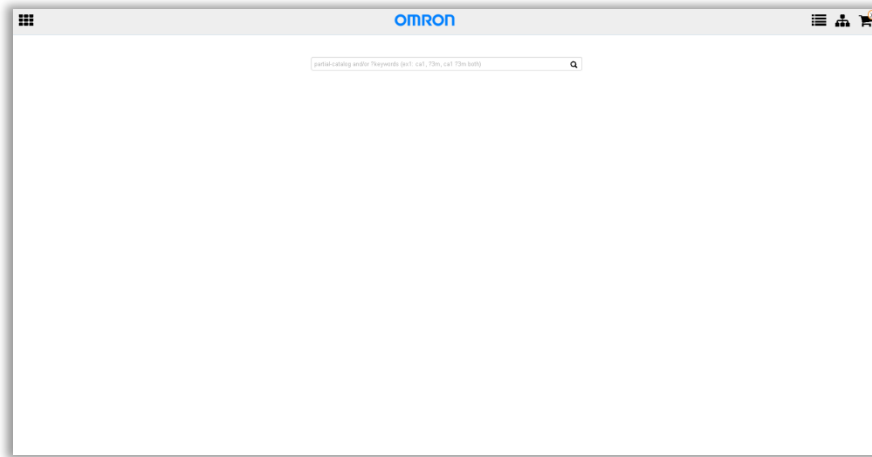


Welcome to ONSeT! Please use the guide below to walk through using the Omron Navigated Selection Tool.

1) To access ONSeT, enter [omronsolutions.com](http://omronsolutions.com) into your Internet Browser.

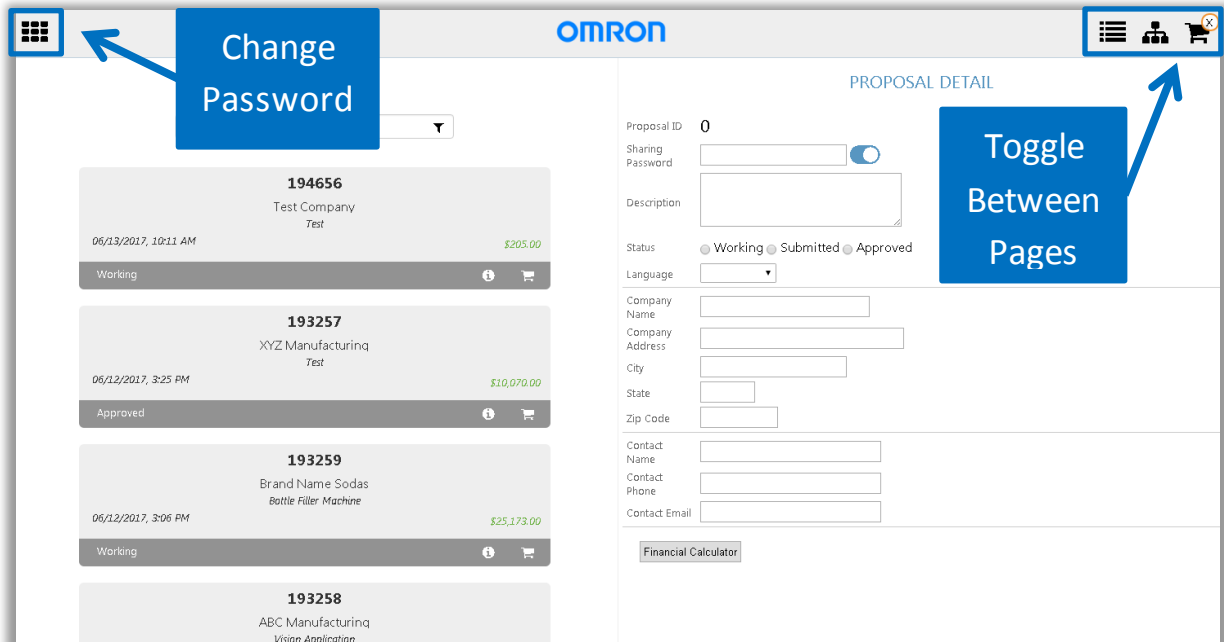


Once you arrive at the website you will be immediately prompted to log-in. If you accidentally click the 'x' icon you can always log-in by clicking on the icon in the upper left corner and selecting "Sign In" from the drop down menu.

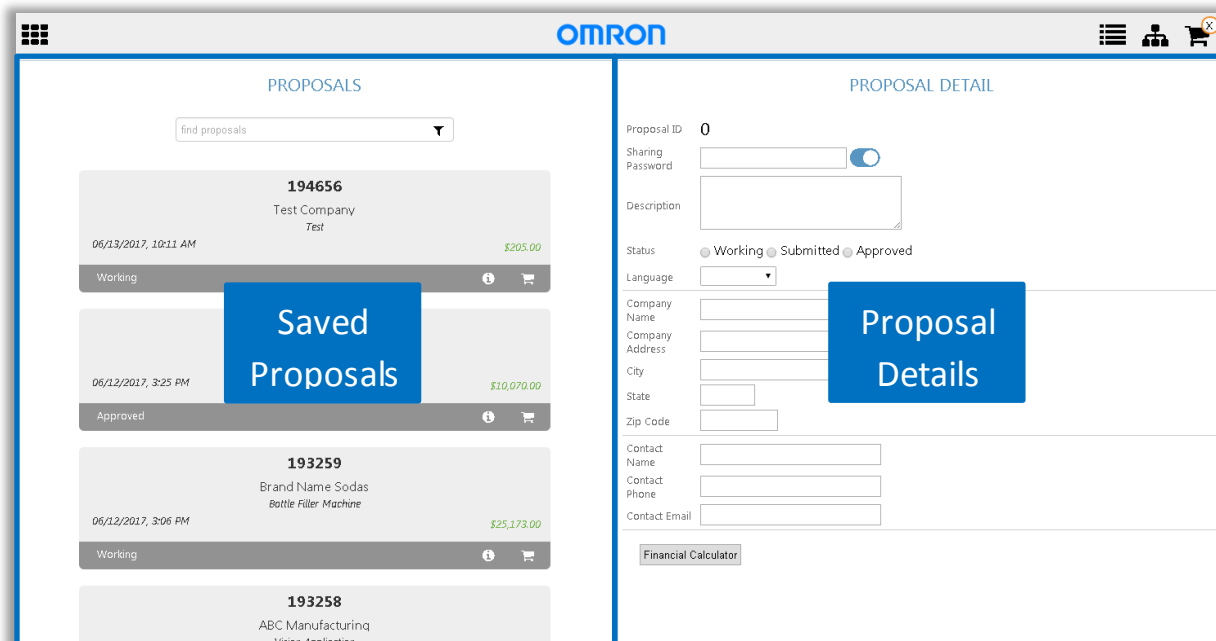
- ✓ Your username is your business email (i.e., [first.last@omron.com](mailto:first.last@omron.com))
- ✓ If you forgot your password click on "Forgot my password?". You will be prompted to enter your email. If you have an ONSeT account you will receive an email with your password.
- ✓ If you enter your email and get the following message "user not found" email [onset.support@omron.com](mailto:onset.support@omron.com) to set you up with an account.

A screenshot of a login window titled "Login" with a close button (X) in the top right corner. The form contains two input fields: "login email" with a person icon and "password" with a key icon. Below these fields is a "Sign In" button with a right-pointing arrow icon. At the bottom of the form is a blue hyperlink that reads "Forgot my password?".

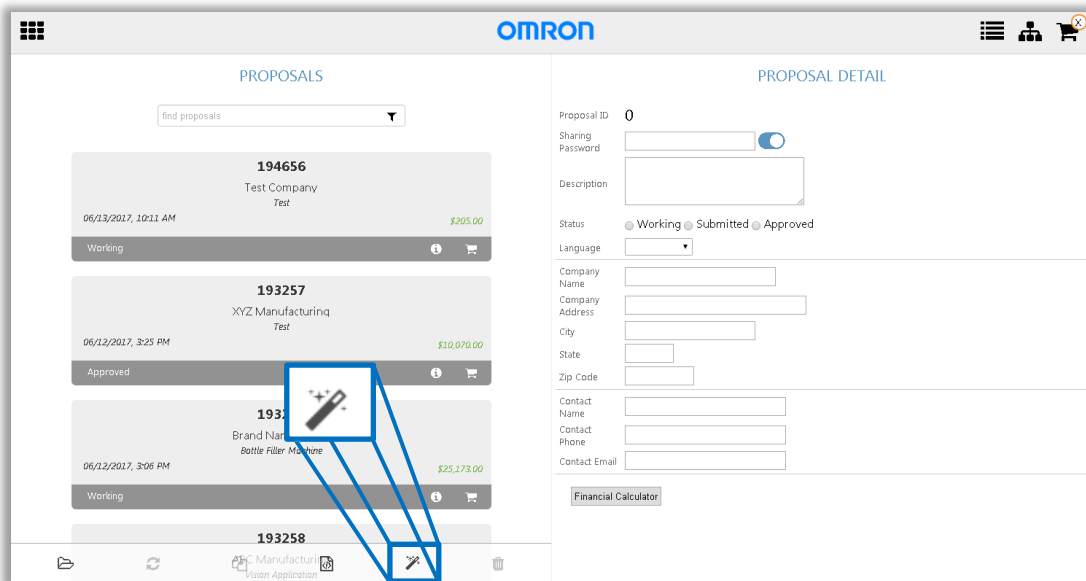
**2) Now that you're logged in, this is your home screen, the Proposals Page.** In ONSeT you will be working within 3 main pages: Proposals Page, Product Catalog Page, and the Cart Page. When logging in for the first time change your password by clicking on the icon in the upper left. From the drop down menu select "Change Password", you can also find technical help here under "Contact".



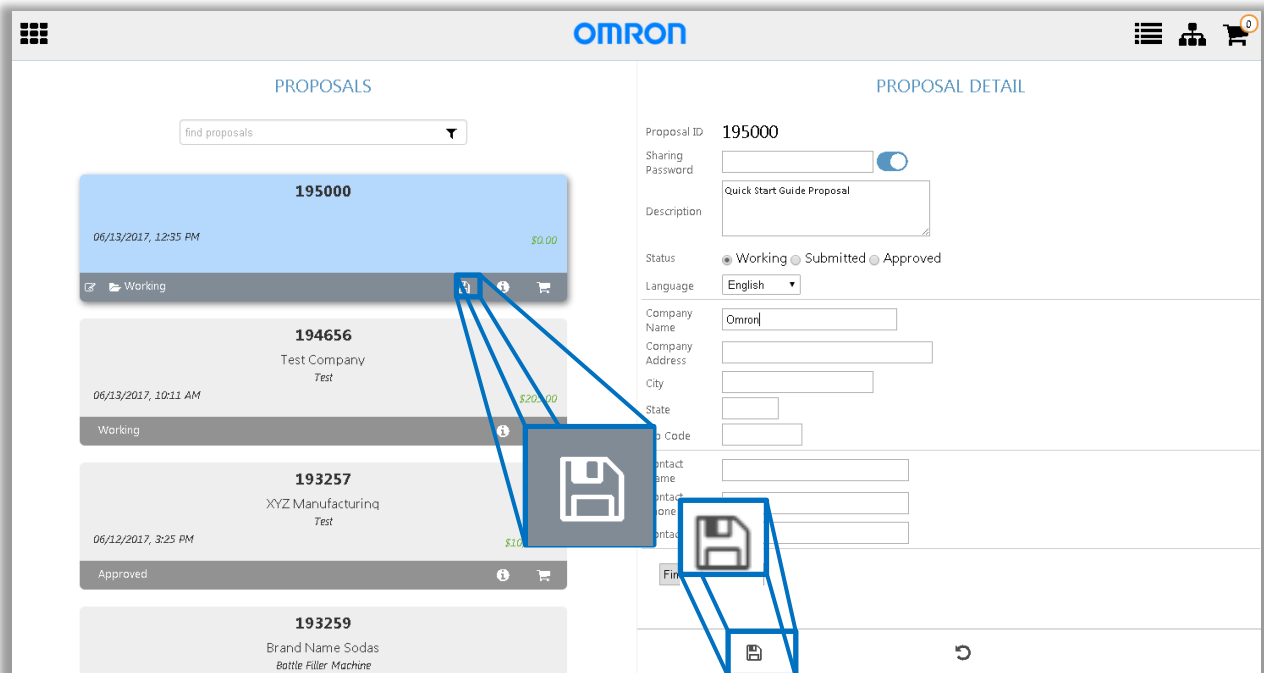
The Proposals page is split into two sections. The Proposals section will have all your saved Proposals and the Proposal Details Section will show the Proposal Details



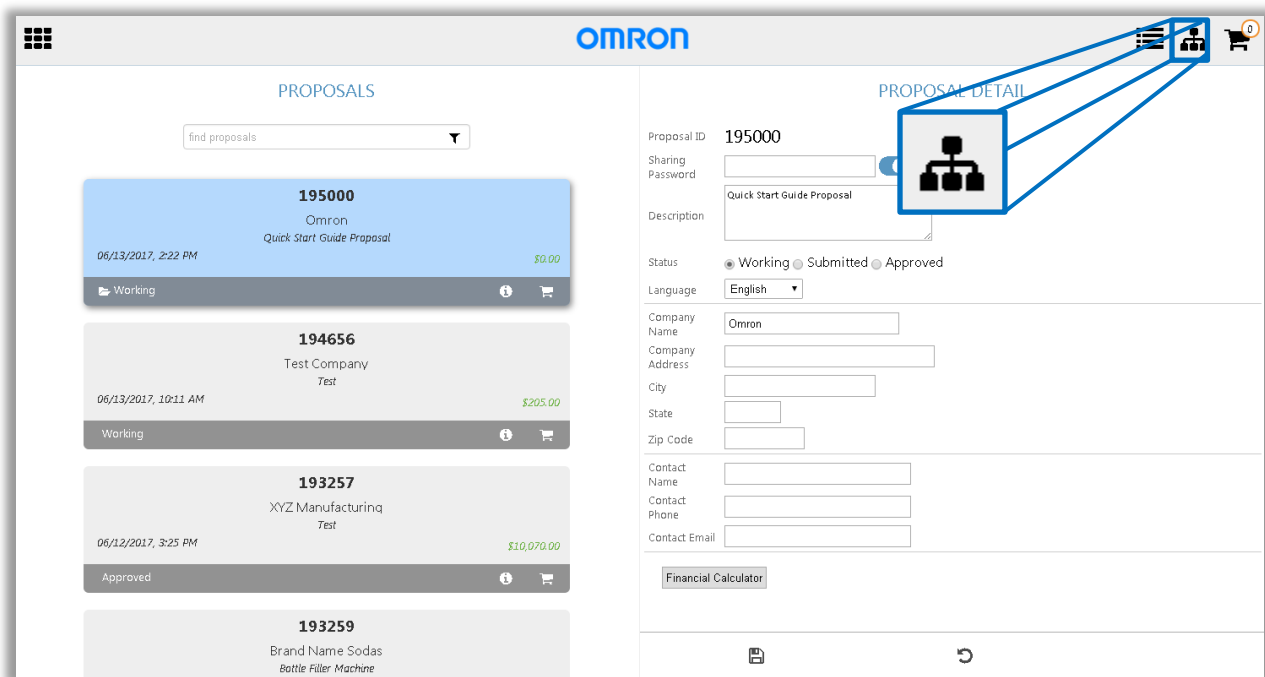
To begin using ONSeT click on the 'New Quote' icon at the bottom of the Proposals Page



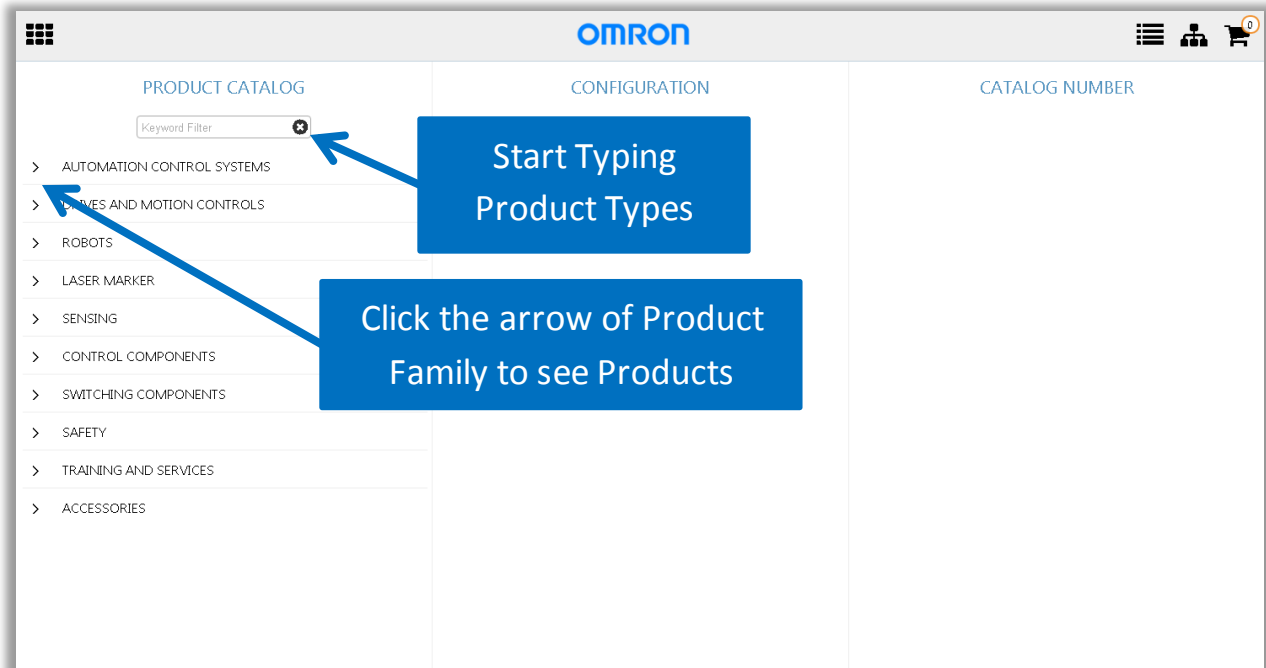
Click on the newly created Proposal to begin adding in Proposal Details. After making edits always save! You can Save by clicking on the Save on the Proposal (Saves all Proposal Changes) or on the Proposal Detail Page (Saves Proposal Details Changes).



3) Click the “Product Catalog” icon to begin your search. Make sure that you have an open Proposal before proceeding to the Product Catalog Page.



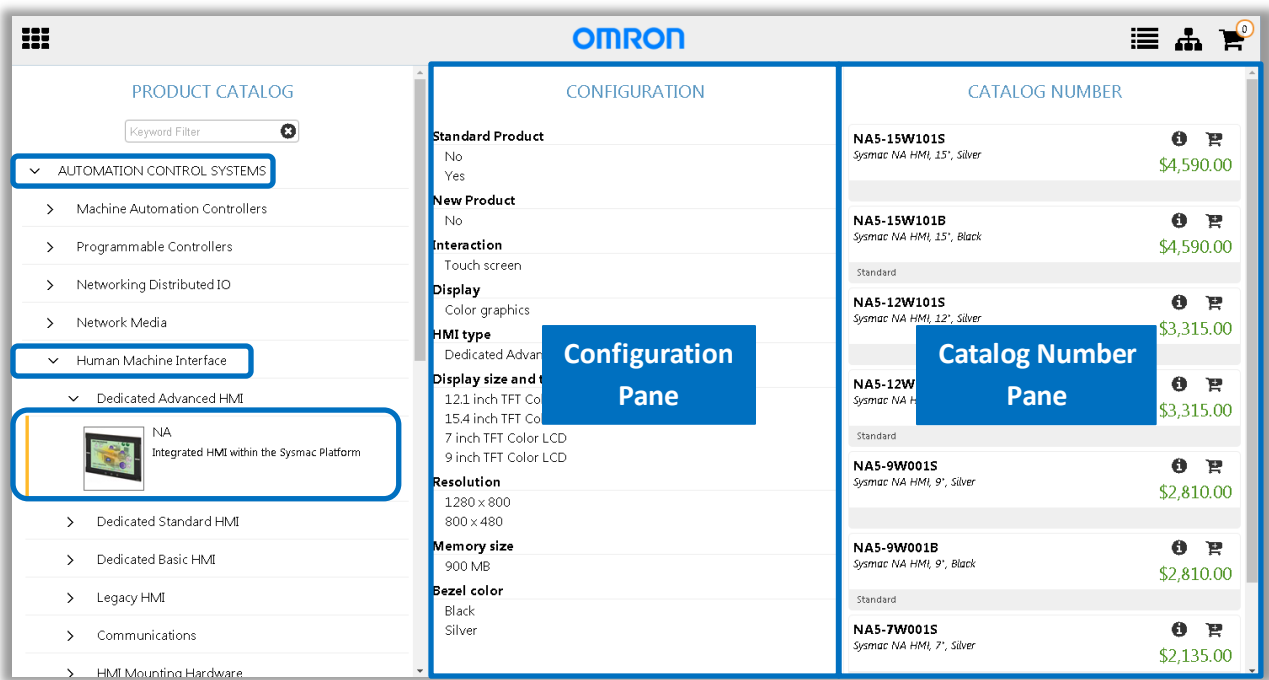
You can search for products in the Product Catalog in two ways. You can search by product type, like temp controllers or vision sensors, OR you can click on the arrows to expand or collapse the different product categories.



If you don't know what series to start in, you can select a Platform "Automation Control Systems" and then a technology "Human Machine Interface" and all of that technology's specifications will appear in the second column, the Configuration pane. The product results will appear in the third column, the Catalog Number pane.

- ✓ This allows you to start at the highest level and drill into the right solution.

You can also click on a product family, like the NA, to drill into those specific family attributes.



In the Configuration Pane, select specific specs like "Standard" or "Resolution" to narrow down your options further. Remember, there is a lot of data behind the scenes, so wait until the loading circles disappear.

The filters you select will change to orange to indicate that they have been turned on. Click on the filters again to turn them off. If underneath the Part description “Standard” is listed then it is typically stocked in our US warehouse.

Click on the ‘Cart +’ icon to add a product to the cart. Click on the ‘information’ icon to open the drop down with the specs for that product.

The image displays two screenshots of the Omron product catalog interface, illustrating the process of filtering products and viewing specifications.

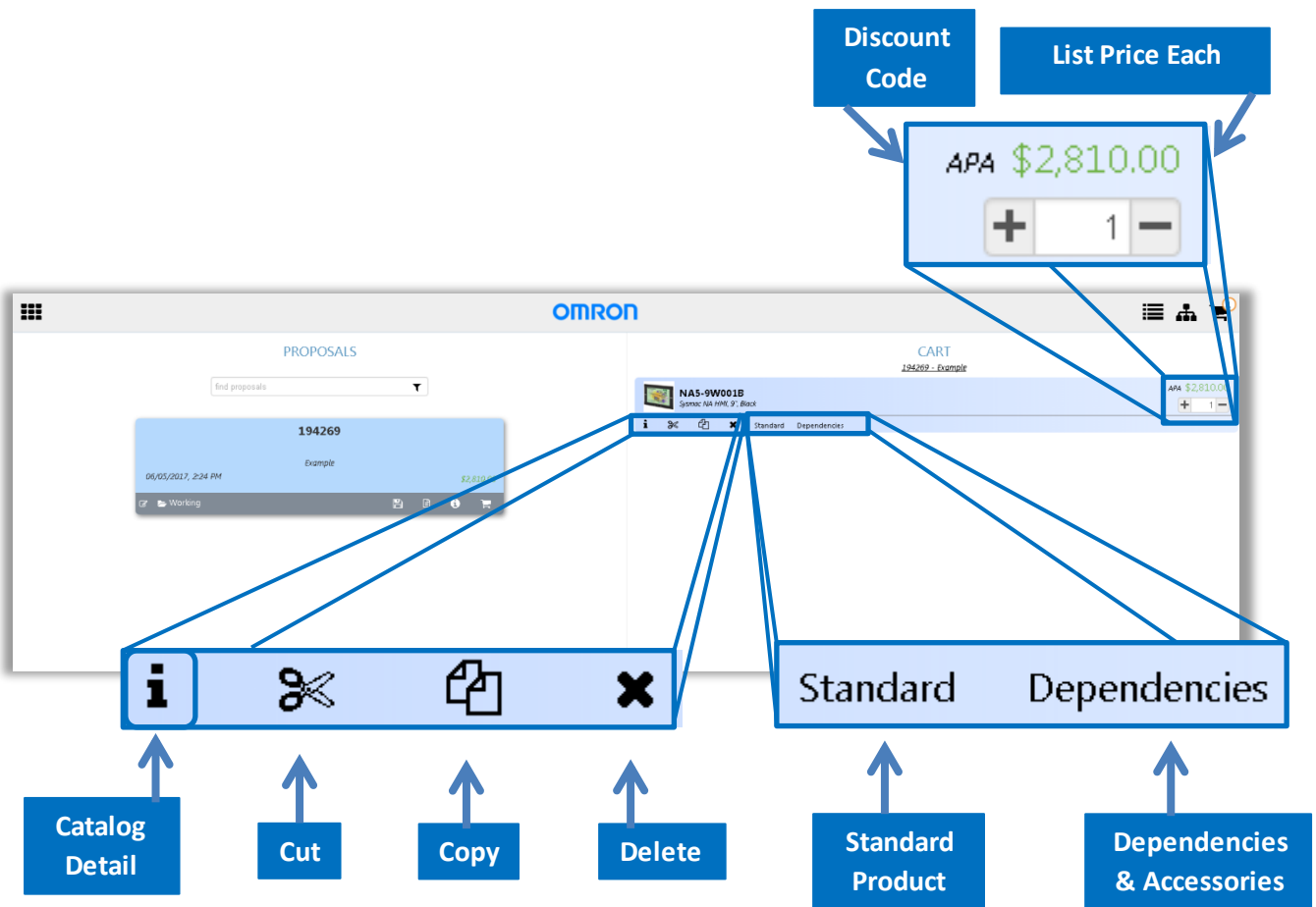
**Top Screenshot:** The interface shows the 'PRODUCT CATALOG' on the left, the 'CONFIGURATION' section in the middle, and the 'CATALOG NUMBER' section on the right. The 'CONFIGURATION' section includes filters for 'Standard Product' (Yes), 'New Product' (No), 'Interaction' (Touch screen), 'Display' (Color graphics), 'HMI type' (Dedicated Advanced HMI), 'Display size and type' (9 inch TFT Color LCD), 'Resolution' (800 x 480), 'Memory size' (900 MB), and 'Bezel color' (Black). The 'CATALOG NUMBER' section shows the product 'NA5-9W001B' (Sysmac NA HMI, 9", Black) with a price of \$2,810.00. A 'View Specs' button is highlighted, and a 'Go to Cart View' button is shown.

**Bottom Screenshot:** The 'View Specs' dropdown menu is expanded, showing the following specifications:

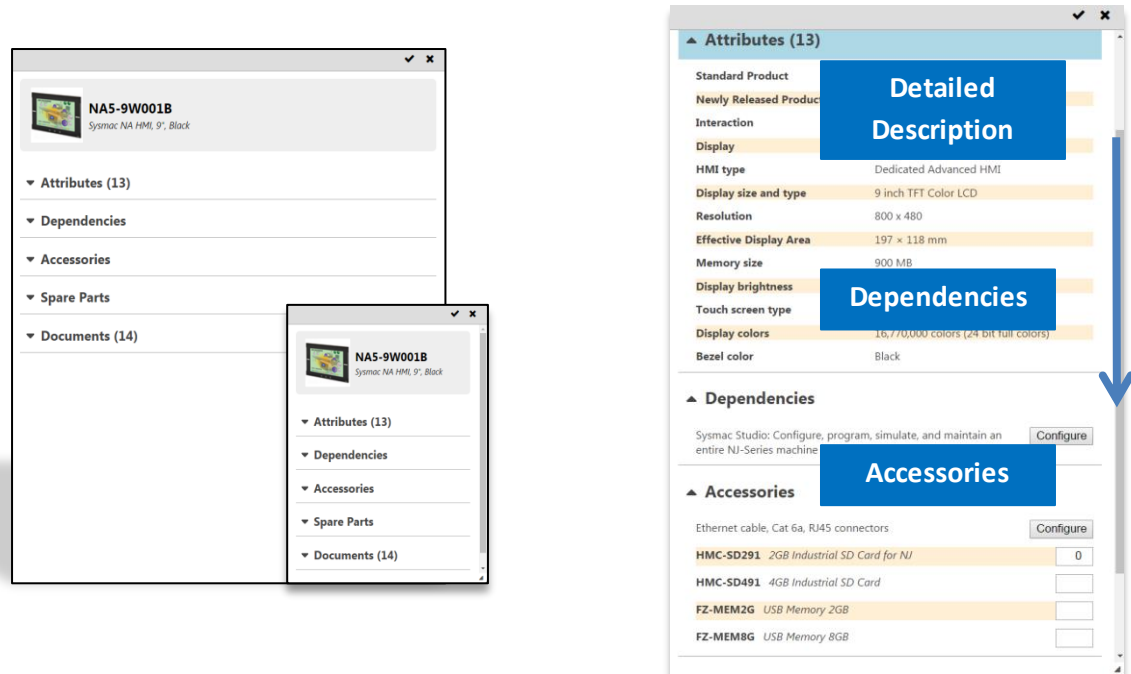
- Standard Product : Yes
- New Product : No
- Interaction : Touch screen
- Display : Color graphics
- HMI type : Dedicated Advanced HMI
- Display size and type : 9 inch TFT Color LCD
- Resolution : 800 x 480
- Memory size : 900 MB
- Bezel color : Black
- Standard

**4) In the “Cart” view, you can view all the products you added to your proposal, gather additional information on those products and add accessories, dependencies or spare parts. Below “Cart” you will also see Proposal information (the Proposal ID and description) of the open Proposal.**

- ✓ Under the product description, if dependencies is listed that means that this product has accessories or dependencies you should consider adding to the proposal. Select the information ‘i’ icon to see and select additional parts.
- ✓ The distributor discount code is listed above the product quantity
- ✓ Change your quantities using the up or down arrows or enter it manually.

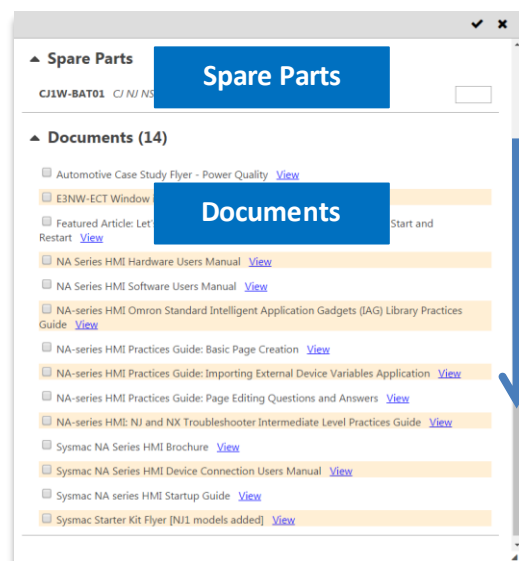


In the "Catalog Detail" view, you can see all of the specifications for this product, its attributes, dependencies, accessories...



...Spare parts, and documents that you can view here or click to include it as a link in the Resource Document you generate with your Proposal documents.

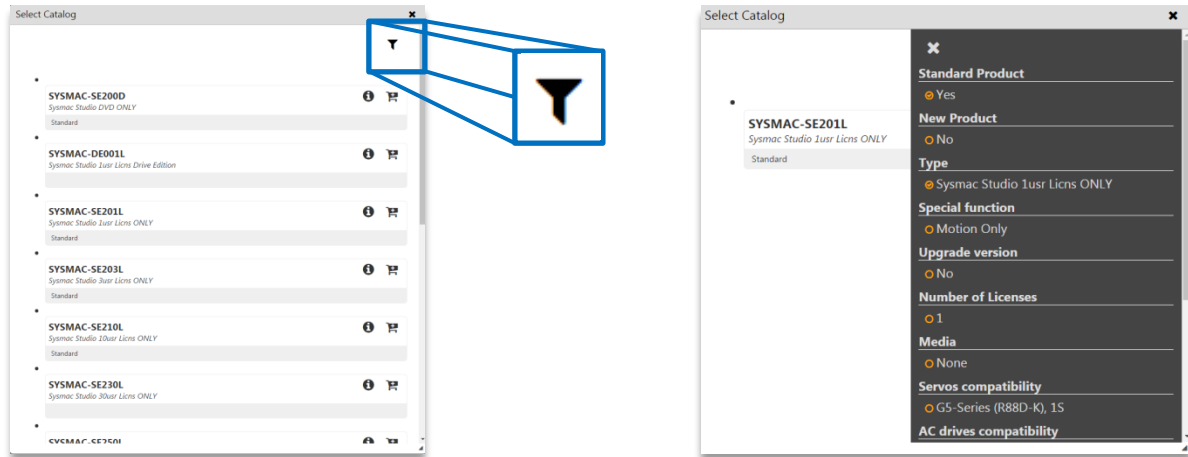
- ✓ Use the arrow in the right corner to resize and hover over the top of the gray area to reposition the "Catalog Detail" view



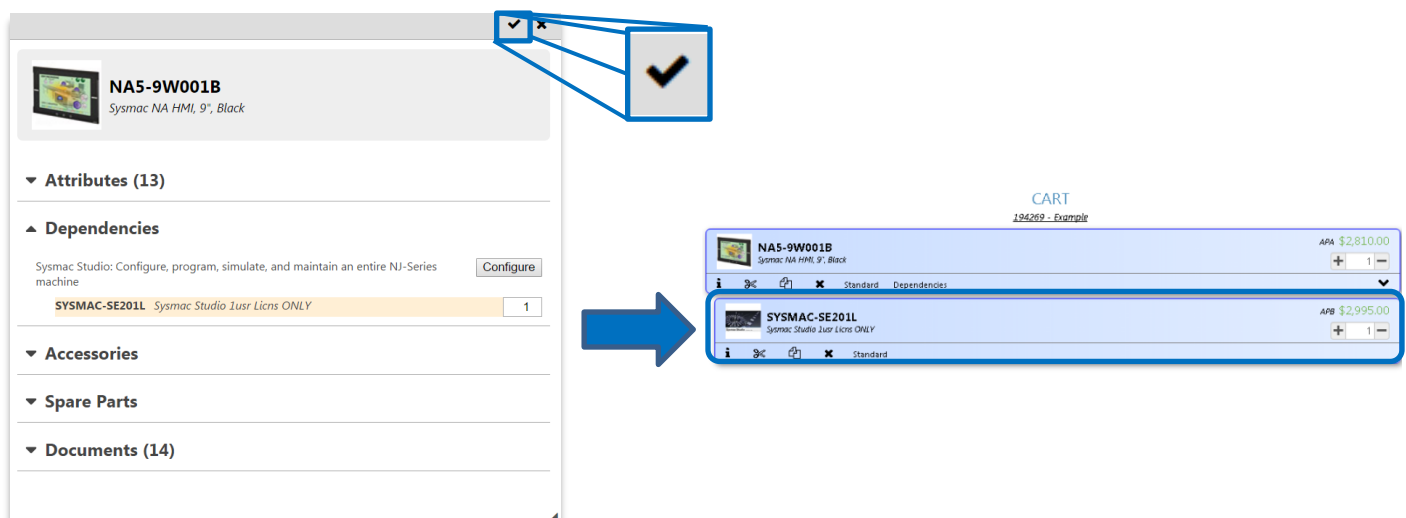


To add dependencies and accessories click on configure

- ✓ In the right corner of the screen select the **'filter'** icon to narrow down products. Selected filter items will contain an orange check mark, to unselect a filter click it again.
- ✓ To add the dependency/accessory after filtering close the filter window and click on the **'Cart +'** icon



Once the desired dependencies, accessories, and spare parts have been added be sure to select the **'✓'** icon to accept changes and close. The **'x'** icon will close the window and not add any of the items configured.

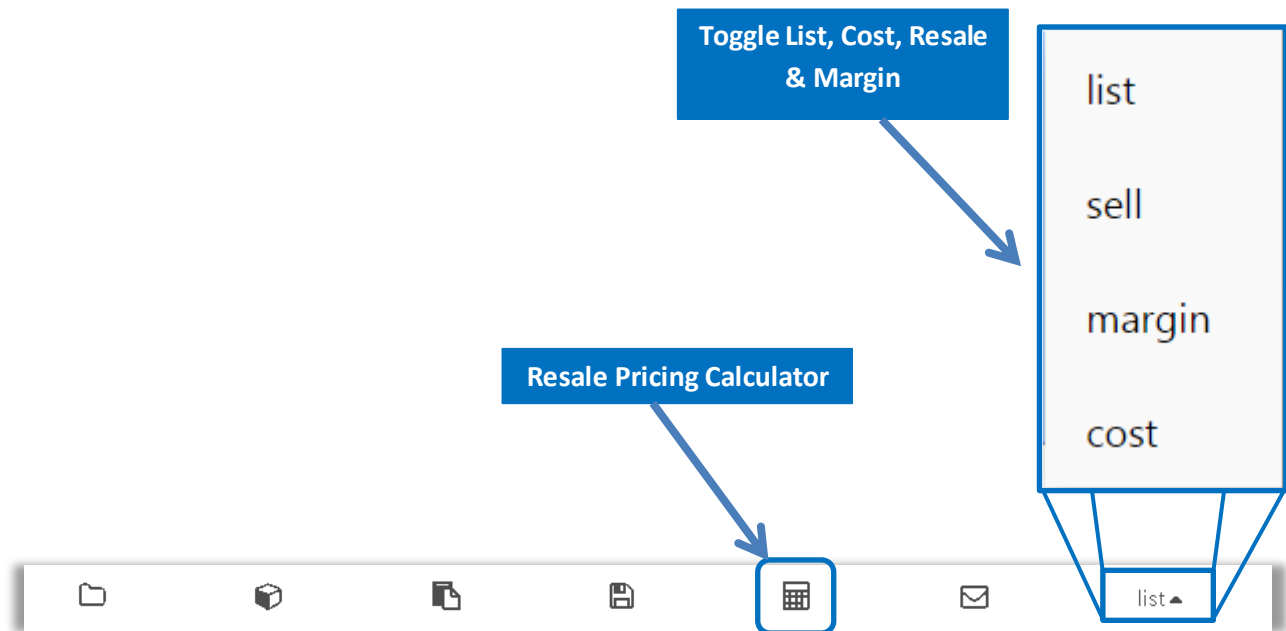


Use the tool bar at the bottom of the cart menu to organize the products within your proposal to make it easy to digest for your customer.



- ✓ Starting on the left, the folder icon enables you to “Add a Group” to create your own hierarchy. Simply add a group, then cut or copy an item and paste it into the group after selecting it.
  - To change the name of the group, double click the “group header” text.
  - Performing actions on a group (delete, cut, copy) will reference not only on the group header, but all of its contents as well.
- ✓ “Add Custom Product” lets you add products from other manufacturers to the Cart. Enter Product Code [part number], Description, List Price and Cost Factor [discount multiplier] then click "Apply".
- ✓ The “Save changes” icon saves any changes that you have made to the proposal

5) The Cart View provides a “price calculator”, which enables you to add resale pricing to the proposal, and a drop down that shows list, cost, sell, and margin. When switched from “List” to “Cost,” the prices will change to blue to alert you that your discount code was applied and is being viewed.



From the calculator, you can enter the resale price by: discount off list, margin %, or a specific dollar amount. You can apply prices to the entire BOM, by discount code, or by individual part.

The screenshot shows the "Price Calculator" window with the "Sell" radio button selected. The total is displayed as \$5,805.00 (list), \$5,805.00 (sell), and \$0.00 (margin). The table below shows the pricing for individual parts.

Group/Catalog	List(\$)	Sell(%)	Sell(\$)
APA		100.00	
NA5-9W001B	\$2,810.00	100.00	2810.00
APB		100.00	
SYSMAC-SE201L	\$2,995.00	100.00	2995.00

Two blue boxes with arrows point to the "Sell(%)" column: "Apply by Discount Code" points to the 100.00 value for APA, and "Apply to Specific Part" points to the 100.00 value for SYSMAC-SE201L.

**6) Once you have all the products you need added to your cart you can use the “Financial Calculator”.** With this calculator you can calculate the estimated monthly payments that a customer would have to make. The financing calculator is accessible in the Proposals view under the Proposals Details Pane.

PROPOSAL DETAIL

Proposal ID: 193215

Sharing:  ☒

Password:

Description:

Status: ☒ Working ☐ Submitted ☐ Approved

Language: English

Company Name:

Company Address:

City:

State:

Zip Code:

Contact Name:

Contact Phone:

Contact Email:

**Financial Calculator**

**Payment Calculator**

Please input values into yellow highlighted cells

Client Name:

Start Date:

Product/Model	Quantity	Sell Price	Ext Price
Product Total			5,805.00
Freight			
Installation			
Other			
Tax-Exempt Items			
Tax Rate(%) / Amount			
Total Sales Order Amount			
Down Payment			
Total Amount to be Financed			

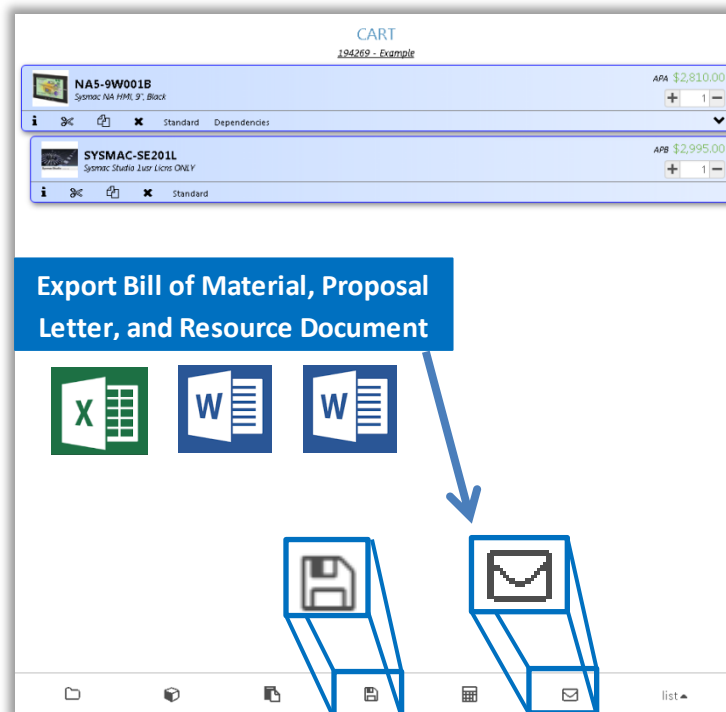
Client Interest Rate (between 4.50-7.99%)

Term (Months)	Estimated Monthly Payment**
12	
24	
36	
48	
60	
72	

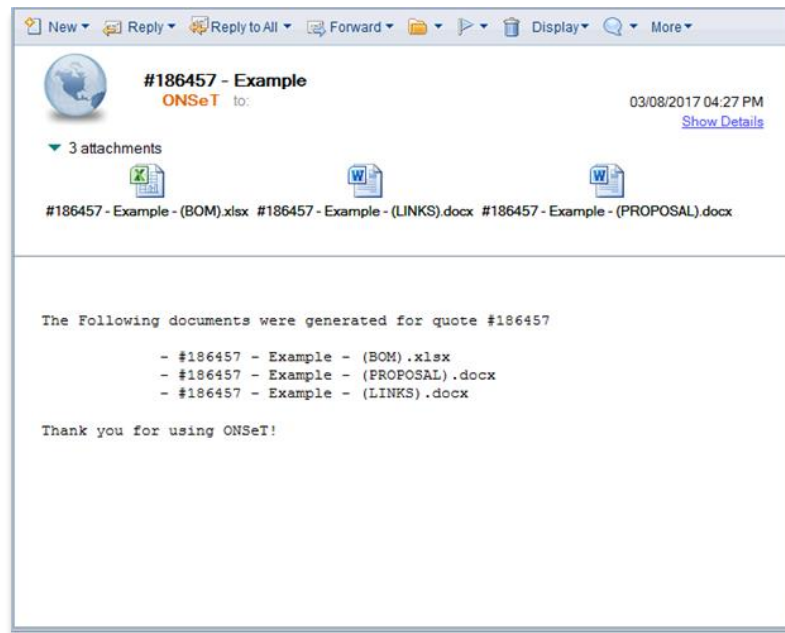
The payment calculator will automatically populate your product total, to use this calculator you will need to enter in: Freight, Installation, Other, Tax-Exempt Items, Tax Rate(%) / Amount, Down Payment, and Client Interest Rate.

**7) The final thing to do with your Proposal is to Save and generate your proposal documents.** You can save by clicking on the Save on the Cart Page (Saves Cart Changes). After saving click on the envelope icon and your three documents will be automatically sent in an email to your inbox. You will see an orange pop-up confirming that your proposal was sent.

- ✓ A bill of materials in Microsoft Excel format showing List Prices and Distributor Cost
- ✓ A pre-formatted Microsoft Word Proposal Letter on Omron letterhead
- ✓ And the Resource Document in Microsoft Word, which includes hyperlinks to all of the data sheets, manuals and brochures for the products you selected from within the cart view



Below is an example of the email you will receive from ONSeT containing your proposal documents.



The Bill of Materials will be provided in a completely customizable Microsoft Excel spreadsheet, listing out all the details of your quote, including both LIST and NET pricing.

	A	B	C	D	E
1	Proposal Number: 186457 Description: Example Date Prepared: 3/8/2017				
2	Prepared For:		Prepared By:		
	Tel:		Omron Automation & Safety		
	Email:		2895 Greenspoint Parkway, Suite 200		
			Hoffman Estates, IL 60169		
3	Top Level Group				
4	Catalog Number	Description	Qty	Sell	Ext Sell
5	NA5-9V001B	Sysmac NA HMI, 9", Black	1	\$2,810.00	\$2,810.00
6	SYSMAC-SE201L	Sysmac Studio 1usr Licens ONLY	1	\$2,995.00	\$2,995.00
7	Top Level Group Subtotal:				\$5,805.00
8					
9	Proposal Total:				\$ 5,805.00
10					
11					

The Resource Document is provided as a Microsoft Word document and includes hyperlinks to the online sales and support documents you selected in the cart's product view.

Proposal Number: 186457  
3/8/2017

Prepared For: \_\_\_\_\_ Prepared By: \_\_\_\_\_

Dear I,

I am pleased to submit the following proposal for your review. On behalf of Omron Automation and Safety, our promise is to provide superior global engineering support for machine development, start-up and continued assistance to ensure the overall successful implementation of our technologies.

Top Level Group				
Catalog Number	Description	Qty	Sell Price	Ext Sell Price
NA5-9W001B	Sysmac NA HMI, 9", Black	1	\$2,810.00	\$2,810.00
SYSMAC-SE201L	Sysmac Studio 1usr Licens ONLY	1	\$2,995.00	\$2,995.00
				<b>\$5,805.00</b>
group header				
Catalog Number	Description	Qty	Sell Price	Ext Sell Price
				<b>\$0.00</b>
Proposal Totals				Ext Sell Price
				<b>\$5,805.00</b>

We appreciate this opportunity to quote on your requirements and look forward to receiving your order. If you have any questions or need additional information, please give me a call.

Best regards,

The Proposal Letter is also a customizable Microsoft Word document that summarizes your quote information into a customer-ready format.

Following the initial proposal letter, you will find Omron's Terms & Conditions. Distributors should cut and paste this proposal onto their own letterhead, make edits and include their own Terms & Conditions.

Proposal Number: 186457  
3/8/2017

Prepared For: \_\_\_\_\_ Prepared By: \_\_\_\_\_

**Resource Links Organized by Type**

Catalog	<a href="#">Catalog: Sysmac NJ Machine Automation Controller (Color intro with datasheets)</a>
Tech Notes	<a href="#">MC Command Table Library Sysmac-XR002 Tech Note Sysmac Studio, NJ, NX, G5 servos</a>
Manual	<a href="#">Manual: SYSMAC Studio Software Version 1.17 Operation Manual</a>
Press Releases	<a href="#">Press Release: Omron Sysmac NJ-Series Machine Automation Controller Revolutionizes Machine Control</a>



**Resource Links Organized by Product Family**

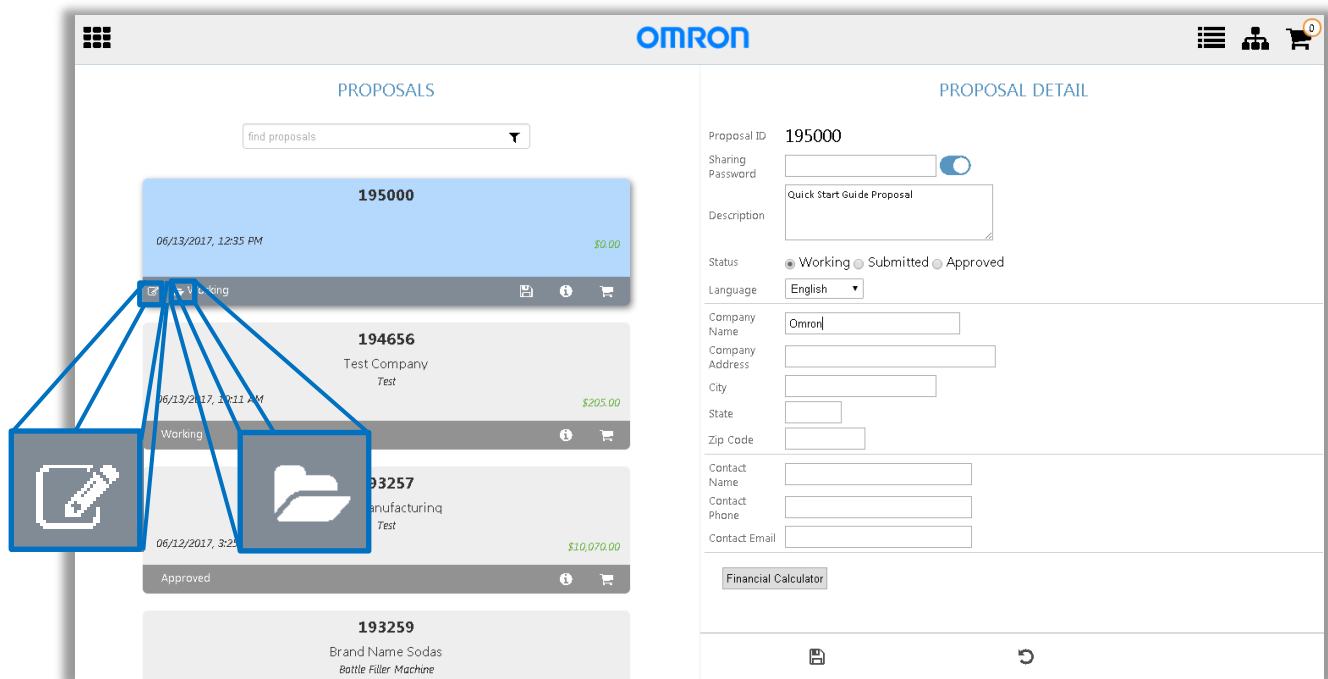
SYSTDIO - Sysmac Studio:	<a href="#">MC Command Table Library Sysmac-XR002 Tech Note Sysmac Studio, NJ, NX, G5 servos</a>
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## WORKING WITH PROPOSALS:

Once you have proposals created, you will see them under the Proposals Page. These Proposals will have status icons to indicate the current state of the Proposal.

### Status Icons:

	<i>Proposal is Open – This is a visual indication of the proposals you currently have open.</i>
	<i>Proposal has been Modified – You have made a change to the proposal and it needs to be saved.</i>



The screenshot displays the OMRON PROPOSALS interface. The left pane, titled 'PROPOSALS', shows a list of proposals with columns for ID, Date, Status, and Amount. The right pane, titled 'PROPOSAL DETAIL', shows the details for Proposal ID 195000, including fields for Sharing, Password, Description, Status, Language, Company Name, Address, City, State, Zip Code, Contact Name, Phone, and Email. A 'Financial Calculator' button is also visible. A callout box highlights the status icons: a folder icon for 'Open' and a pencil icon for 'Modified'.



## PROPOSAL SHARING:

To **share a proposal**, provide the user with the “Proposal Number” and your “Sharing Password.” To allow full editing rights to your proposal make sure the slider to the right of the sharing password is slid to the right; otherwise it will remain read-only.

To **open a shared proposal**, click “Open Any” and enter the “Proposal Number” and the “Sharing Password” into the pop-up. The shared proposal will appear on the Proposals Page.

The screenshot displays the ONSet Advanced web interface. The left pane shows the 'PROPOSALS' list with three entries. The right pane shows the 'PROPOSAL DETAIL' for Proposal ID 195000. Annotations include:

- A blue box labeled "Proposal Number & Sharing Password" with an arrow pointing to the 'Sharing Password' field in the Proposal Detail pane.
- A blue box labeled "Make Shared Proposal read-only or writable" with an arrow pointing to the toggle switch next to the 'Sharing Password' field.
- A blue box labeled "Open a Shared Proposal" with an arrow pointing to the folder icon in the bottom navigation bar.

Proposal ID	Proposal Name	Status	Amount
194656	Test Company Test	Working	\$205.00
193257	XYZ Manufacturing Test	Approved	\$10,070.00
193259	Test Name Soda Bottle Filler Machine		

**Proposal Detail (195000):**

- Proposal ID: 195000
- Sharing Password: [Field]
- Quick Start Guide Proposal: [Field]
- Description: [Field]
- Status: Working (selected), Submitted, Approved
- Language: English
- Company Name: Omron
- Company Address: [Field]
- City: [Field]
- State: [Field]
- Zip Code: [Field]
- Contact Name: [Field]
- Contact Phone: [Field]
- Contact Email: [Field]



## PRICING UPDATES:

When Omron Automation and Safety publishes new list prices, any proposals previously created are considered “Expired” because they do not reflect the latest list prices.

There are three options when working with expired proposals:

1. **Refresh:** To update your proposal pricing, click on a Proposal. Then on the Proposals Page click “Refresh” and then the “Expired” icon will no longer show next to that proposal.
2. **Duplicate:** To keep a proposal intact with the previous pricing, click on the Proposal and then click “Duplicate.” The duplicated proposal can now be “refreshed” to current list prices and your original can remain for future reference.
3. **Open (in Read Only Mode):** If you open an expired proposal without refreshing it, you will not have the ability to make changes. Your only option is to view the parts in the Cart View, where you can email the expired Proposal to yourself for historic reference.

The following icons can be found on the ONSeT Home/Proposals screen when a pricing update has taken place:

	<i>Proposal is Expired</i> – This proposal contains pricing that is no longer in effect. You must open and refresh, open and duplicate or open in read-only mode as described above.
	<i>Proposal is Read-Only</i> – You have opened a proposal but the prices have not been refreshed.

You can find the most current Price List by click on the icon in the upper left corner and selecting “Price List” from the drop down.

