After completing the registration process, you will receive an email confirming your registration. Please be sure to note your login and password. You must perform the set up tasks outlined below to ensure that the OLV system will be a useful tool for you to manage purchase orders from Crate & Barrel.

This document will walk you through the 2 steps in the set up process:

- 1) Setting up the Email Alerts.
- 2) Setting up accounts for additional users in your company.

You can begin by logging into: **olv.gxsolc.com**

STEP 1) SETTING UP EMAIL ALERTS

Order Lifecycle Visibility can proactively notify you when orders arrive in the system, commitments are overdue, and when shipments are past the ship date. The person at your company designated as the OLV company administrator will need to establish the settings for the email notifications. The OLV administrator for your company is typically the first person at your company who registers to use the OLV system and establishes your company profile information.

There are 3 email alerts you will receive to manage Crate & Barrel's purchase orders:

- 1) New Purchase Order Alert = new or changed orders have been posted.
- Overdue Commit Alert = purchase order need to be acknowledged and/or the ship date and quantity will need to be committed.
- 3) Overdue Shipment Alert = you will need to send C&B an ASN.

Below are the recommended settings for setting up your email alerts.

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Step 1: Choose "Alerts" from the action panel (see illustration below)

Step 2: The system displays the "Company Settings" on the "Alerts" tab.



Preferred Email Language:

Choose the language you prefer the system to use in the email alert (English or Chinese option only)

From Email Address:

This distinguishes who the sender of the email alerts will be. Enter the email address in the *"From Email Address"* text box. **Do not enter a valid email address. The email must include "@gxs.com".** For example, you can enter crate&barrelorders@gxs.com or companyname@gxs.com, which can help you identify that these are Crate & Barrel's orders.

Email Recipient List:

To establish the email addresses that should receive the email alerts, type an email address in the *"Email Address"* test box and then choose *"Add"*. You should include everyone involved in handling Crate & Barrel's purchase orders in your company.

Frequency:

Establish the frequency setting you want to use. If you elect to have multiple email notifications sent, the "Frequency" settings determines the interval between email notifications. The "0" setting will send you emails as they are available. **Crate and Barrel recommends you set the "Frequency" to 1.** This will batch the emails together and send it at one time during the day.

Step 3: Select the following Checkboxes below in green.

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New Documents:

In the "New Documents" section, select only the "New Order" checkbox. This will ensure that an email will be sent to you when you receive a new or changed order from Crate & Barrel.

Invoice:

Do not select any checkbox's in the "Invoice" section (Crate and Barrel will not be transmitting invoicing documents in this phase of this project).

Shipments

Select Overdue Shipment under the "Shipments" section.

The Overdue Shipment is used for notification that an ASN (Advance Ship Notice) is due. In the case of "Overdue Shipments", the threshold determines how many hours after the ship date that you should be sent an email alert. **Crate & Barrel recommends you set the "Threshold" at 1 hour for Domestic vendors and Import vendors.** You will receive an email 1 hour after the ship date on a purchase order that an ASN is due.

The "Maximum Number of Alerts" setting determines how many times the system should continue to send email notifications if the condition continues to exist. *Crate and Barrel recommend you set the threshold for Maximum Number of Alerts to 1 for Overdue Shipment.*

Orders:

Select Overdue Commit under the "Orders" section.

The Overdue Commit is used for notification that you need to acknowledge and commit to a new or changed purchase order. In the case of "Overdue Commit", the threshold determines how many hours after receiving the new purchase order or change that you should be sent an email alert. **Crate & Barrel recommends you set the "Threshold" at 96 hours for Domestic vendors and 168 hours for Import vendors.** You will receive an email 96 hours or 168 hours after receiving a new or changed purchase order from Crate & Barrel that an acknowledgement and/or commitment of the new or changed purchase order is needed.

The "Maximum Number of Alerts" setting determines how many times the system should continue to send email notifications if the condition continues to exist. *Crate and Barrel recommend you set the threshold for Maximum Number of Alerts to 1 for Overdue Commit.*

* If any of the above steps have been completed within the timelines specified above, you will not receive an email alert. The alerts are only sent if you are outside of the set "Threshold" times.

Out of Stock:

Do not select any checkbox's in the "Out of Stock" section (Crate and Barrel will not be transmitting inventory documents in this phase of this project).

UCCEAN Prefix Code:

Please enter your Crate and Barrel vendor number in the "UCCEAN Prefix Code" field. If you do not know your vendor number, please contact your merchandising team.

- Select Manage Prefixes
- Select Add
- Enter vendor number in the *Code field
- Select the OK box
- Save
- Close

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Mismatch Alerts:

Do not select any checkbox's in the "Mismatch Alerts" section (Crate and Barrel will not be transmitting these documents in this phase of this project).

Step 4: Select "Preview Supplier Settings" from the action panel.

Step 5: Select "Submit" from the action panel to save your settings.

Step 6: Select "Return to Alert Settings" from the action panel.

STEP 2) SETTING UP ACCOUNTS FOR ADDITIONAL USERS

We realize that the tasks involved in managing purchase orders can be spread among numerous people in your organization. In order to allow access to OLV to the individuals and areas that are responsible for each of the tasks in the Order Lifecycle, you are able to set up numerous accounts for additional users in your company.

Step 1: Choose "Company Profile" from the action panel (see illustration below).

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Step 2: Under "User Maintenance" in the Action Panel, select "Create New Users".

Step 3: Fill in the following sections for the New User Profile.

User Information

Please note: When entering the Business E-mail address, you may get a pop-up message that states that the email address already exists. If this user already has their email address registered in the OLV system, you will need to enter a different email address to create an additional OLV user account. The different email address does not have to be a valid email address. (Create a unique email address)

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- Language Information
- Login Information
 - Create a generic password for the new user. They will be required to change their password once they have registered.
 - Please make note of the login and password you just created.
- Roles
 - Check the Company Administrator box.
- Select Submit at the bottom of this page when complete.

Step 4: Select the Application(s) the New User will need access to in OLV.

Crate & Barrel recommends you assign the following two options to an user you have added.

Option one: Anyone in your company that will receive, view, and update purchase orders. Select the following options. If you are going to be performing these tasks, you do not need to invite another user. If you are sharing these tasks with another person, you will need to select the following options after you have added them to OLV.

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Option two: Anyone in your company that will prepare shipments, create ship notices, and make actual shipments. Select the following options. Make sure you have selected PO Viewer as well.



By selecting one of the two options above for anyone involved in managing Crate & Barrel's purchase orders, this will allow them full access to the necessary information in OLV to perform their tasks.

Step 5: Select "Submit". The system will confirm the new user account .

Step 6: Provide the new user with their Login ID, Password and the OLV URL.

The OLV URL is : https://olv.gxsolc.com

Step 7: The new user will need to go into the OLV website, select Personal Profile in the action panel, and change their password. The system will require the new user to change their password the first time they login to the OLV website.