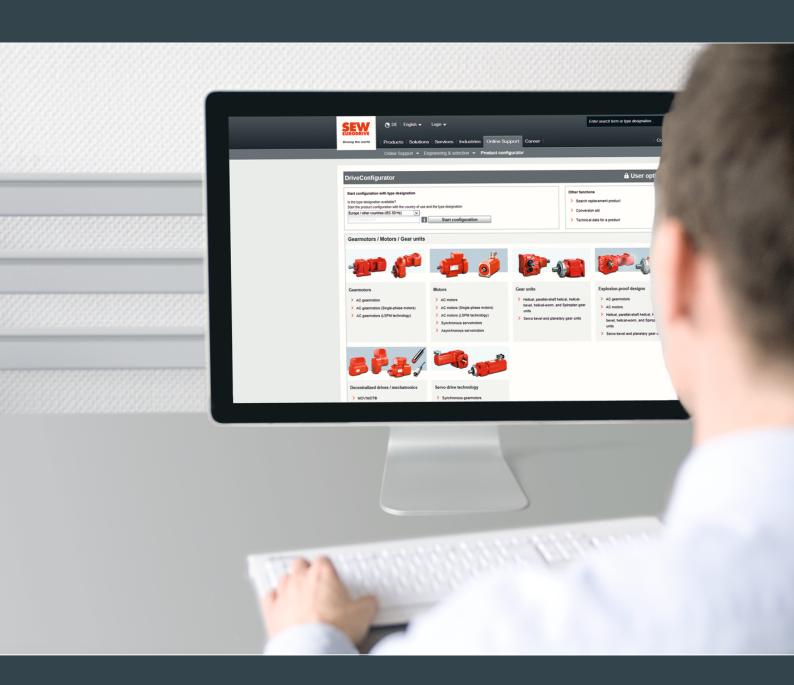


Brief Instructions



DriveConfigurator

The Product Configurator from SEW-EURODRIVE

Edition 09/2018 25832336/EN





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1 Introduction to DriveConfigurator

1.1 What is DriveConfigurator?

DriveConfigurator is the ideal online product configurator for reliable and fast selection of drive components.

You can access DriveConfigurator from the SEW-EURODRIVE homepage via the menu item "Online Support".

With only a few clicks, you can select your product and add it to the shopping cart. You can order the selected products directly or save the shopping cart as template to either share it with other authorized persons or for later use.

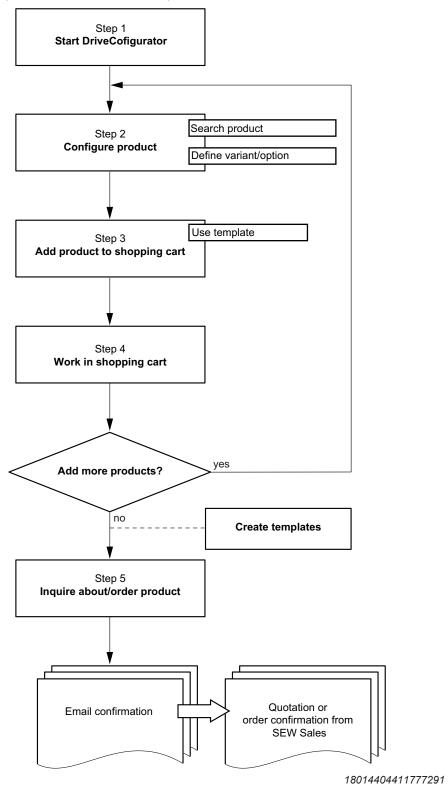
1.2 How do customers benefit from DriveConfigurator?

The DriveConfigurator offers the following advantages:

- Simple and guided online configuration of products
- Individual adaptation thanks to user options for search tolerances and region-specific measurement systems
- · Visual support through numerous images and a 3D view of the configured product
- Efficiency thanks to the possibility of saving already configured products as template
- CAD data, technical data and documentation are available directly in the shopping cart
- · All technical information on the selected product at a glance
- Efficient processing by placing online inquiries and orders via the shopping cart

1.3 How to use DriveConfigurator?

The following flowchart shows you how to configure and order a required product or request a quotation from SEW in 5 steps.



The individual steps are described in detail on the following pages.

2 Five steps to your quotation or order

INFORMATION



It is not necessary to log in on the SEW-EURODRIVE homepage if you only want to configure a product. To order, request a quotation or save the shopping cart, you must be logged in.

If you have not yet registered, you can do so at the end of the configuration.

Quick access bar



The quick access bar on the right allows you to easily access the most important tasks.

→ Contact SEW-EURODRIVE

Move with the mouse pointer over the telephone icon. A window opens with different options to contact SEW-EURODRIVE. Search for the nearest SEW-EURODRIVE subsidiary by entering the postal code or complete the contact form.

\rightarrow Data and documents

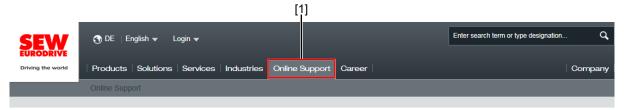
Use the icon in the middle to access all available data and documents from SEW-EURODRIVE.

→ Shopping cart

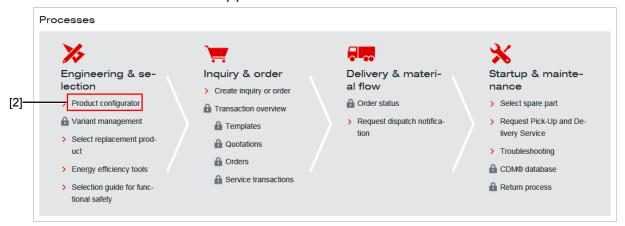
Use the shopping cart button and choose whether you want to open the shopping cart or add a product to it.

3 Step 1: Start product configuration

You will find the product configurator in the "Online Support" in the "Processes" section under "Engineering & selection":



Welcome to the Online Support!



- [1] [Online Support] button
- [2] Link to DriveConfigurator
 - 1. To start, click the "Product configurator" link [2].
 - ⇒ DriveConfigurator opens.

Step 2: Configuring the product 4

4.1 Starting product selection

The configuration starts with the following window:



- Product groups in DriveConfigurator [1]
- [2] Start configuration with type designation
- [3] Link to select replacement products
- [4] Link to conversion aid
- [5] Search for technical data



Start the configuration in DriveConfigurator by selecting a SEW product group [1] or by entering the type designation into the search field under "Start configuration with type designation" [2]. Both options are described in the following chapters.

4.1.1 Starting product configuration by selecting a product group

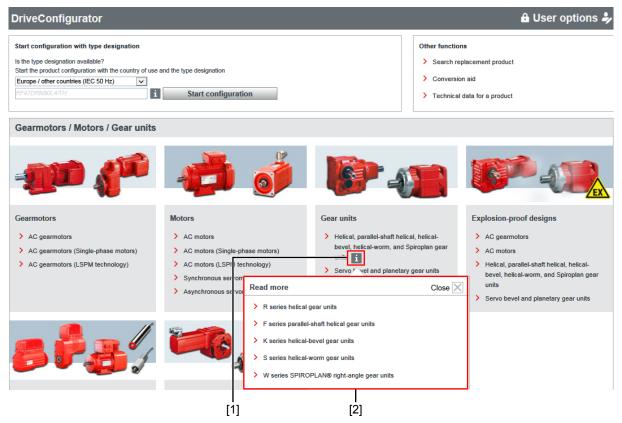
- 1. Click on the required product group [1] in DriveConfigurator.
- ⇒ A window opens to search for products.

4.1.2 Starting product configuration with a type designation

- 1. Enter the type designation under "Start configuration with type designation" [2].
- 2. Click the [Start configuration] button.
- ⇒ A window opens to search for products. The search results show all products with this type designation.



4.1.3 Link to promotional product page



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- [1] [More information] button
- [2] More information on the product

The link corresponds to the selected product and offers the following benefit:

- Information on the product
- · Overview of the technical data
- · Overview of the areas of application
- · Information on the designs

Product search

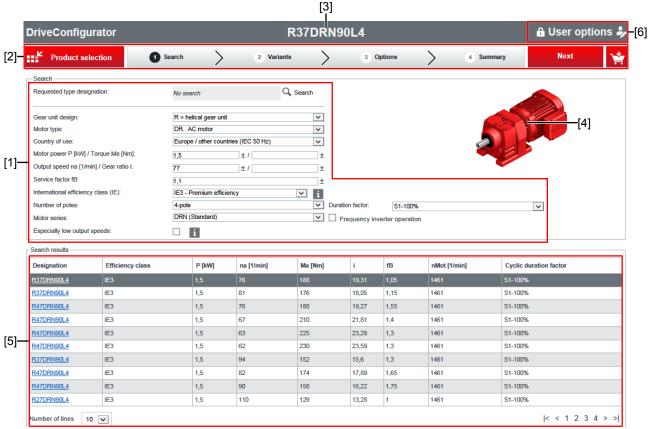
4.2 **Product search**

INFORMATION



The number of configuration steps and the product characteristics to be selected depend on the selected product. The following example shows the configuration of an AC gearmotor.

4.2.1 Search for technical criteria



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- [1] Search criteria
- [2] Navigation bar
- [3] Type designation
- [4] Preview of the selected design
- Search results [5]
- [6] Link to the user options, see chapter "Setting user options" ($\rightarrow \mathbb{B}$ 23)
 - 1. Define the characteristics of the searched product in the search criteria [1].
 - ⇒ The results list only shows products with the selected search criteria.
 - 2. Select the product from the results list that fulfills your needs.
 - ⇒ A window for defining the product design opens.

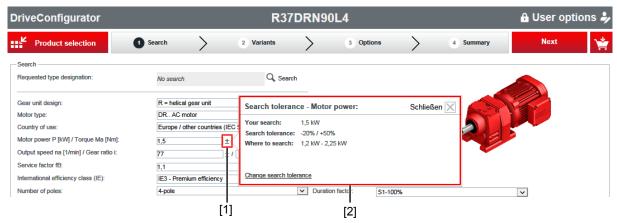
INFORMATION



You can influence the product search via the [User options] button [6] by defining search tolerances/tolerance ranges for the characteristics in the "DriveConfigurator parameters" window.

You must be logged in to use the user options, see chapter "Setting user options" (\rightarrow \mathbb{B} 23).

4.2.2 Search tolerances



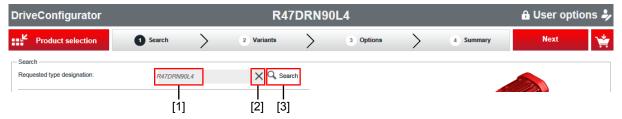
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- [1] Search tolerances button
- [2] "Search tolerance Motor power" window

Function:

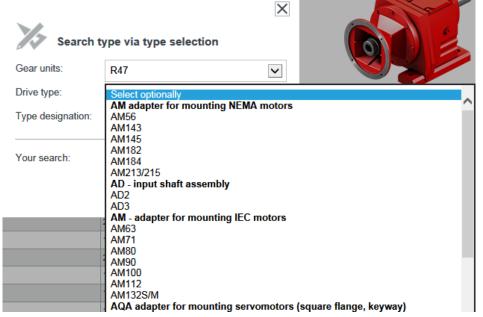
- · View search tolerances
- Link to "Change search tolerance" leads to the user options

4.2.3 Search for type within a product category



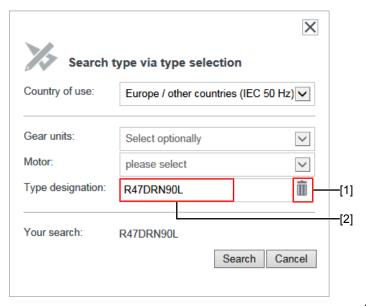
- [1] Currently requested type designation
- [2] Clear search
- [3] Start new search

Search via type selection



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Text search for type designation



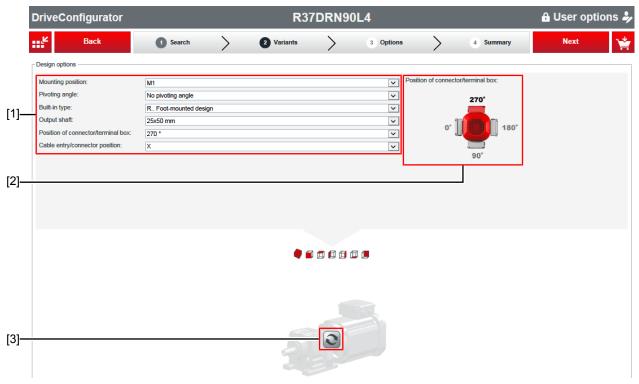
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- [1] Clear search
- [2] Change latest search



4.3 Determining the design

In the following window, you can determine the gearmotor design:

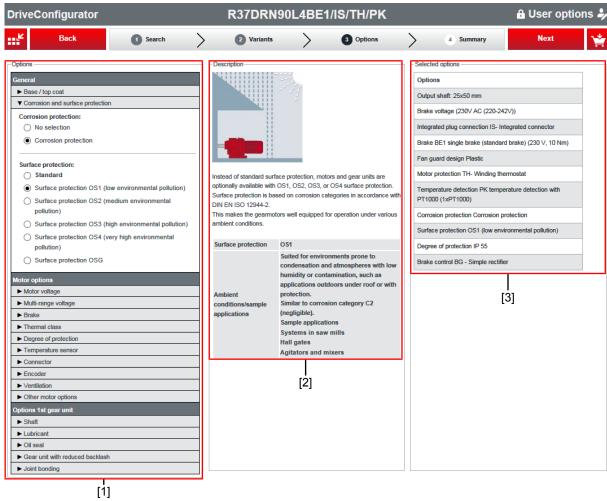


- [1] Choice boxes for design characteristics
- [2] Preview for assistance during selection
- [3] Button to refresh the preview
 - 1. Set the design characteristics in the drop-down lists [1].
 - ⇒ Depending on the selected design characteristics, a preview [2] is displayed next to the drop-down lists to assist you during selection.
 - 2. Click the "Refresh" button [3] to get a preview of the current configuration.
 - 3. When all design characteristics are set, click the [Next] button in the navigation bar to switch to the options selection.

Selecting options

4.4 **Selecting options**

The following window opens for selecting options:

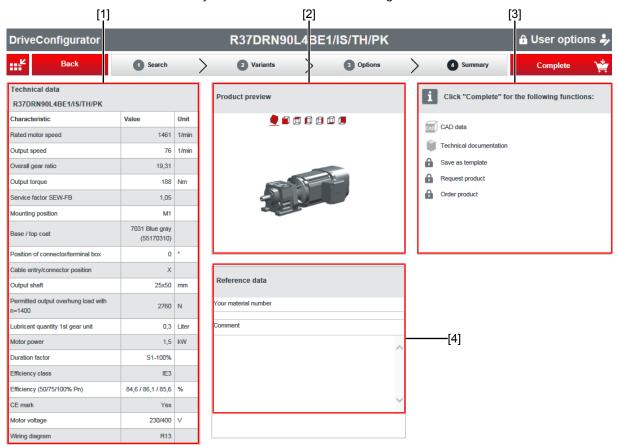


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- [1] Options selection
- Description of the active option [2]
- [3] List of selected options
 - 1. Select the required options [1].
 - ⇒ In the "Description" section [2], additional information on the selected option is displayed.
 - All selected options are listed in the "Selected options" section [3]. Click on the options to display the description again.
 - 2. If you selected all required options, click the [Next] button in the navigation bar to switch to the "Summary" window.

4.5 Summary of the configuration





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- [1] Technical data^{1) 2)}
- [2] Product preview
- [3] Preview of functions in shopping cart
- [4] Reference data
- 1) Technical data must be confirmed in a final technical verification. This verification is performed when creating the quotation.
- For the exact mass, refer to the order confirmation. The real mass may differ from that mentioned on the order confirmation for technical reasons.

In the "Reference data" section [4], you can enter your reference data such as material number or a comment regarding a product. The data will be used for the quotation or order process.

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5 Step 3: Adding a product to the shopping cart

- 1. Click [Complete] in the navigation bar to add the product to your shopping cart.
 - ⇒ The "Shopping cart" window opens with the added product.



6 Step 4: Working in the shopping cart

6.1 Setting quantity and adding documents

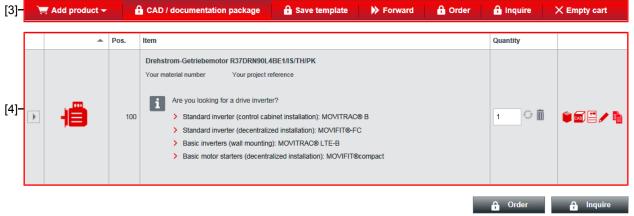
INFORMATION



To order, request a quotation or save the shopping cart as template, you must be logged in. If you are not logged in, the login window opens in the next step where you can register and log in.

Shopping cart





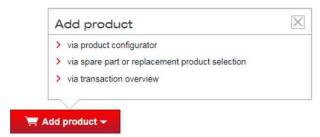
- [1] Edit boxes for reference data
- [1] Edit box for a message to SEW-EURODRIVE
- [1] Task bar
- [4] Product list
- Enter your reference data [1]. For additional edit boxes for reference data, click "More reference data".
- 2. If necessary, enter a message to SEW-EURODRIVE [2].
- 3. In the product list [4].
- 4. Download selected documentation for the product by clicking the [Technical documentation] button or send a download link.
- 5. Download the CAD data for the product in the required format by clicking the [CAD data] button or send a download link.

Adding more products to the shopping cart

- Use the [Technical data] button to see the technical data of the product. If needed, choose a different language or download information in different formats or send information as a download link.
- To change the configuration of the product, click the "Edit" button.

Adding more products to the shopping cart 6.2

- 1. To add another product to the shopping cart, click the [Add product] button in the task bar.
 - ⇒ The following drop-down list appears:



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2. Select how you want to add the product.

6.2.1 Adding product via DriveConfigurator

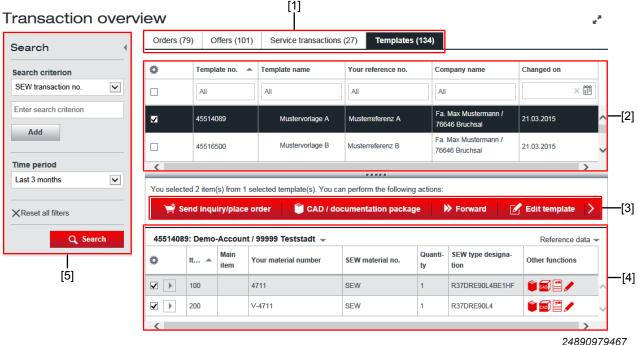
- 1. Select the entry "via product configurator".
 - ⇒ The start window of the product configurator opens.

6.2.2 Adding product via spare part or replacement product selection

- 1. Select the entry "via spare part or replacement product selection".
 - ⇒ The search mask for replacement products and spare part opens.
- 2. Enter a serial number, part number, SEW designation, or the document number of a spare parts list into the search mask.
- 3. Select the required product and add it to the shopping cart using the respective button.

6.2.3 Adding product via transaction overview

- 1. Select the entry "via transaction overview" in the drop-down list.
 - ⇒ The "Transaction overview" window opens.



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- [1] Tab for different transactions
- [2] Transaction list
- [3] Task bar

- [4] Transaction details
- [5] Search mask
- 2. Select whether you want to select a product from an order, a quotation, or from a template by clicking the respective tab [1]. As an alternative, use the search mask on the left side [5].
- 3. Select the transaction with the required product in the transaction list [2].
 - ⇒ The products of this transaction are displayed in the transaction details [4].
- 4. Select the products you want to add to the shopping cart.
- 5. Click the [Inquire/Order] button in the task bar [3] to add the product to the shopping cart.
- 6. To add the products to the shopping cart, click the [Inquire/Order] button in the task bar [3].

6.3 Save shopping cart as template

Use the [Save template] to save the content of the shopping cart in the transaction overview for later use. You can use the template later to order the products, request a quotation, send a link to the template, or edit the products in the template. To open the link, you have to be logged in.

- 1. Click the [Save template] button in the navigation bar.
 - ⇒ The "Save template" window opens.

- 2. Enter a template name and choose whether it is a private or a company-wide template. Private templates can only be seen by you. Company-wide templates can be seen by all Online Support users of your company.
- 3. Save the template by clicking the [Save template] button.

6.4 Forwarding a shopping cart

Send a link leading to the products in the shopping cart. The content is saved as a template first.

- 1. In the navigation bar, click the [Forward] button.
 - ⇒ The "Forward" window opens.
- 2. Enter a template name.
- 3. Click [Save template & forward].
 - ⇒ The e-mail client opens a new message with a link to the template. To be able to open the link, the person who receives the e-mail must be logged in to the Online Support.
- 4. Enter a recipient and, if required, enter a message. Then send the message.

7 Step 5: Inquiring about or ordering a product

The shopping cart contains all required products. You can order the products or request a quotation from SEW-EURODRIVE.

7.1 Ordering products

- 1. Make sure you entered an "inquiry or order reference".
- 2. Click the [Order] button.
 - ⇒ The "Delivery information" window opens.
- 3. Select a delivery address or enter a new one, if necessary.
- 4. Enter the desired delivery date.
- 5. Click the [Order now] button to complete the order.
 - ⇒ The order is sent.
 - ⇒ The "Confirmation" window opens.
 - ⇒ You will receive a confirmation of receipt via e-mail with the details concerning your order. As usual, you will receive the order confirmation after your order was processed by our sales department.

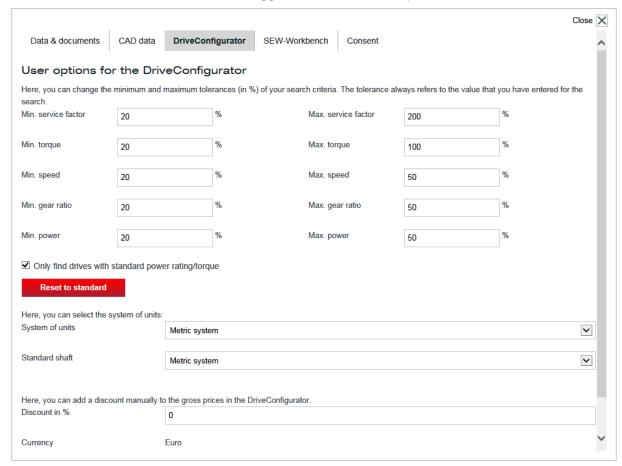
7.2 Inquiring about products

- 1. Make sure you entered an "inquiry or order reference".
- 2. Click the [Inquiry] button.
 - ⇒ The "Delivery information" window opens.
- 3. Select a delivery address or enter a new one, if necessary.
- 4. Enter the desired delivery date if necessary.
- 5. Click the [Inquire now] button to complete the inquiry.
 - ⇒ Your inquiry is sent.
 - ⇒ The "Confirmation" window opens.
 - ⇒ You will receive a confirmation of receipt via e-mail with the details concerning your inquiry. As usual, you will receive the quotation after your inquiry was processed by our sales department.

8 Other functions

8.1 Setting user options

You will find the link to the user options in the upper part of the DriveConfigurator window. You have to be logged in to use the user options.



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Here you can adjust the user options of the DriveConfigurator to your needs. Set tolerance ranges for the product search, select the needed units of measurement, or change other settings.

8.2 Selecting replacement products or spare parts

You will find the link to the search for replacement products or spare parts on the start screen of the DriveConfigurator in the "Other functions" section or on the homepage of the Online Support via "Select replacement product" and "Select spare part".



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- [1] Search for link to replacement product
- [2] Link to conversion aid for conversion to motors with higher energy efficiency class
- [3] Link to search mask for technical data
 - 1. Click on the link "Search replacement product" [1].
 - ⇒ The search mask for replacement products and spare parts opens.
 - 2. Enter a serial number, part number, SEW designation, or the document number of a spare parts list into the search mask.
 - 3. Select the required product and add it to the shopping cart using the respective button.
 - ⇒ A window opens where you can add more products to the shopping cart or complete the process by requesting a quotation or send an order.
 - 4. Choose whether you want to add another product or switch to the shopping cart.

8.3 Conversion aid for conversion to motors with higher energy efficiency class

The conversion aid supports you in the search for a motor with a higher energy efficiency class.

- 1. Click "Conversion aid" [2].
 - ⇒ The "Conversion aid" window opens.
- 2. Select the country of use and the motor data of the motor to be replaced.
- 3. Click the [Results] button.
 - ⇒ A results list shows motors with higher energy efficiency and their technical data.

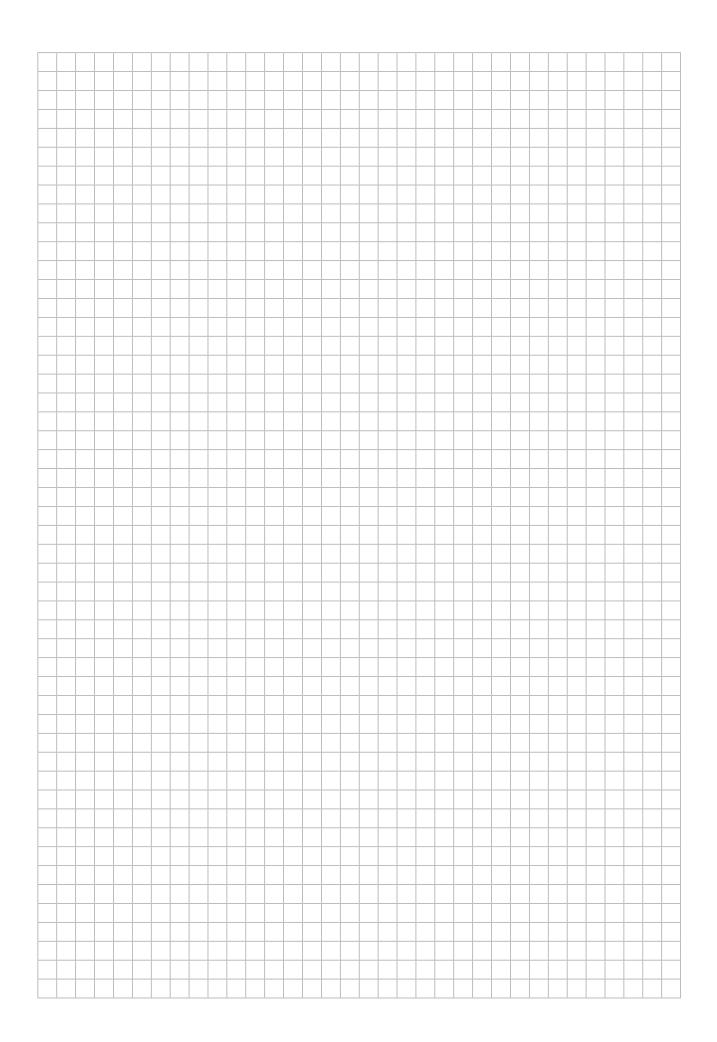


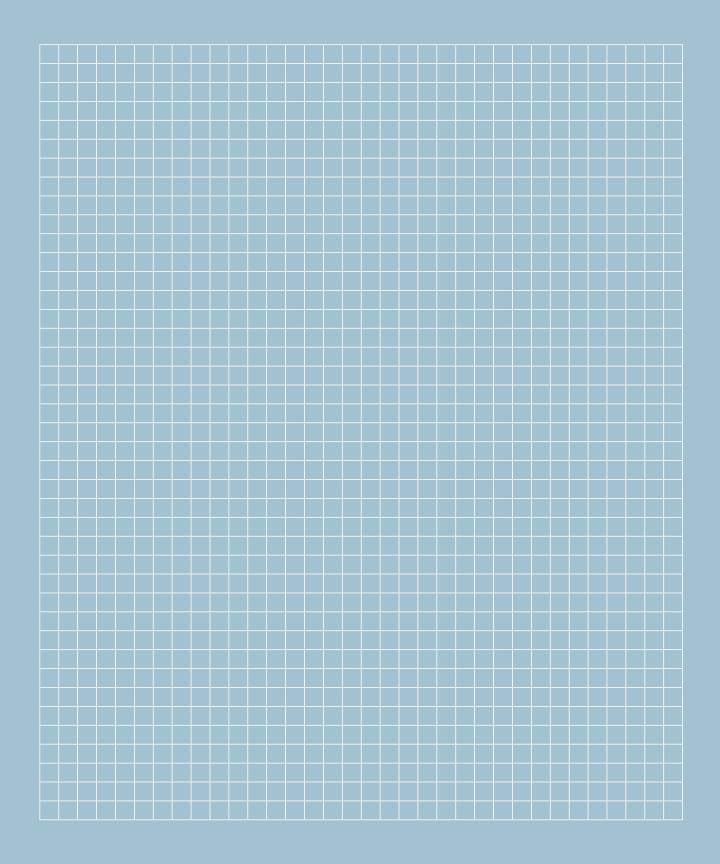
Technical data of a product

8.4 Technical data of a product

Use the search mask to get the technical data of a product and to check, forward, or download it as file.

- 1. Click "Technical data of a product" [3].
 - ⇒ The search mask for replacement products opens.
- 2. Enter the serial number, quotation number, or order confirmation number.
 - ⇒ The technical data of the product are displayed. You can check, forward or download the technical data.









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