Manual Supplier Portal Pool4Tool

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Introduction / Description

The supplier portal Pool4Tool (P4T) serves as an instrument to optimize the exchange of documents between Carl Zeiss and its suppliers. In this connection, interfaces and media translations should be minimized, processes should be simplified and shortened and the document exchange should be accomplished more reliable, safe and environment-friendly.

By means of the supplier portal, documents and data which were transmitted in hardcopy form so far will be exchanged in electronic form between Carl Zeiss and the suppliers in the future. The implementation of the supplier portal will be carried out in several steps and will initially include the exchange of orders as well as order changes by Carl Zeiss and order confirmations by the suppliers. However, the integration of further document types (e.g. inquiries, offers, drafts, invoices and quality records) into the supplier portal should take place in the medium term.

The connection of the supplier to the supplier portal is exempt from charges for the supplier and is carried out via Web-EDI (Web based Electronic Data Interchange).

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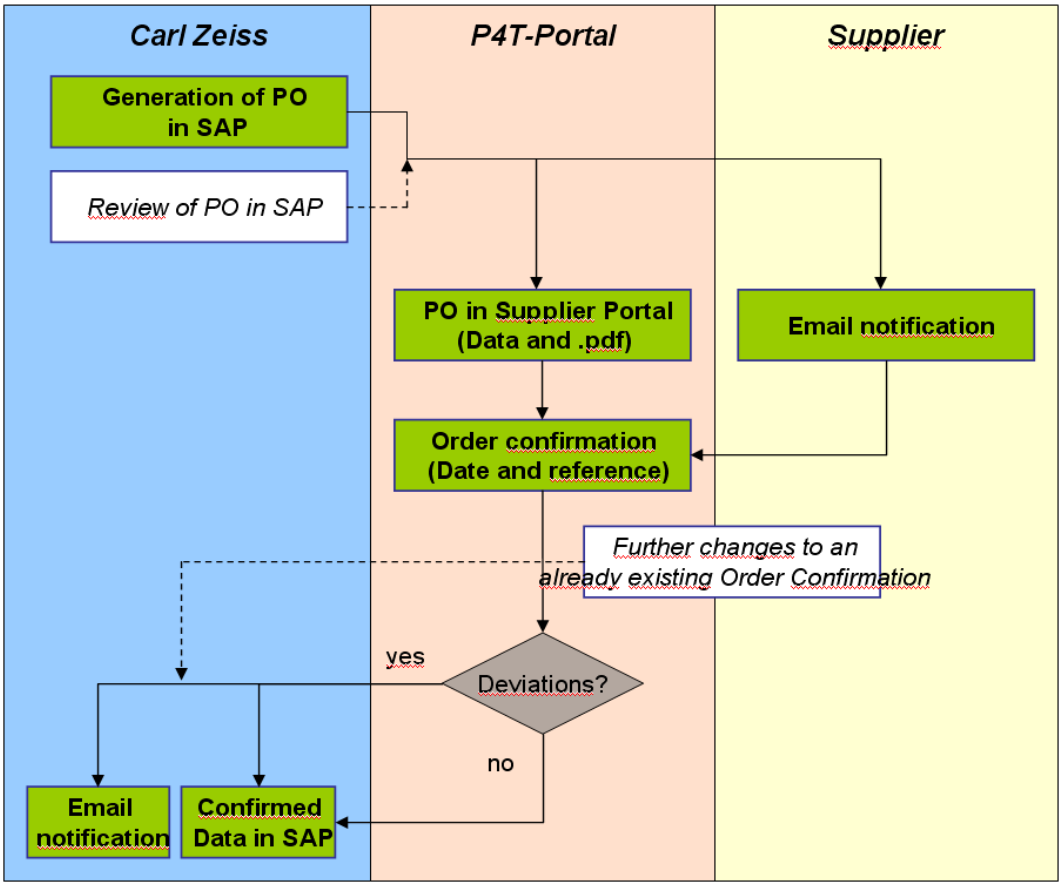
2. Orders and Order Confirmation

Orders as well as order changes generated by Carl Zeiss will be placed on the portal of the supplier in question. The supplier will be informed about the receipt of the order/order change via email and is able to directly reach the portal via the notification email or with his general login credentials. On the portal he/she will be able to access and check the order transaction.

By specifying the delivery date and order confirmation number, the supplier will be able to enter the most relevant information for Carl Zeiss and to send back a confirmation in a few steps. The transmitted data from the supplier is directly carried over to the SAP system of Carl Zeiss and the respective buyer is informed about possible order deviances.

An exchange of signed hardcopy documents is no longer required.

The functionality is organized as follows:



2.1 Request for orders received

In order to access and edit incoming orders of Carl Zeiss, you have two possibilities:

- The email notification contains a link which leads you directly to the corresponding order in the portal.
- The link https://www.pool4tool.com/portal/zeiss leads to the homepage of the portal. Please enter your username and password here.

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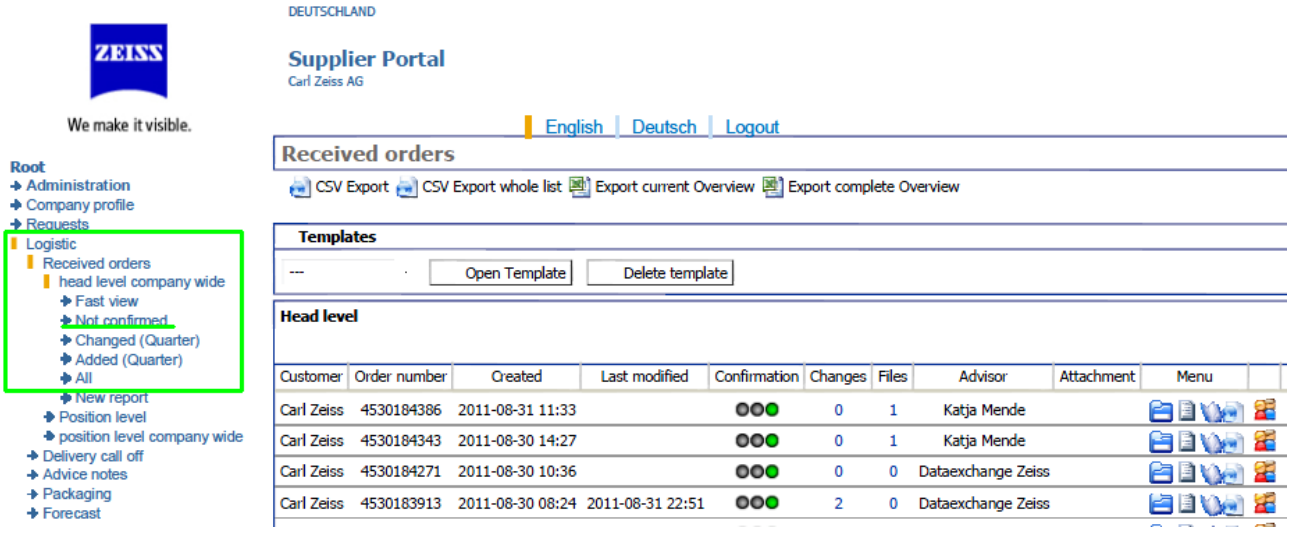
You receive your login credentials automatically via email after the first activation of the electronic exchange via Pool4Tool, the provider of the supplier portal.

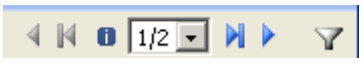
2.2 Layout of the portal

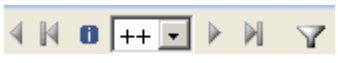
A navigation tree is located on the left side of the homepage. In order to review orders, please click on *incoming orders* in the navigation tree. Now you can filter on the *head* or *position level* by clicking on the corresponding entry. Furthermore you can filter for non-confirmed orders.



The reference list contains general order data like customer, order date, order number, order and confirmation status. All corresponding documents and applications have shortcuts.

You can navigate in the reference list with the pager in the upper right menu bar. Furthermore you can access previous sites with older order transactions as well as display all order transaction in one data sheet.





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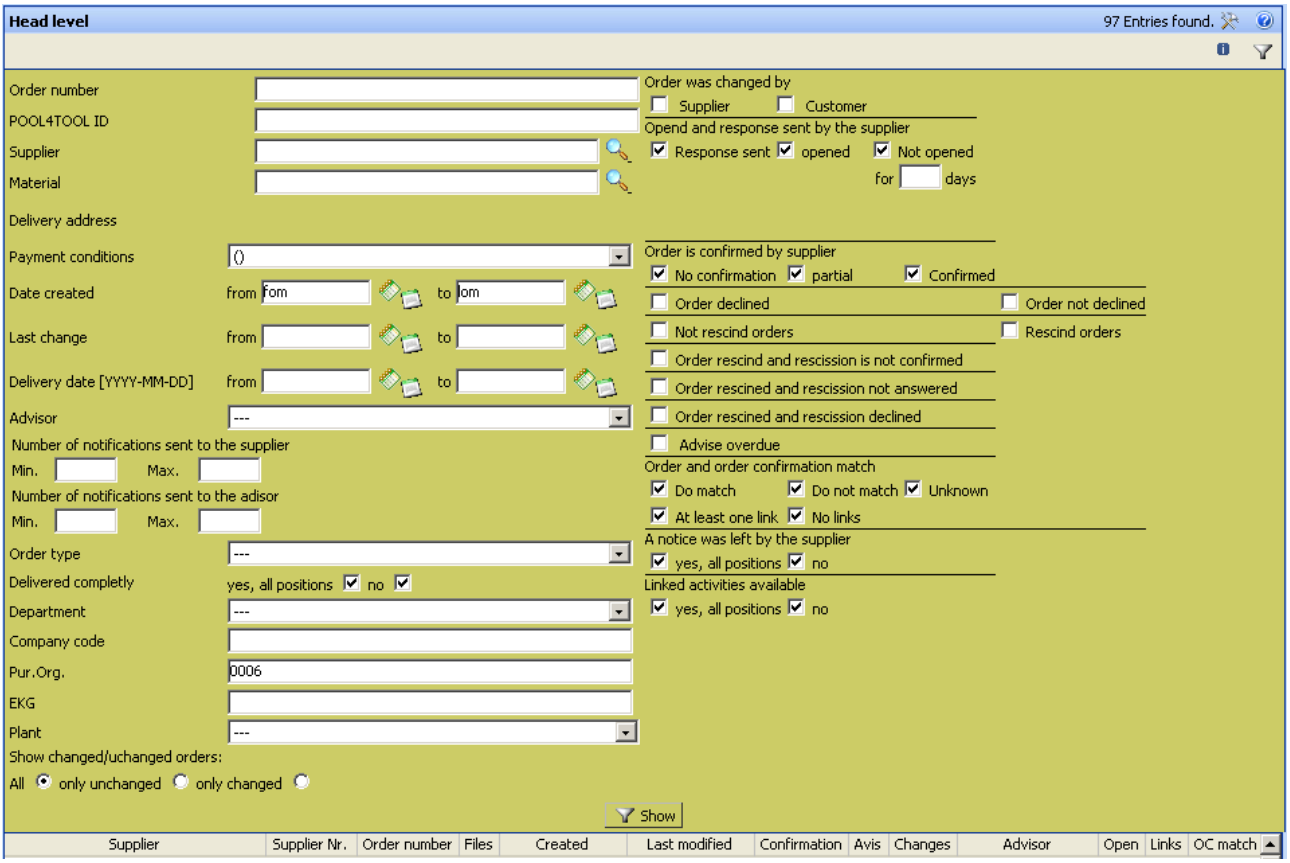
The button in the menu bar offers the possibility to filter the reference list as well as search for specific orders.



With a click on *Display* the list will be refreshed.

Essential information in the reference list is located in the columns:

Confirmation = Confirmation status of the order transaction

- Traffic light without color: the order was not yet confirmed
- Traffic light on green: the order was entirely confirmed
- Traffic light on yellow: the order was partly confirmed

Menu = continuative links

Button for opening an order transaction and for performing an order confirmation

Open = Processing / display status of the order transaction

= Order transaction was not yet opened via the button

= Order transaction was reviewed, but attached PDF not yet opened

= Order transaction and attached PDF were opened & order confirmation was sent

Last modified = Date of the latest order change

Last modified = In case of a change made by Zeiss the corresponding date will be shown here.

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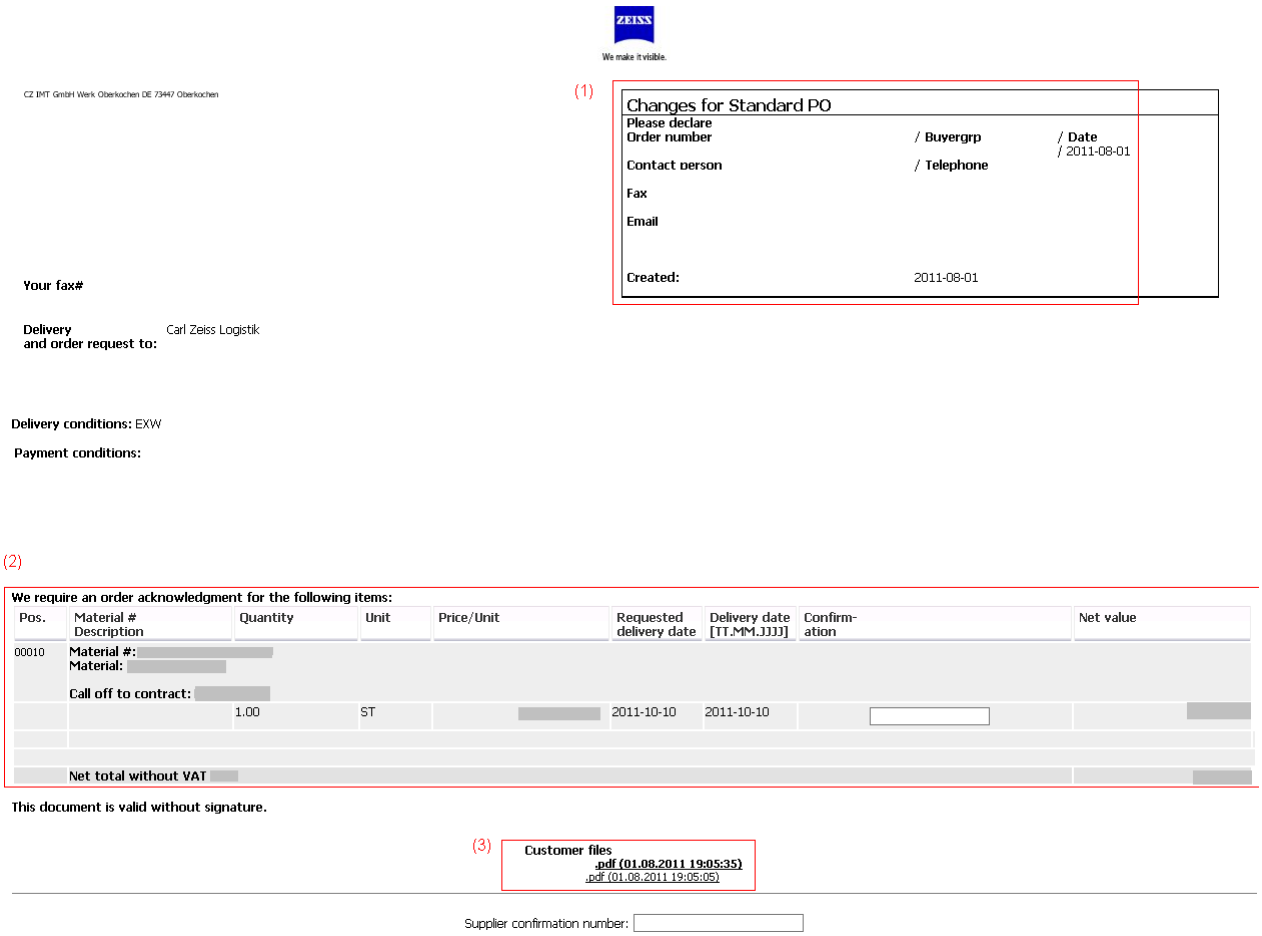
2.3 Process / confirm orders

You have the possibility to review, check and confirm individual orders in the reference list via the symbol in the menu column.

After clicking on the symbol or through the access via the link in the notification email, the following window will appear:



The upper area contains the header of the order with general conditions (1). The gray central area contains the single order positions with material number, material description, requested amount, delivery date and price as well as the essential boxes for order confirmation (2).

The lower area contains a button as well as shortcuts to the entire order in PDF format (3). You also have the possibility to export completed order confirmations into CSV format.

Before you can confirm an order, you have to click on the button *„In order to open the order, click on this button. Prior to that no confirmation is possible."*

If you click on this button, you have the possibility to display, print, save etc. the complete order as a PDF (the order will look like the previous hardcopies). This is the valid order document, which contains all essential information about the order and which you have to take carefully into account before confirming the order.

Afterwards you can proceed with the confirmation in the earlier displayed original window.

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Your order confirmation options are:

- Adjust the delivery date
- Enter order confirmation numbers per position or for all positions
- Arrange delivery schedules for individual positions
- Enter a statement for differing delivery date confirmations or price variances.

Generally, the following standards for order confirmations have to be considered:

- Zeiss claims an order confirmation for each order. Additionally, confirmed arrangements with Zeiss have to be attested in the supplier portal accordingly.
- Each order change conducted by Zeiss also has to be confirmed.
- Extensive changes have to be coordinated with a MRP via telephone. The portal can not replace adjustment conversations.
- The delivery date is the exact delivery date at Zeiss.
- The values in the confirmation are directly transferred to the system of Zeiss and have to be veridical and preferably up to date.
- The attachment of documents is not possible. Zeiss will only receive the values which were entered into the predefined areas.

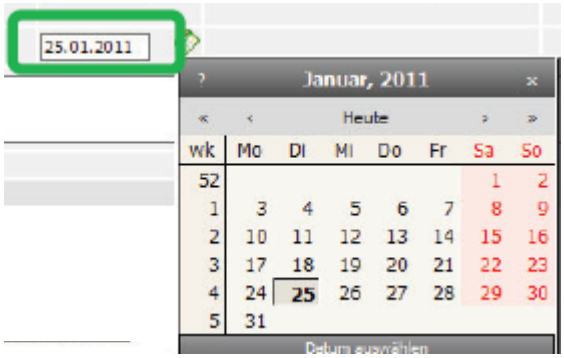
2.3.1 Order confirmation options

1) Confirm as ordered

In this case, the order confirmation number has to be entered either per position or on header level for all positions. Then click on “save & return“. The order confirmation will be automatically transferred to the SAP system.

2) Change delivery date

Choose the deviant delivery date via the calendar icon .



After entering your order confirmation number and pushing the button „save & return“, a change notification will be send to Zeiss and the buyer will be informed via email.

3) Amount scheduling

An additional row appears when you push the button split. Here you can divide the amount on different dates. The splitting can be implemented as often as desired. After entering your order confirmation number and pushing „save & return“, a change notification will be send to Zeiss and the buyer will be informed via email.

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4) Partial confirmation

You can manage the confirmation of order positions through removal of the check marks . When you push the button „save & return“, the partial confirmation will subsequently be send to Zeiss.

5) Info box

Additional information can be send to Zeiss via this box. The buyer receives an email with the contents of the info box. This box should only be used for contents that are relevant for Zeiss (e.g. price variances).

2.3.2 Status of the order confirmation

After you click on „save & return“, a status update appears in the upper frame, which informs you about the successful or failed transmission of your order confirmation:

Successful transmission:

Failed transmission:

Please repeat the transaction if transmission of the IDOC (= electronic document) fails. If a transmission is not possible, please contact Pool4Tool. You can reach the Pool4Tool support via:

POOL4TOOL Support Team
Selected Services GmbH
Altmannsdorfer Straße 91/19
1120 Vienna, Austria
Internet: www.pool4tool.com
E-Mail: support@pool4tool.com
Phone: +43 1 80 41 050

2.4 Cancelations

If Zeiss cancels an order or position, you will be informed via email and the order transaction will be displayed as crossed out on the portal. A confirmation on your part is no longer required.

~~4530158496 / 10~~ ~~0~~ CZ Industrielle Meßtechnik GmbH, 73447 Oberkochen ~~1,00~~

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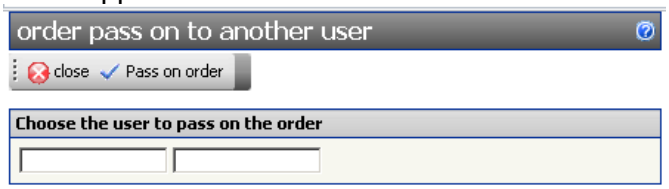
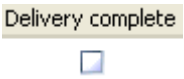
2.5 General Information

- Print out the order with the button *Print*.
- With the second icon in the column menu you can jump to the item level of the order.
- With the book icon in the column menu you can jump to the classification view.
- With the fourth symbol in the column menu you can pass an order on to another user. Insert the name of the user in the corresponding box of the following popup. Afterwards a dropdown list with corresponding users appears.



- With the icon

in the menu bar all order transactions and all filtered data in the reference list can be exported to Excel. With the icon in the column menu all data of an individual order transaction can be exported to Excel.
- With the icon in the menu bar you can determine which columns will be shown in which order in the reference list.
- With a double click on the column header all order transactions in the reference list will be sorted in ascending or descending order.
- With the icon in the reference list you have the possibility to create a delivery note for one or more order transactions with all relevant data. You could also advise the delivery for Zeiss in advance.
(If you would like to use this option, we can send you a detailed process description.)
- In the menu bar you have the possibility to change the language of the Pool4Tool portal in a drop down list.

- In the column *Completely delivered* you have the possibility to mark completed transactions. 

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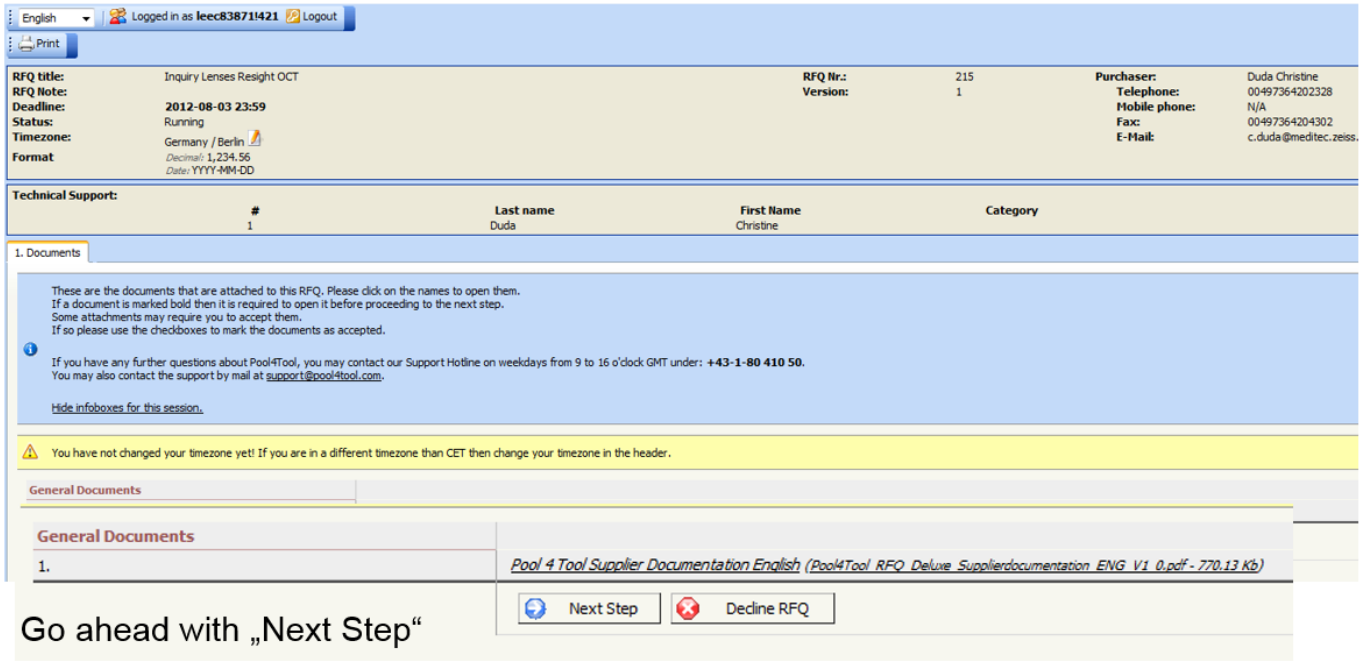
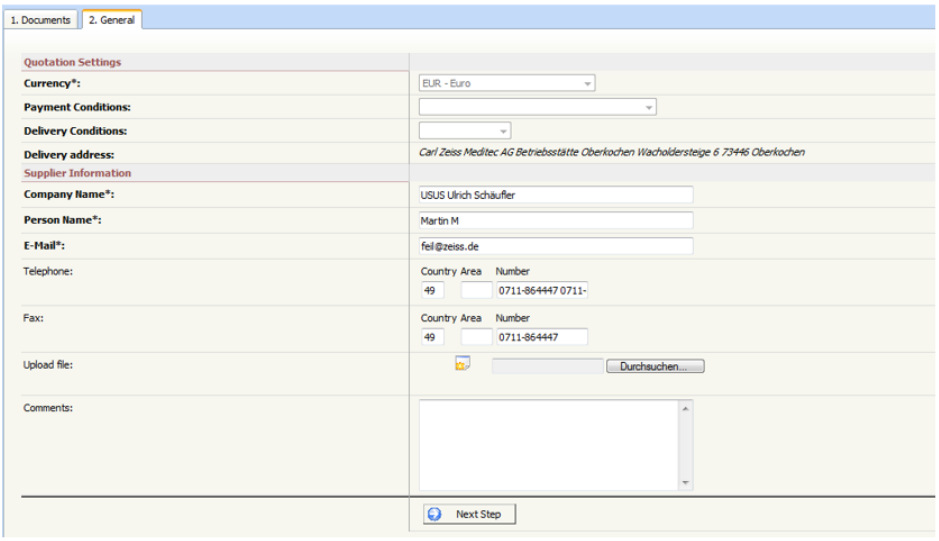
3. RFQ

1. Step: Edit the header documents



Go ahead with „Next Step“

2. Step: General RFQ information



In this tab you find the Quotation Settings and the Supplier Information.
In the “Quotation Settings”- area the purchaser can determine whether or not you can change the settings.
In the “Supplier Information”-area you can see your personal data which are changeable.

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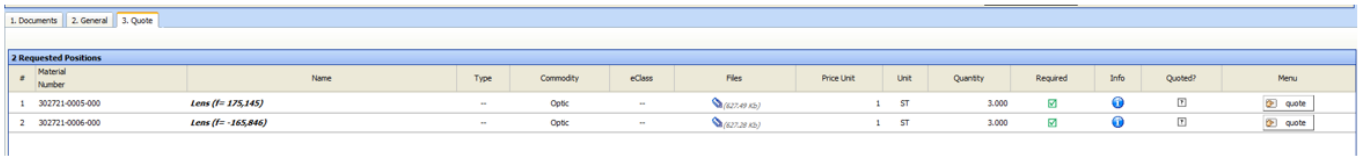
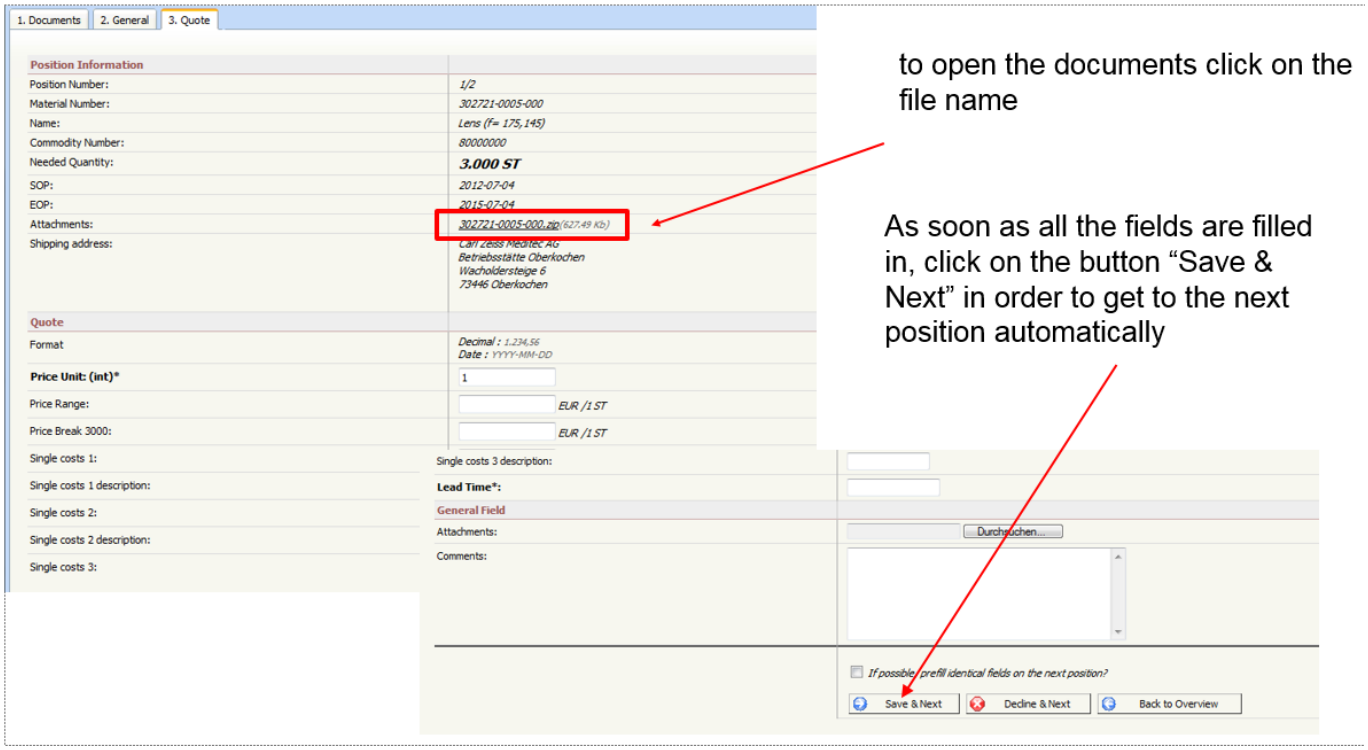
3. Step: „Quote“



In tab 3 „Quote“, all requested positions are listed. If you can see a green checkmark in the “Required”-row, this means that this position is mandatory and must be filled in.
To fill in a position click on the button “View Details” in the “Menu”-row.

To open the position documents click on the symbol

→ Open the position details with „quote”



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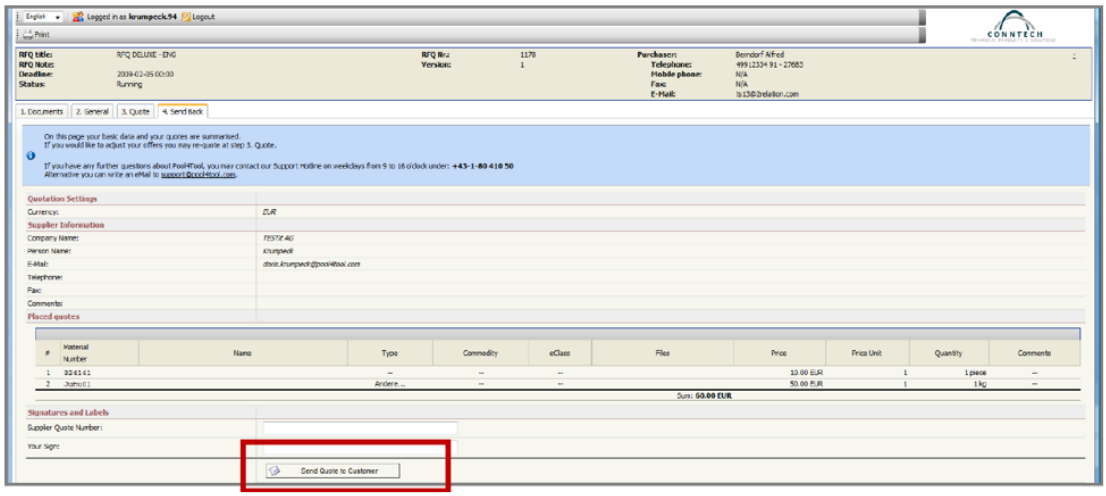
→ 4. Step: Send the offer back to Carl Zeiss



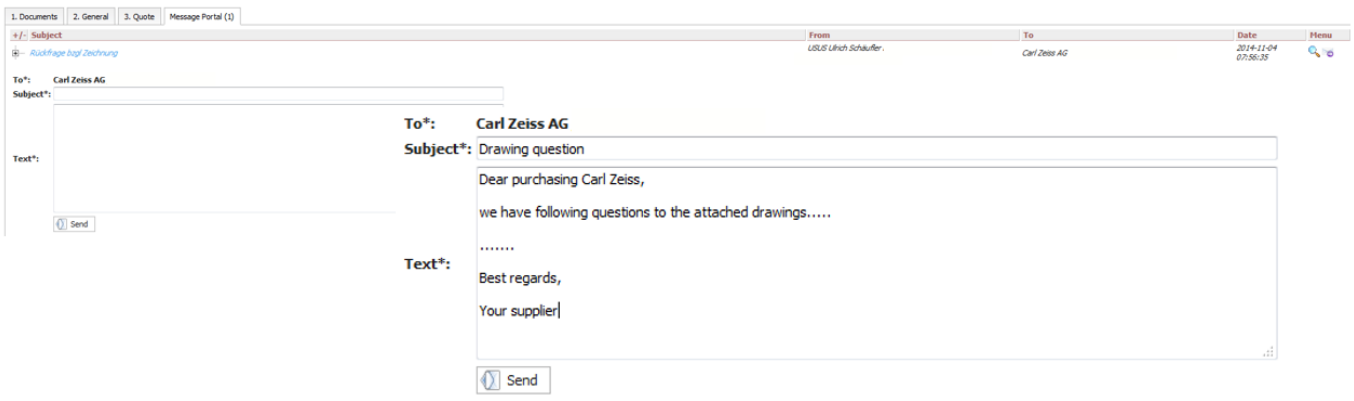
In Tab 4 „Send Back“ you get an overview of the whole request. To change the data you filled in before, you need to go back to the designated tab.
Before you send back the quotation to the purchaser, there’s the opportunity to fill in a “Supplier Quote Number” and “Your Sign”
After that you can hit the button „Send Quote to customer“. As soon as you clicked on this button, your quotation will be sent back to the purchaser and you can’t change it anymore.

→ Improved communication with the request relation between you and Carl Zeiss

For any questions you will be able under the tab "Message Directory" to contact the Carl Zeiss buyers and the technical contacts directly, with the RFQ relation.

There is always a reference to the RFQ, from which you start the message.

Also you can see in this portal the entire communication history.



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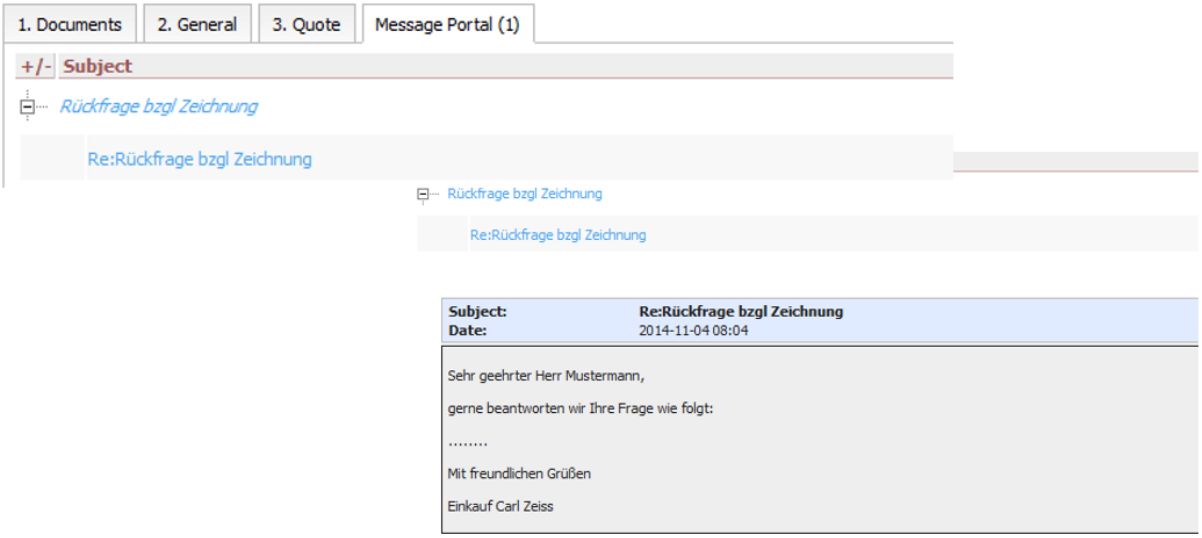
The responses from our site are also available in the **Message Portal**. Additional you will be inform via email.

Notice: Please respond only via the Pool4Tool portal.



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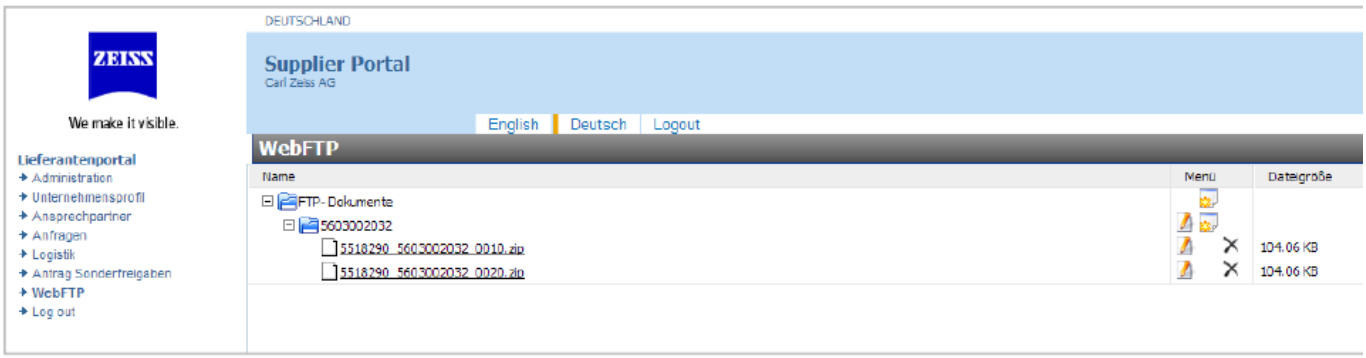
4. Document transmission/ WebFTP

Instruction for the retrieval of documents:

For the retrieve of documents to an order by the supplier portal Pool4Tool, click on the link www.pool4tool.com/portal/zeiss and go on with “WebFTP”. There you can find all documents which are provided by the FTP- Server. (Screenshot). The documents are listed in the folder which is named with the order number. The name of the documents are structured like the following principle “Supplier number_Order number_Item”

To download a document package click either on the data file or on the data file and afterwards on “Save link under”



Bitte beachten Sie, dass die Dokumente nach dem Erhalt der Bestellung aus technischen Gründen erst innerhalb von 24 Stunden zur Verfügung gestellt werden können und damit die Dokumente aus datenschutzrechtlichen Gründen nach 10 Tage vom Server gelöscht werden.

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4. VMI

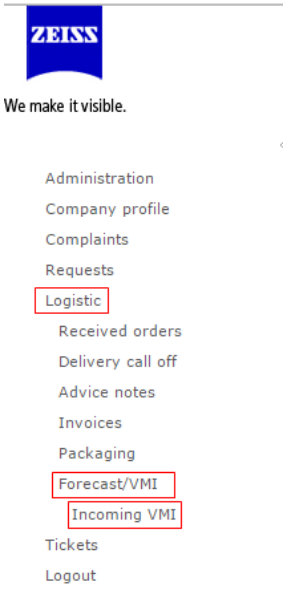
4.1 Definition: VMI

VMI (=Vendor Managed Inventory) enables the supplier to take over the customer's material requirement planning in order to adapt it as much as possible to his own production scheduling and capacities.

Therefore a minimum and maximum stock quantity is defined for each material and the customer's requirements are shown and updated daily on the Pool4Tool portal.

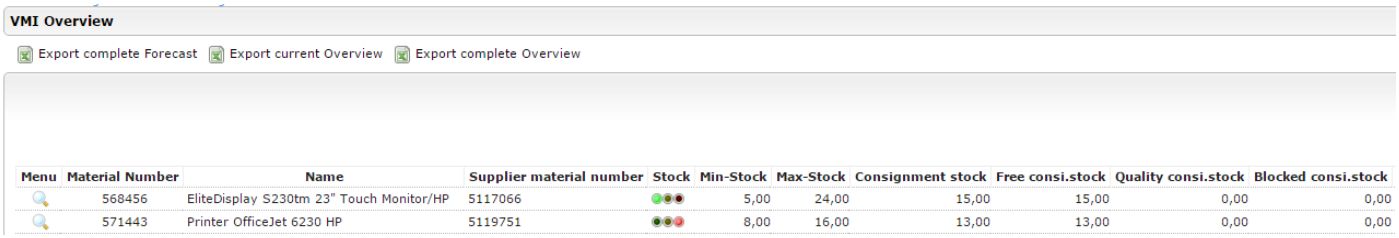
4.2 Access and structure of VMI

The VMI section on the Pool4Tool portal is located at: Logistic->Forecast/VMI->Incoming VMI



4.3 VMI-Overview

The initial screen of the VMI section is the VMI Overview. In the VMI Overview, all articles and their essential parameters for planning material requirements are listed.



Menu	Material Number	Name	Supplier material number	Stock	Min-Stock	Max-Stock	Consignment stock	Free consi.stock	Quality consi.stock	Blocked consi.stock
	568456	EliteDisplay S230tm 23" Touch Monitor/HP	5117066		5,00	24,00	15,00	15,00	0,00	0,00
	571443	Printer OfficeJet 6230 HP	5119751		8,00	16,00	13,00	13,00	0,00	0,00

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The VMI overview contains the following columns:

Column	Description
Menu	The magnifying glass icon opens the detailed view for each material
Material number	ZEISS material number
Name	ZEISS material description
Supplier material number	Material number of supplier
Stock	Traffic light symbol shows if the current stock level is within the defined range
Min – Stock	Minimum consignment stock level of each material
Max - Stock	Maximum consignment stock level of each material
Consignment Stock	Current consignment stock (complete)
Free consi.stock	Current consignment stock (can be used)
Quality consi.stock	Current consignment stock (quality)
Blocked consi.stock	Current consignment stock (blocked)
Entire Amount (Current Month)	Summarized demand for current month
Entire Amount (Next Month)	Summarized demand for next month
Entire Amount (30 Days)	Summarized demand for next 30 days
Entire Amount (3 Months)	Summarized demand for next 3 months
Free own stock	Additional customer stock
Entire Amount orders (30 Days)	Summarized quantity of already existing orders within next 30 days
Entire Amount orders (3 Months)	Summarized quantity of already existing orders within next 3 months
Vendor Number	
Vendor name	
Plant	ZEISS plant number
Last viewer (Supplier)	Shows which supplier account has most recently opened the detailed view for each material
Last view date (Supplier)	Date of last view
Contract number	Related Zeiss contract number
Contract position	Related Zeiss contract position
Date and time of transmission	Latest update of requirements / stock by Zeiss

Stock traffic light

The traffic light shows the status of the stock for the actual and the following day. The respective status refers to the average stock from two days as compared to the given min. stock. In the case of a green traffic light, the min. stock is available for the next two days. If the traffic light is yellow, the min. stock has fallen short by up to 40% and should be monitored. As soon as the average stock falls by more than 40% below the min. stock, the traffic light switches to red. The traffic lights can be calculated as follows. The stock from today and tomorrow is divided by the min. stock in each case and then added. This sum is divided by 2 to determine the average value. The traffic light color depends on the average value. If the value is greater than 0.9 (90%), the light becomes green. Less than 0.6 (60%), the stock lies in the red, critical area. A yellow traffic light indicates that the stock is between these two values.

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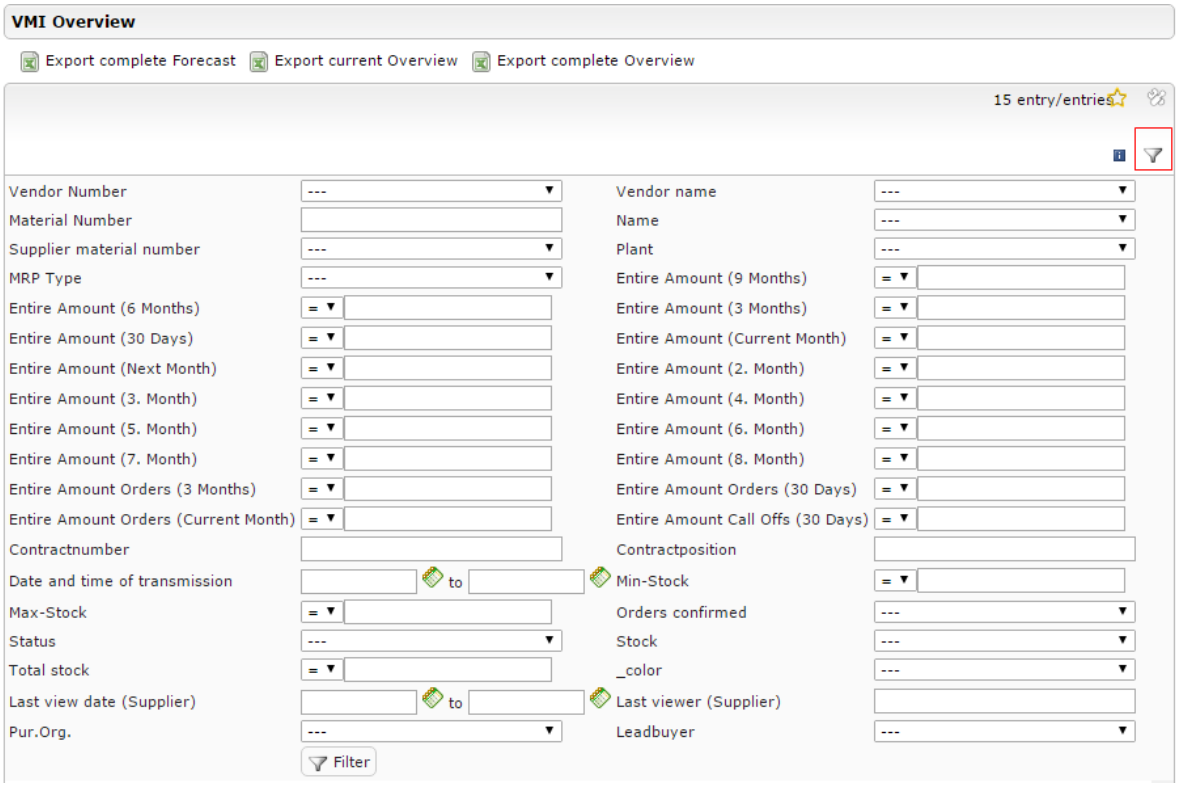
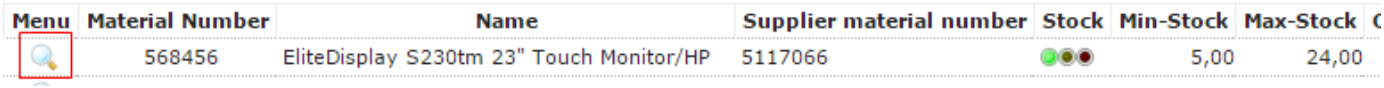
Filter in the VMI Overview

By using the filter icon, you can reduce the criteria for the materials listed in the VMI Overview.



VMI Detailed View

A magnifying glass symbol in the Menu column of the VMI Overview opens the VMI Detailed View for each material



Section: Details

The first section of the VMI Detailed View also contains the data from the VMI Overview. Additionally, the responsible planner from ZEISS and his contact information is given.

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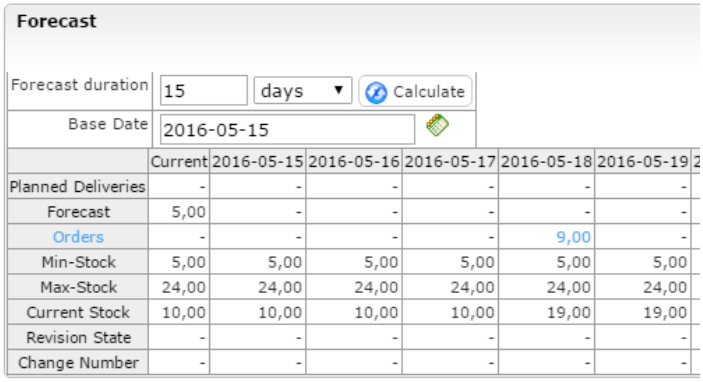
Section: Forecast

The second section of the VMI Detailed View contains exact dates on which materials are required and also displays planned deliveries and VMI orders which have already been created. Using this data, the prospective development of existing consignment stock is shown.



	Current	2016-05-15	2016-05-16	2016-05-17	2016-05-18	2016-05-19	2
Planned Deliveries	-	-	-	-	-	-	
Forecast	5,00	-	-	-	-	-	
Orders	-	-	-	-	9,00	-	
Min-Stock	5,00	5,00	5,00	5,00	5,00	5,00	
Max-Stock	24,00	24,00	24,00	24,00	24,00	24,00	
Current Stock	10,00	10,00	10,00	10,00	19,00	19,00	
Revision State	-	-	-	-	-	-	
Change Number	-	-	-	-	-	-	

In addition to the VMI Overview, the Forecast section is the central component of the VMI module. Based on the data shown here, the supplier must ensure that the Min- and Max-Stock quantities are fulfilled and the supply of materials for ZEISS is adequate.

The columns and lines of the Forecast section are described in detail below:

Column / Line	Description
Forecast duration and Base Date	The duration and start of the forecast could be changed. Additionally, the displayed view can be switched from a daily to a weekly or monthly summary. By clicking on the computer button, the preview is recalculated and redisplayed with the time frame entered.
Planned Deliveries	In the Planned Deliveries line, VMI deliveries and their effect on the prospective stock can be simulated and the corresponding VMI orders can be generated (for a detailed description, see section 3).
Forecast	In this line, the accurate ZEISS requirements are displayed. It must always be possible to fulfill demands from the current stock.
Orders	VMI orders which have already been created are shown in this line. Scheduled VMI deliveries will be added to this line after successful processing.
Current Stock	Collects current consignment stock with open orders, planned deliveries and demands and shows prospective consignment stock development. This value always has to be between Min. and Max. -Stock quantities.
Column Current	Open orders with an income date in the past and ZEISS' demands in the past which have not been withdrawn are summarized in the column and influence the current stock of the base date.

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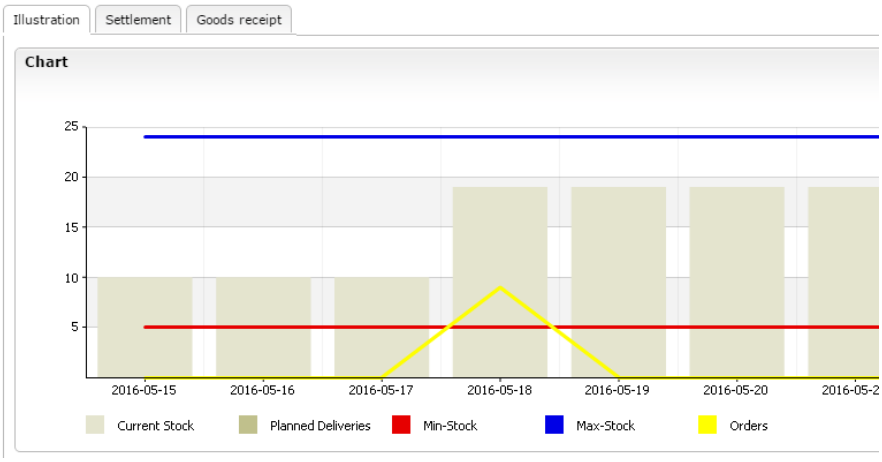
Section: Chart

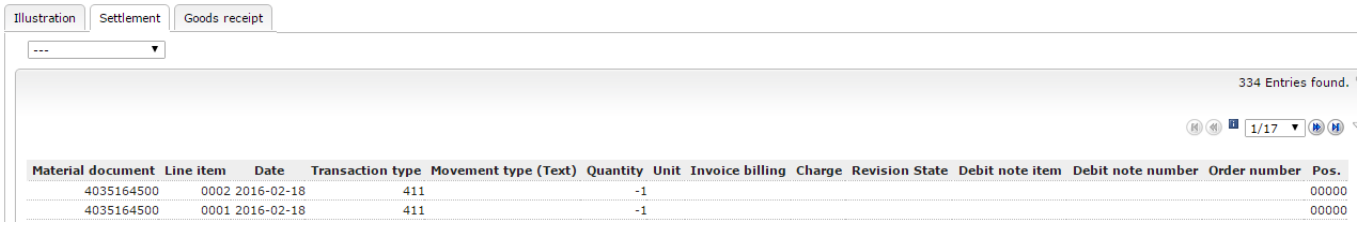
Illustration

In this tab, the data for the section forecast will be displayed as a graph.



Settlement – consignment stock withdrawals

Consignment stock withdrawals by ZEISS will be shown and updated daily in this tab.



Goods receipt – Incoming goods entries for VMI orders

All the incoming goods entries for this material are displayed in the “Goods receipt” tab. Here you can have a detailed look at the ZEISS incoming goods entries. These data are updated daily.

4.4 VMI orders / deliveries

4.4.1 Adding a VMI order

To add a new VMI order, go to the “Planned deliveries” line in the detailed view located in the “Preview” box. By using the “Edit” icon for the delivery date you have selected, an entry field appears in which the desired quantity can be entered. If the entry is made in the weekly or monthly view, then the delivery schedule will be for the first day of the week or month. When finished, click on the “Save/Disk” icon.

The saved field is now blue, which means that this is only a simulation. The "Preview Current Stock" line is also affected.

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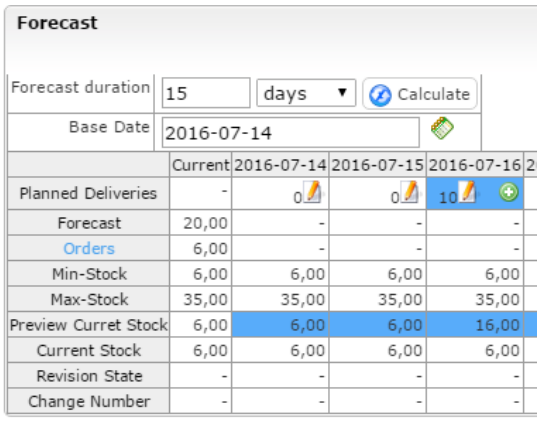
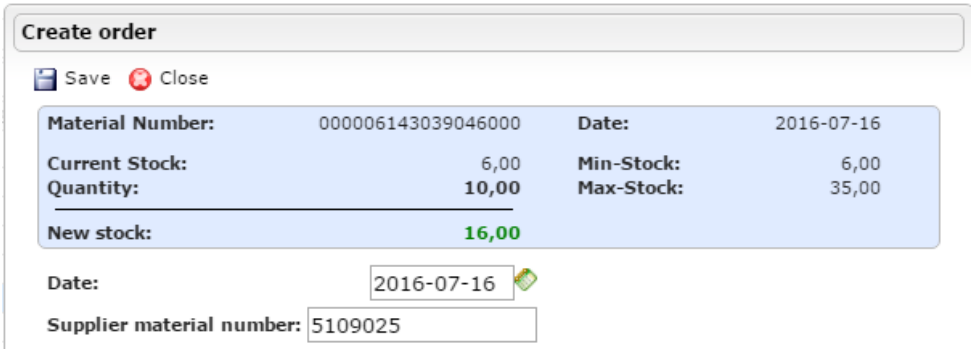
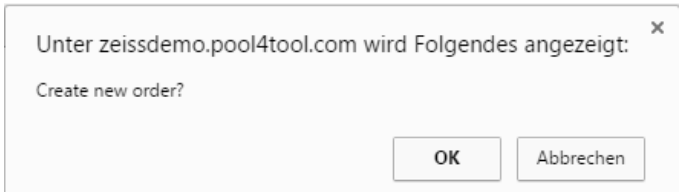


If you would like to add the planned delivery, please click on the green "+" icon (or the , depending on the display settings). This opens a new pop-up window with all the important data.



Here you have the opportunity to change the delivery date. If you would like to save the order, please click on "Save." You will then be asked again if you would like to save the order. Please confirm with a click on the “OK”-Button



Please weight a few second and refresh the page if necessary. The saved order is now displayed in the "Orders" line.

4.5 Changing a VMI order

VMI orders can be changed by the supplier so long as ZEISS has not made any received goods entries.

To find this information, click on the saved line heading (blue text) in the detailed view in the "Preview" area or click directly on the order item schedule line you want to change.

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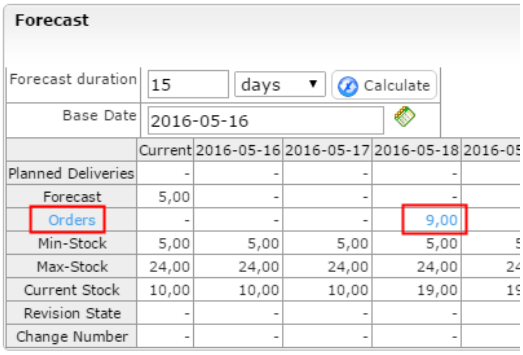
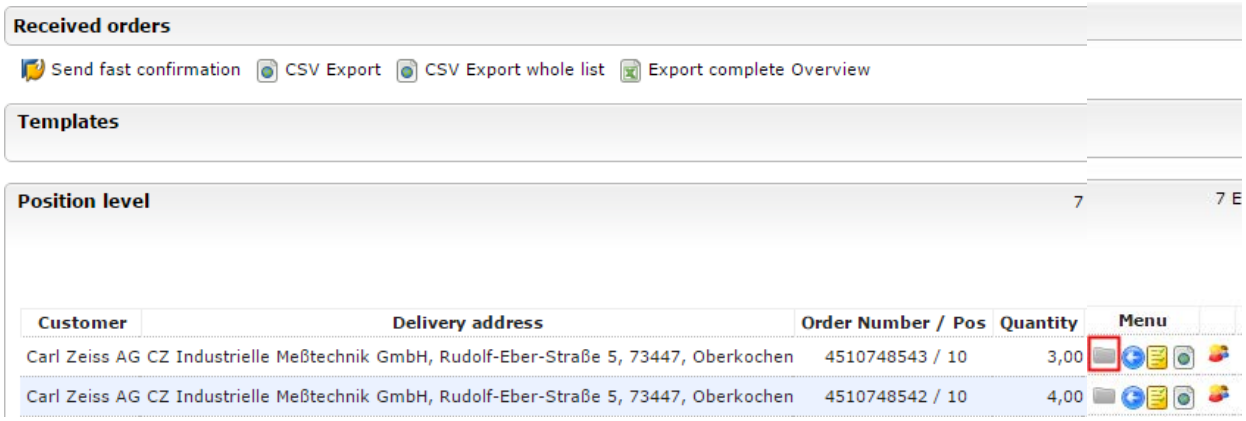
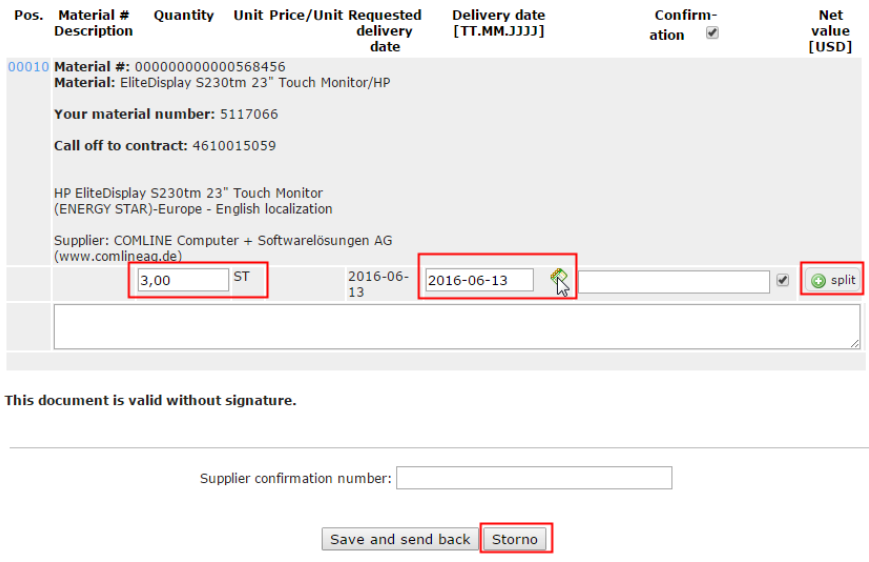


By clicking on this link, a new window opens with all open VMI orders and/or existing orders for this delivery date.



By using the gray folder icon in the "Menu" column, the supplier can open the particular order and perform the following changes to the order:

- Change the delivery date
- Split the order
- Change the quantity
- Cancel the order



After you have made a change, you must click on the "Save and send back" button.

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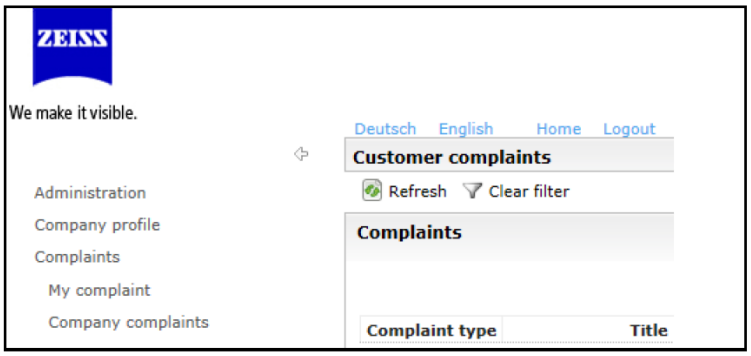
5. Rejection (5D/8D)

At registration in the supplier portal the complaints which are ready for processing are given at the menu Item „Complaints“.

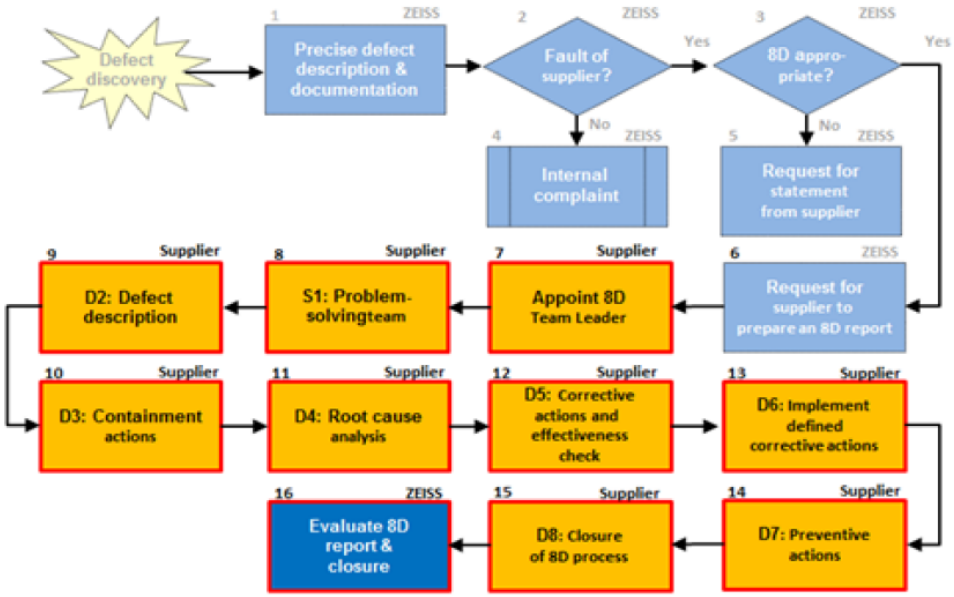
- My complaint — complaints assigned to the contact person
- Company-complaints — all complaints of the supplier



There are 3 types of reports/complaints

- Short confirmation
- 5D-report (explained here)
- 8D-report

The name 8D results from the 8 steps (or disciplines) which this method includes. It is a structured problem solving method, which aims a sustainable stop of defects and problems. For this the basic reasons causing the defects will be analyzed and permanently stopped. Emergence actions protect die customer against defective parts, during the problem solving process. Prevention actions against defect repetition ensure that similar or equal defects do not happen at other places in the company.



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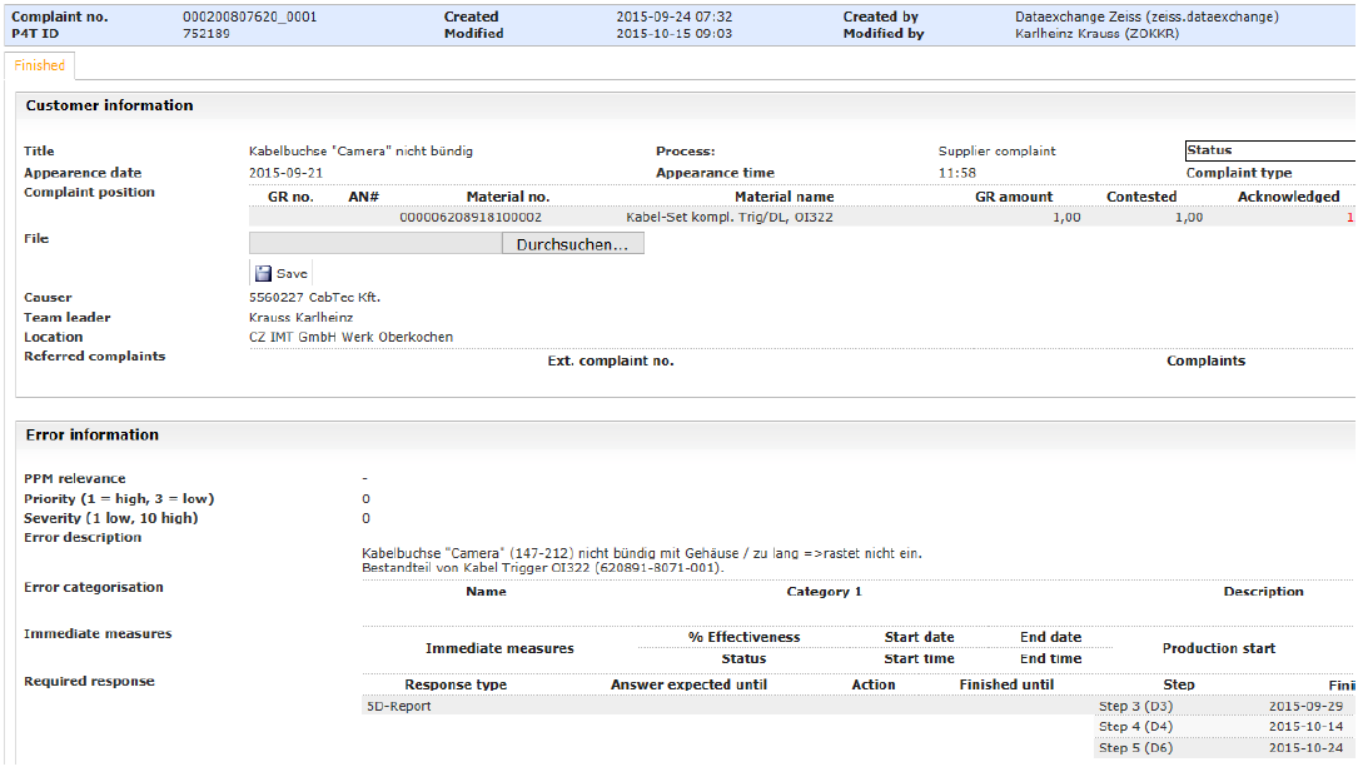
5.1 Costumer/ error information



Complaint no.	000200807620_0001	**Created**	2015-09-24 07:32	**Created by**	Dataexchange Zeiss (zeiss.dataexchange)
P4T ID	752189	**Modified**	2015-10-15 09:03	**Modified by**	Karlheinz Krauss (ZOKKR)

Finished

Customer information

Title	Kabelbuchse "Camera" nicht bündig	**Process:**	Supplier complaint	**Status**	
Appearence date	2015-09-21	**Appearance time**	11:58	**Complaint type**	

Complaint position

GR no.	AN#	Material no.	Material name	GR amount	Contested	Acknowledged
		000006208918100002	Kabel-Set kompl. Trig/DL, OI322	1,00	1,00	1

File Durchsuchen...

Save

Causer	5560227 CabTec Kft.
Team leader	Krauss Karlheinz
Location	CZ IMT GmbH Werk Oberkochen

Referred complaints

Ext. complaint no.	Complaints

Error information

PPM relevance	-
Priority (1 = high, 3 = low)	0
Severity (1 low, 10 high)	0
Error description	Kabelbuchse "Camera" (147-212) nicht bündig mit Gehäuse / zu lang =>rastet nicht ein. Bestandteil von Kabel Trigger OI322 (620891-8071-001).

Error categorisation

Name	Category 1	Description

Immediate measures

Immediate measures	% Effectiveness	Start date	End date	Production start
	Status	Start time	End time	

Required response

Response type	Answer expected until	Action	Finished until	Step	Fini
5D-Report				Step 3 (D3)	2015-09-29
				Step 4 (D4)	2015-10-14
				Step 5 (D6)	2015-10-24

Complaint No. ⇨ complaint number generated by CZ
Created ⇨ creation date
Created by ⇨ creator CZ

Title ⇨ short error description
Status ⇨ status of complaint
Material number ⇨ CZ-material number
File ⇨ file notes to the complaint
Causer ⇨ supplier number and supplier name
Team leader ⇨ coordinator /contact person CZ

Error description ⇨ expanded error description
Required response ⇨ short confirmation, 5D-report or 8D-report
⇨ expected graduation date of each step

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5.2 Active complaint processing

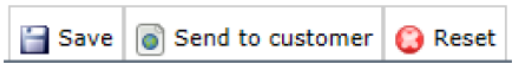
All fields filled with an * are **required fields**.

The response time in the individual disciplines are specified for the supplier. If the time limits for the steps D3 containment actions and D6 (5D-report) or D8 (8D-report) will be exceed, automatically a reminder system becomes activated.

D3	⇨	5	calendar days
D6 or **D8**	⇨	30	calendar days

Before a containment action is send to the supplier, a reason code must be specified (deleted by new release).
For the supplier it is possible to save every single step, without transfer the data.

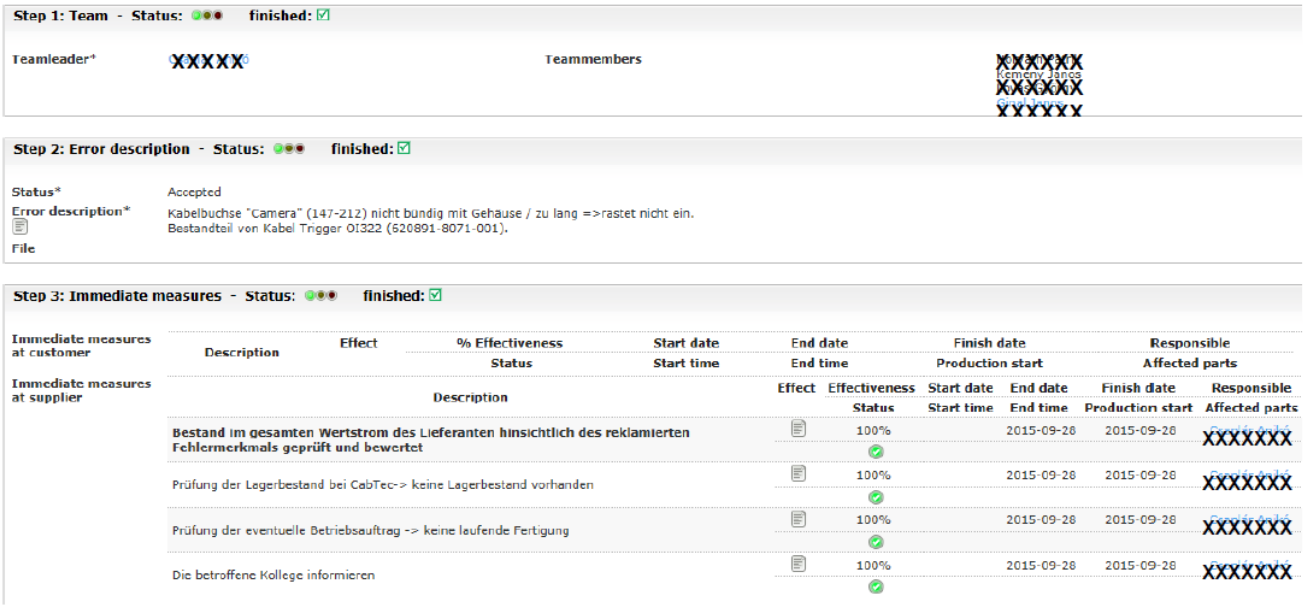
Among each report the following buttons are shown.



Save	the report is saved
Send to customer	return to team leader (costumer)

The single steps must be sequential processed for a 5D-/8D-report.

Step 1(D1) to step 3(D3)



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Step 1: Team

Team leader	⇨	Specification of the team leader and the team members Team members could be added by the +
Status	⇨	in each of the 5 or 8 steps a status could be selected (Ok, critical or endangered) via a traffic light system
Finished	⇨	before further processing every single step must be finished

Step 2: Error description

Status	⇨	here a status must be selected (accepted, not accepted or decision pending) the accepted incorrect number of pieces must be transferred to the field “Complaints position” (headboard)
Error description	⇨	this step is all about describing the problem. The result must be a complete, understandable, clear and delimited description of the problem. This description is built on the error description of the complaining organization and is the base for the quality of the basic cause in step D4.
File	⇨	via the “add file” button a file could be added It is possible to add files for each single step

Step 3: Containment actions

Containment actions are a sort of „emergency management“, which should protect the costumer immediate against the consequences of the problem, until it is sustainable and final solved. The containment actions should be coordinated with the customer. They got to be maintained and permanently check on their effectiveness, until the permanent corrective actions from step D6 are effectively implemented.

Indication of emergency actions at the customer and / or

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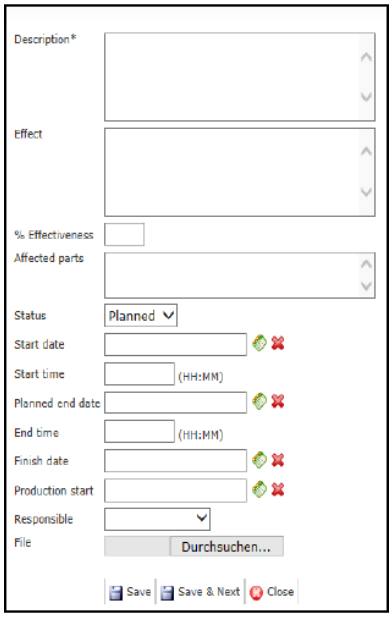
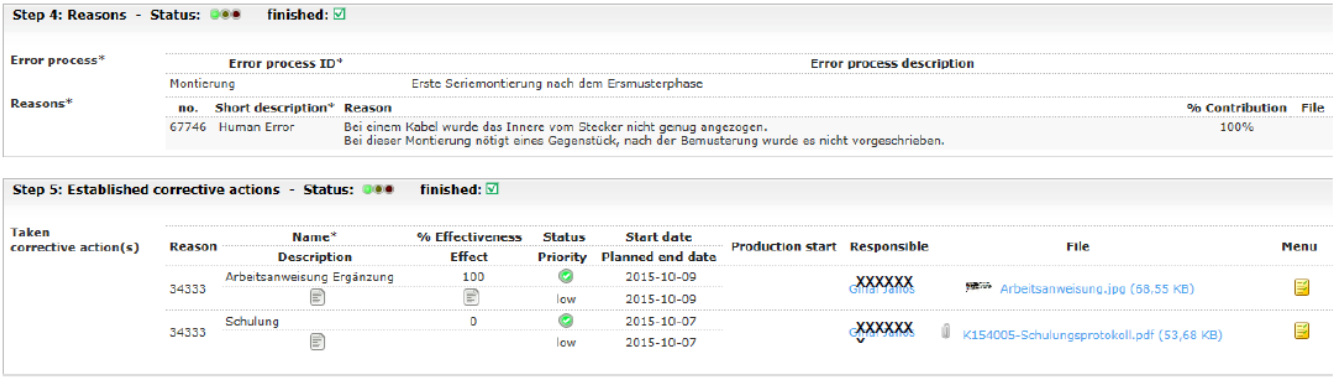
Description	⇨	description of the containment actions
Effect	⇨	description of the effect (proof)
% effectiveness	⇨	indication of the percentage effect
Affected parts	⇨	indication of the affected parts
Status	⇨	status indication planned/ in prog./completed
Start date	⇨	indication of the starting date
Start time	⇨	indication of the starting time
plan. end date	⇨	indication of the planned end date
End time	⇨	indication of the end time
Finish date	⇨	indication of the end date
Production start	⇨	indication of the production start
Responsible	⇨	indication of the responsible person
File	⇨	here a file can be added



Examples for containment actions:

- Defective parts got be checked, sorted and removed from all stocks
- prevent delivery of faulty parts to customers
- product that already were produced got to be checked, sorted and possibly touched up
- temporarily change(s) at the product/ the process for reaching the target
- documentation of the changes (interims- working plans, -test plans…)
- establishing additionally inspections and demonstrate effectiveness
- replacement delivery with parts that are conform to specification

Step 4(D4) to step 5(D6)



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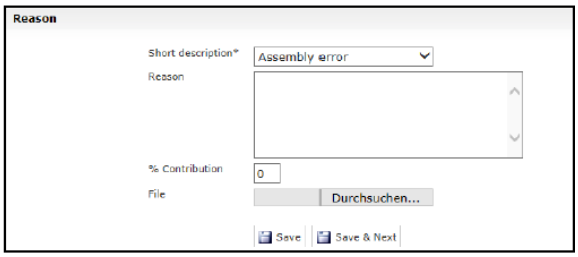
Step 4: Reasons

Analysis of the problem causing basic causes. The final result of the problem solving process is massively influenced by this step. A wrong analysis of these problems would generate inadequate remedial. The result of this step is a clear identification of the problems basic causes. They must be verified through cause-effect relationships. The problem must be explainable by the basic causes.

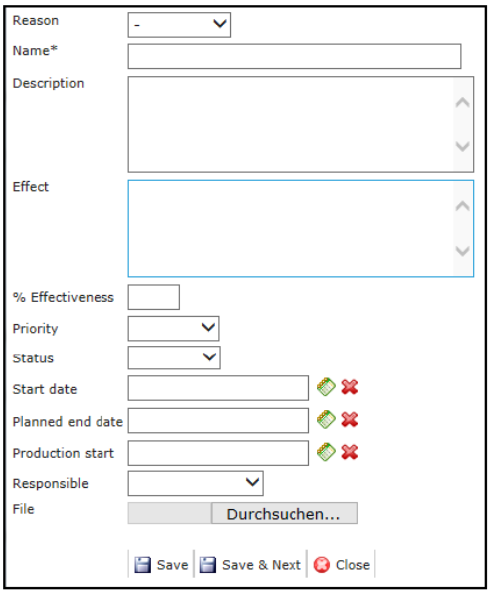
Short description ⇨ preassigned catalog selection
Reason ⇨ indication of the cause
% Contribution ⇨ indication of what percentage the cause is involved in the error
File ⇨ attachment



Step 5: Established corrective actions

Note to 5D-report
On the basis of the 8D-report the supplier is given 5 disciplines for completion.
The disciplines “planned remedial”, “preventive remedial” (incl. efficacy evaluation) and the statements comment were hidden.

Reason ⇨ select the cause for the remedial
Name ⇨ preamble of the description
Description ⇨ description of the remedial
Effect ⇨ evidence for the effectiveness of the unreacted actions
%Effectiveness ⇨ indication of the percentage efficacy
Priority ⇨ priority of the remedial
Status ⇨ status of the remedial
Start date ⇨ starting date of the remedial
plan. end date ⇨ planned graduation date
Production start ⇨ production start
Responsible ⇨ responsible person for the remedial
File ⇨ attachment



After the effectiveness of the realized actions is proved, the containment actions, which were introduced in 3 steps, were removed.

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6. Administration

For any questions or issues please contact the in *point 2.3.2* named Pool4Tool Support Hotline.

6.1 Administration as a user

You have the following alternatives as a user:

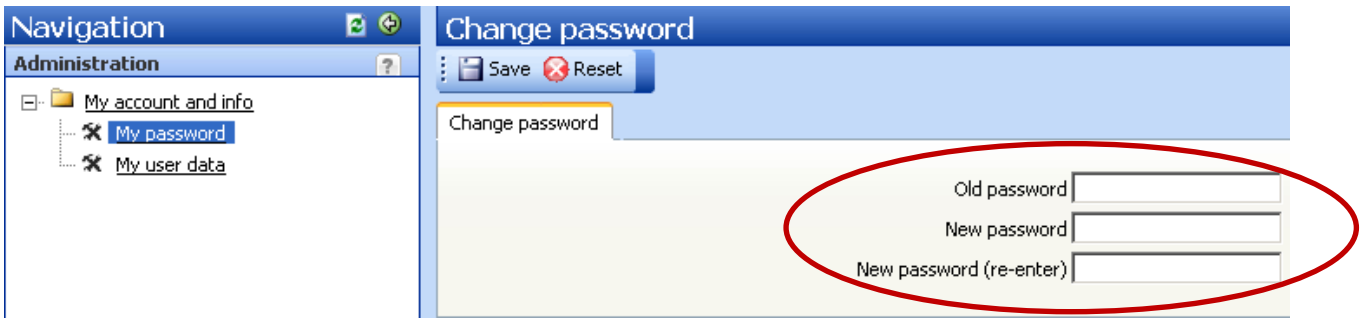
- Change password
- Change user data

Change password

In order to change the password, please proceed as follows:

„Administration“ – „My account and info“ – „My password“:

Now you have to enter your current and new password twice. Afterwards click on “Change” in order to confirm the new password.



After confirming the new password, you have to log out and afterwards log in with your new password.

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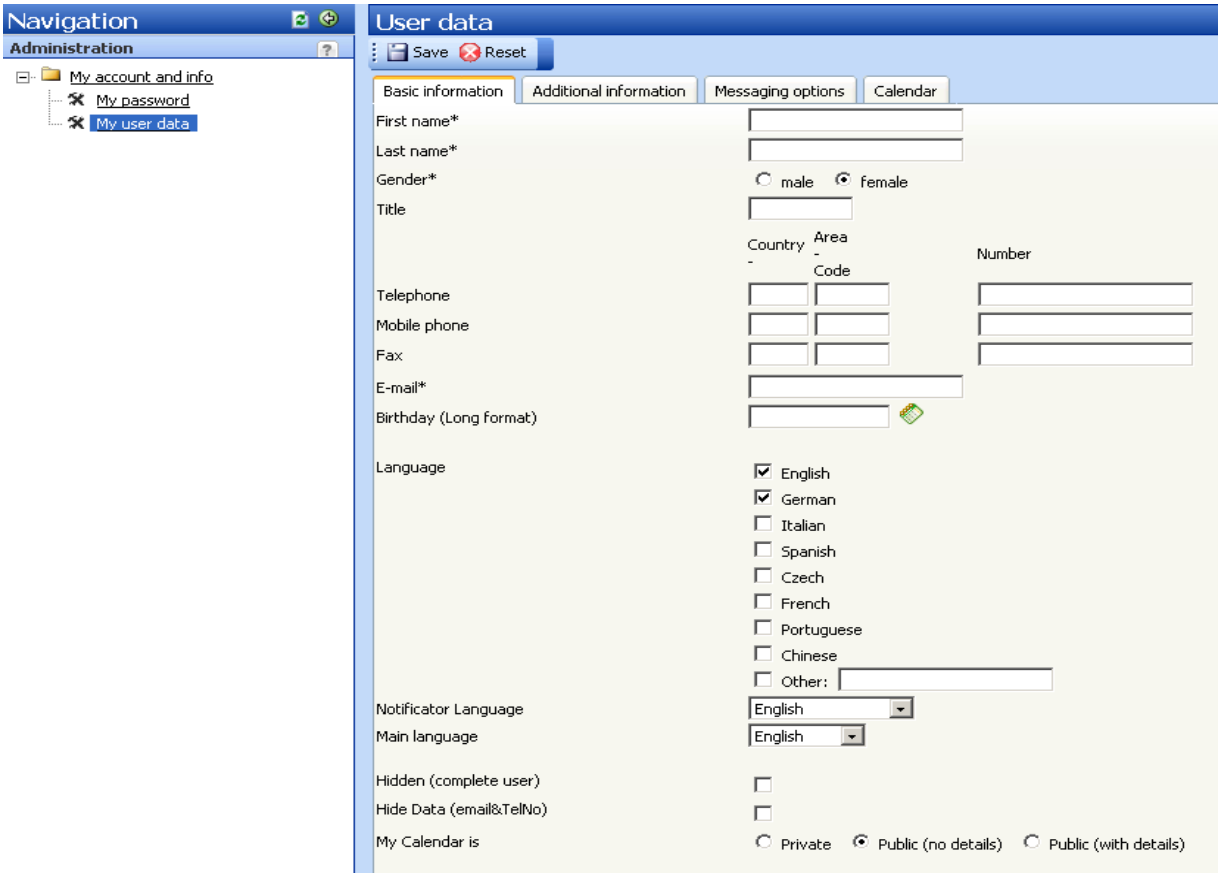
Change user data:

In order to change your personal settings like name and email address, you have to enter the administration as described earlier. Click on “My user data“ in the navigation tree.



The

Following boxes can be changed:

- **First and last name**
- **Gender**
- **Telephone number, mobile phone and fax number and email address**
- **Language:** Here you can decide on your communication language.
- **Main language:** Here you can choose the language of the standard portal display.
- **Hidden:** You do not appear as a user in the user list of your company.
- **Hide data:** Your data is not visible on the POOL4TOOL market place.
- **My calendar is:**
    - o Private: Your calendar is not visible for other users of your company.
    - o Open (no details): Other users of your company can see your calendar, but no details are shown.
    - o Open: Other users of your company can see your calendar including details.

Change your settings and click on „Save“.

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6.2 Administration as a key user

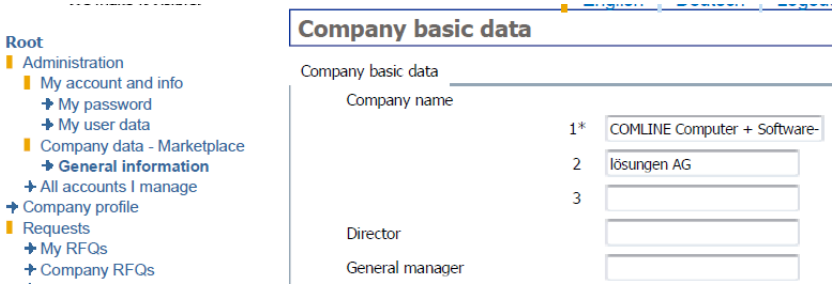
As an administrator you have two additional options:

- Change company data
- User administration

Change company data:

In order to change company data, please proceed as follows:

„Administration“ – „Company Data“ – „Basic Data“



The following data can be changed:

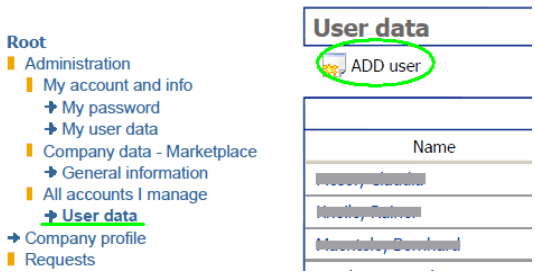
- **Company names**
- **Director of the company and CEO**
- **Address, telephone and fax number, homepage, email addresses**
- **Logo:** You can upload your company logo here.
- **Hidden:** Your data is not visible on the POOL4TOOL market place.
- **Company information:**
  - Brief information: You can enter brief information about your company in several languages here.
  - Detailed information: With a click on the memo symbol you can specify detailed information about your company in several languages.

Change the settings and click on „Change“ on the lower part of the site.

User administration:

Key user rights allow you to create new users and edit existing users. In order to administrate users proceed as follows:

„Administration“ – „Administrate all users“ – „User list“



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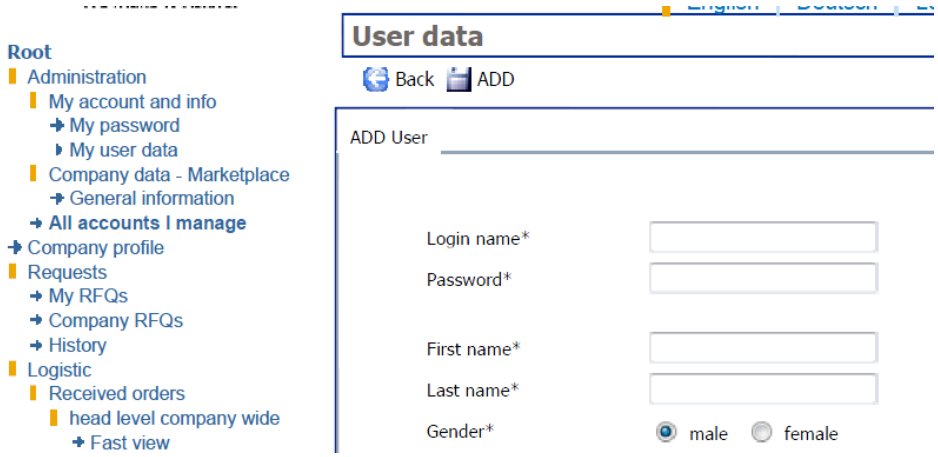
Now you can see a list with all existing users of the company.

In order to add a user, click on „Add user“ in the toolbar. The following mask enables you to add a new user by filling in the information.



The most important boxes are:

- The **login name**: This name can only be used once for all POOL4TOOL users. Should the chosen login name already be assigned, an error message appears and you have to choose another name. The login name can not be longer than 20 characters.
- **First name, last name, gender, email address**
- **Authorization**: Normally you would give a new user the authorization „User“. If you choose the box “Admin”, the new user will have key user rights.
- **Notification**: When activating this box, an email will be created which contains the user name and password. This will be send to the specified email address in order to inform the new user about his/her account.

When you have entered all the requested data, click on „Add“ in order to register the new user in the system.

Edit existing users:

Click on the Change symbol in the user list in the column „Menu“. The same form as for adding new users appears. The only difference is that all the boxes are already filled. In order to save your changes, click on “Save” on the lower part of the site. In order to delete a user, click on the Delete symbol in the user list in the column “Menu”.

6.3 Reset password

If you forgot your password you can click on “I forgot my password“, to reset your password at the Pool4Tool Sign- on page.

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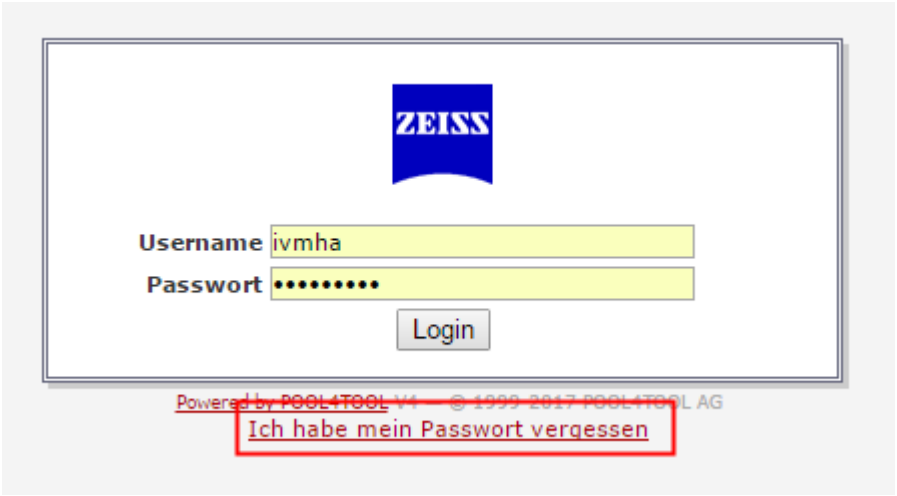

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