation date

- **AREA 3** contains the **header data** for the selected order. Mosaico displays here the following information
    o Sales order number
   o Purchase order
    o Order net value

- o Currency
- o Sales area
- o Description of sales area
- o Ship to code
- o Ship to description and address
- o Order status
- o Creation date

- **AREA 4** contains the **positions data** for the selected order and shows the following information
  - o Material position
  - o Customer material code
  - o Material code
  - o Material description
  - o Quantity
  - o Quantity unit
  - o Order net value
  - o Currency
  - o Req. delivery date
  - o Order status

The position data area starts with a bar of icons that represents the possible status of a position.

At the top right of the icon, Mosaico counts the number of positions in the orders that belong to that status.

Possible status are:

  - ➢ **R - Requested/Ordered** ➔ if the position is not completely dated (confirmed)
  - ➢ **F - Confirmed** ➔ if the position is completely dated (including multiple schedules)
  - ➢ **P - Partially shipped** ➔ if the position has been partially shipped
  - ➢ **S - Shipped** ➔ if the position has been completely shipped
  - ➢ **I - Invoiced** ➔ if a completely shipped position has also been invoiced
  - ➢ **D - Deleted/Revoked** ➔ if a reason for rejecting has been applied to the position
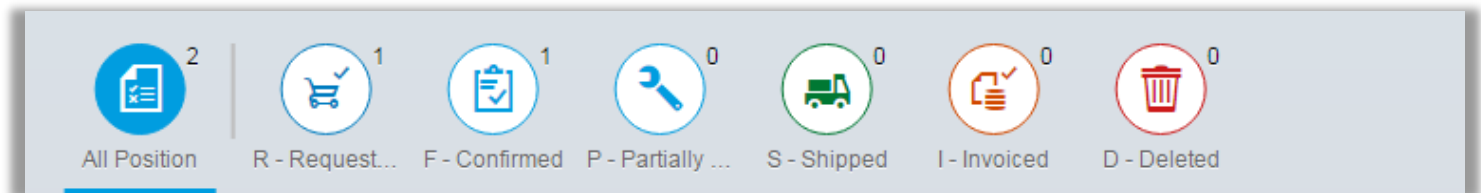
5.1.   Filter management

To modify the filters for the order monitor, click on the filter icon [▼]   next to the Customer's name:

- The APP will display the **Order Tracking- Filters** window, in which you can refine the search with the following fields:
    a. **Creation data From – To**
    b. **PO number**
    c. **Customer material code**
    d. **Order status**
        - Closed (i.e. completely shipped)
        - Open

N.B.: "**Creation Date**" is always a mandatory field.

In addition to the filters, if you wish to find a specific order you can use the "**Search**" bar under the filter icon.

The Search bar allows searching by **Bonfiglioli order numbers** (partially or complete) or **Purchase Order** (partially or complete).

5.2. Position detail management

For each order position displayed, you can open a detailed view by clicking on the arrow to the right of the line in question.

The detailed view displays 4 areas:

1. **Information ➔** contains the principal data about the position
2. **Delivery date ➔** for firmed positions, Mosaico will display the schedule line.
3. **Shipping data ➔** for shipped positions, Mosaico will display the shipment information
4. **Invoicing data ➔** for invoiced positions, Mosaico will display the invoice number, date and value

5.3.   Order confirmation management

The Order Tracking APP can also allow displaying order confirmation in .pdf format.

To obtain it, you can click on the bottom "Download order confirmation" on the top right of the APP window.

It is the same document that usually Bonfiglioli sent by e-mail to his customers.

If changes to the first confirmation will be applied, then a second or a third confirmation will be available.

6. On Line Support

If an error occurs during the use of the new Mosaico APPs, you can ask support to the Mosaico team using the function "Support Online" that you will find on the top bar of the following APPs:
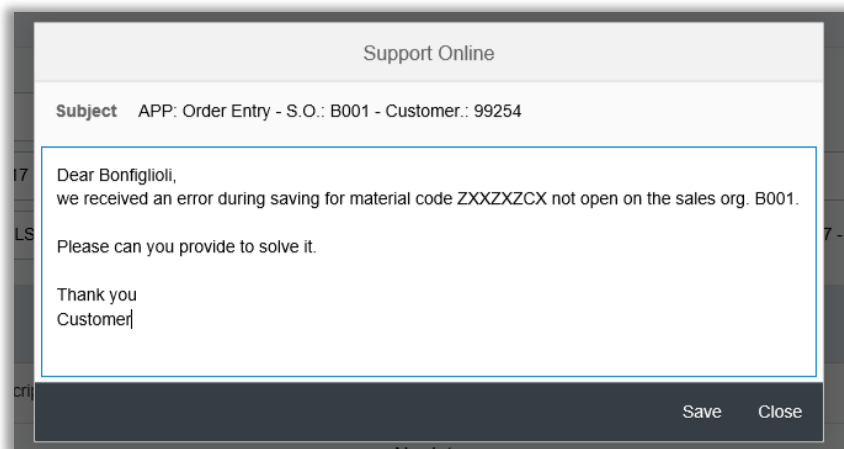
- Product Configurator
- Order Entry
- My Bonfiglioli Product

This button will open a ticket to the Mosaico team.
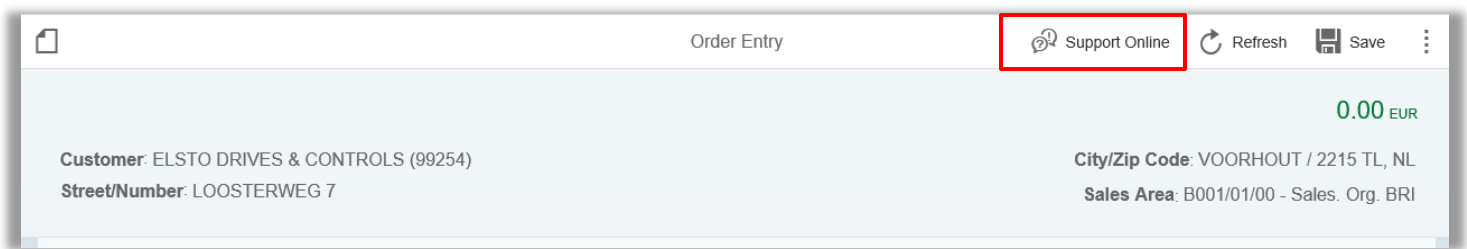
When you click on the button "Support Online" the following window will open:

1. Enter the text to ask support. **Please give as more details you can in order to allow to reproduce the mistake**
2. Click on Save to send the ticket to Bonfiglioli team

A ticket mail will be sent

- to you, in order to allow you to know the progress of the issue resolution
- To the team dedicated to support you on that problem in order to solve it ASAP.

End of document