



RELEASE NOTES

VallenIQ v1.17

Release Date: June 30th, 2021

1. Introduction	3
2. Permissions Updates	4
2.1 Super Admin Permissions	4
2.2 Admin Permissions	5
3. Preview & Confirm: Columns for Quantity 1-4	6
4. Customer Information Modal Updates	8
4.1 Project Lead Field	9
4.2 Project Types Field	9
5. Auto-Assignments For CSR Users	11
6. Pricing & Availability Preferences	12
7. API Integrations	13
7.1 Overview	13
7.2 Get-Price-Availability API	13
7.3 Get-NonStock-Price API	15
7.4 When Will VallenIQ Call APIs?	16
7.5 Error Messages	16
8. Project View Updates	17
8.1 Assignee	17
8.2 Available Quantity	18
8.3 Price	18
8.4 Quote Price	18
8.5 GP%	19
8.6 Extended Price	19

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8.7 Moving Forward	19
9. Quote & Order History	20
9.1 Quote History	20
9.2 Order History	21
10. Custom Export	22
10.1 New Exportable Fields	22
10.2 Updated Exportable Fields	24
11. Public & Private Projects	25
11.1 Default Privacy of New Projects	25
11.2 Changing Privacy Status	25
11.3 Private Project Behavior	26
11.3.1 Share Status	26
11.3.2 Line Item Assignments	26
11.4 Permissions	27
12. Share & Unshare	29
12.1 Default Share Status of New Projects	30
12.2 Sharing Private Projects	31
12.3 Permissions	33
13. Project Management Tab Updates	34
13.1 New Privacy Column	34
13.2 Change Privacy Setting	35
13.3 Team Dropdown in All Projects	36
14. Global Search Updates	37
14.1 Specialists	37
14.1.1 Part Number Search Results	37
14.1.1.1 Public Project Results	37
14.1.1.2 Private Project Results	38
14.1.2 Project ID, Project Name, & Customer Search Results	39
14.2 Super Admins & Admins	39
14.2.1 Part Number Search Results	40
14.2.1.1 Public Project Results	40
14.2.1.2 Private Project Results	40
14.2.2 Project ID, Project Name, & Customer Search Results	41
15. Quote History Header & Details Files	43
15.1 New & Updated Fields	43
15.1.1 quote_history_header	43
15.1.2 quote_history_detail	44
15.2 Quote History Extracts	45

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1. Introduction

V1.17 is the first VallenIQ release to contain enhancements related to the CSR expansion project.

The goal of this project is to update the features and functionality of VallenIQ to support both the Q&S team, as well as the CSR team within the Vallen organization.

To support this expansion, a number of changes are required to fit the needs of CSR users who will eventually work within VallenIQ, the first of which are covered in the sections below.

Central to the expansion will be VallenIQ's integration with three new APIs that have been created and will be maintained by the Vallen IT team:

- Get-Price-Availability API:
 - Provides pre-calculated pricing and warehouse specific inventory for stocking items
- Get-NonStock-Price API:
 - Provides pre-calculated pricing for non-stock items
- Quote-to-Order API:
 - Allows users to initiate the customer order creation process for quotes within VallenIQ

In this release, we've integrated with the Get-Price-Availability and Get-NonStock-Price APIs. VallenIQ will support the Quote-to-Order API after our next release, v1.18.

2. Permissions Updates

Changes have been made to super admin and admin permissions within VallenIQ to support the CSR expansion. Specialist permissions will remain the same.

2.1 Super Admin Permissions

Feature	Previous Permissions	Updated Permissions
Project Creation	Can create new projects	Can create new projects
	Can upload new projects	Can upload new projects
Project Visibility & Edit Permissions in Project Management Tab	Can see all projects	Can see all public and private projects
	Can edit all projects	Can edit all public and private projects
	-	Can make own public quotes private
	-	Can make own private quotes public
	-	Can make others' public quotes private
	-	Can make others' private quotes public
Global Search	Can search across all projects	Can search across all projects (including private projects)
	-	Can see others' private projects in search results page
	-	Can open others' private projects from search results page
	-	Can edit others' private projects
User Management	Can upgrade users accounts to Super Admin role	Can upgrade users accounts to Super Admin role
	Can add new users to VallenIQ	Can add new users to VallenIQ
	Can remove users from VallenIQ (all users including other Super Admins)	Can remove users from VallenIQ (all users including other Super Admins)
	Can change user roles of non-Super Admin users to Specialist or Admin	Can change user roles of non-Super Admin users to Specialists or Admins
	Can change users' employee IDs	Can change users' employee IDs
	-	Can change which team users belong to
Settings	Can change Auto-Assignments in Settings tab	Can change Auto-Assignments in Settings tab
	Can see and download QSRS Summary & Owners reports in Settings tab	Can see and download QSRS Summary & Owners reports in Settings tab
	Can download Auto-Match Metrics reports in Settings tab	Can download Auto-Match Metrics reports in Settings tab

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2.2 Admin Permissions

Feature	Previous Permissions	Updated Permissions
Project Creation	Can create new projects	Can create new projects
	Can upload new projects	Can upload new projects
Project Visibility & Edit Permissions in Project Management Tab	Can see all projects	Can see all public projects and private projects that I own (cannot see others' private projects)
	Can edit all projects	Can edit all public projects
	-	Can make own public quotes private
	-	Can make own private quotes public
	-	Cannot make others' public quotes private
	-	Cannot make others' private quotes public
Global Search	Can search across all projects	Can search across all projects (including private projects)
	-	Can see others' private projects in search results page
	-	Cannot open others' private projects from search results page
User Management	Can add new users to VallenIQ	Cannot add new users to VallenIQ
	Can remove all existing users from VallenIQ (except Super Admins)	Cannot remove any users from VallenIQ (only Super Admins can)
	Can change user roles of non-Super Admin users to Specialist or Admin	Cannot change user roles of non-Super Admin users to Specialist or Admin (only Super Admins can)
	Can change users' employee IDs	Cannot change users' employee IDs
	-	Cannot change which team users belong to
Settings	Can change Auto-Assignments in Settings tab	Can change Auto-Assignments in Settings tab
	Can see and download QSRS Summary & Owners reports in Settings tab	Can see and download QSRS Summary & Owners reports in Settings tab
	Can download Auto-Match Metrics reports in Settings tab	Can download Auto-Match Metrics reports in Settings tab

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3. Preview & Confirm: Columns for Quantity 1-4

We've added new 4 quantity columns to the "Preview and Confirm Project Data" modal that users can utilize to upload customer requested quantities into the application. The four new columns are Quantity 1, Quantity 2, Quantity 3, and Quantity 4.

Previously, the only quantity related values that could be mapped into VallenIQ projects was the "Usage" field.

Preview and Confirm Project Data

Project Name

TEST PROJECT

Select Sheet

Sheet1

Manufacturer	Vendor	Usage	Quantity 1	Quantity 2	Quantity 3	Quantity 4	Cust Last Pr
Manufacturer	Select Vendor	Usage	Quantity 1	Quantity 2	Quantity 3	Quantity 4	Ignore Cust
United Scientific	No Vendor found	220	100	200	300	400	No Last Pric
Schlage Commercial	No Vendor found	275	250	300	450	600	No Last Pric
Emtek	No Vendor found	1,260	1,000	1,200	1,400	1,600	No Last Pric
Honeywell Safety Products USA Inc	No Vendor found	1,000	1,160	1,260	1,360	1,460	No Last Pric

Next

Cancel

New "Quantity" columns in "Preview and Confirm Project Data" modal

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Once the values have been mapped into the project, the quantity breaks will appear in the “Req. Qty” column:

Ref #	Req. Part Number	Req. MFR/Vendor	Quoted Part Number	Vallen MFR/Vendor	Avail. Qty	Req. Qty	Price	Quote Price	Cost	Quote Cost	GP %	Extended Price	Status			
6	EWL	RPN 11030042 CPI GMEAB18004 UC-223 CUTTER 3/4 ST OOR PAGED PANEL CUST. LINE # 6	MFR Kinematic NO VENDOR	MPN 4212 ATN9 VALLIN P/N 11030042 VENDOR P/N 4212 ATN9 4212 ATN9 DOUBLE ROW BAL. L BRGS 73165770044 99 UCM EA		85		\$ Price	Set	REPLACEMENT COST \$113.05000	113.05000	Set	GP	%	-	VAL
						50		\$ Price	Set	Set	GP	%	-			
						70		\$ Price	Set	Set	GP	%	-			
						90		\$ Price	Set	Set	GP	%	-			
						110		\$ Price	Set	Set	GP	%	-			
7	EWL	RPN LSG4513ST CPI YKAB185324 4012381002987 BHCS BLAC MEX 1.25 X 8MM LONG CUST. LINE # 7	MFR LG Electronics NO VENDOR	No Vallen Match	No Vallen Match	600		\$ Price	Set	REPLACEMENT COST \$ Cost	\$ Cost	Set	GP	%	-	IT
						100		\$ Price	Set	Set	GP	%	-			
						400		\$ Price	Set	Set	GP	%	-			
						700		\$ Price	Set	Set	GP	%	-			
						1,000		\$ Price	Set	Set	GP	%	-			
8	EWL	RPN 5109SLR CPI 2251860GQA 40-60-3000 SPRING CUST. LINE # 8	MFR Klein Tools NO VENDOR	MPN 5109SLR VALLIN P/N 020448004 VENDOR P/N 5109SLR 5109SLR ALL PURPOSE W ORW BUCKET WITH PLAST IC BOT UCM EA		37		\$ Price	Set	REPLACEMENT COST \$39.71000	39.71000	Set	GP	%	-	VAL
						25		\$ Price	Set	Set	GP	%	-			
						35		\$ Price	Set	Set	GP	%	-			
						45		\$ Price	Set	Set	GP	%	-			
						55		\$ Price	Set	Set	GP	%	-			

Quantities 1-4 will map into the “Req. Qty” column once the quote has been processed

Note that the first value in the “Req. Qty” column will be the value for “Usage.”

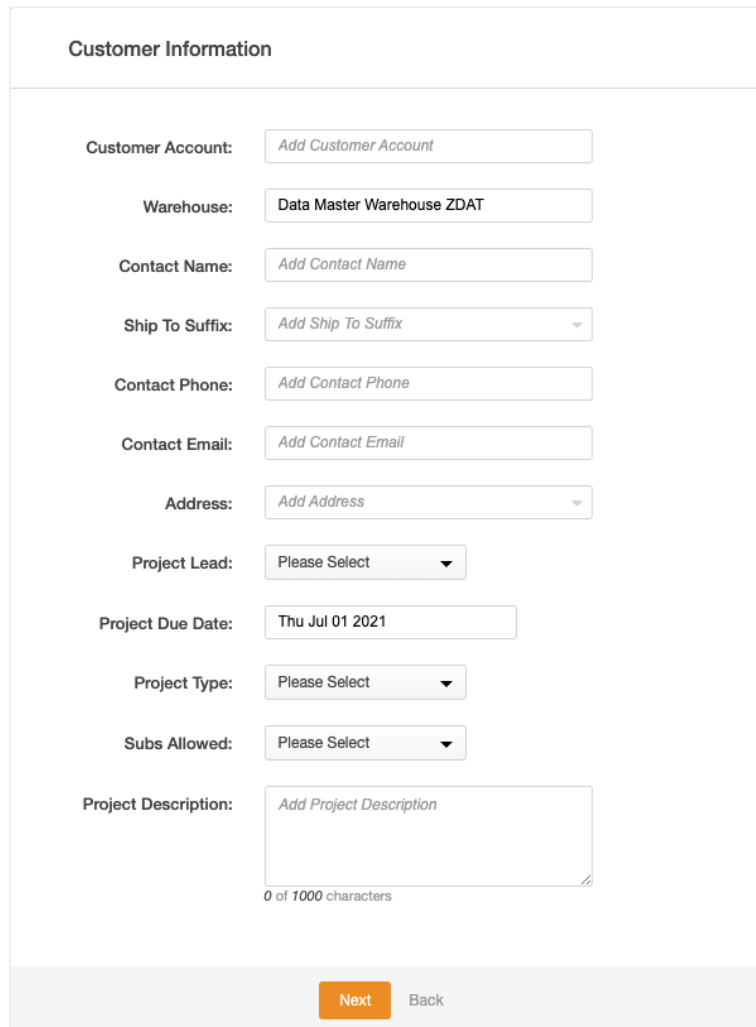
Currently, when no values are mapped into “Usage,” the system will automatically set the value to 1. However, this can be changed in subsequent releases.

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4. Customer Information Modal Updates

We've made additions to the "Customer Information" modal, the "Create a New Project" modal, and the "Customer Information" tab in Project Settings, where users populate the details of their project header.



The screenshot shows a modal titled "Customer Information". It contains several input fields and dropdown menus for project details. The fields are arranged vertically, each with a label on the left and an input area on the right. The input areas contain placeholder text. At the bottom, there is a "Next" button in orange and a "Back" button in gray. Below the "Project Description" field, there is a character count "0 of 1000 characters".

Field Label	Value / Placeholder
Customer Account:	Add Customer Account
Warehouse:	Data Master Warehouse ZDAT
Contact Name:	Add Contact Name
Ship To Suffix:	Add Ship To Suffix
Contact Phone:	Add Contact Phone
Contact Email:	Add Contact Email
Address:	Add Address
Project Lead:	Please Select
Project Due Date:	Thu Jul 01 2021
Project Type:	Please Select
Subs Allowed:	Please Select
Project Description:	Add Project Description

"Customer Information" modal

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4.1 Project Lead Field

The following CSR team leads have been added to the “Project Lead” field:

- Catie Bassett
- Greg Vinsant
- Jon Holloway
- Karen McKnight
- Kevin Kellums
- Lindsey Cross
- Shanna Gobel

4.2 Project Types Field

The following CSR team project types have been added to the “Project Types” field:

- RFQ
- Blanket

Both RFQ and Blanket project types will allow users to use both the Update Part and the Create New Part features in the “Create & Update” tab of Quoted Part Number modal.

Requested Part Number: 100-75 Requested Manufacturer: United Scientific Manufacturer Part Number: 10075 Vallen Part Number: 69178110075
Cutting Tools

Multiple Vallen Matches (23) Did you mean? (100) Advanced Search Create & Update Alternates

Part Options
Create New Part Update Part Clear All Fields

Manufacturer Part Number: 10075 Vendor Part Number: 10075 Vallen Part Number: Vallen Part Number
Cost: 8.54 Purchase UIM Code: Purchase UIM Code Pack Quantity: 1

Manufacturer Code: 502307 Manufacturer Name: ATA Tools Inc Vendor Code: Vendor Code Vendor Name: Vendor Name
Product Category Code: 500 Product Category Name: Cutting Tools Lead Time (days): 14 Base UIM Code: ea

Description 1: 10075 BUR SA-3 C
Description 2: SA03P

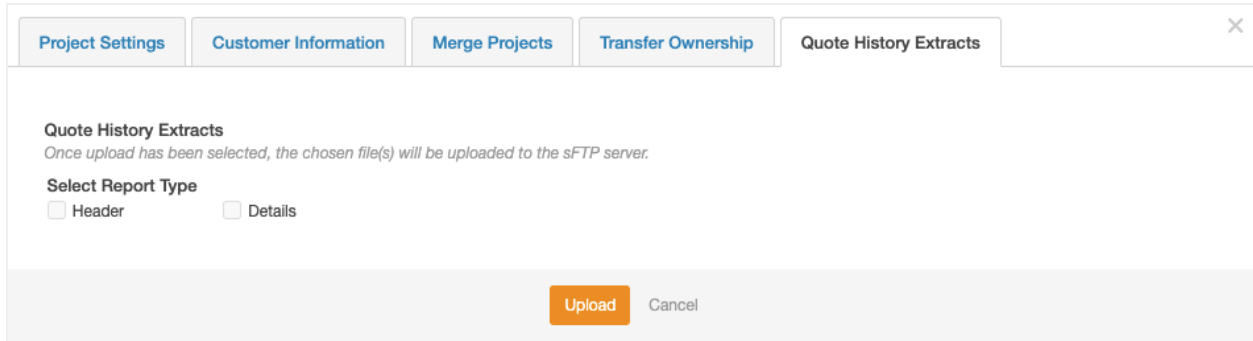
Save Cancel

Both Create New Part and Update Part features will remain available for RFQ and Blanket project types

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Also, the “Quote History Extracts” feature in “Project Settings” modal will continue to only be accessible for Market Basket projects. Implementation, RFQ, and Blanket project types will not have access to this feature, as the “Quote History Extracts” feature is only utilized by the Q&S team, for only Market Basket opportunities.



The screenshot shows a modal window titled "Quote History Extracts" with a close button (X) in the top right corner. The modal has a tabbed interface with five tabs: "Project Settings", "Customer Information", "Merge Projects", "Transfer Ownership", and "Quote History Extracts". The "Quote History Extracts" tab is currently selected. Below the tabs, the text "Quote History Extracts" is followed by a sub-header "Select Report Type". Under this sub-header, there are two radio button options: "Header" and "Details". At the bottom of the modal, there is a grey bar containing two buttons: "Upload" (in orange) and "Cancel" (in grey).

Quote History Extracts feature will only be available for Market Basket project types

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5. Auto-Assignments For CSR Users

When members of the CSR team upload or create new projects in VallenIQ, all line items will be assigned to themselves, and the system will not auto-assign line items based on the priority defined in the “Auto-Assignments” page in “Settings” tab.

However, when Q&S users upload or create new projects, auto-assignments will remain enabled.

This will prevent the system from assigning line items in CSR users’ projects to members of the Q&S team.

User Management						
Find a User		+ Add New User		6 pending / 122 total		
Name	Member Email	Team	Role	Employee ID	Action	
Megan Dickinson	megan.dickinson@vallen.com	QS	Admin		Edit	Remove
Renee Neal	renee.neal@vallen.com	CSR	Admin	RLN1	Edit	Remove
Admin Test Acc...	elee+8@supplyframe.com	QS	Admin		Edit	Remove
Jennifer Lynch	jennifer.lynch@vallen.com	CSR	Admin	JRL2	Edit	Remove
Cline Drum	cline.drum@vallen.com	CSR	Admin	CCD	Edit	Remove
Wei-Cheng Tsai	wtsai@supplyframe.com	QS	Super Admin	QSSU	Edit	Remove
Dylan Stutzman	dylan.stutzman@vallen.com	CSR	Admin	DS10	Edit	Remove
TRACIE EMINETH	tracie.emineth@vallen.com	CSR	Admin	TLE1	Edit	Remove
Bridget Fosback	bridget.fosback@vallen.com	CSR	Admin	BAF1	Edit	Remove

The team that user accounts belong to will dictate whether auto-assignments will or will not be active during project upload or creation

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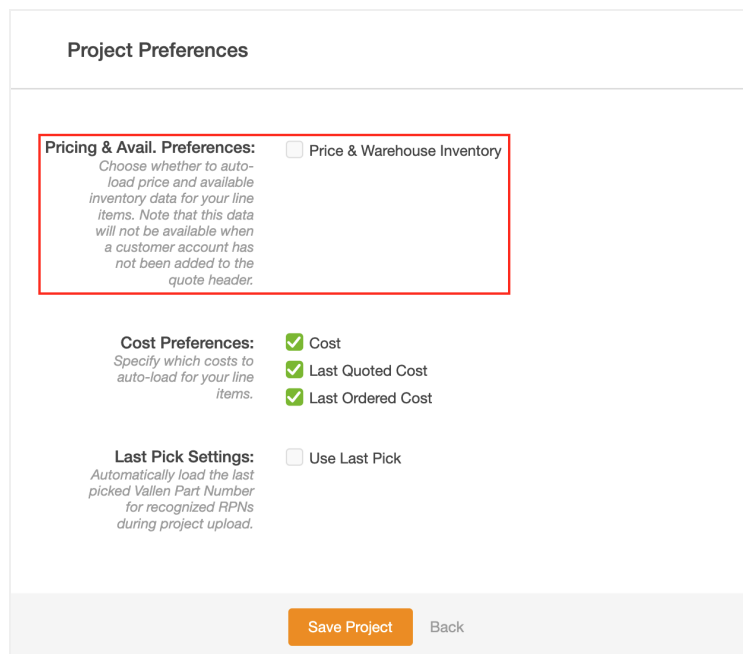
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6. Pricing & Availability Preferences

Pricing and warehouse availability data is made available to VallenIQ via the Get-Price-Availability and Get-NonStock-Price APIs.

Although this data is key to the CSR team quoting process, pricing and warehouse inventory are not as critical to the Q&S team in their day-to-day workflow.

Therefore, during the quote upload and creation process, users will now see a new “Pricing & Avail. Preferences” option in the “Project Preferences” modal:



The screenshot shows the 'Project Preferences' modal. The 'Pricing & Avail. Preferences' section is highlighted with a red box. It contains a checkbox labeled 'Price & Warehouse Inventory' which is currently unchecked. Below this, there are two other sections: 'Cost Preferences' with three checked checkboxes ('Cost', 'Last Quoted Cost', 'Last Ordered Cost') and 'Last Pick Settings' with one unchecked checkbox ('Use Last Pick'). At the bottom of the modal are two buttons: 'Save Project' (orange) and 'Back' (grey).

New option in “Project Preferences” modal

This checkbox allows super admins and admins to specify whether VallenIQ should request pricing and availability data from the two APIs. The checkbox will by default be unselected.

For CSR users, we recommend selecting this option whenever pricing and warehouse inventory are needed. For Q&S users, we recommend keeping this checkbox unselected.

Additionally, because the Q&S team usually works on quotes that are multiple hundreds or thousands of lines, keeping the checkbox unselected when uploading Q&S projects will prevent VallenIQ from overloading the 2 APIs.

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7. API Integrations

7.1 Overview

In this release we've implemented the Get-Price-Availability API and the Get-NonStock-Price API.

7.2 Get-Price-Availability API

This API will provide pricing for stocking items that is pre-calculated on the Vallen side, and warehouse specific inventory that is based on the customer and warehouse added to the quote header.

The API will use quote header and line item information to retrieve the appropriate unit price for stocking items, and display in the "Price" column of the Project View page.

Additionally, the API will use the same information as mentioned above to retrieve the appropriate availability of stocking items in the warehouse chosen in the quote header.

This data will display in the following two columns:

TEST PROJECT 062921 - 3 (6 Lines)

2021/06/29 at 8:08 PM EST

Public

Shared

owned by: Eugene Lee

33900

KIMBALL INTERNATIONAL

Project ID

2907

Status

Open

Date

2021/07/01

Team Lead

Jon Holloway

Project Type

Blanket

Filter by Category (5)

Cutting Tools2

Hand Tools1

Miscellaneous Products1

Power Tools1

Safety Products1

Filter by Req. Manufacturer (6)

Becton & Dickinson1/1

Honeywell Safety1/1

Products USA Inc1/1

Ingersoll Rand1/1

Kinematics1/1

Klein Tools1/1

United Scientific1/1

Filter by Intelligence

Multiple Vallen Matches2

Cross References0

Part Cross References0

Suggested Parts3

Changed RPN1

Changed CPN0

Updated Parts0

Created Parts0

Last Picks0

Filter by Cost Source

With Order History3

With Quote History3

With Cost5

With Standard Cost5

Filter by Status

RC Status2

CU Status0

DU Status4

TI Status0

NQ Status0

CS Status0

AL Status0

NM Status0

Refresh All

Custom Export

Edit History

More Filters

Selecting 0 Item(s)

Showing 6/6 results

Select All

Group Edit

Remove

Assign

Switch to Expand View

Hide All Alternates

Ref #

Search line items

Total Cost

\$9,111,620.00

Ref #	Req. Part Number	Req. MFR/Vendor	Quoted Part Number	Vallen MFR/Vendor	Avail. Qty	Req. Qty	Price	Quote Price	Cost	Quote Cost	GP %	Extended Price	Status
1	RPN 100-75 CPN AH4990 11000100H2 LAN OWARD 12IN 2PLY BLK/WH/ROCK CUST LINE # 1	MFR United Scientific NO VENDOR	MPN 10075 VALLN P/N 89178110075 VENDOR P/N 10075 10075 BUR SA-3 C BA GSP UCM BA Multiple Vallen Matches Suggested Parts	MFR JDA TOOLS INC CODE 002307 M/Vendor Notes	5	220	\$10.41000	10.41000 Set	REPLACEMENT COST	8.54000 Set	21.90 %	\$2,290.20...	OK
						100		10.41000 Set	8.54000 Set	21.90 %	\$1,041.00...		
						200		10.41000 Set	8.54000 Set	21.90 %	\$2,082.00...		
						300		10.41000 Set	8.54000 Set	21.90 %	\$3,123.00...		
						400		10.41000 Set	8.54000 Set	21.90 %	\$4,164.00...		
2	RPN S2960HS CPN 3GGGHC1 599 300R1611D GLOVE CUT DELTA GOLA TH EV NEDGRN CUST LINE # 2	MFR Honeywell Safety Products USA Inc NO VENDOR	MPN S2960HS VALLN P/N 6039013102 6 VENDOR P/N S2960HS S2960HS UNEX HYPE RSHOCK SMOKE BPO WIN FRM CLR LENS UCM PR	MFR HONEYWELL SAFETY PRODUCTS USA CODE 468810 M/Vendor Notes	142	1,000	\$6.92000	6.92000 Set	REPLACEMENT COST	5.60000 Set	23.57 %	\$6,920.00...	OK
						1,160		6.92000 Set	5.60000 Set	23.57 %	\$8,027.20...		
						1,280		6.92000 Set	5.60000 Set	23.57 %	\$8,719.20...		
						1,360		6.92000 Set	5.60000 Set	23.57 %	\$9,411.20...		
						1,460		6.92000 Set	5.60000 Set	23.57 %	\$10,103.2...		
3	RPN 11030042 CPN GMAE818 004 UC-233 CUTTER 3/ 4 STOCK RAISED P ANEL CUST LINE # 3	MFR Kinematics NO VENDOR	MPN 4212 ATN9 VALLN P/N 11030042 VENDOR P/N 4212 ATN9 4212 ATN9 DOUBLE R OW BAL L BRGS 7316 57700499 UCM BA	MFR SKF USA INC. CODE 468810 M/Vendor Notes	-	85	\$282.62000	282.62000 Set	REPLACEMENT COST	113.05000 Set	150.00 %	\$24,022.7...	OK
						50		282.62000 Set	113.05000 Set	150.00 %	\$14,131.0...		
						70		282.62000 Set	113.05000 Set	150.00 %	\$19,783.4...		
						90		282.62000 Set	113.05000 Set	150.00 %	\$25,435.8...		
						110		282.62000 Set	113.05000 Set	150.00 %	\$31,088.2...		
4	RPN S109SLR CPN 225186G CA 40-50-3000 SPRIN G CUST LINE # 4	MFR Klein Tools NO VENDOR	MPN S109SLR VALLN P/N 0904462004 VENDOR P/N S109SLR S109SLR ALL PURPOSE SE WORK BUCKET WI TH PLASTIC BOT UCM BA	MFR KLEIN TOOLS CODE 928844 M/Vendor Notes	-	37	\$79.42000	79.42000 Set	REPLACEMENT COST	39.71000 Set	100.00 %	\$2,938.54...	OK
						25		79.42000 Set	39.71000 Set	100.00 %	\$1,985.50...		
						35		79.42000 Set	39.71000 Set	100.00 %	\$2,779.70...		
						45		79.42000 Set	39.71000 Set	100.00 %	\$3,573.90...		
						55		79.42000 Set	39.71000 Set	100.00 %	\$4,368.10...		

Data from the Get-Price-Availability API will populate into the "Avail. Qty" and "Price" columns

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Unit prices should also populate the price breaks in the “Quote Price” column as well:

Ref #	Req. Part Number	Req. MFR/Vendor	Quoted Part Number	Valien MFR/Vendor	Avail. Qty	Req. Qty	Price	Quote Price	Cost	Quote Cost	GP %	Extended Price	Status
3	RPN 11030042 CPN GMEAB18 004 UC-223 CUTTER 3/ 4 STOCK RAISED P ANEL CUST. LINE # 3	MFR Kinematica NO VENDOR	MPN 4212 ATN9 VALLEN PN 11030042 VENDOR PN 4212 ATN9 4212 ATN9 DOUBLE R OW BAL L BRGS 7316 S77004499 UCM EA	MFR SKF USA INC. CODE 463810 * MFR/Vendor Notes	--	85 50 70 90 110	\$282.62000	282.62000 Set 282.62000 Set 282.62000 Set 282.62000 Set 282.62000 Set	\$113.05000 REPLACEMENT COST \$113.05000 \$113.05000 \$113.05000 \$113.05000	113.05000 Set 113.05000 Set 113.05000 Set 113.05000 Set 113.05000 Set	150.0% 150.0% 150.0% 150.0% 150.0%	\$24,022.7... \$14,131.0... \$19,783.4... \$25,435.8... \$31,088.2...	VAL

Unit prices will populate the Quote Price column when pricing is returned by the API

Note that company wide inventory is still available at the line item level. To view inventory available across the entire company, select expand view and find the “Company Wide Inventory” field to the bottom left hand side of the dropdown:

Ref #	Req. Part Number	Req. MFR/Vendor	Quoted Part Number	Valien MFR/Vendor	Avail. Qty	Req. Qty	Price	Quote Price	Cost	Quote Cost	GP%	Extended Price	Status
2	RPN S2960HS CPN 3G66HC1 599 30061611D GLOVE CLP DELTA GOLA TH EV NEODGRN CUST. LINE # 2	MFR Honeywell Safety Products USA Inc NO VENDOR	MPN S2960HS VALLEN PN 603903322 6 VENDOR PN S2960HS S2960HS UVEX HYPE RSHOCK SMOKE BR OWN FRM CLR LENS UCM PR	MFR HONEYWELL SAFETY PRODUCTS USA CODE 401178 * MFR/Vendor Notes	142	1,000 1,160 1,260 1,360 1,460	\$6.92000	6.92000 Set 6.92000 Set 6.92000 Set 6.92000 Set 6.92000 Set	\$5.60000 REPLACEMENT COST \$5.60000 \$5.60000 \$5.60000 \$5.60000	5.60000 Set 5.60000 Set 5.60000 Set 5.60000 Set 5.60000 Set	23.57% 23.57% 23.57% 23.57% 23.57%	\$6,920.000... \$8,027.200... \$8,719.200... \$9,411.200... \$10,103.20...	VAL
<div> <div> Description: S2960HS UVEX HYPERSHOCK SMOKE BROWN FRM CLR LENS </div> <div> Lead Time: 7 List Price: 11.43000000 Customer Resale Price: - Stand. Package Size: 10 Purchase UM: - Taxable: Y Non-Tax Type: - Image Link: - </div> <div> SPA Cost: - SPA Type: - Replacement Cost: 5.6 Cost Change Date: 2021/05/01 Standard Cost: 5.76800000 Vendor Type: Manufacturer Vendor Packaging: - Vendor Notes: - </div> <div> Misc. 1: 09380750CR ENDMILL Misc. 2: 83407700-08062 Misc. 3: 1746 Misc. 4: Precision Tools </div> </div> <div> Part Notes: - Product Category: Safety Products Prod. Category Code: 1900 Company Wide Inventory: 158 Stocking Status: S MSDS Code: N Hazmat Code: - </div>													
<div> <div> + Add Comment </div> <div> Wed Jun 30 2021 00:09:16 GMT+0000 (Coordinated Universal Time) Refresh </div> </div>													

Company Wide Inventory field in Expand View

Required fields for the Get-Price-Availability API are:

- product
 - Valien part number, customer part number, vendor part number, or manufacturer part number of the record in “Quoted Part Number” column
- warehouse
 - Warehouse specified in the quote header
- customer_number
 - Account number of the customer specified in the quote header
- uom
 - Unit of measure of the record in “Quoted Part Number” column
- viq_reference
 - Project ID # and line item reference number separated by a dash

If any of the required fields above are missing or invalid, the system should return an error to the user.

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7.3 Get-NonStock-Price API

This API will provide pricing for non-stock items that is pre-calculated on the Vallen side. Inventory will not be returned by this API because these are non-stock items.

Get-NonStock-Price will use quote header and line item information to retrieve the appropriate unit price for non-stock items, and display in the “Price” column of the Project View page.

Similar to unit price returned by the Get-Price-Availability API, these prices will carry over to the breaks in “Quote Price” column:

Ref #	Req. Part Number	Req. MFR/Vendor	Quoted Part Number	Vallen MFR/Vendor	Avail. Qty	Req. Qty	Price	Quote Price	Cost	Quote Cost	GP %	Extended Price	Status
4	RPN 5109SLR CPN 2251860G QA 40-50-3080 SPINN G CUST. LINE # 4	MFR Klein Tools NO VENDOR	MPN 5109SLR VALLN PN 0026440204 VENDOR PN 5109SLR 5109SLR ALL PURPOSE SE WORK BUCKET WI TH PLASTIC BOT UCM EA	MFR KLEIN TOOLS CODE 92644 MFR Vendor Notes	-	37	\$79.42000	79.42000 Set	\$39.71000	39.71000 Set	100.0% %	\$2,938.54...	VAL
						25		79.42000 Set					
						35		79.42000 Set					
						45		79.42000 Set					
						55		79.42000 Set					

Unit price will be applied to all price breaks in the “Quote Price” column

Required fields for the Get-NonStock-Price API are:

- product
 - Vallen part number, customer part number, vendor part number, or manufacturer part number of the record in “Quoted Part Number” column
- warehouse
 - Warehouse specified in the quote header
- customer_number
 - Account number of the customer specified in the quote header
- vendor_number
 - Vendor code or manufacturer code of the record in “Vallen MFR/Vendor” column
- cost
 - Replacement cost of the record in “Quoted Part Number” column
- company_number
 - Company number within Vallen organization
- viq_reference
 - Project ID # and line item reference number separated by a dash

If any of the required fields above are missing or invalid, the system should return an error to the user.

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7.4 When Will VallenIQ Call APIs?

VallenIQ will only call the two APIs to retrieve pricing and warehouse specific inventory during the following scenarios:

- When line items are first uploaded into VallenIQ
- When line item details are changed (part number, requested quantity, update part, create new part)
- When users manually refresh individual line items
- When entire project is refreshed
- When quote header details are changed (customer account, warehouse, ship to suffix)

7.5 Error Messages

When the two APIs are called, certain required fields may be missing or populated with incorrect values.

In these scenarios, VallenIQ will display error messages that describe which API was called, and which fields were problematic:

Ref #	Req. Part Number	Req. MFR/Vendor	Quoted Part Number	Vallen MFR/Vendor	Avail. Qty	Req. Qty	Price	Quote Price	Cost	Quote Cost	GP %	Extended Price	Status
Vallen GET-NonStock-Price API returned a missing required field error for fields: PRODUCT, VENDOR, CODE, COST.													
7	101562 40MM NYL SWL CSTR SB	MFR COLSON GROUP USA NO VENDOR	No Vallen Match	No Vallen Match	-	1	-	\$ Price <input type="button" value="Set"/>		<div>SELECT COST TYPE</div> <div>\$ Cost <input type="button" value="Set"/></div>	GP %	-	

Sample missing field errors for the Get-NonStock-Price API

Additionally, there may be instances where the APIs are down, or are experiencing an outage. In these situations, VallenIQ will display an error message that says:

Ref #	Req. Part Number	Req. MFR/Vendor	Quoted Part Number	Vallen MFR/Vendor	Avail. Qty	Req. Qty	Price	Quote Price	Cost	Quote Cost	GP %	Extended Price	Status
Vallen GET-NonStock-Price API returned an error.													
8	101502 BUSHING R EDUCING CONDUIT 1-3/4	NO MFR NO VENDOR	No Vallen Match	No Vallen Match	-	1	-	\$ Price <input type="button" value="Set"/>		<div>SELECT COST TYPE</div> <div>\$ Cost <input type="button" value="Set"/></div>	GP %	-	

Sample outage message for Get-NonStock-Price API

When API outages are experienced, the Vallen IT team must be notified so they can investigate and fix the issues.

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8. Project View Updates

The columns available in Project View have been updated to accommodate fields that CSR users will need to see within VallenIQ.

TEST PROJECT 062921 - 3 (6 Lines) • 2021/05/29 at 8:08 PM EST • Public • Shared
owned by: Eugene Lee

Filter by Category (5)
Cutting Tools 2
Hand Tools 1
Miscellaneous Products 1
Power Tools 1
Safety Products 1

Filter by Req. Manufacturer (5)
Becton & Dickinson 1
Honeywell Safety Products 1
USA Inc 1
Ingersoll Rand 1
Kinematica 1
Klein Tools 1
United Scientific 1

Filter by Intelligence
Multiple Vallen Matches 2
Cross References 0
Part Cross References 0
Suggested Parts 3
Changed RPN 1
Changed CPN 0
Updated Parts 0
Created Parts 0
Last Picks 0

Filter by Cost Source
With Order History 3
With Quote History 3
With Cost 5
With Standard Cost 5

Filter by Status
RC Status 2
QU Status 0
VAL Status 4
CU Status 0
TI Status 0
ND Status 0
CR Status 0
AL Status 0
NM Status 0

Selecting 0 item(s) Showing 6/6 results

Ref #	Req. Part Number	Req. MFR/Vendor	Quoted Part Number	Vallen MFR/Vendor	Avail. Qty	Req. Qty	Price	Quote Price	Cost	Quote Cost	GP %	Extended Price	Status
1	RPN 100-75 CPN AH4990 11561020PVE LANCIA RD 100R 2PLX BLK/AN RH0002 CUST LINE # 1	MFR United Scientific NO VENDOR	MPN 10075 VALLIN PN 89738110075 VENDOR PN 10075 10075 BUR SA-3 C SAG3P UCM EA	MFR ATA TOOLS INC CODE 502307 Multiple Vallen Matches Suggested Parts	5	220 100 200 300 400	\$10.41000	10.41000 10.41000 10.41000 10.41000 10.41000	REPLACEMENT COST \$8.54000 \$8.54000 \$8.54000 \$8.54000 \$8.54000	21.90 21.90 21.90 21.90 21.90	% % % % %	\$2,290.20000 \$1,041.00000 \$2,082.00000 \$3,123.00000 \$4,164.00000	
2	RPN S2960HS CPN 3GG6HC1599 300616010 GLOVE CU P 0ELN SQUARH EV H EONGRN CUST LINE # 2	MFR Honeywell Safety Products USA Inc NO VENDOR	MPN S2960HS VALLIN PN 00288010295 VENDOR PN S2960HS S2960HS UNEX HYPERSH OCK SMOKE BROWN FRM CLR LENS UCM PR	MFR HONEYWELL SAFETY PRODUCTS USA CODE 95844 Multiple Vallen Matches	142	1,000 1,160 1,260 1,360 1,460	\$6.92000	6.92000 6.92000 6.92000 6.92000 6.92000	REPLACEMENT COST \$5.60000 \$5.60000 \$5.60000 \$5.60000 \$5.60000	23.57 23.57 23.57 23.57 23.57	% % % % %	\$6,920.00000 \$8,027.20000 \$8,719.20000 \$9,411.20000 \$10,103.20...	
3	RPN 11030042 CPN GMEAB18004 UC-225 CUTTER 3/4 ST OCK RAISED PANEL CUST LINE # 3	MFR Kinematica NO VENDOR	MPN 4212 ATN9 VALLIN PN 11030042 VENDOR PN 4212 ATN9 4212 ATN9 DOUBLE ROW BAL L BRGS 73165770044 99 UCM EA	MFR BKT USA INC CODE 463810 Multiple Vallen Matches	-	85 50 70 90 110	\$282.62000	282.62000 282.62000 282.62000 282.62000 282.62000	REPLACEMENT COST \$113.05000 \$113.05000 \$113.05000 \$113.05000 \$113.05000	150.00 150.00 150.00 150.00 150.00	% % % % %	\$24,022.70... \$14,131.00... \$19,783.40... \$25,435.80... \$31,088.20...	
4	RPN S109SLR CPN 2251860GQA 40-50-2060 SPRING CUST LINE # 4	MFR Klein Tools NO VENDOR	MPN S109SLR VALLIN PN 00288482004 VENDOR PN S109SLR S109SLR ALL PURPOSE W ORK BUCKET WITH PLAST IC BOT UCM EA	MFR KLEIN TOOLS CODE 92644 Multiple Vallen Matches	-	37 25 35 45 55	\$79.42000	79.42000 79.42000 79.42000 79.42000 79.42000	REPLACEMENT COST \$39.71000 \$39.71000 \$39.71000 \$39.71000 \$39.71000	100.00 100.00 100.00 100.00 100.00	% % % % %	\$2,938.54000 \$1,985.50000 \$2,779.70000 \$3,573.90000 \$4,368.10000	

New columns have been added to the Project View page in VallenIQ

8.1 Assignee

Assignee was previously its own column located on the right hand side of Project View.

However, to provide more space for new column additions, we've moved the Assignee functionality into the "Ref #" column on the left hand side of Project View.

The functionality of this column is the same as it was previously - both single line item assignments as well as group edit line item assignments are possible in public projects (line item assignments will not be possible in private projects, as is discussed in the "Public & Private Projects" section below).

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8.2 Available Quantity

A new column titled “Avail. Qty” has been added to Project View.

The purpose of this column is to show warehouse specific inventory that we receive from the Get-Price-Availability API.

If inventory is not available in the selected warehouse in the quote header, the system will show a dash:

Ref #	Req. Part Number	Req. MFR/Vendor	Quoted Part Number	Valien MFR/Vendor	Avail. Qty	Req. Qty	Price	Quote Price	Cost	Quote Cost	GP %	Extended Price	Status
14	RPN 205647 205647 MOTOR AIR PRESIDENT L/P	MFR GRACO INC. NO VENDOR	MFR 205647 VALLEN PH 47932220564 7 VENDOR PH 205647 205647 MOTOR AIR P RESIDENT L/P UOM EA Multiple Valien Matches Suggested Parts Part Cross References	MFR GRACO INC. CODE 479322 MFR Vendor Notes	–	1	\$4,425.00000	4,425.00000 Set	REPLACEMENT COST \$3,540.00000 SC QH OH LP C	REPLACEMENT COST 3,540.00000 Set	25.00 %	\$4,425.000...	RC

Inventory is not available for the warehouse selected in the quote header

Note that warehouse specific inventory is not available for non-stock items, so inventory will not be returned when calling the Get-NonStock-Price API.

8.3 Price

As described in the “API Integrations” section above, the new “Price” column will display unit price for stocking and non-stock items.

8.4 Quote Price

The “Quote Price” column will contain text entry boxes that correspond to each quantity break in the “Req. Qty” column. Users will be able to manually change quote price for each quantity break.

Note that the boxes highlighted in red correspond with the value mapped into the “Usage” field and the boxes in blue correspond with the values mapped into Requested Quantities 1 - 4:

Req. Qty	Price	Quote Price	Cost	Quote Cost	GP %	Extended Price
				REPLACEMENT COST		
220		10.41000 Set		8.54000 Set	21.90 %	\$2,290.200...
100		10.41000 Set		8.54000 Set	21.90 %	\$1,041.000...
200		10.41000 Set		8.54000 Set	21.90 %	\$2,082.000...
300		10.41000 Set		8.54000 Set	21.90 %	\$3,123.000...
400		10.41000 Set		8.54000 Set	21.90 %	\$4,164.000...
	\$10.41000		REPLACEMENT COST \$8.54000 SC QH OH LP C			

Usage fields vs. fields for Quantities 1-4

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8.5 GP%

This field will display the gross profit percentage for the usage and each quantity break. When users edit “Quote Price” and “Quote Cost,” the related GP% should automatically update to reflect this change.

Users may also manually edit the GP% as well, which should change the corresponding values in “Quote Price” and “Quote Cost” columns.

GP% is calculated as follows:

- $\text{Quote Price} - \text{Quote Cost} = \text{Gross Profit}$
- $(\text{Gross Profit} / \text{Quote Cost}) * 100 = \text{Gross Profit \%}$

Note that when “Quote Cost” is unavailable, the “GP%” column will not be populated.

8.6 Extended Price

Extended Price is calculated by taking the price in “Quote Price” and multiplying by the same break in the “Req. Qty” column.

Values in the “Extended Price” column will not be manually editable, but will automatically update depending on the values in “Quote Price” and “Req. Qty” columns.

8.7 Moving Forward

In upcoming releases, we plan on allowing users to select which columns they’d like to see within Project View, so individual users can configure the page to best fit their needs.

This will enable Q&S users to hide columns that were added for the CSR team and vice versa.

9. Quote & Order History

Updates have been made to Quote and Order History tabs located in the “Cost” modal:

Ref #	Req. Part Number	Req. MFR/Vendor	Quoted Part Number	Vallen MFR/Vendor	Avail. Qty	Req. Qty	Price	Quote Price	Cost	Quote Cost	GP %	Extended Price	Status
1	RPN 100-75 CPU AH4990 11000100R12 LANDY ARD 1/2IN 2PLY BLK/ AN RH00K2 CUST. LINE # 1	MFR United Scientific NO VENDOR	MPN 10075 VALLEN P/N 69178110075 VENDOR P/N 10075 10075 BUR SA-3 C SA03 P UOM EA Multiple Vallen Matches Suggested Parts	MFR ATA TOOLS INC CODE 902307 MFR Vendor Name	5	220 100 200 300 400	\$10.41000	10.41000 Set 10.41000 Set 10.41000 Set 10.41000 Set 10.41000 Set	\$8.54000 \$8.54000 \$8.54000 \$8.54000 \$8.54000	\$8.54000 \$8.54000 \$8.54000 \$8.54000 \$8.54000	21.90 % 21.90 % 21.90 % 21.90 % 21.90 %	\$2,290.20000 \$1,041.00000 \$2,082.00000 \$3,123.00000 \$4,164.00000	[Icons] [Status]

Access Quote and Order History tabs by clicking into the “Cost” column

9.1 Quote History

The following changes have been made to the “Quote History” tab:

Cost Details
Quote History
Order History

Vallen Part Number:
11954816
Manufacturer Part Number:
29-1212
Vendor Part Number:
29-1212
Stocking Status:
C

Quote History

Cost

Price

Total Quotes	Last Quoted Date	Last Quoted Price	Min Quoted Price	Max Quoted Price	Last Quoted Cost	Min Quoted Cost	Max Quoted Cost
3	06/30/2021	\$2.43320	\$2.43320	\$4.70880	\$2.35440	\$2.35440	\$2.35440

Cust ID	Cust Name	Proj ID	Quote Date	Repl Cost	Std Cost	Change Date	UOM	PUM	Cust Last Price	Cust Price
213994	ROBERT BOSCH CORP LLC	2383	2021/07/01	\$2.35440	\$2.35440	2021/06/30	EA	-	73.19000000	-
119252	VIKING PUMP INC	2250	2021/06/25	\$2.35440	\$2.35440	2021/06/18	EA	-	73.19000000	4.7088
47184	WAUPACA FOUNDRY INC	2283	2021/06/22	\$2.35440	\$2.35440	2021/06/22	EA	-	-	3.14

Close

Updated “Quote History” tab in “Cost” modal

- Historic quote activity from VallenIQ will now appear in “Quote History” tab
 - This historic VallenIQ activity was previously not populating in this tab
- Added quote history price information into the modal (previously were only showing cost data)

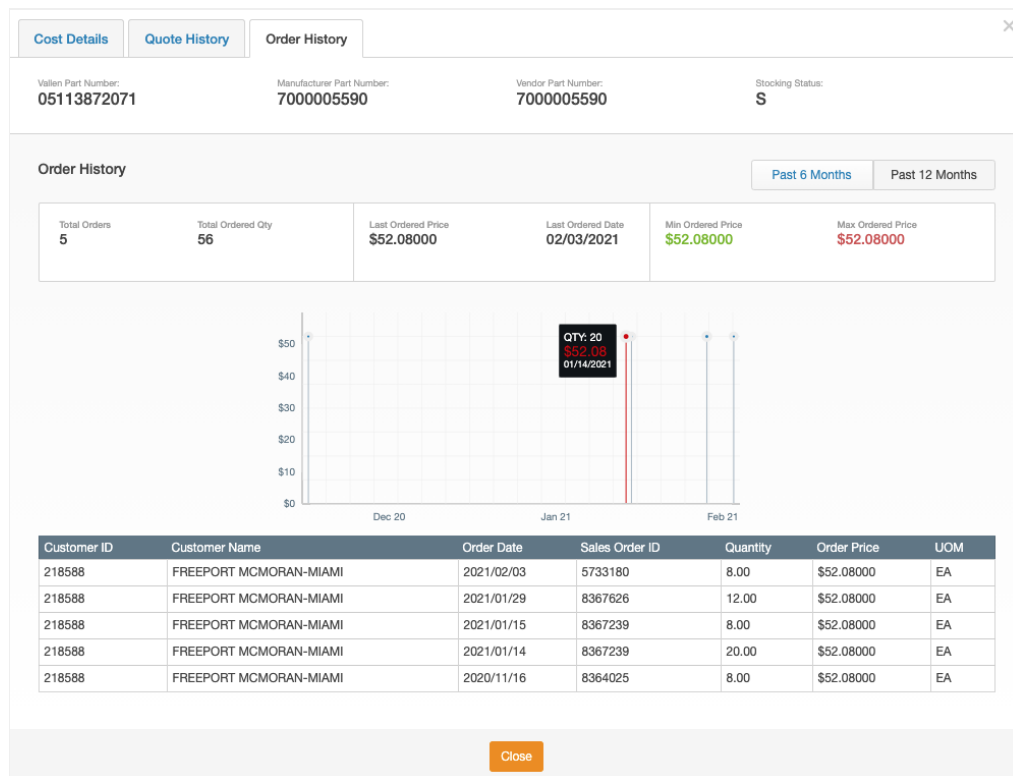
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- Added “Last Quoted Price,” “Min Quoted Price,” and “Max Quoted Price” price metrics in the Summary Metrics bar above the quote history chart. This data pulls from prices in “Quote Price” column from quotes that are closed
 - Note that until more quotes that contain pricing are closed within VallenIQ, this section may be sparsely populated
- Added the Price / Cost toggle button on the top right of the modal that allows users to switch between seeing price vs. cost in the quote history chart
- Implemented horizontal scroll in the quote history data table at the bottom of the page to give column values more space for legibility
- Added the following fields to the quote history data table:
 - Customer Last Price
 - Customer last price mapped into VallenIQ from customer RFQ
 - Customer Price
 - Unit price of quoted item taken from “Price” column in Project View
 - List Price
 - List price of quoted item from part_master table

9.2 Order History

The following changes have been made to the “Order History” tab:



Updated “Order History” tab in “Cost” modal

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We've updated the placement of the 6 months / 12 months toggle buttons. When these buttons are selected, the data in the Summary Metrics bar, order history chart, and the order history data table will change based on the selected time range.

10. Custom Export

The "Custom Export" feature has been updated. Values from all new columns must be exportable, so new fields have been added and two existing fields have been altered.

10.1 New Exportable Fields

The following selected fields have been added to the "Select Columns for Export" section of "Custom Export:"

Export Preferences

Export Options

User Export

Customer Export

Select Columns for Export

Select all

Deselect all

Default only

☐ Assignee

☒ Available Quantity

☐ Base UM Code

☐ Company Wide Inventory

☐ Cost Change Date

☐ Customer Description

☐ Customer Last Price

☐ Customer Line #

☐ Customer Part Number

☐ Customer UOM

☒ Extended Price

☒ Extended Price Usage

☐ External Comment

☒ GP %

☒ GP % Usage

☐ Image Link

☐ Internal Comment

☐ Lead Time

☐ MSDS Code

☐ Manufacturer Part Number

☐ Minimum Quantity

☐ Miscellaneous 1

☐ Miscellaneous 2

☐ Miscellaneous 3

☐ Miscellaneous 4

☐ Non-Tax Type

☐ Part Notes

☒ Price

☐ Product Category Code

☐ Product Category Name

☐ Purchase UM Code

☐ Quantity Breaks

☐ Quote Cost Quantity Breaks

☐ Quote Cost Type

☐ Quote Cost Usage

☒ Quote Price Quantity Breaks

☒ Quote Price Usage

☐ Ref #

☐ Replacement Cost

☐ Requested Manufacturer

☐ Requested Part Number

☐ Requested Vendor Name

☐ SPA Cost

☐ Standard Cost

☐ Standard Package Size

☐ Status

☐ Stocking Status

☐ Taxable

☐ Usage

☐ Vallen Customer Part Number

☐ Vallen Description

☐ Vallen Manufacturer Code

☐ Vallen Manufacturer Name

☐ Vallen Part Number

☐ Vallen Vendor Code

☐ Vallen Vendor Name

☐ Vend Pack

☐ Vendor Notes

☐ Vendor Part Number

Selected fields above are new to "Custom Export"

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Field Name	Notes
Available Quantity	Maps to value in "Avail. Qty" column for warehouse specific inventory
Price	Maps to value in "Price" column
Quote Price Usage	Maps to price for Customer Usage value. Similar to export behavior of "Quote Cost Customer Usage"
Quote Price Quantity Breaks	Maps to prices per quantity breaks in "Quote Price" column. Behavior of this field is similar to "Quote Cost Quantity Breaks," where if selected, "Quote Price Quantity 1" through "Quote Price Quantity 4" get exported to the downloaded file
GP%	Maps to values in "GP%" column. Behavior of this field is similar to "Quote Cost Quantity Breaks," where if selected, "GP% 1" through "GP% 4" are exported to the downloaded file
GP% Usage	Maps to value in GP% column for usage
Extended Price	Maps to values in "Extended Price" column. Behavior of this field is similar to "Quote Cost Quantity Breaks," where if selected, "Extended Price 1" through "Extended Price 4" get exported to the downloaded file
Extended Price Usage	Maps to value in Extended Price column for usage

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10.2 Updated Exportable Fields

Also, the names of the following existing fields were updated:

Select Columns for Export

[Select all](#) [Deselect all](#) [Default only](#)

<input type="checkbox"/> Assignee	<input type="checkbox"/> Minimum Quantity	<input type="checkbox"/> Requested Part Number
<input type="checkbox"/> Available Quantity	<input type="checkbox"/> Miscellaneous 1	<input type="checkbox"/> Requested Vendor Name
<input type="checkbox"/> Base UM Code	<input type="checkbox"/> Miscellaneous 2	<input type="checkbox"/> SPA Cost
<input type="checkbox"/> Company Wide Inventory	<input type="checkbox"/> Miscellaneous 3	<input type="checkbox"/> Standard Cost
<input type="checkbox"/> Cost Change Date	<input type="checkbox"/> Miscellaneous 4	<input type="checkbox"/> Standard Package Size
<input type="checkbox"/> Customer Description	<input type="checkbox"/> Non-Tax Type	<input type="checkbox"/> Status
<input type="checkbox"/> Customer Last Price	<input type="checkbox"/> Part Notes	<input type="checkbox"/> Stocking Status
<input type="checkbox"/> Customer Line #	<input type="checkbox"/> Price	<input type="checkbox"/> Taxable
<input type="checkbox"/> Customer Part Number	<input type="checkbox"/> Product Category Code	<input checked="" type="checkbox"/> Usage
<input type="checkbox"/> Customer UOM	<input type="checkbox"/> Product Category Name	<input type="checkbox"/> Vallen Customer Part Number
<input type="checkbox"/> Extended Price	<input type="checkbox"/> Purchase UM Code	<input type="checkbox"/> Vallen Description
<input type="checkbox"/> Extended Price Usage	<input type="checkbox"/> Quantity Breaks	<input type="checkbox"/> Vallen Manufacturer Code
<input type="checkbox"/> External Comment	<input type="checkbox"/> Quote Cost Quantity Breaks	<input type="checkbox"/> Vallen Manufacturer Name
<input type="checkbox"/> GP %	<input type="checkbox"/> Quote Cost Type	<input type="checkbox"/> Vallen Part Number
<input type="checkbox"/> GP % Usage	<input checked="" type="checkbox"/> Quote Cost Usage	<input type="checkbox"/> Vallen Vendor Code
<input type="checkbox"/> Image Link	<input type="checkbox"/> Quote Price Quantity Breaks	<input type="checkbox"/> Vallen Vendor Name
<input type="checkbox"/> Internal Comment	<input type="checkbox"/> Quote Price Usage	<input type="checkbox"/> Vend Pack
<input type="checkbox"/> Lead Time	<input type="checkbox"/> Ref #	<input type="checkbox"/> Vendor Notes
<input type="checkbox"/> MSDS Code	<input type="checkbox"/> Replacement Cost	<input type="checkbox"/> Vendor Part Number
<input type="checkbox"/> Manufacturer Part Number	<input type="checkbox"/> Requested Manufacturer	

Selected field names above have been altered

- “Customer Usage” has been changed to “Usage”
- “Quote Cost Customer Usage” has been changed to “Quote Cost Usage”

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11. Public & Private Projects

This new feature allows super admin and admin users to make their projects public or private. The purpose of this feature is to allow users to create private quotes for customers that require NDA's and to limit the number of users that can see certain quotes in the system.

11.1 Default Privacy of New Projects

Projects will by default be created as public projects. However, super admins and admins will have the ability to change the privacy status of projects as needed.

11.2 Changing Privacy Status

The privacy status of quotes can be changed in two locations within the application.

The first location is within the “Project Settings” modal of your projects. We’ve added a new section titled “Quote Privacy,” where the two options are “public” and “private.”

The screenshot shows the 'Project Settings' modal with tabs for 'Project Settings', 'Customer Information', 'Merge Projects', and 'Transfer Ownership'. The 'Project Name' field contains 'TEST PROJECT'. The 'Quote Status' dropdown is set to 'Open'. The '58 Code' field has a placeholder 'Add 58 Code'. The 'Quote Privacy' section is highlighted with a red box and contains the text: 'Making public quotes private will refresh your quote and assign all lines to the quote owner.' Below this are two radio buttons: 'Public' (selected) and 'Private'. The 'Share Status' section has 'Shared' selected. The 'Project Description' field is empty. At the bottom are 'Save Settings' and 'Cancel' buttons.

Change privacy status by selecting the appropriate quote status and saving settings

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The second location is in the “Project Management” tab where:

- Super admins can change the privacy settings of any project in both “My Projects” and “All Projects” tabs
- Admins can change the privacy settings of any projects they own in only “My Projects” tab

11.3 Private Project Behavior

As mentioned above, projects will be set to public by default when first created within VallenIQ. However, when public projects are set to private, a number of changes will be made within the project.

11.3.1 Share Status

The “Share Status” of the project will be set to “Unshared.” See the “Share & Unshare” section below for more details.

Quote Privacy:
Making public quotes private will refresh your quote and assign all lines to the quote owner.

☐ Public ☒ Private

Share Status:
Public quotes cannot be unshared. When shared private quotes are unshared, the quote link will no longer be accessible.

☐ Shared ☒ Unshared

“Share Status” setting in “Project Settings” modal

11.3.2 Line Item Assignments

When public projects are set to private, all line items in the project will be automatically re-assigned to the owner of the project.

Additionally, line item assignments will be disabled within the private project. The blue “Assign” button will no longer be available, and users will not be able to select into the “Ref #” column to assign single line items.

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TEST PROJECT 062921 - 3 (6 Lines) • 2021/06/29 at 8:08 PM EST • Private • Unshared

owned by: Eugene Lee

33900

KIMBALL INTERNATIONAL

Project ID: 2507

Status: Open

Due Date: 2021/07/01

Team Lead: Jon Holloway

Project Type: Blanket

Filter by Category (5)

Cutting Tools

Hand Tools

Miscellaneous Products

Power Tools

Safety Products

Filter by Req. Manufacturer (6)

Becton & Dickinson

Honeywell Safety Products

USA Inc

Ingersoll Rand

Kinematica

Klein Tools

United Scientific

Filter by Intelligence

Multiple Valen Matches

Cross References

Part Cross References

Suggested Parts

Changed RPN

Changed CPN

Updated Parts

Created Parts

Last Picks

Filter by Cost Source

With Order History

With Quote History

With Cost

With Standard Cost

Filter by Status

RC Status

CU Status

VAL Status

DU Status

TI Status

NQ Status

CS Status

AL Status

NMI Status

Refresh All

Custom Export

Edit History

More Filters

Selecting 0 item(s) Showing 6/6 results

Select All

Group Edit

Remove

Switch to Expand View

Hide All Alternates

Ref #

Search line items

Total Cost: \$9,502,37000

Ref #	Req. Part Number	Req. MFR/Vendor	Quoted Part Number	Valen MFR/Vendor	Avail. Qty	Req. Qty	Price	Quote Price	Cost	Quote Cost	GP %	Extended Price	Status
1	RPN 100-75 CPN AH4990 11000/SPND LINDY AND 1/2IN 2PLY BLK/ AN RH002 CUST LINE #1	MFR United Scientific NO VENDOR	MPN 10075 VALLEN PN 8817810075 VENDOR PN 10075 10075 BUR SA-3 C SA03 P UOM EA Multiple Valen Matches Suggested Parts	MFR ATA TOOLS INC CODE 502307 Mfr/Vendor Notes	5	220	\$10.41000	10.41000	Set	REPLACEMENT COST \$8.54000 \$8.54000 \$8.54000 \$8.54000 \$8.54000	(21.90 %)	\$2,290.20000	INC
						100		10.41000	Set			\$1,041.00000	
						200		10.41000	Set			\$2,082.00000	
						300		10.41000	Set			\$3,123.00000	
						400		10.41000	Set			\$4,164.00000	
2	RPN S2960HS CPN 3G5GHC15 99 30081611D GLOVE C LIP DELTA GLOATH E V NEONGRN CUST LINE #2	MFR Honeywell Safety Products USA Inc NO VENDOR	MPN S2960HS VALLEN PN 8208013296 VENDOR PN S2960HS S2960HS UNEX HYPERS HOOK SMOKE BROWN F RM CLR LENS UOM PR	MFR HONEYWELL SAFETY PRODUCTS USA CODE 461178 Mfr/Vendor Notes	142	1,000	\$6.92000	6.92000	Set	REPLACEMENT COST \$5.60000 \$5.60000 \$5.60000 \$5.60000 \$5.60000	(23.57 %)	\$6,920.00000	VAL
						1,160		6.92000	Set			\$8,027.20000	
						1,260		6.92000	Set			\$8,719.20000	
						1,360		6.92000	Set			\$9,411.20000	
						1,460		6.92000	Set			\$10,103.20...	
3	RPN 11030042 CPN GMEAR1800 4 UC-203 CUTTER 3/4 STOCK RAISED PANE L CUST LINE #3	MFR Kinematica NO VENDOR	MPN 4212 ATN9 VALLEN PN 11030042 VENDOR PN 4212 ATN9 4212 ATN9 DOUBLE RO W BAL L BRGS 7316577 00499 UOM EA	MFR B&F USA INC. CODE 463810 Mfr/Vendor Notes	--	85	\$282.62000	282.62000	Set	REPLACEMENT COST \$113.05000 \$113.05000 \$113.05000 \$113.05000 \$113.05000	GP	\$24,022.70...	VAL
						50		282.62000	Set			\$14,131.00...	
						70		282.62000	Set			\$19,783.40...	
						90		282.62000	Set			\$25,435.80...	
						110		282.62000	Set			\$31,088.20...	
4	RPN 5109SLR CPN 2251860GQ A 40-50-3000 SPRING CUST LINE #4	MFR Klein Tools NO VENDOR	MPN 5109SLR VALLEN PN 0034482004 VENDOR PN 5109SLR 5109SLR ALL PURPOSE WORK BUCKET WITH PL ASTIC BOT UOM EA	MFR KLEIN TOOLS CODE 00844 Mfr/Vendor Notes	--	37	\$79.42000	79.42000	Set	REPLACEMENT COST \$39.71000 \$39.71000 \$39.71000 \$39.71000 \$39.71000	100.00 %	\$2,938.54000	?
						25		79.42000	Set			\$1,985.50000	
						35		79.42000	Set			\$2,779.70000	
						45		79.42000	Set			\$3,573.90000	
						55		79.42000	Set			\$4,368.10000	

Line item assignments are disabled for private projects

Users may still share private projects with other users to gather feedback or to ask for help. This behavior is discussed in the “Share & Unshare” section below.

11.4 Permissions

Whether users can view, edit, or change privacy settings of projects will be determined by their user role.

Permissions per role are summarized in the table below:

Role	Super Admins	Admins	Specialists
Private	<p><u>Visibility</u></p> <ul style="list-style-type: none"> Can see my private quotes in "My Projects" and "All Projects" tabs in Project Management page Can see my and all other users' private quotes in "All Projects" tab in Project Management page <p><u>Editing</u></p> <ul style="list-style-type: none"> Can open and edit all users' private quotes <p><u>Privacy Settings</u></p> <ul style="list-style-type: none"> Can make my private quotes public Can make other users' private quotes public 	<p><u>Visibility</u></p> <ul style="list-style-type: none"> Can only see my own private quotes in "My Projects" and "All Projects" tabs in Project Management page <p><u>Editing</u></p> <ul style="list-style-type: none"> Can only edit my own private quotes <p><u>Privacy Settings</u></p> <ul style="list-style-type: none"> Can only make my private quotes public 	<p><u>Visibility</u></p> <ul style="list-style-type: none"> Cannot see any users' private quotes in Project Management page <p><u>Editing</u></p> <ul style="list-style-type: none"> Cannot edit any users' private quotes (line item assignments are disabled for private quotes) <p><u>Privacy Settings</u></p> <ul style="list-style-type: none"> Cannot make any private quotes public
Public	<p><u>Visibility</u></p> <ul style="list-style-type: none"> Can see my and all users' public quotes in "All Projects" tab of Project Management page Can see other users' public quotes in "My Projects" tab of Project Management page if I have lines assigned to me in them <p><u>Editing</u></p> <ul style="list-style-type: none"> Can edit all users' public quotes <p><u>Privacy Settings</u></p> <ul style="list-style-type: none"> Can make my public quotes private Can make other users' public quotes private 	<p><u>Visibility</u></p> <ul style="list-style-type: none"> Can see my and all users' public quotes in "All Projects" tab in Project Management page Can see other users' public quotes in "My Projects" tab of Project Management page if I have lines assigned to me in them <p><u>Editing</u></p> <ul style="list-style-type: none"> Can edit all users' public quotes <p><u>Privacy Settings</u></p> <ul style="list-style-type: none"> Can only make my public quotes private 	<p><u>Visibility</u></p> <ul style="list-style-type: none"> Can see my and all users' public quotes in "All Projects" tab in Project Management page Can see other users' public quotes in "My Projects" tab of Project Management page if I have lines assigned to me in them <p><u>Editing</u></p> <ul style="list-style-type: none"> Can open other users' public quotes but only edit lines that are assigned to me <p><u>Privacy Settings</u></p> <ul style="list-style-type: none"> Cannot make public quotes private

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12. Share & Unshare

When private projects are shared with other users, this new feature will allow the owner to control whether recipients of the private project link can access and edit the project.

The Share status of projects can be edited in the “Project Settings” modal in the section below:

The screenshot shows the 'Project Settings' modal with tabs for 'Project Settings', 'Customer Information', 'Merge Projects', and 'Transfer Ownership'. The 'Project Name' is 'TEST PROJECT 062921 - 3'. The 'Quote Status' is set to 'Open'. The '58 Code' field is empty. The 'Quote Privacy' is set to 'Private'. The 'Share Status' section is highlighted with a red box, showing 'Shared' and 'Unshared' radio buttons, with 'Unshared' selected. The 'Pricing & Avail. Preferences' section has 'Price & Warehouse Inventory' checked. The 'Cost Preferences' section has 'Cost', 'Last Quoted Cost', and 'Last Ordered Cost' checked. The 'Last Pick Settings' section has 'Use Last Pick' unchecked. The 'Project Description' field is empty. At the bottom are 'Save Settings' and 'Cancel' buttons.

“Share Status” section in “Project Settings” modal

Additionally, the share status of projects will be shown to the right of the project name:

The screenshot shows the project header for 'TEST PROJECT 062921 - 3 (6 Lines)'. The project is owned by Eugene Lee. The 'Share Status' is shown as 'Unshared' with a red icon. The header also includes buttons for 'Share Project', 'Project Settings', and 'Hide Filters'. Below the header is a table with filters for Category, Manufacturer, Intelligence, Cost Source, and Status. The table shows 6 results.

“Share Status” is shown at the top of each project

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12.1 Default Share Status of New Projects

Projects will by default be created as public projects and the share status will be set to “Shared.”

This means that because the project is public, it is available in the “Project Management” tab, it is accessible by VallenIQ users, and is therefore “Shared.”

Also, note that projects that are public cannot be unshared, so only the “Shared” option in “Project Settings” modal will be available to select. The “Unshared” option is only selectable when the “Private” Quote Privacy setting is selected.

The screenshot shows the 'Project Settings' modal with the following sections:

- Project Name:** TEST PROJECT 062921 - 3
- Quote Status:** Open (dropdown menu)
- 58 Code:** Add 58 Code (text input)
- Quote Privacy:** Public (selected), Private (radio button)
- Share Status:** Shared (radio button), **Unshared** (radio button, highlighted with a red box)
- Project Description:** Write Project Description (text area)
- Pricing & Avail. Preferences:** Price & Warehouse Inventory (checked)
- Cost Preferences:** Cost (checked), Last Quoted Cost (checked), Last Ordered Cost (checked)
- Last Pick Settings:** Use Last Pick (checkbox)

At the bottom, there are 'Save Settings' and 'Cancel' buttons.

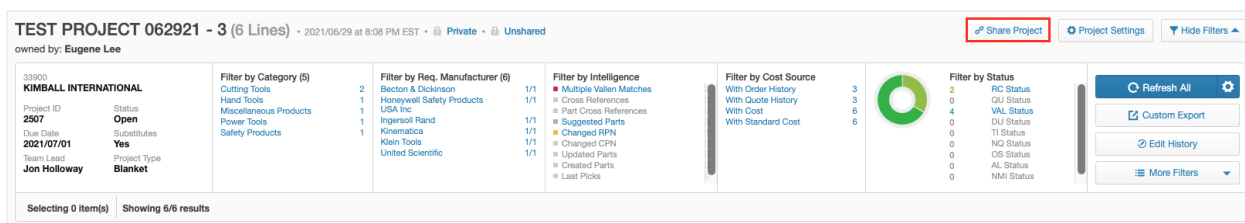
When “Public” Quote Privacy setting is selected, the “Unshared” Share Status is not selectable

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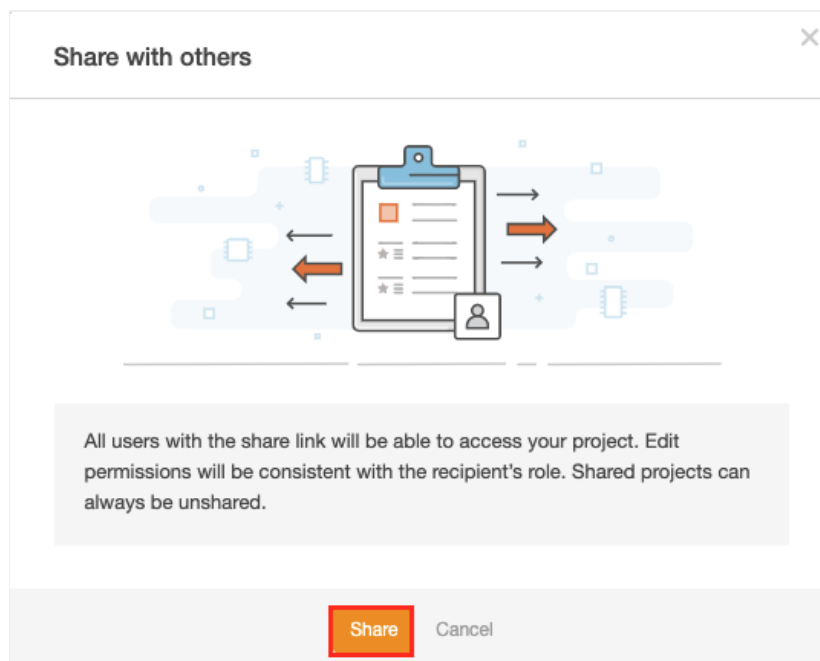
12.2 Sharing Private Projects

Public projects can be accessed by any user in the “Project Management” tab. However, to give access to private projects to another user, the project owner should click into the “Share Project” modal:



“Share Project” button at the top of your project

Then select the “Share” button:

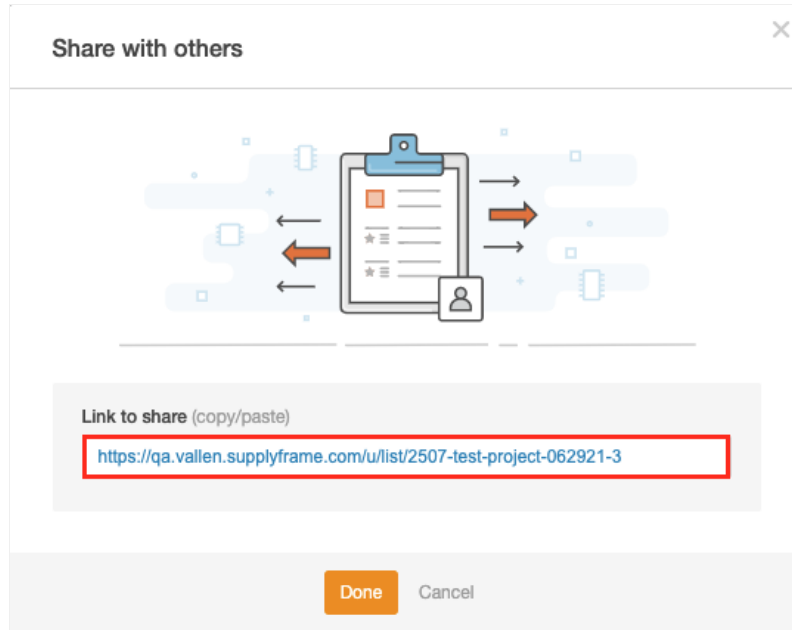


Select “Share” to move onto the next step

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After the “Share” button is selected, the “Share with others” modal will contain a shareable link to the project:



Copy the share link and send to recipients

Note that when “Share” is selected in the prior step, the system will automatically change the Share status of the project to “Shared:”

TEST PROJECT 062921 - 3 (6 Lines) • 2021/06/29 at 8:08 PM EST • Private **Shared** [Share Project](#) [Project Settings](#) [Hide Filters](#)

owned by: Eugene Lee

23900 KIMBALL INTERNATIONAL Project ID: 2507 Status: Open Due Date: 2021/07/01 Substitutes: Yes Team Lead: Jon Holloway Project Type: Blanket	Filter by Category (5) Cutting Tools: 2 Hand Tools: 1 Miscellaneous Products: 1 Power Tools: 1 Safety Products: 1	Filter by Req. Manufacturer (6) Becton & Dickinson: 1/1 Honeywell Safety Products: 1/1 USA Inc: 1/1 Ingersoll Rand: 1/1 Kinematica: 1/1 Klein Tools: 1/1 United Scientific: 1/1	Filter by Intelligence Multiple Vallen Matches: 2 Cross References: 0 Part Cross References: 0 Suggested Parts: 3 Changed RPN: 1 Changed CPN: 0 Updated Parts: 0 Created Parts: 0 Last Picks: 0	Filter by Cost Source With Order History: 3 With Quote History: 3 With Cost: 6 With Standard Cost: 6	Filter by Status RC Status: 2 QU Status: 0 VAL Status: 4 DU Status: 0 TI Status: 0 NQ Status: 0 OS Status: 0 AL Status: 0 NMI Status: 0
--	---	---	---	---	---

Selecting 0 item(s) Showing 6/6 results

Buttons: Refresh All, Custom Export, Edit History, More Filters

When “Share Project” is used, the system will make the project “Shared”

The project owner should then send the project link to users who need to access the private project.

When the recipient of the project link receives the URL, they should first ensure that they are logged into VallenIQ, then open the link in their browser.

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12.3 Permissions

When the project owner has shared the project link to their recipient(s), the behavior of the private project will differ depending on the roles of the project owner and the recipient:

Project Owner	Share Link Recipient	Behavior
Admin	Admin	<ul style="list-style-type: none"> Admin recipient of private project does not see the project in Project Management (neither in “My Projects”, nor “All Projects”) Admin recipient is only able to access the project using share link Admin recipient has full edit permissions within shared project If Admin project owner selects “unshare” then: <ul style="list-style-type: none"> Project continues to not be visible in the Admin recipient’s Project Management tab If prior Admin recipient of shared private project opens the link, system will show an error page
Admin	Super Admin	<ul style="list-style-type: none"> Super Admins can see and edit all other users’ private projects in Project Management Super Admin recipients of shared projects have full edit permissions within the project If Admin project owner unshares the project <ul style="list-style-type: none"> Super Admins will still be able to see the private project in Project Management tab Super Admins will still have full edit permissions within other users’ private projects
Super Admin	Admin	<ul style="list-style-type: none"> Admin recipient of private project does not see the project in Project Management (neither in “My Projects”, nor “All Projects”) Admin recipient is only able to access the project using share link Admin recipient has full edit permissions for all lines in project If Super Admin project owner selects “unshare” <ul style="list-style-type: none"> Project continues to not be visible in the Admin recipient’s Project Management tab If prior Admin recipient of shared private project opens the link, the system will show an error page
Super Admin	Super Admin	<ul style="list-style-type: none"> Super Admins can see and edit all other users’ private projects in Project Management Super Admin recipients of shared projects have full edit permissions If Super Admin unshares a project <ul style="list-style-type: none"> Super Admins will still see the private project in Project Management tab Super Admins will still have full edit permissions within other users’ private projects

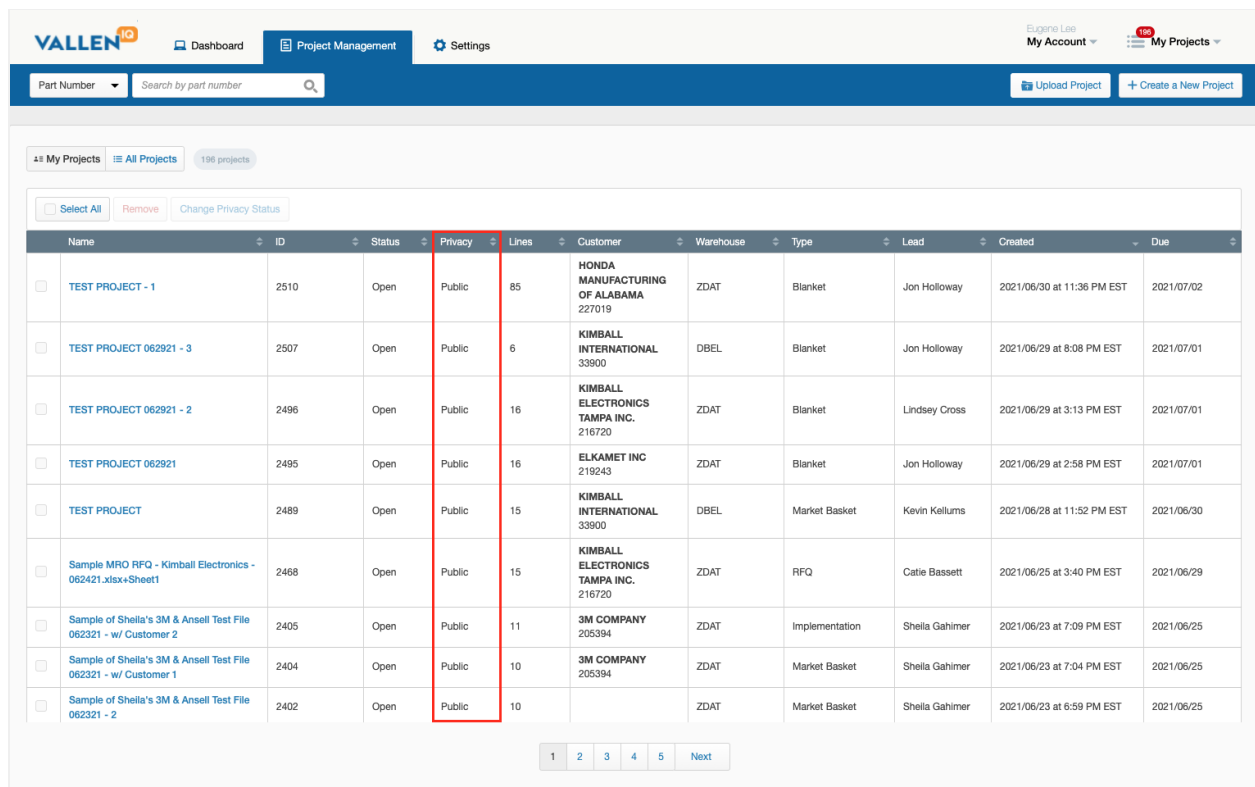
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13. Project Management Tab Updates

“Project Management” tab has been updated to allow certain users to see and edit the privacy setting of quotes and also to allow users to see projects uploaded by both teams, Q&S and CSR.

13.1 New Privacy Column

All user roles will now be able to see the Privacy status of quotes in “My Projects” and “All Projects” tabs:



The screenshot shows the Valen Project Management interface. At the top, there's a navigation bar with 'Dashboard', 'Project Management', and 'Settings'. Below this is a search bar for 'Part Number' and buttons for 'Upload Project' and 'Create a New Project'. The main content area shows a list of projects under the 'My Projects' tab. A table lists various projects with columns for Name, ID, Status, Privacy, Lines, Customer, Warehouse, Type, Lead, Created, and Due. The 'Privacy' column is highlighted with a red border, showing values like 'Public' for all listed projects. Below the table is a pagination control showing pages 1 through 5 and a 'Next' button.

Name	ID	Status	Privacy	Lines	Customer	Warehouse	Type	Lead	Created	Due
TEST PROJECT - 1	2510	Open	Public	85	HONDA MANUFACTURING OF ALABAMA 227019	ZDAT	Blanket	Jon Holloway	2021/06/30 at 11:36 PM EST	2021/07/02
TEST PROJECT 062921 - 3	2507	Open	Public	6	KIMBALL INTERNATIONAL 33900	DBEL	Blanket	Jon Holloway	2021/06/29 at 8:08 PM EST	2021/07/01
TEST PROJECT 062921 - 2	2496	Open	Public	16	KIMBALL ELECTRONICS TAMPA INC. 216720	ZDAT	Blanket	Lindsey Cross	2021/06/29 at 3:13 PM EST	2021/07/01
TEST PROJECT 062921	2495	Open	Public	16	ELKAMET INC 219243	ZDAT	Blanket	Jon Holloway	2021/06/29 at 2:58 PM EST	2021/07/01
TEST PROJECT	2489	Open	Public	15	KIMBALL INTERNATIONAL 33900	DBEL	Market Basket	Kevin Kellums	2021/06/28 at 11:52 PM EST	2021/06/30
Sample MRO RFQ - Kimball Electronics - 062421.xlsx+Sheet1	2468	Open	Public	15	KIMBALL ELECTRONICS TAMPA INC. 216720	ZDAT	RFQ	Catie Bassett	2021/06/25 at 3:40 PM EST	2021/06/29
Sample of Sheila's 3M & Ansell Test File 062321 - w/ Customer 2	2405	Open	Public	11	3M COMPANY 205394	ZDAT	Implementation	Sheila Gahimer	2021/06/23 at 7:09 PM EST	2021/06/25
Sample of Sheila's 3M & Ansell Test File 062321 - w/ Customer 1	2404	Open	Public	10	3M COMPANY 205394	ZDAT	Market Basket	Sheila Gahimer	2021/06/23 at 7:04 PM EST	2021/06/25
Sample of Sheila's 3M & Ansell Test File 062321 - 2	2402	Open	Public	10		ZDAT	Market Basket	Sheila Gahimer	2021/06/23 at 6:59 PM EST	2021/06/25

New “Privacy” column in Project Management page

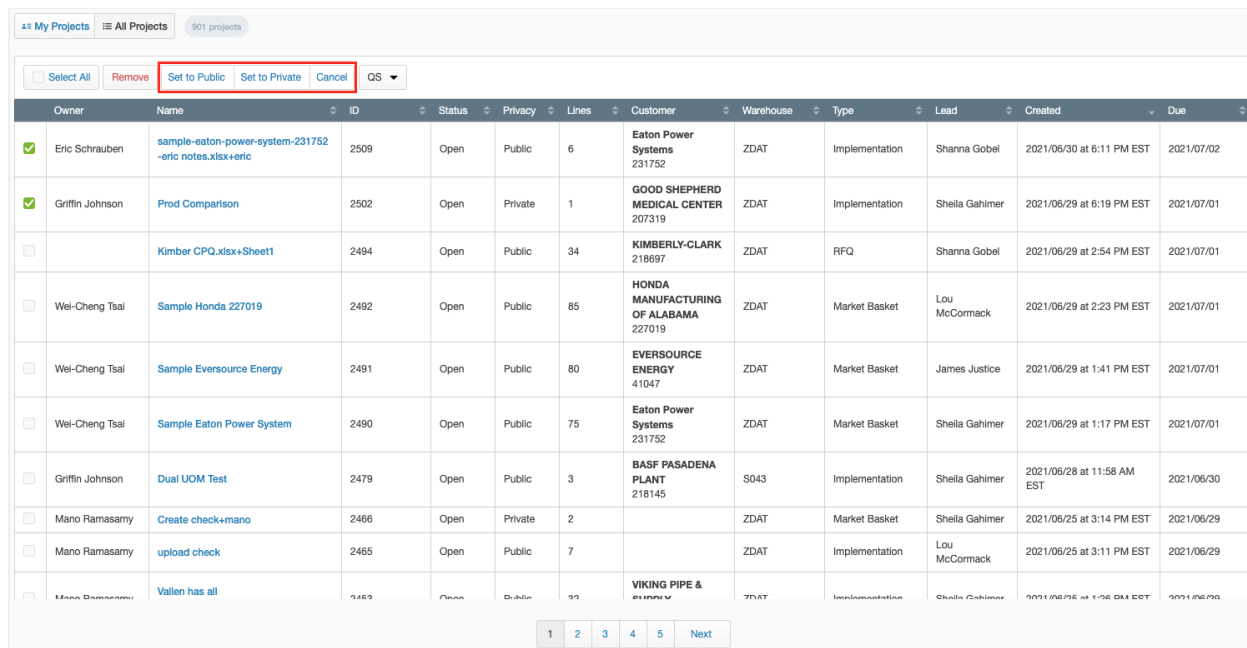
Note that the permissions described in the “Public & Private Projects” section above will still apply to all user roles.

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13.2 Change Privacy Setting

This enhancement only applies to super admin and admin users. Specialists will not be able to change the privacy settings of projects in VallenIQ.

Super admins will have the ability to change the privacy setting of any quote in “Project Management” tab, whether in “My Projects” or “All Projects.”

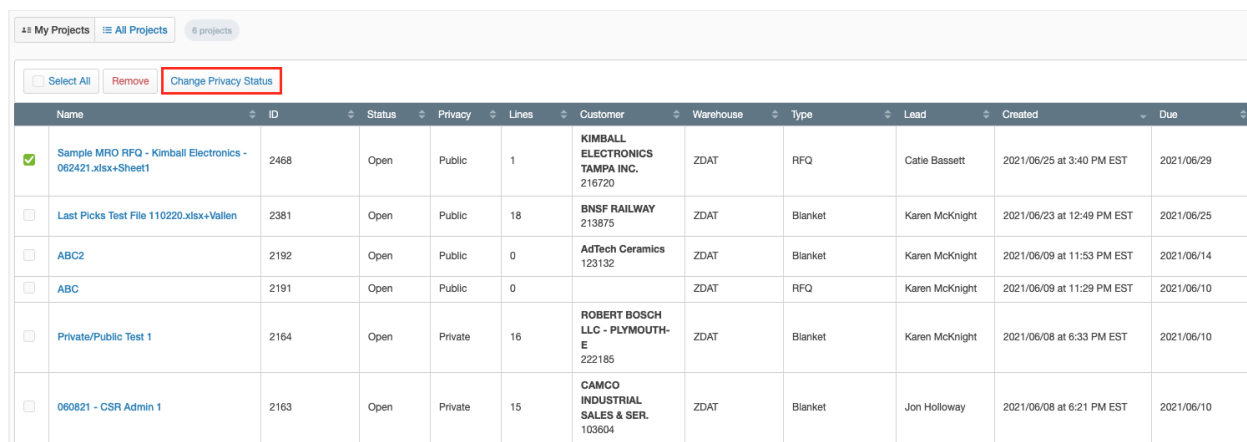


The screenshot shows the 'My Projects' tab with 901 projects. A red box highlights the 'Set to Private' button in the top toolbar. The table below lists various projects with columns for Owner, Name, ID, Status, Privacy, Lines, Customer, Warehouse, Type, Lead, Created, and Due.

Owner	Name	ID	Status	Privacy	Lines	Customer	Warehouse	Type	Lead	Created	Due
Eric Schrauben	sample-eaton-power-system-231752-eric notes.xlsx+eric	2509	Open	Public	6	Eaton Power Systems 231752	ZDAT	Implementation	Shanna Gobel	2021/06/30 at 6:11 PM EST	2021/07/02
Griffin Johnson	Prod Comparison	2502	Open	Private	1	GOOD SHEPHERD MEDICAL CENTER 207319	ZDAT	Implementation	Sheila Gahimer	2021/06/29 at 6:19 PM EST	2021/07/01
	Kimber CPQ.xlsx+Sheet1	2494	Open	Public	34	KIMBERLY-CLARK 218697	ZDAT	RFQ	Shanna Gobel	2021/06/29 at 2:54 PM EST	2021/07/01
Wei-Cheng Tsai	Sample Honda 227019	2492	Open	Public	85	HONDA MANUFACTURING OF ALABAMA 227019	ZDAT	Market Basket	Lou McCormack	2021/06/29 at 2:23 PM EST	2021/07/01
Wei-Cheng Tsai	Sample Eversource Energy	2491	Open	Public	80	EVERSOURCE ENERGY 41047	ZDAT	Market Basket	James Justice	2021/06/29 at 1:41 PM EST	2021/07/01
Wei-Cheng Tsai	Sample Eaton Power System	2490	Open	Public	75	Eaton Power Systems 231752	ZDAT	Market Basket	Sheila Gahimer	2021/06/29 at 1:17 PM EST	2021/07/01
Griffin Johnson	Dual UOM Test	2479	Open	Public	3	BASF PASADENA PLANT 218145	S043	Implementation	Sheila Gahimer	2021/06/28 at 11:58 AM EST	2021/06/30
Mano Ramasamy	Create check+mano	2466	Open	Private	2		ZDAT	Market Basket	Sheila Gahimer	2021/06/25 at 3:14 PM EST	2021/06/29
Mano Ramasamy	upload check	2465	Open	Public	7		ZDAT	Implementation	Lou McCormack	2021/06/25 at 3:11 PM EST	2021/06/29
Mano Ramasamy	Vallen has all	2463	Open	Public	39	VIKING PIPE & SYSTEMS	ZDAT	Implementation	Sheila Gahimer	2021/06/25 at 1:56 PM EST	2021/06/29

Super admins can change privacy setting of any quote in “Project Management”

However, Admins will only be able to change the privacy setting of the quotes they own. Therefore, this functionality will only be available in the “My Projects” tab.



The screenshot shows the 'My Projects' tab with 6 projects. A red box highlights the 'Change Privacy Status' button in the top toolbar. The table below lists various projects with columns for Name, ID, Status, Privacy, Lines, Customer, Warehouse, Type, Lead, Created, and Due.

Name	ID	Status	Privacy	Lines	Customer	Warehouse	Type	Lead	Created	Due
Sample MRO RFQ - Kimball Electronics - 062421.xlsx+Sheet1	2468	Open	Public	1	KIMBALL ELECTRONICS TAMPA INC. 216720	ZDAT	RFQ	Catie Bassett	2021/06/25 at 3:40 PM EST	2021/06/29
Last Picks Test File 110220.xlsx+Vallen	2381	Open	Public	18	BNSF RAILWAY 213875	ZDAT	Blanket	Karen McKnight	2021/06/23 at 12:49 PM EST	2021/06/25
ABC2	2192	Open	Public	0	AdTech Ceramics 123132	ZDAT	Blanket	Karen McKnight	2021/06/09 at 11:53 PM EST	2021/06/14
ABC	2191	Open	Public	0		ZDAT	RFQ	Karen McKnight	2021/06/09 at 11:29 PM EST	2021/06/10
Private/Public Test 1	2164	Open	Private	16	ROBERT BOSCH LLC - PLYMOUTH-E 222185	ZDAT	Blanket	Karen McKnight	2021/06/08 at 6:33 PM EST	2021/06/10
060821 - CSR Admin 1	2163	Open	Private	15	CAMCO INDUSTRIAL SALES & SER. 103604	ZDAT	Blanket	Jon Holloway	2021/06/08 at 6:21 PM EST	2021/06/10

Admins can only change privacy setting of quotes they own in “Project Management”

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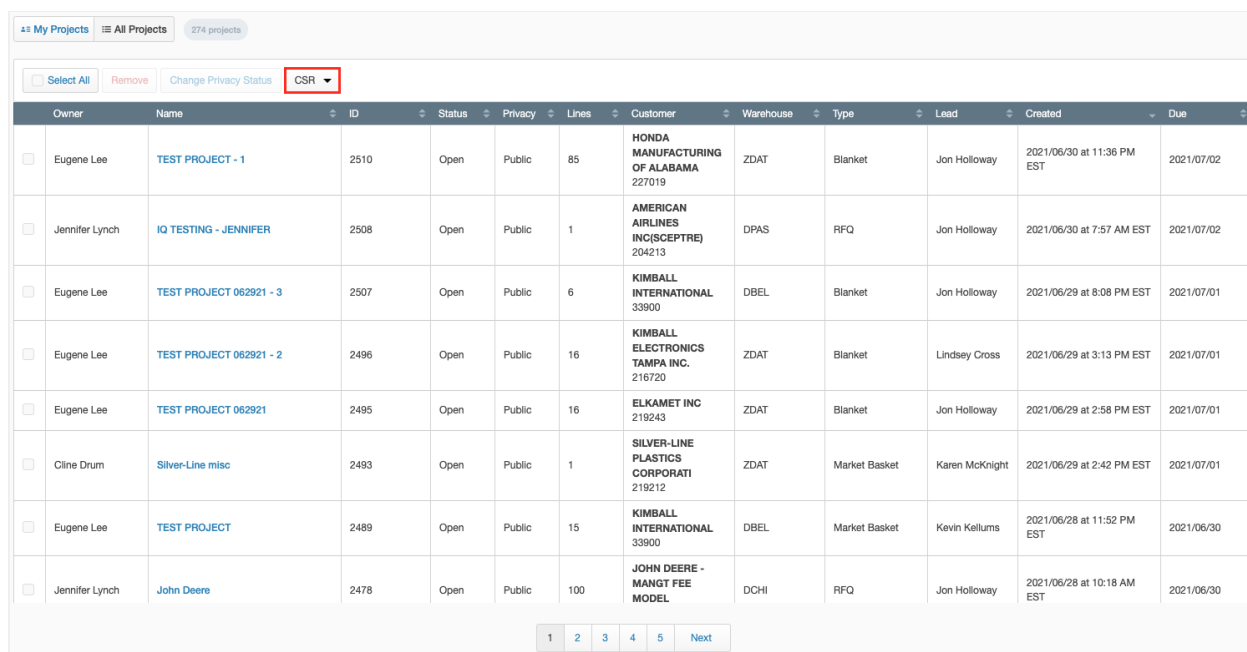
13.3 Team Dropdown in All Projects

We've introduced a new team dropdown in the "All Projects" tab that will allow users to see projects uploaded by their team, the opposite team, or projects owned by both teams at once. Note that this dropdown will not be available in "My Projects."

The values for this dropdown will be:

- QS
- CSR
- QS & CSR

When users access "All Projects," VallenIQ will default the dropdown to only show projects created by your team. For example, if I am a member of the Q&S team, the team dropdown will be pre-selected to show "QS" projects. The opposite will be true for CSR users.



The screenshot shows the 'All Projects' tab with 274 projects. A dropdown menu is open, showing 'CSR' as the selected team. The table below lists various projects with columns for Owner, Name, ID, Status, Privacy, Lines, Customer, Warehouse, Type, Lead, Created, and Due.

Owner	Name	ID	Status	Privacy	Lines	Customer	Warehouse	Type	Lead	Created	Due
Eugene Lee	TEST PROJECT - 1	2510	Open	Public	85	HONDA MANUFACTURING OF ALABAMA 227019	ZDAT	Blanket	Jon Holloway	2021/06/30 at 11:36 PM EST	2021/07/02
Jennifer Lynch	IQ TESTING - JENNIFER	2508	Open	Public	1	AMERICAN AIRLINES INC(SCEPTRE) 204213	DPAS	RFQ	Jon Holloway	2021/06/30 at 7:57 AM EST	2021/07/02
Eugene Lee	TEST PROJECT 062921 - 3	2507	Open	Public	6	KIMBALL INTERNATIONAL 33900	DBEL	Blanket	Jon Holloway	2021/06/29 at 8:08 PM EST	2021/07/01
Eugene Lee	TEST PROJECT 062921 - 2	2496	Open	Public	16	KIMBALL ELECTRONICS TAMPA INC. 216720	ZDAT	Blanket	Lindsey Cross	2021/06/29 at 3:13 PM EST	2021/07/01
Eugene Lee	TEST PROJECT 062921	2495	Open	Public	16	ELKAMET INC 219243	ZDAT	Blanket	Jon Holloway	2021/06/29 at 2:58 PM EST	2021/07/01
Cline Drum	Silver-Line misc	2493	Open	Public	1	SILVER-LINE PLASTICS CORPORATI 219212	ZDAT	Market Basket	Karen McKnight	2021/06/29 at 2:42 PM EST	2021/07/01
Eugene Lee	TEST PROJECT	2489	Open	Public	15	KIMBALL INTERNATIONAL 33900	DBEL	Market Basket	Kevin Kellums	2021/06/28 at 11:52 PM EST	2021/06/30
Jennifer Lynch	John Deere	2478	Open	Public	100	JOHN DEERE - MANGT FEE MODEL	DCHI	RFQ	Jon Holloway	2021/06/28 at 10:18 AM EST	2021/06/30

Team dropdown in "All Projects" tab

Additionally, the following role permissions will apply:

- Specialists can see all public projects for both CSR and Q&S teams
- Admins can see private projects they own and all public projects for both CSR and Q&S teams
- Super admins can see all private projects and all public projects for both CSR and Q&S teams

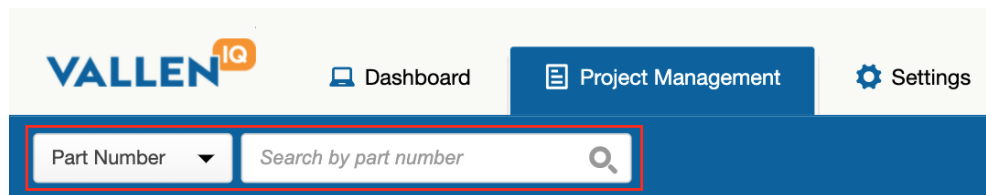
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14. Global Search Updates

All users can now use the Global Search feature to search for results across “All Projects.” Global Search results will now include matches to/in:

- Public and private projects
- Open and closed projects
- Projects uploaded by my team, as well as the opposite team



Global Search feature on the top left of VallenIQ

The intended user benefit for this enhancement is to promote and make available both current and prior quote history to all users within VallenIQ.

14.1 Specialists

Specialist users previously could only search across projects they were assigned to. When using the Global Search feature, specialists can now search across “All Projects,” not just “My Projects.”

14.1.1 Part Number Search Results

14.1.1.1 Public Project Results

When the “Part Number” search category is used, Specialists will now see results from projects they’re not assigned to, both public and private projects, as well as projects uploaded by members of the opposite team.

In the results page, line items that are not assigned to the user or belong to closed projects will show a lock symbol under their employee ID in the “Ref #” column:

<div> <div>VALLEN</div> <div> Dashboard Project Management Settings </div> </div> <div> Specialist Test Account My Account My Projects </div>													
<div> Part Number 29-1212 </div>													
33 results for Part Number "29-1212"													
<div> My Projects All Projects </div> <div> <div>Select All</div> <div>Remove</div> <div>Switch to Expand View</div> <div>Ref #</div> <div>Search line items</div> </div> <div>Page 1 of 2</div>													
Ref #	Req. Part Number	Req. MFR/Vendor	Quoted Part Number	Valien MFR/Vendor	Avail. Qty	Req. Qty	Price	Quote Price	Cost	Quote Cost	GP %	Extended Price	Status
1	RPN: 29-1212 CPN: AG459913 FITTING HOSE, 3/4 M NPT TO 3/4 HOSE, BR AS UOM: EA CUST. LINE # 1	MFR: GENERIC MANUFACTURE R VENDOR: REGAL	MPN: 29-1212 VALLEN PN: 11954816 VENDOR PN: 29-1212 29-1212 3/4 BARB X 3/4 M PT HOSE BARB 39278 3 7300 UOM: EA Last Price TEST PROJECT - QH / O H (ID: 2515)	MFR: WORLD & MAIN (CRANBURY) LLC CODE: 499819 Mfr/Vendor Notes	-	65	-	-	REPLACEMENT COST \$2.35440	REPLACEMENT COST \$2.35440	-	-	VAL
1	RPN: 29-1212	NO MFR NO VENDOR	MPN: 29-1212 VALLEN PN: 11954816 VENDOR PN: 29-1212 29-1212 3/4 BARB X 3/4 M PT HOSE BARB 39278 3 7300 UOM: EA Last Price TEST 062321 (ID: 2400)	MFR: WORLD & MAIN (CRANBURY) LLC CODE: 499819 Mfr/Vendor Notes	-	1,000	-	-	REPLACEMENT COST \$2.35440	REPLACEMENT COST \$2.35440	-	-	VAL
1	RPN: 29-1212 CPN: AG459913 FITTING HOSE, 3/4 M NPT TO 3/4 HOSE, BR AS UOM: EA CUST. LINE # 1	MFR: GENERIC MANUFACTURE R VENDOR: REGAL	MPN: 29-1212 VALLEN PN: 11954816 VENDOR PN: 29-1212 29-1212 3/4 BARB X 3/4 M PT HOSE BARB 39278 3 7300 UOM: EA Last Price TEST PROJECT 062321 (ID: 2495)	No Valien Match Mfr/Vendor Notes	-	65	-	\$2.80000	REPLACEMENT COST \$2.35440	REPLACEMENT COST \$2.35440	18.93%	\$182.00000	VAL
1	RPN: 29-1212 CPN: AG459913 FITTING HOSE, 3/4 M NPT TO 3/4 HOSE, BR AS UOM: EA CUST. LINE # 1	MFR: GENERIC MANUFACTURE R VENDOR: REGAL	MPN: 29-1212 VALLEN PN: 11954816 VENDOR PN: 29-1212 29-1212 3/4 BARB X 3/4 M PT HOSE BARB 39278 3 7300 UOM: EA Last Price TEST 062321 (ID: 2383)	MFR: WORLD & MAIN (CRANBURY) LLC CODE: 499819 Mfr/Vendor Notes	-	65 100 200 300 400	- \$2.43320 \$2.41902 \$2.40918 \$2.39829 \$2.29180	- \$2.43320 \$2.41902 \$2.40918 \$2.39829 \$2.29180	REPLACEMENT COST \$2.35440 REPLACEMENT COST \$2.35440 REPLACEMENT COST \$2.35440 REPLACEMENT COST \$2.35440 REPLACEMENT COST \$2.35440	REPLACEMENT COST \$2.35440 REPLACEMENT COST \$2.35440 REPLACEMENT COST \$2.35440 REPLACEMENT COST \$2.35440 REPLACEMENT COST \$2.35440	3.35% 8.03% 9.88% 20.34% 24.66%	\$158.15800 \$241.90200 \$481.83600 \$719.48700 \$916.72000	VAL
52	RPN: 29-1212	NO MFR NO VENDOR	MPN: 29-1212 VALLEN PN: 11954816 VENDOR PN: 29-1212 29-1212 3/4 BARB X 3/4 M PT HOSE BARB 39278 3 7300 UOM: EA Last Price Ship to suffix (ID: 2383)	MFR: WORLD & MAIN (CRANBURY) LLC CODE: 499819 Mfr/Vendor Notes	-	1	-	\$3.14000	REPLACEMENT COST \$2.35440	REPLACEMENT COST \$2.35440	33.37%	\$3.14000	VAL

Locked line items in Part Search results

Specialist users should also be able to click the project name and ID of any search result (in “Quoted Part Number” column), and go to the project.

Within the project, if it is still open, specialist users will be able to edit lines they’re assigned to, but not edit those they are not assigned to. If the project is closed, specialist users should not be able to edit line items within the project.

14.1.1.2 Private Project Results

Specialist users will also see private project results now within the results page.

For these results, the project name in the “Quoted Part Number” column will appear as grey instead of blue, and will not be selectable by the user.

This means that specialist users should not be able to open these private projects to see the entire quote, but should be able to see the line item in the Part Search results page.

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14.1.2 Project ID, Project Name, & Customer Search Results

When these three search categories are used, specialist users will see public and private project results, for open and closed project, from both the Q&S and CSR teams.

However, similar to the behavior above, private projects will appear grey, and will not be openable by specialist users.

Public projects will display as blue, and will be selectable by users.

36 results for Project Name "viking"

☐ My Projects ☒ All Projects

Page 1 of 2

Owner	Name	ID	Status	Privacy	Lines	Customer	Warehouse	Type	Lead	Created	Due
Mano Ramasamy	Vallen has all filters+vikings.xlsx+Vallen	2453	Open	Public	32	VIKING PIPE & SUPPLY 117631	ZDAT	Implementation	Sheila Gahimer	2021/06/25 at 1:26 PM EST	2021/06/29
mano QS Admin	viking check	2398	Open	Private	1	VIKING PIPE & SUPPLY 108596	ZDAT	RFQ	Sheila Gahimer	2021/06/23 at 5:48 PM EST	2021/06/25
Eugene Lee	Viking Pump Test 2	2316	Open	Public	10	VIKING PUMP INC 119252	ZDAT	RFQ	Karen McKnight	2021/06/21 at 5:09 PM EST	2021/06/23
Eugene Lee	Viking Pump Test	2314	Open	Public	5	VIKING PUMP INC 119252	ZDAT	Blanket	James Justice	2021/06/21 at 4:34 PM EST	2021/06/23
Mano CSRAdmin2	Vallen has all filters+vikings.xlsx+Vallen	2265	Open	Private	34	VIKING PIPE & SUPPLY 108596	ZDAT	Implementation	James Justice	2021/06/17 at 3:20 PM EST	2021/06/21
Mano Ramasamy	Vallen has all filters+vikings.xlsx+Vallen	2009	Open	Private	32		ZDAT	Market Basket	James Justice	2021/05/25 at 1:29 PM EST	2021/05/27
Mano Ramasamy	Vallen large file+Viking.xlsx+09 - QSEP Template+node check?	1495	Open	Private	2772		ZDAT	Implementation	Sheila Gahimer	2021/03/25 at 4:33 PM EST	2021/03/29
Griffin Johnson	viking	1489	Open	Private	7	VIKING PIPE & SUPPLY 108596	ZDAT	Implementation	Sheila Gahimer	2021/03/24 at 8:25 PM EST	2021/03/29
Mano Ramasamy	Vallen has all filters+vikings.xlsx+Vallen	1145	Open	Private	32			Implementation	James Justice	2021/01/21 at 3:07 PM EST	2021/01/26
Mano Ramasamy	Vallen has all filters+vikings.xlsx+Vallen	887	Open	Private	32	Viking Pump Inc 119252		Implementation	James Justice	2020/10/26 at 3:30 PM EST	2020/10/28
Mano Ramasamy	Vallen has all filters+vikings.xlsx+Vallen	885	Open	Private	32	Viking Trailers 117632		Implementation	Sheila Gahimer	2020/10/26 at 2:27 PM EST	2020/10/30

1 2 Next

Example of results page for Project ID, Project Name, and Customer searches

14.2 Super Admins & Admins

Super admin and admin users previously could search across "All Projects" when using the Global Search feature.

However, when they use the "Global Search" feature, they can now search across both public and private projects, open and closed projects, as well as projects uploaded by both my team and the opposite team.

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14.2.1 Part Number Search Results

14.2.1.1 Public Project Results

When the “Part Number” search category is used, super admins and admins will now see matches from both public and private projects.

For search results from public projects, both super admins and admins will be able to open the project link in “Quoted Part Number” modal and edit all details of the public project.

Search results that belong to closed projects will show a lock icon under the assigned employee’s ID in “Ref #” column.

14.2.1.2 Private Project Results

For super admins, because have the ability to open and edit all private projects, all project links in the “Quoted Part Number” column will be blue and will be selectable.

33 results for Part Number "29-1212"													
My Projects		All Projects											
Select All		Remove		Switch to Expand View		Ref #		Search line items					
Ref #	Req. Part Number	Req. MFR/Vendor	Quoted Part Number	Valien MFR/Vendor	Avail. Qty	Req. Qty	Price	Quote Price	Cost	Quote Cost	GP %	Extended Price	Status
1	RPN 29-1212 CPN AG459913 FITTING HOSE 3/4 M NPT TO 3/4 HOSE BR AS UOM EA CUST LINE # 1	MFR: GENERIC MANUFACTURE R VENDOR REGAL	MPN 29-1212 VALLEN PH 11954816 VENDOR PH 29-1212 29-1212 3/4 BARB X 3/4 M PT HOSE BARB 39278 3 7300 UOM EA Last Photo TEST PROJECT - QH / O H 85-2919	MFR WORLD & MAIN (CRANBURY) LLC CODE 499819 Mfr/Vendor Notes	-	65	-	\$ Price	REPLACEMENT COST \$2,35440	2,35440	GP %	-	VAL
1	RPN 29-1212	NO MFR NO VENDOR	MPN 29-1212 VALLEN PH 11954816 VENDOR PH 29-1212 29-1212 3/4 BARB X 3/4 M PT HOSE BARB 39278 3 7300 UOM EA Last Photo TEST PROJECT (ID: 2400)	MFR WORLD & MAIN (CRANBURY) LLC CODE 499819 Mfr/Vendor Notes	-	1,000	-	\$ Price	REPLACEMENT COST \$2,35440	2,35440	GP %	-	VAL
1	RPN 29-1212 CPN AG459913 FITTING HOSE 3/4 M NPT TO 3/4 HOSE BR AS UOM EA CUST LINE # 1	MFR: GENERIC MANUFACTURE R VENDOR REGAL	MPN 29-1212 VALLEN PH 11954816 VENDOR PH 29-1212 29-1212 3/4 BARB X 3/4 M PT HOSE BARB 39278 3 7300 UOM EA Last Photo TEST PROJECT 062921 ID: 2495	No Valien Match	-	65	-	2,80000	REPLACEMENT COST 2,35440	2,35440	18.93 %	\$182.00000	VAL
1	RPN 29-1212 CPN AG459913 FITTING HOSE 3/4 M NPT TO 3/4 HOSE BR AS UOM EA CUST LINE # 1	MFR: GENERIC MANUFACTURE R VENDOR REGAL	MPN 29-1212 VALLEN PH 11954816 VENDOR PH 29-1212 29-1212 3/4 BARB X 3/4 M PT HOSE BARB 39278 3 7300 UOM EA Last Photo TEST 062921 (ID: 2583)	MFR WORLD & MAIN (CRANBURY) LLC CODE 499819 Mfr/Vendor Notes	-	65 100 200 300 400	-	\$2,43320 \$2,41902 \$2,40918 \$1,99289 \$2,29180	REPLACEMENT COST \$2,35440 \$2,23918 \$2,19255 \$1,99289 \$1,83850	2,35440 2,23918 2,19255 1,99289 1,83850	3.35% 8.03% 9.88% 20.34% 24.66%	\$158.15800 \$241.90200 \$481.83600 \$719.48700 \$916.72000	VAL
52	RPN 29-1212	NO MFR NO VENDOR	MPN 29-1212 VALLEN PH 11954816 VENDOR PH 29-1212 29-1212 3/4 BARB X 3/4 M PT HOSE BARB 39278 3 7300 UOM EA Last Photo Ship to outfit (ID: 2283)	MFR WORLD & MAIN (CRANBURY) LLC CODE 499819 Mfr/Vendor Notes	-	1	-	\$3.14000	REPLACEMENT COST \$2,35440	2,35440	33.37%	\$3.14000	VAL

All private project search result links will be selectable for super admin users

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For admins, because they only have the ability to open and edit private projects they own, all search results in private projects that they own will be shown in blue and will be selectable. However search results that are private projects they don't own will display in grey and will not be selectable.

33 results for Part Number "29-1212"

My Projects

All Projects

Remove

Switch to Expand View

Ref #

Search line items

Page 1 of 2

Ref #	Req. Part Number	Req. MFR/Vendor	Quoted Part Number	Valien MFR/Vendor	Avail. Qty	Req. Qty	Price	Quote Price	Cost	Quote Cost	GP %	Extended Price	Status
<div><div></div><div>1</div><div>EWL</div></div>	RPN 29-1212 CPN AG459913 FITTING HOSE 3/4 M NPT TO 3/4 HOSE BR AS UOM EA CUST LINE # 1	MFR: GENERIC MANUFACTURE R VENDOR REGAL	MPN 29-1212 VALLEN PN 11954816 VENDOR PN 29-1212 29-1212 3/4 BARB X 3/4 M PT HOSE BARB 39278 3 7300 UOM EA Last Price TEST PROJECT - QH / O H (ID: 2513)	MFR: WORLD & MAIN (CRANBURY) LLC CODE 499819 Mfr/Vendor Notes	-	65	-	\$ PriceSet	REPLACEMENT COST \$2.35440 2.35440Set	GP %	-	VAL	
<div><div></div><div>1</div><div>EWL</div></div>	RPN 29-1212	NO MFR NO VENDOR	MPN 29-1212 VALLEN PN 11954816 VENDOR PN 29-1212 29-1212 3/4 BARB X 3/4 M PT HOSE BARB 39278 3 7300 UOM EA Last Price TEST 062321 (ID: 3400)	MFR: WORLD & MAIN (CRANBURY) LLC CODE 499819 Mfr/Vendor Notes	-	1,000	-	\$ PriceSet	REPLACEMENT COST \$2.35440 2.35440Set	GP %	-	VAL	
<div><div></div><div>1</div><div>EWL</div></div>	RPN 29-1212 CPN AG459913 FITTING HOSE 3/4 M NPT TO 3/4 HOSE BR AS UOM EA CUST LINE # 1	MFR: GENERIC MANUFACTURE R VENDOR REGAL	MPN 29-1212 VALLEN PN 11954816 VENDOR PN 29-1212 29-1212 3/4 BARB X 3/4 M PT HOSE BARB 39278 3 7300 UOM EA Last Price TEST PROJECT 062921 (ID: 3495)	No Valien Match	-	65	-	2.80000Set	REPLACEMENT COST 2.35440Set	18.93 %	\$182.00000	VAL	
<div><div></div><div>1</div><div>EWL</div></div>	RPN 29-1212 CPN AG459913 FITTING HOSE 3/4 M NPT TO 3/4 HOSE BR AS UOM EA CUST LINE # 1	MFR: GENERIC MANUFACTURE R VENDOR REGAL	MPN 29-1212 VALLEN PN 11954816 VENDOR PN 29-1212 29-1212 3/4 BARB X 3/4 M PT HOSE BARB 39278 3 7300 UOM EA Last Price TEST 062321 (ID: 3385)	MFR: WORLD & MAIN (CRANBURY) LLC CODE 499819 Mfr/Vendor Notes	-	65 100 200 300 400	- \$2.43320 \$2.41902 \$2.40918 \$2.39829 \$2.29180	REPLACEMENT COST \$2.35440 \$2.23918 \$2.19255 \$1.99289 \$1.83850	3.35% 8.03% 9.88% 20.34% 24.66%	\$158.15800 \$241.90200 \$481.83600 \$719.48700 \$916.72000	VAL		
<div><div></div><div>52</div><div></div></div>	RPN 29-1212	NO MFR NO VENDOR	MPN 29-1212 VALLEN PN 11954816 VENDOR PN 29-1212 29-1212 3/4 BARB X 3/4 M PT HOSE BARB 39278 3 7300 UOM EA Last Price Ship to suffix (ID: 2283)	MFR: WORLD & MAIN (CRANBURY) LLC CODE 499819 Mfr/Vendor Notes	-	1	-	\$3.14000	REPLACEMENT COST \$2.35440 2.35440Set	33.37%	\$3.14000	VAL	

Search results that are private projects and are not owned by the admin user will not be selectable

14.2.2 Project ID, Project Name, & Customer Search Results

When these three search categories are used, super admin and admin users will see public and private project results, for open and closed projects, from both the Q&S and CSR teams.

However, for super admin users, similar to the behavior above, all project names whether public or private will be blue and will be selectable.

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For admin users, all public projects and private projects they own will appear blue and selectable, but private projects they don't own will display as grey and will not be selectable.

37 results for Project Name "viking"

☐ Select All

 QS & CSR
 Page 1 of 2

Owner	Name	ID	Status	Privacy	Lines	Customer	Warehouse	Type	Lead	Created	Due
<input type="checkbox"/> CSR Admin 1	Viking Pump Private Quote	2514	Open	Private	32	VIKING PUMP INC 119252	ZDAT	Blanket	Lindsey Cross	2021/07/01 at 7:45 PM EST	2021/07/05
<input type="checkbox"/> Mano Ramasamy	Vallen has all filters+vikings.xlsx+Vallen	2453	Open	Public	32	VIKING PIPE & SUPPLY 117631	ZDAT	Implementation	Sheila Gahimer	2021/06/25 at 1:26 PM EST	2021/06/29
<input type="checkbox"/> mano QS Admin	viking check	2398	Open	Private	1	VIKING PIPE & SUPPLY 108596	ZDAT	RFQ	Sheila Gahimer	2021/06/23 at 5:48 PM EST	2021/06/25
<input type="checkbox"/> Eugene Lee	Viking Pump Test 2	2316	Open	Public	10	VIKING PUMP INC 119252	ZDAT	RFQ	Karen McKnight	2021/06/21 at 5:09 PM EST	2021/06/23
<input type="checkbox"/> Eugene Lee	Viking Pump Test	2314	Open	Public	5	VIKING PUMP INC 119252	ZDAT	Blanket	James Justice	2021/06/21 at 4:34 PM EST	2021/06/23
<input type="checkbox"/> Mano CSRAdmin2	Vallen has all filters+vikings.xlsx+Vallen	2265	Open	Private	34	VIKING PIPE & SUPPLY 108596	ZDAT	Implementation	James Justice	2021/06/17 at 3:20 PM EST	2021/06/21
<input type="checkbox"/> Mano Ramasamy	Vallen has all filters+vikings.xlsx+Vallen	2009	Open	Private	32		ZDAT	Market Basket	James Justice	2021/05/25 at 1:29 PM EST	2021/05/27
<input type="checkbox"/> Mano Ramasamy	Vallen large file+Viking.xlsx+09 - QSEP Template+node check?	1495	Open	Private	2772		ZDAT	Implementation	Sheila Gahimer	2021/03/25 at 4:33 PM EST	2021/03/29
<input type="checkbox"/> Griffin Johnson	viking	1489	Open	Private	7	VIKING PIPE & SUPPLY 108596	ZDAT	Implementation	Sheila Gahimer	2021/03/24 at 8:25 PM EST	2021/03/29
<input type="checkbox"/> Mano Ramasamy	Vallen has all filters+vikings.xlsx+Vallen	1145	Open	Private	32			Implementation	James Justice	2021/01/21 at 3:07 PM EST	2021/01/26
<input type="checkbox"/> Mano Ramasamy	Vallen has all filters+vikings.xlsx+Vallen	887	Open	Private	32	Viking Pump Inc 119252		Implementation	James Justice	2020/10/26 at 3:30 PM EST	2020/10/28

1 2 Next

Private project owned by admin user is blue and is selectable, other private projects below are not

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15. Quote History Header & Details Files

Quoting activity from both the Q&S and CSR teams will be added to quote_history_header and quote_history_details files.

15.1 New & Updated Fields

New fields have been added to both quote_history_header and quote_history_details files. All new fields have been added to the rightmost part of each file. The changes are discussed below:

15.1.1 quote_history_header

Field Name	Update	Definition
project_type	Added values	New values are “FB” for Blanket quotes and “FR” for RFQ quotes. “FI” (Implementation) and “FM” (Market Basket) will continue to populate for appropriate projects.
team	New field	Values will be “QS” or “CSR”
user_email	New field	Email address of project owner
privacy	New field	Describes the privacy status of the project. Values will be “public” or “private”

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15.1.2 quote_history_detail

Field Name	Definition
misc1	Value in miscellaneous 1 field
misc2	Value in miscellaneous 1 field
misc3	Value in miscellaneous 1 field
misc4	Value in miscellaneous 1 field
customer_price	Unit price of quoted item
list_price	List price of quoted item
qty_brk_1	Requested quantity break 1 from VallenIQ Req. Qty column
qty_brk_2	Requested quantity break 2 from VallenIQ Req. Qty column
qty_brk_3	Requested quantity break 3 from VallenIQ Req. Qty column
qty_brk_4	Requested quantity break 4 from VallenIQ Req. Qty column
cost_1	Cost for requested quantity break 1 in VallenIQ Quote Cost column
cost_2	Cost for requested quantity break 2 in VallenIQ Quote Cost column
cost_3	Cost for requested quantity break 3 in VallenIQ Quote Cost column
cost_4	Cost for requested quantity break 4 in VallenIQ Quote Cost column
price_1	Price for requested quantity break 1 in VallenIQ Quote Price column
price_2	Price for requested quantity break 2 in VallenIQ Quote Price column
price_3	Price for requested quantity break 3 in VallenIQ Quote Price column
price_4	Price for requested quantity break 4 in VallenIQ Quote Price column
gp_percent_1	Gross profit percentage for quantity break 1
gp_percent_2	Gross profit percentage for quantity break 2
gp_percent_3	Gross profit percentage for quantity break 3
gp_percent_4	Gross profit percentage for quantity break 4
extended_price_1	Extended price for quantity break 1
extended_price_2	Extended price for quantity break 2
extended_price_3	Extended price for quantity break 3
extended_price_4	Extended price for quantity break 4
quote_price_usage	Price for usage qty in VallenIQ Quote Price column
quote_cost_usage	Cost for usage qty in VallenIQ Quote Cost column
gp_percent_usage	Gross profit percentage for usage quantity
extended_price_usage	Extended price for usage quantity

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15.2 Quote History Extracts

The new fields discussed above have also been added to the quote_history_header and quote_history_detail files that we generate and upload to the sFTP server when the “Quote History Extracts” feature is used.

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