RELEASE NOTES

VallenIQ v1.17

Release Date: June 30th, 2021

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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.

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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

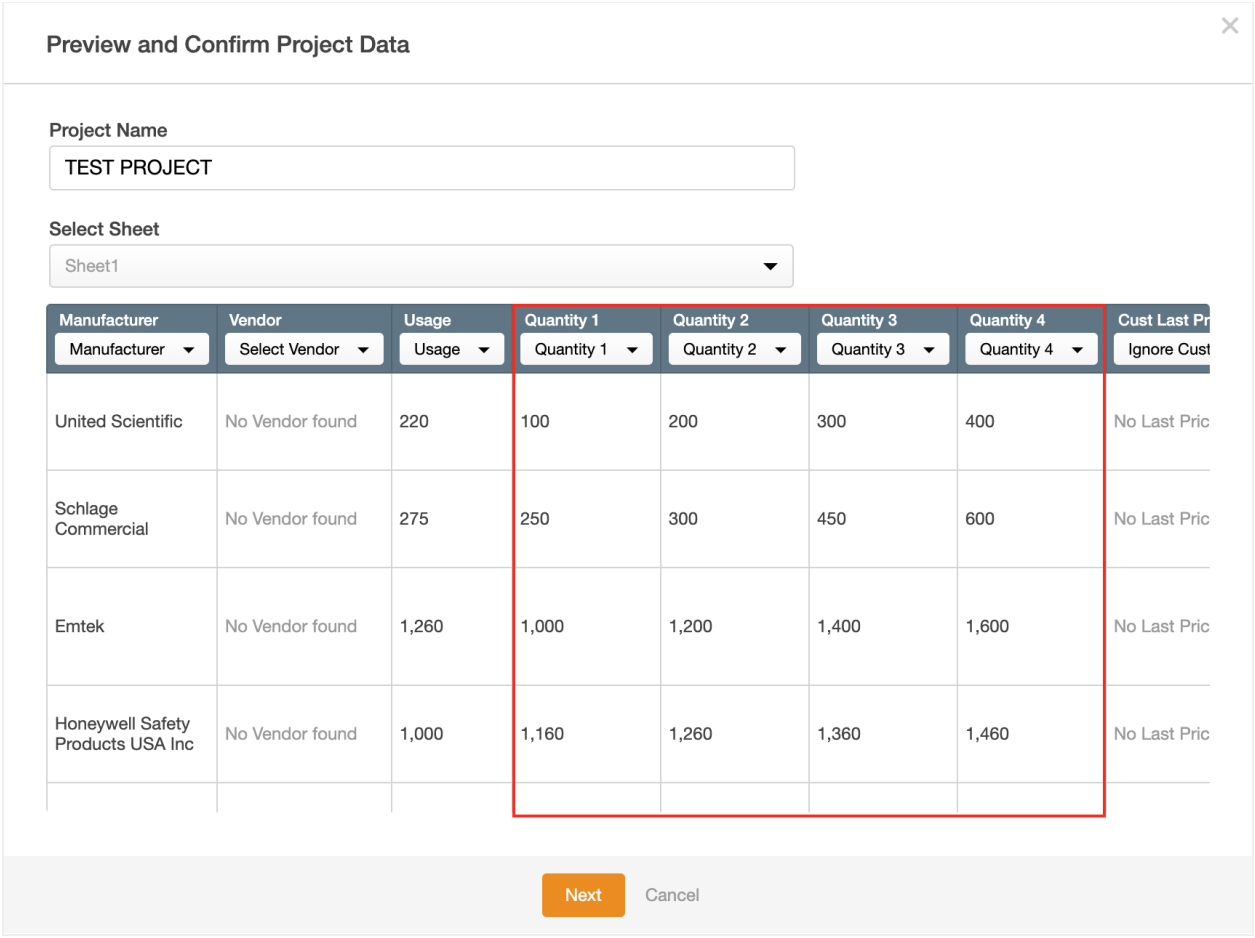
2.2 Admin Permissions

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

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.



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

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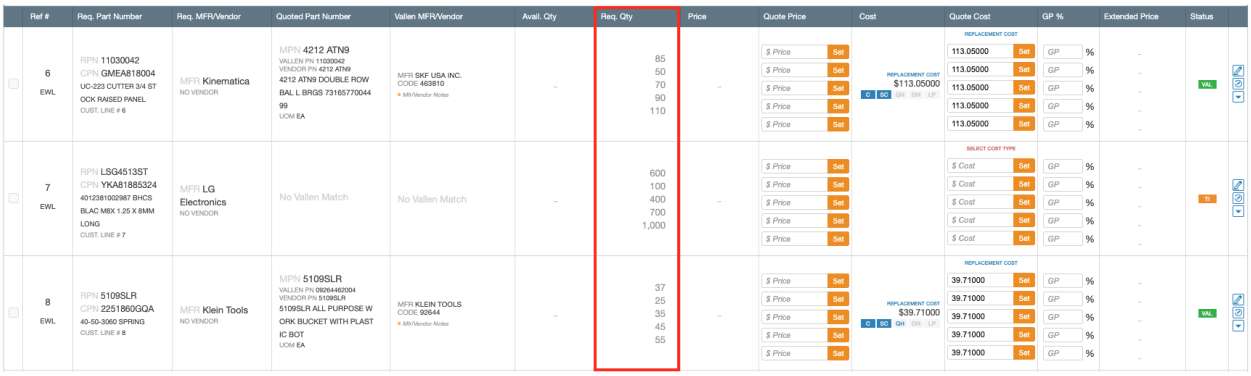
Once the values have been mapped into the project, the quantity breaks will appear in the “Req. Qty” column:



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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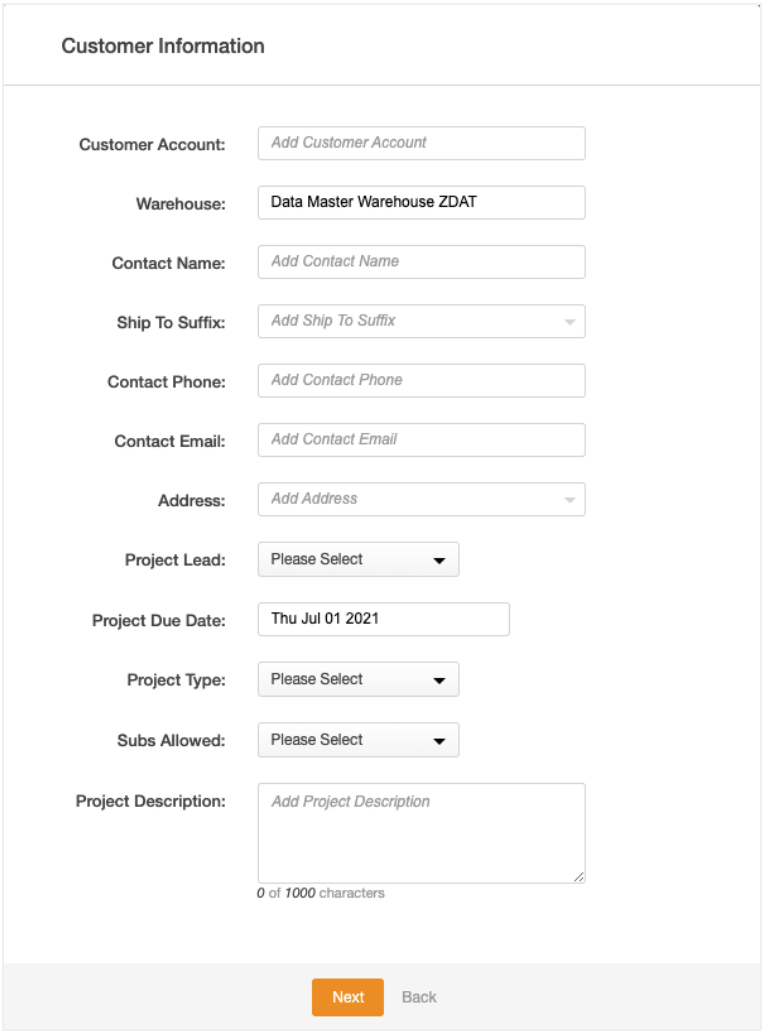
4. Customer Information Modal Updates

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.



"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:

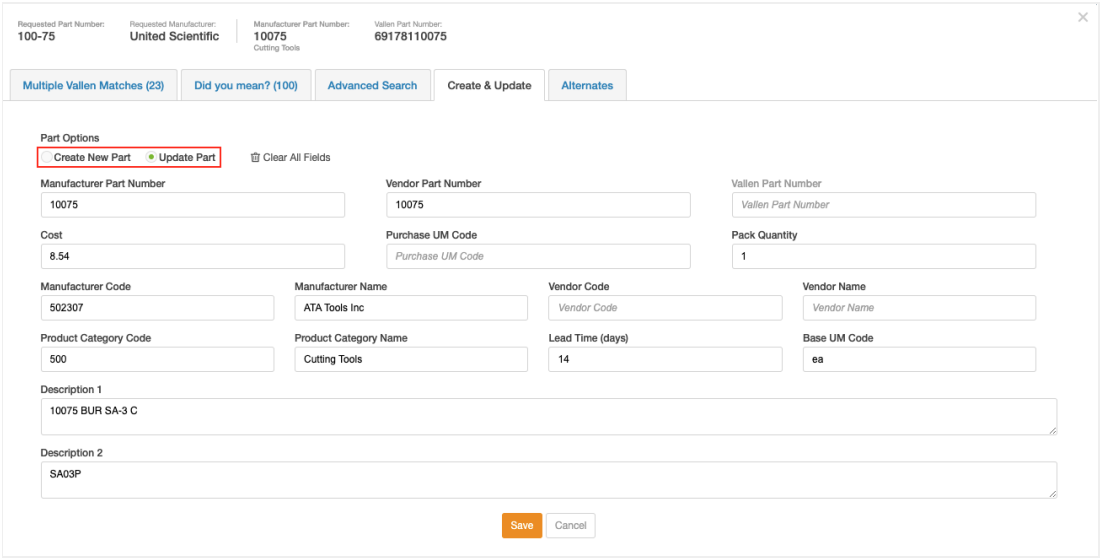
- Catie Bassett
- Greg Vinsant
- Jon Holloway
- Karen McKnight
- Kevin Kellums
- Lindsey Cross
- Shanna Gobel

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.



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

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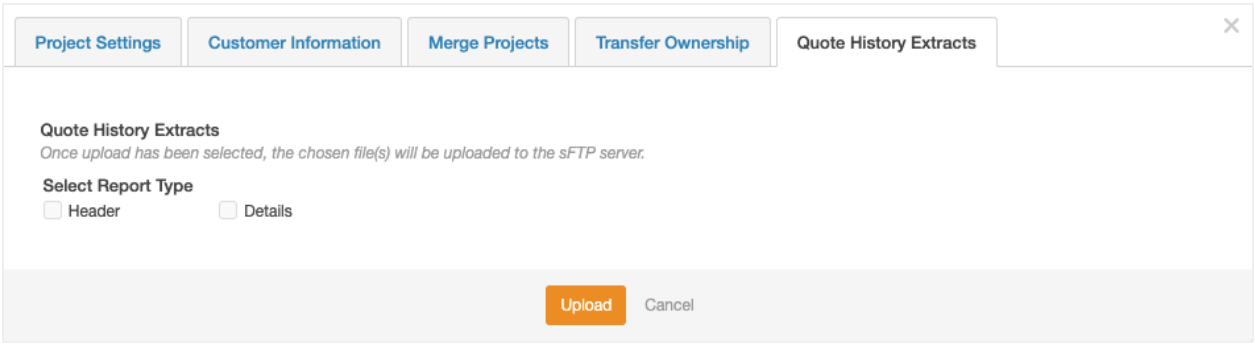
Also, the “Quote History Extracts” feature in “Project Settings” modal will continue to only be accessible for Market Basket projects. Implementation, RFQ, and Blanket project types will not have access to this feature, as the “Quote History Extracts” feature is only utilized by the Q&S team, for only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



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

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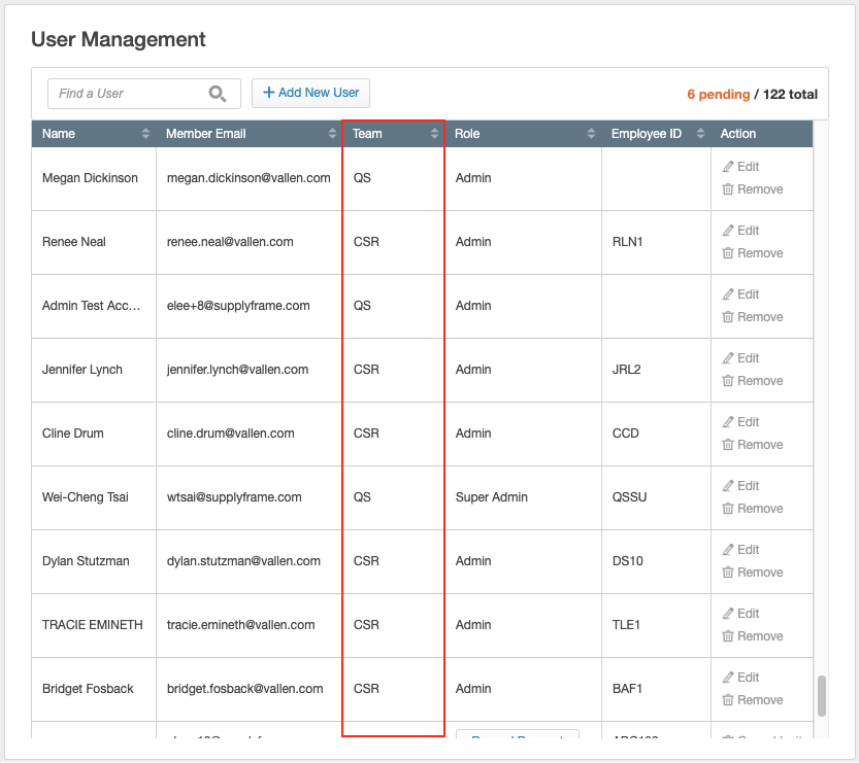
5. Auto-Assignments For CSR Users

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.



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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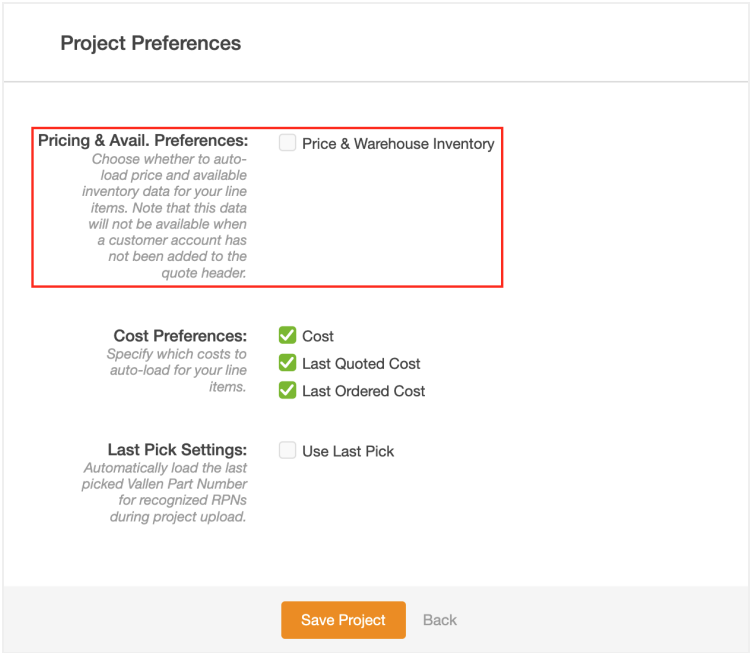
6. Pricing & Availability Preferences

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:



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.

7. API Integrations

7.1 Overview

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

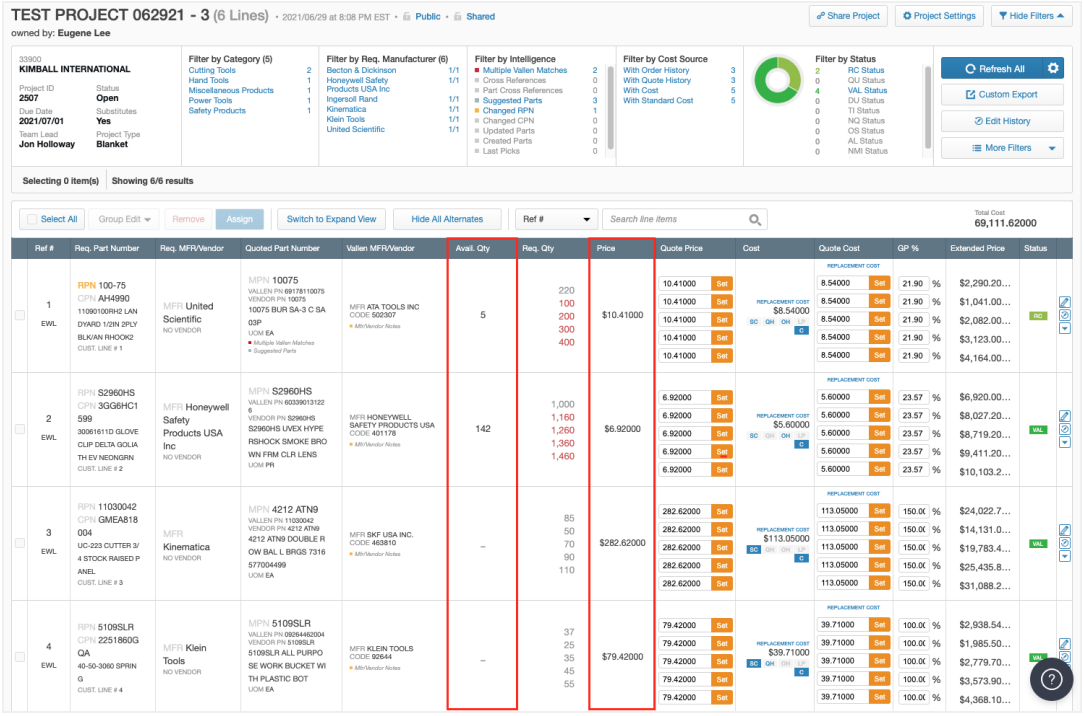
7.2 Get-Price-Availability API

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:



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

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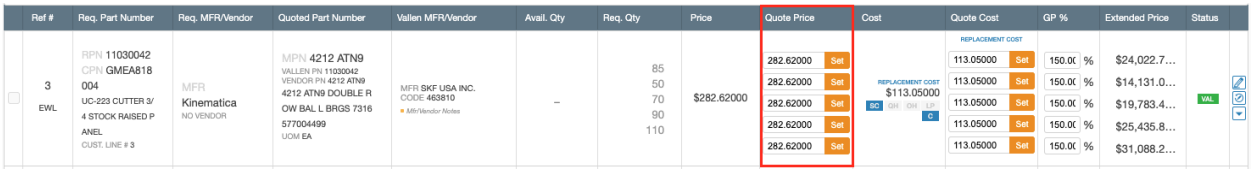
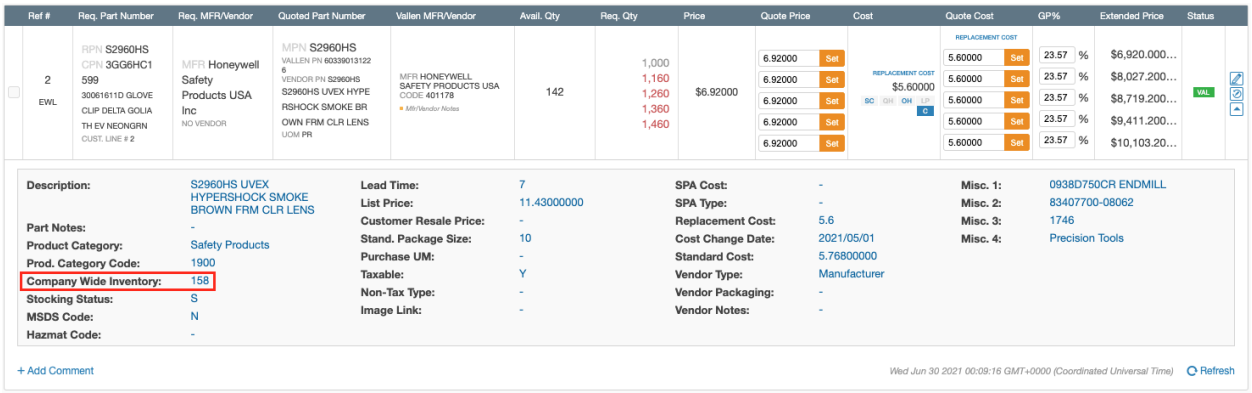
Unit prices should also populate the price breaks in the “Quote Price” column as well:



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:



Company Wide Inventory field in Expand View

Required fields for the Get-Price-Availability 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
- 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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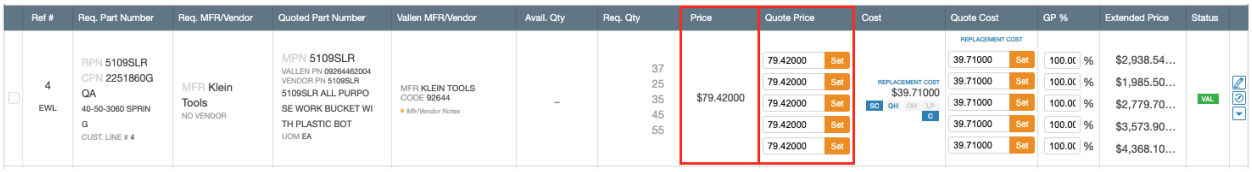
7.3 Get-NonStock-Price API

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:



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.

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:

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:

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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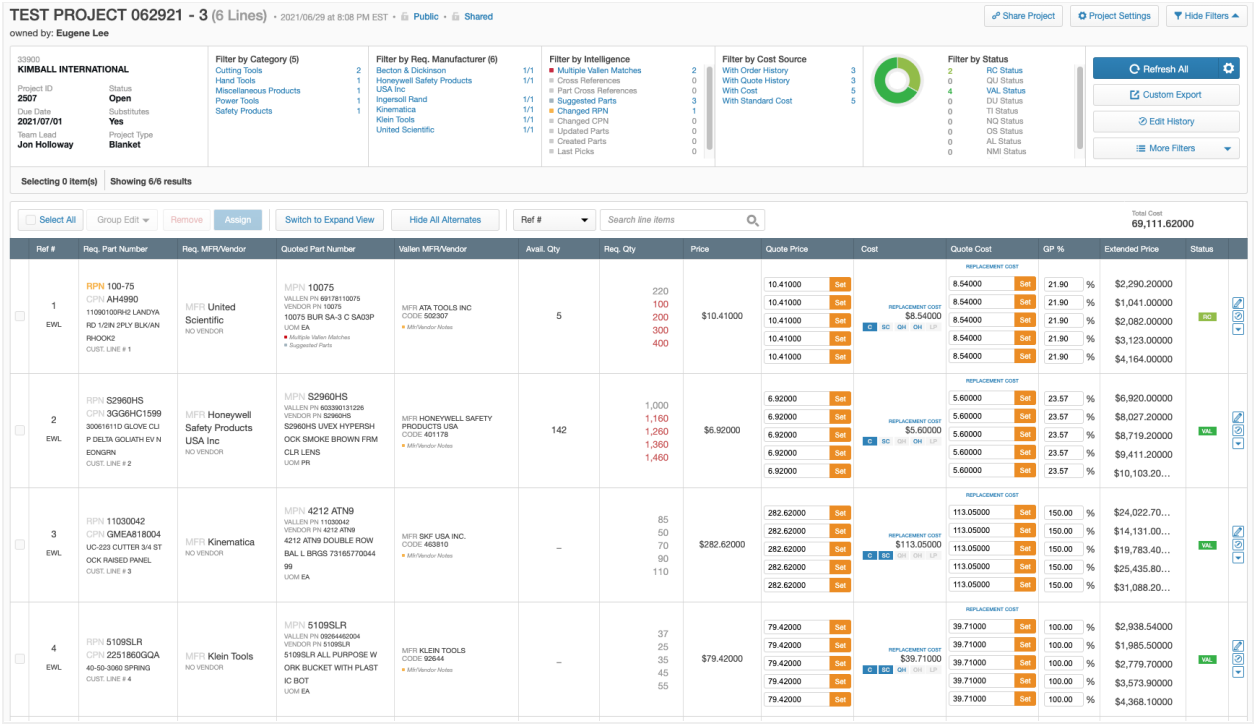
8. Project View Updates

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



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.

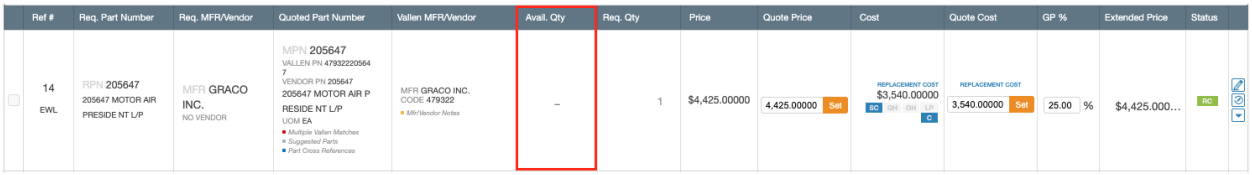
The functionality of this column is the same as it was previously - both single line item assignments as well as group edit line item assignments are possible in public projects (line item assignments will not be possible in private projects, as is discussed in the "Public & Private Projects" section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

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:



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.

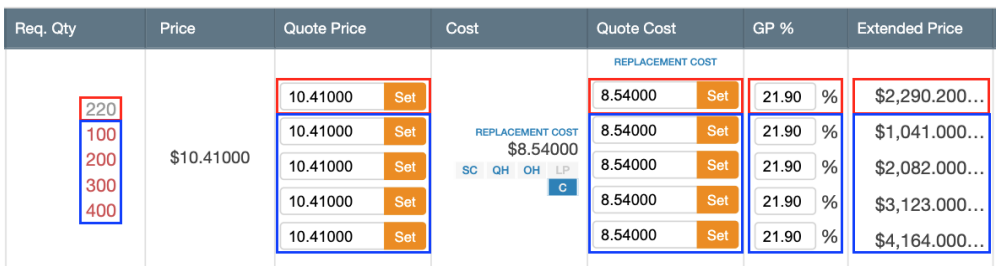
8.3 Price

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:



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:

- Quote Price - Quote Cost = Gross Profit
- (Gross Profit / Quote Cost) * 100 = 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.

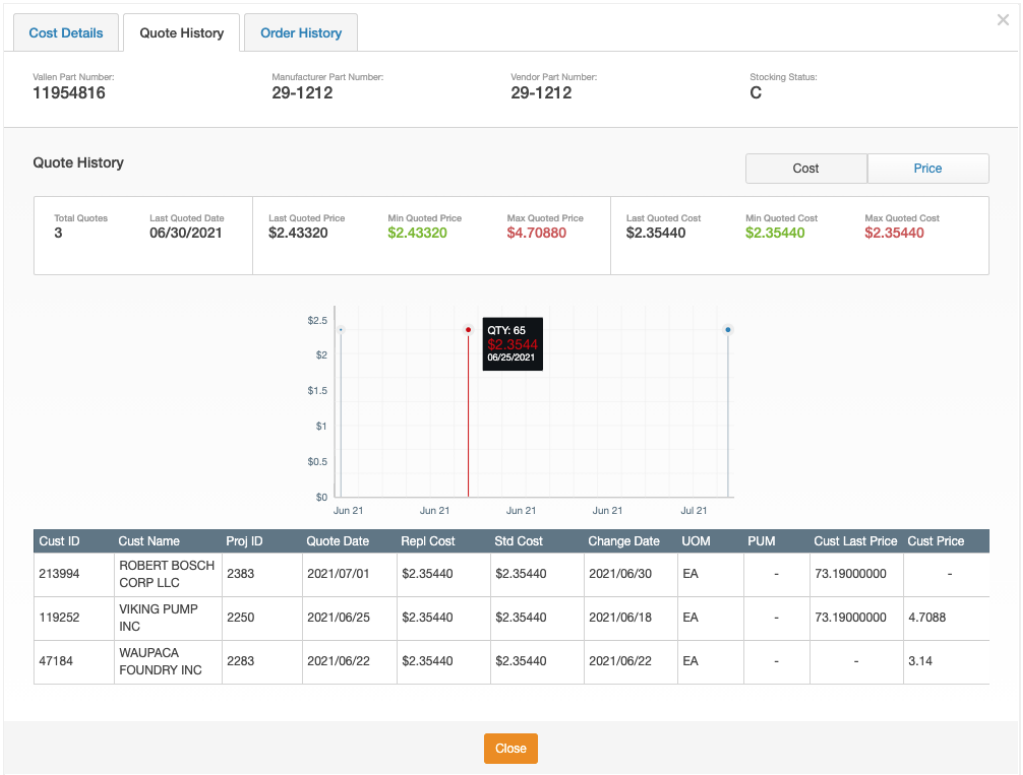
9. Quote & Order History

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

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:



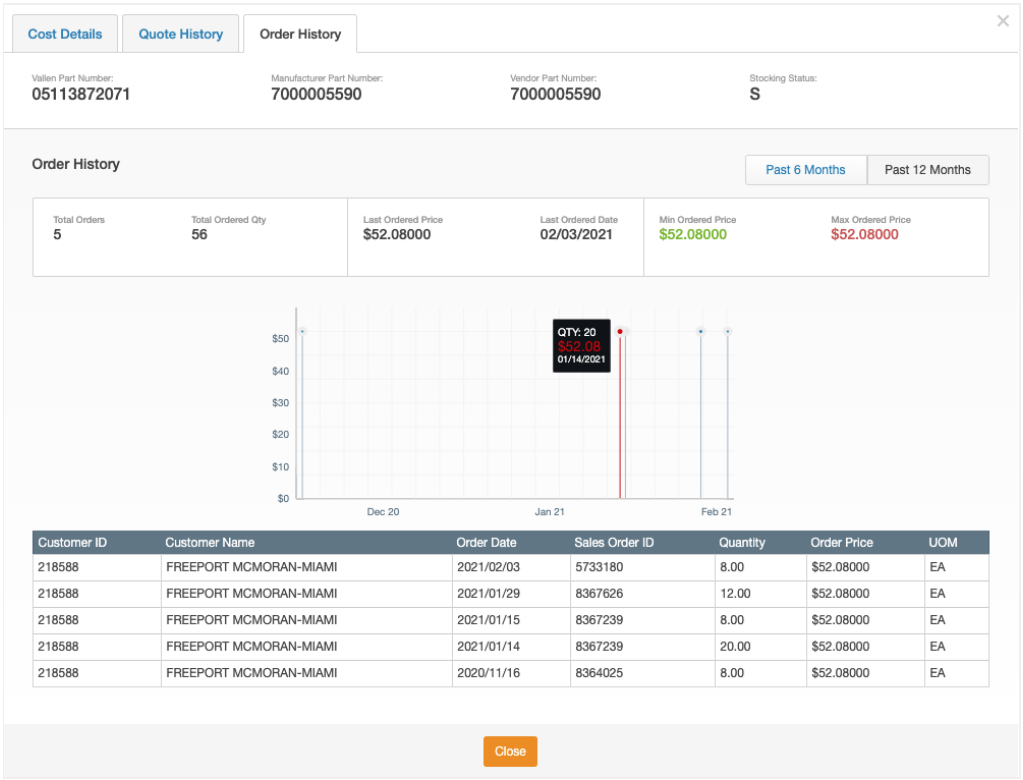
Updated “Quote History” tab in “Cost” modal

- 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)

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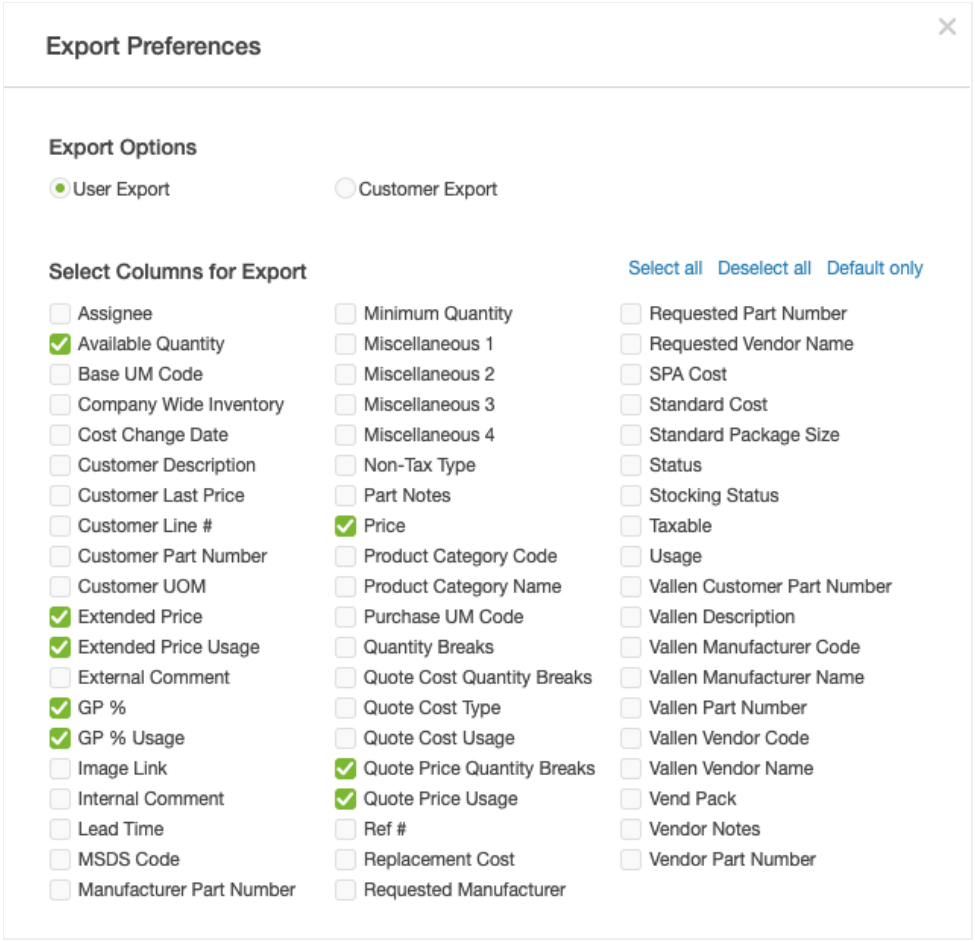
We've updated the placement of the 6 months / 12 months toggle buttons. When these buttons are selected, the data in the Summary Metrics bar, order history chart, and the order history data table will change based on the selected time range.

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:"



Selected fields above are new to "Custom Export"

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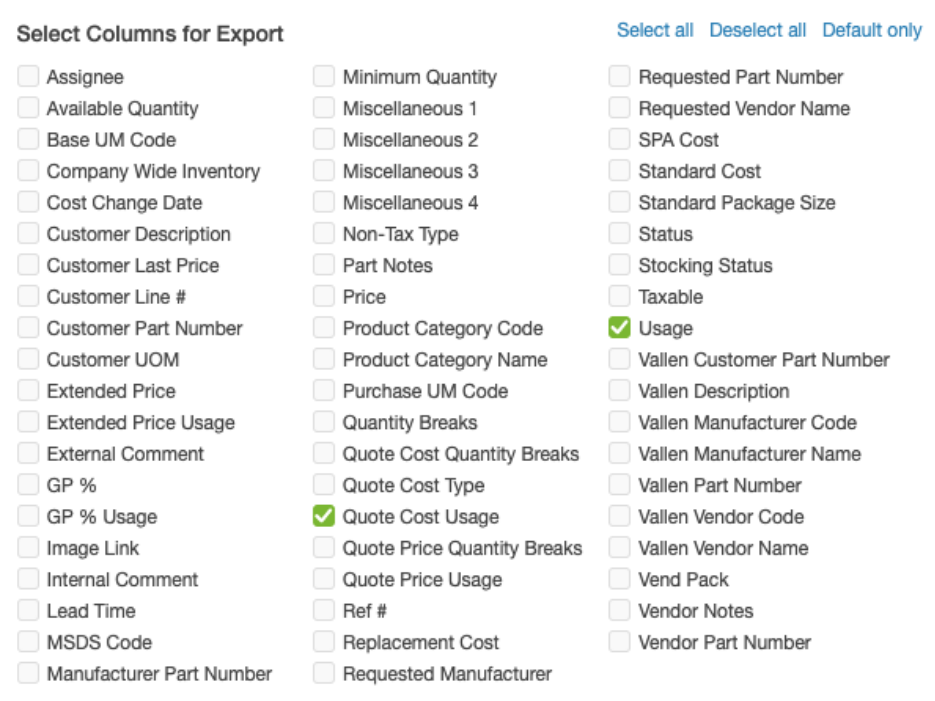
Field Name	Notes
Available Quantity	Maps to value in “Avail. Qty” column for warehouse specific inventory
Price	Maps to value in “Price” column
Quote Price Usage	Maps to price for Customer Usage value. Similar to export behavior of “Quote Cost Customer Usage”
Quote Price Quantity Breaks	Maps to prices 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

10.2 Updated Exportable Fields

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



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.

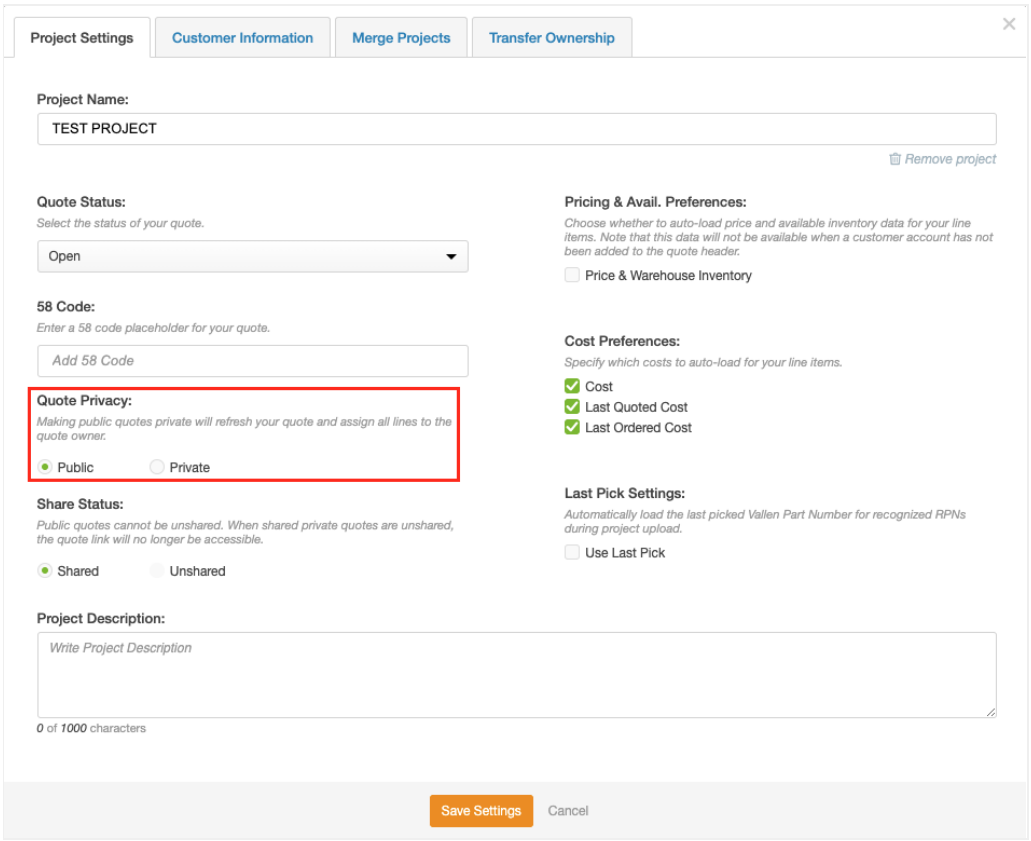
11.1 Default Privacy of New Projects

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."



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:

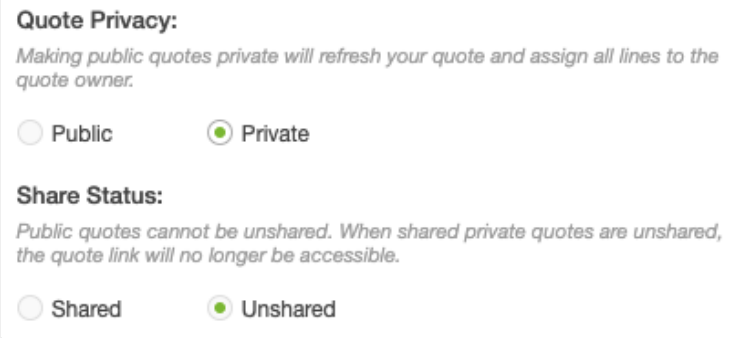
- Super admins can change the privacy settings of any project in both “My Projects” and “All Projects” tabs
- Admins can change the privacy settings of any projects they own in only “My Projects” tab

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.

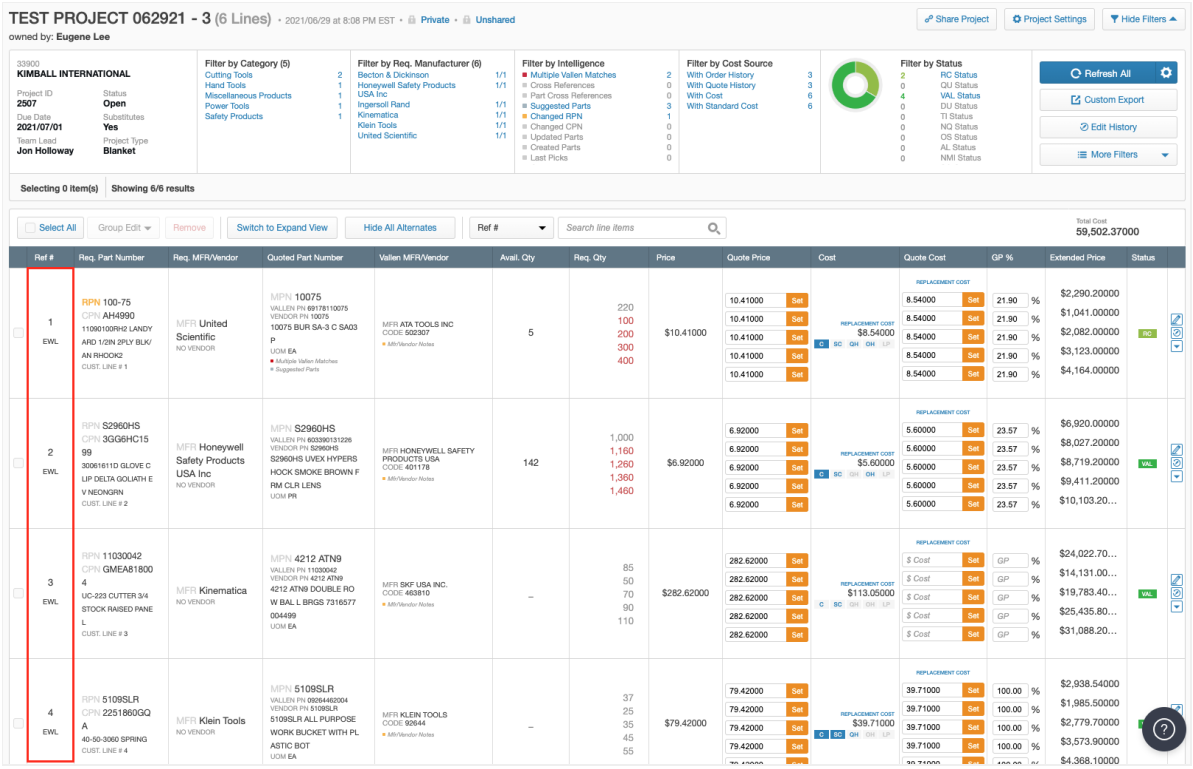


“Share Status” setting in “Project Settings” modal

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.



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:

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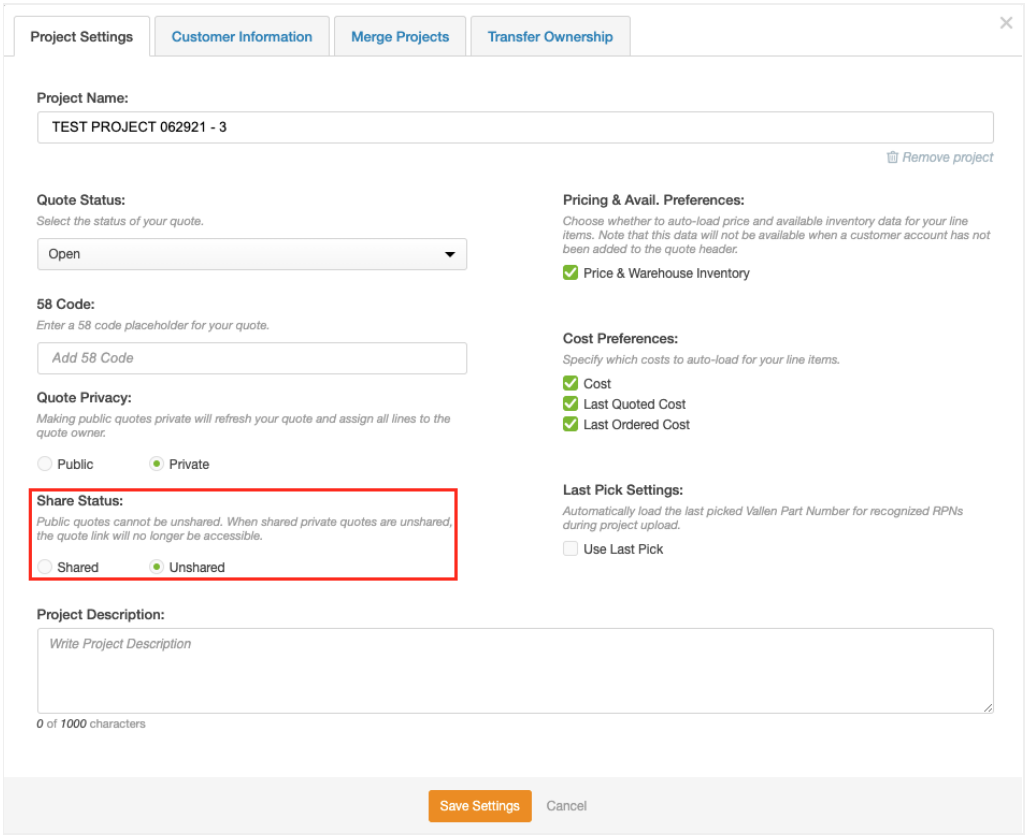
Role	Super Admins	Admins	Specialists
Private	Visibility ● Can see my private quotes in "My Projects" and "All Projects" tabs in Project Management page ● Can see my and all other users' private quotes in "All Projects" tab in Project Management page Editing ● Can open and edit all users' private quotes Privacy Settings ● Can make my private quotes public ● Can make other users' private quotes public	Visibility ● Can only see my own private quotes in "My Projects" and "All Projects" tabs in Project Management page Editing ● Can only edit my own private quotes Privacy Settings ● Can only make my private quotes public	Visibility ● Cannot see any users' private quotes in Project Management page Editing ● Cannot edit any users' private quotes (line item assignments are disabled for private quotes) Privacy Settings ● Cannot make any private quotes public
Public	Visibility ● 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 Editing ● Can edit all users' public quotes Privacy Settings ● Can make my public quotes private ● Can make other users' public quotes private	Visibility ● 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 Editing ● Can edit all users' public quotes Privacy Settings ● Can only make my public quotes private	Visibility ● 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 Editing ● Can open other users' public quotes but only edit lines that are assigned to me Privacy Settings ● Cannot make public quotes private

12. Share & Unshare

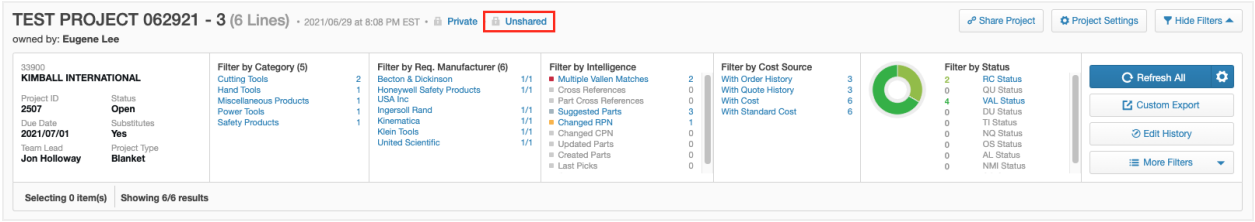
When private projects are shared with other users, this new feature will allow the owner to control whether recipients of the private project link can access and edit the project.

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



“Share Status” section in “Project Settings” modal

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



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

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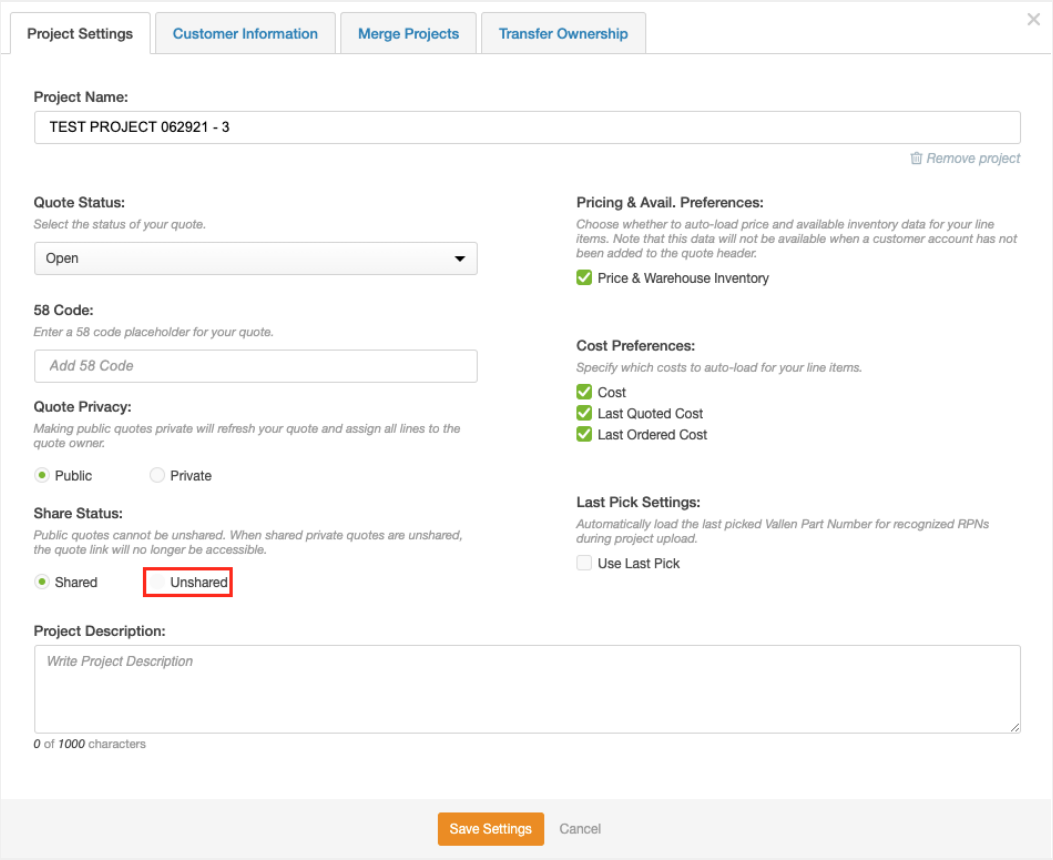
12.1 Default Share Status of New Projects

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.”

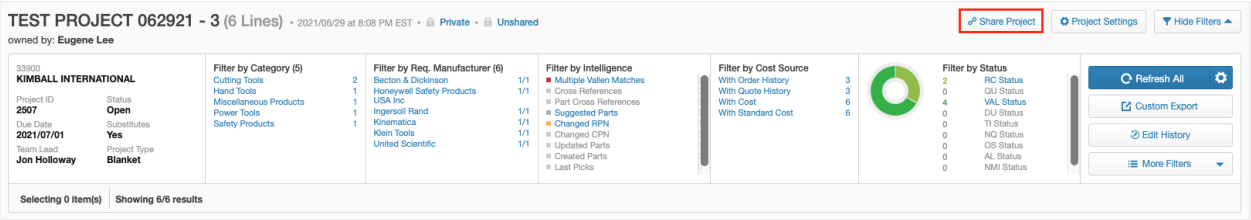
Also, note that projects that are public cannot be unshared, so only the “Shared” option in “Project Settings” modal will be available to select. The “Unshared” option is only selectable when the “Private” Quote Privacy setting is selected.



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

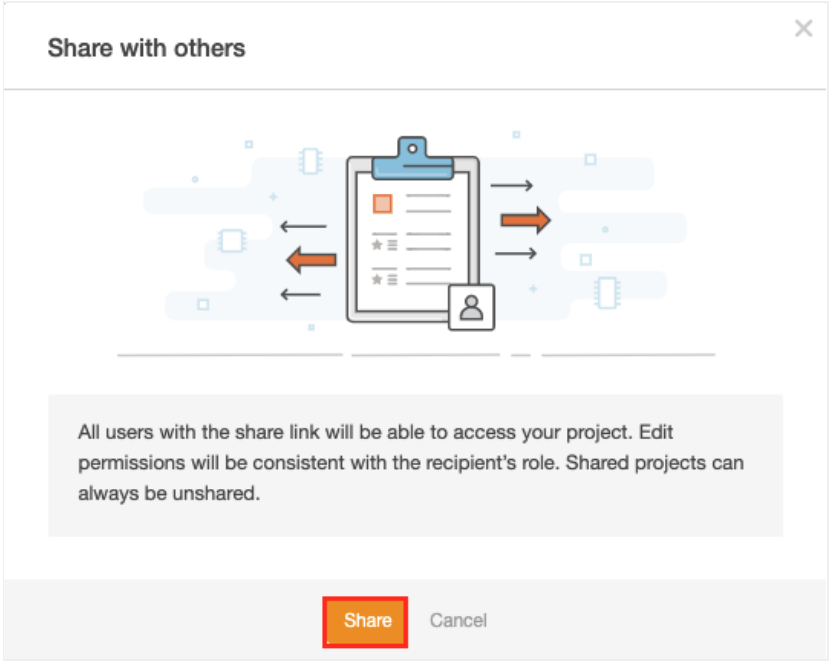
12.2 Sharing Private Projects

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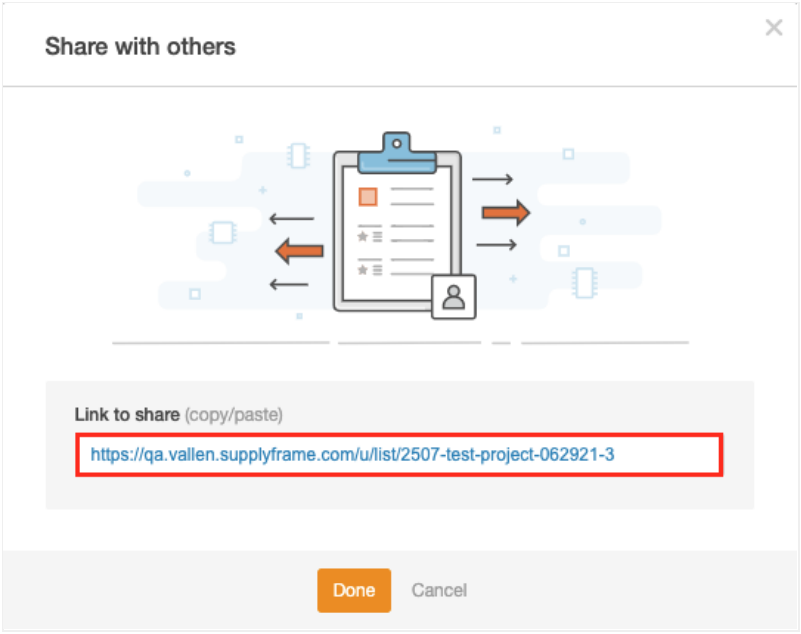
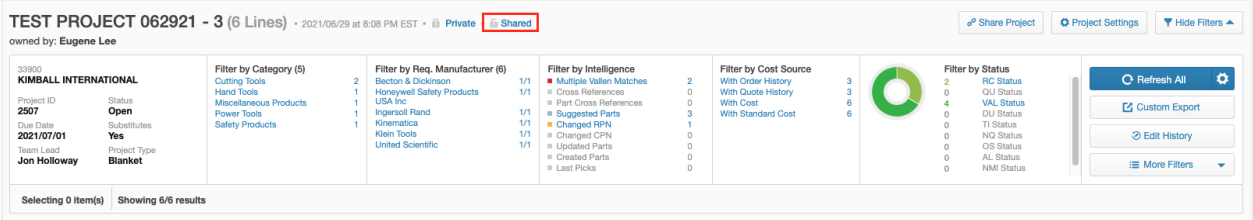
After the “Share” button is selected, the “Share with others” modal will contain a shareable link to the project:



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:”



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.

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:

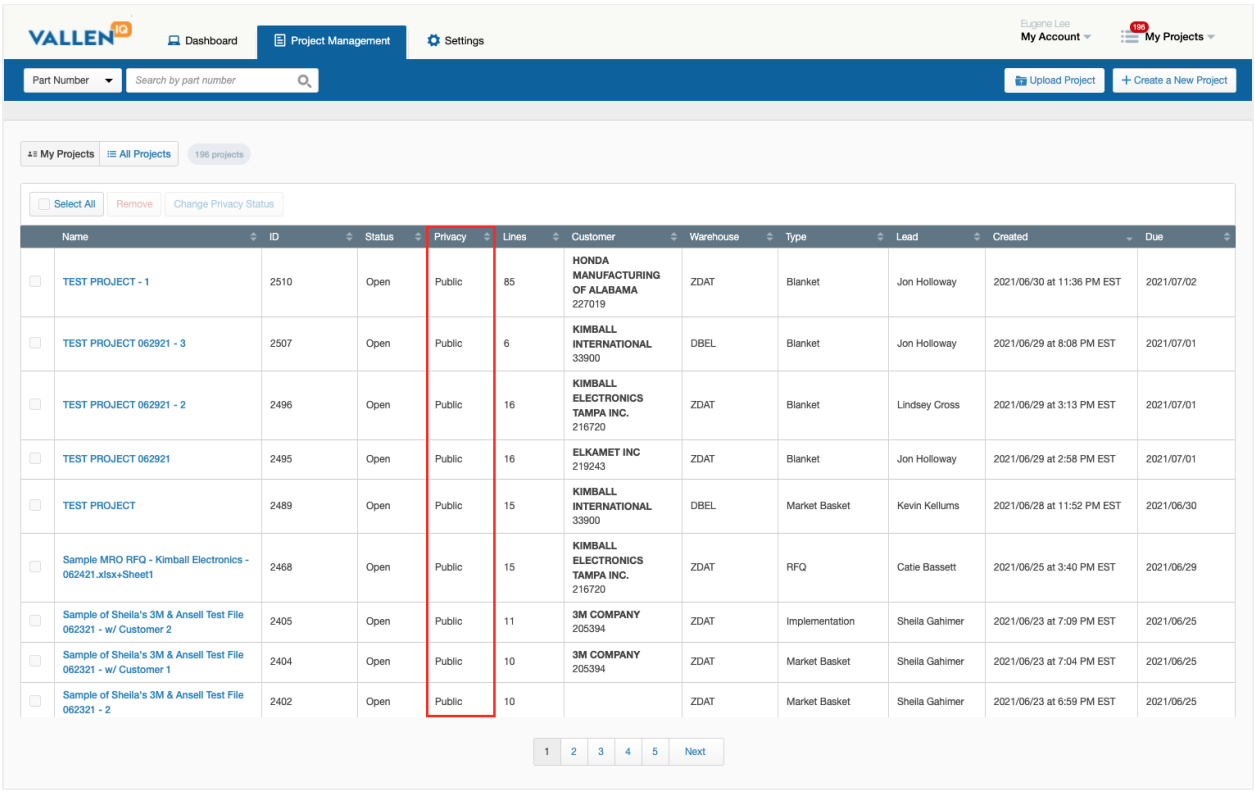
Project Owner	Share Link Recipient	Behavior
Admin	Admin	● Admin recipient of private project does not see the project in Project Management (neither in “My Projects”, nor “All Projects”) ● Admin recipient is only able to access the project using share link ● Admin recipient has full edit permissions within shared project ● If Admin project owner selects “unshare” then: ○ 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	● 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 ○ 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	● 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” ○ 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	● 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 ○ 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

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:



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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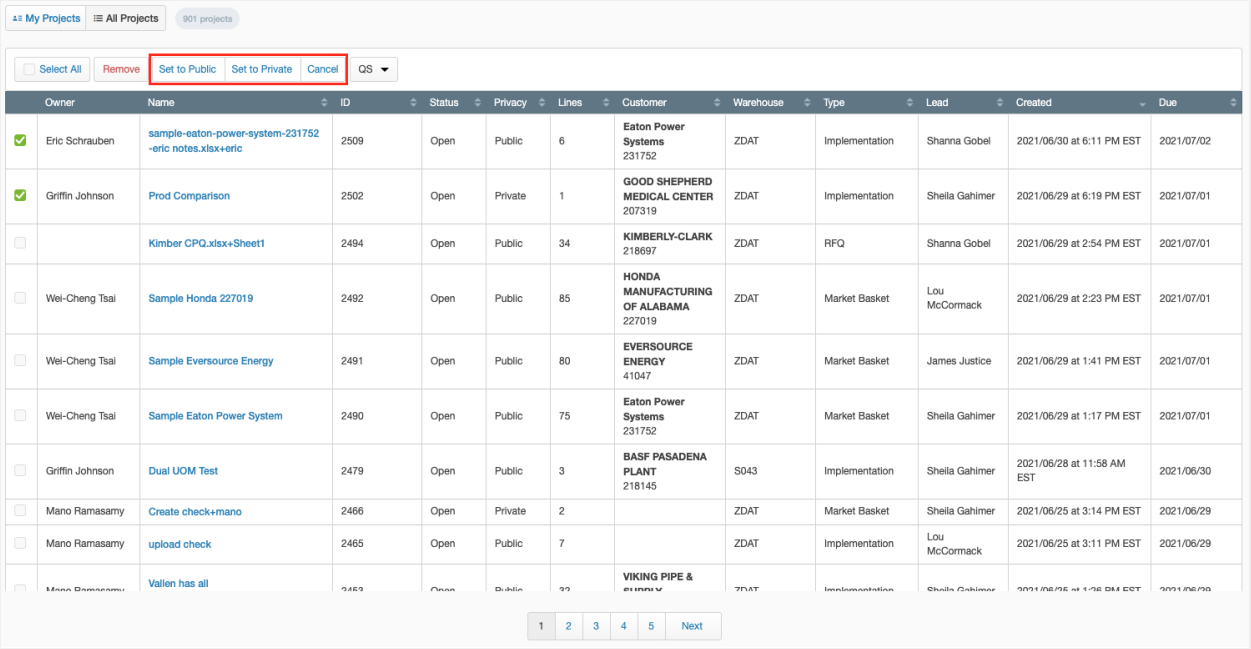
13.2 Change Privacy Setting

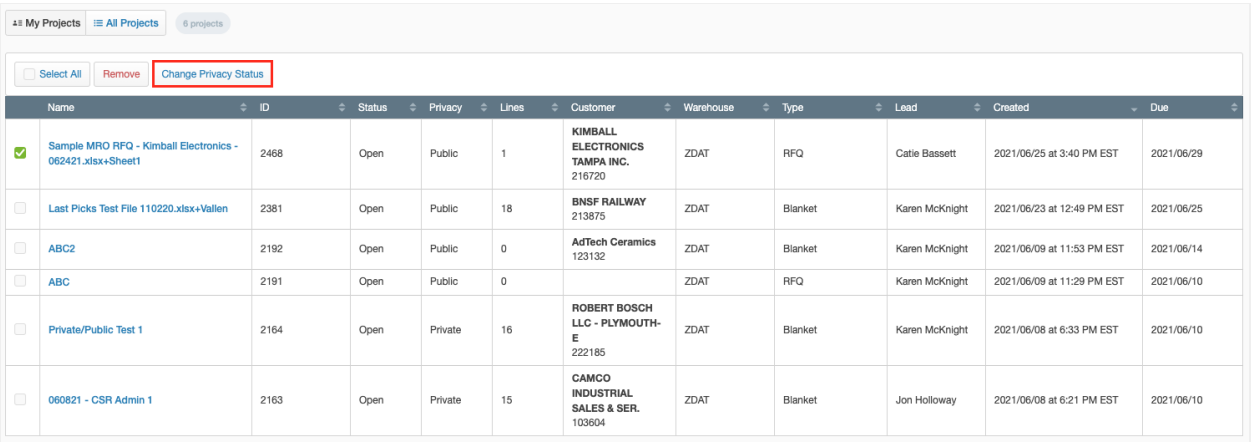
This enhancement only applies to super admin and admin users. Specialists will not be able to change the privacy settings of projects in VallenIQ.

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.”



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.



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

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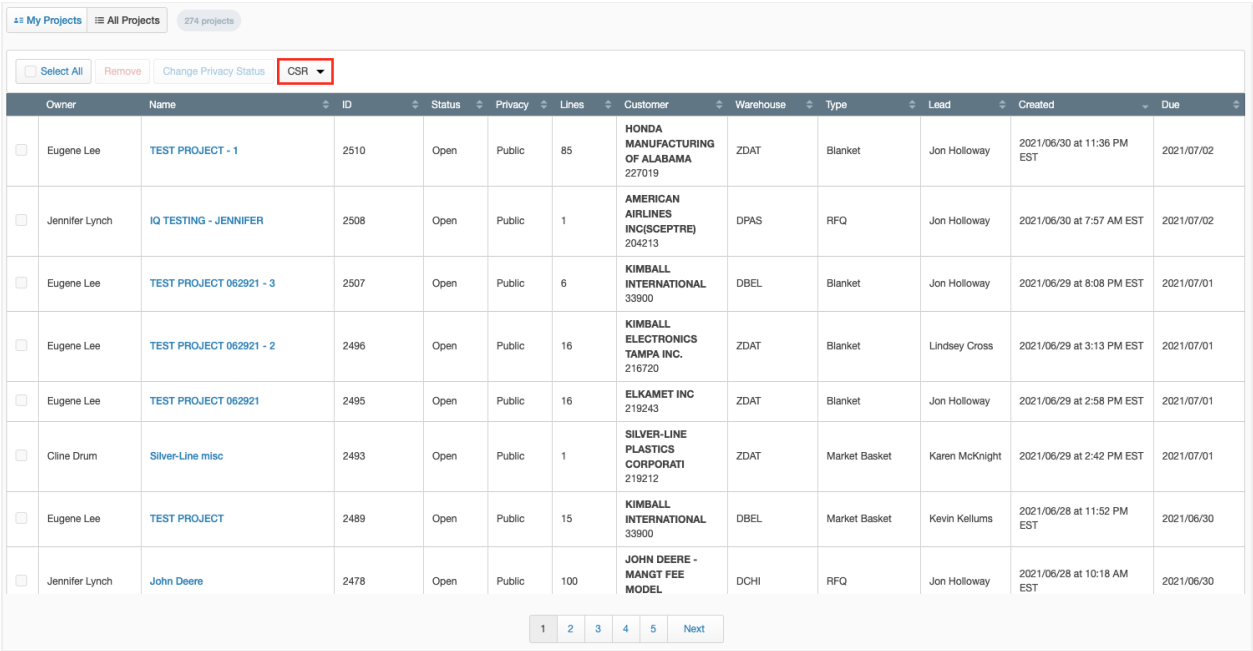
13.3 Team Dropdown in All Projects

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.



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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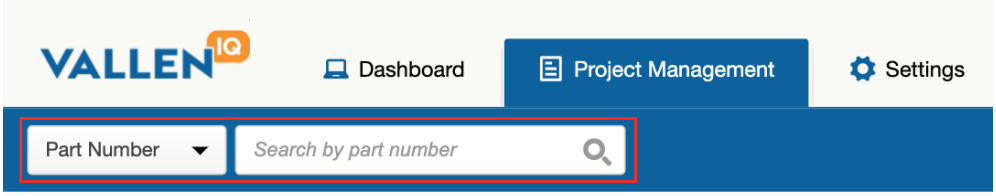
14. Global Search Updates

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

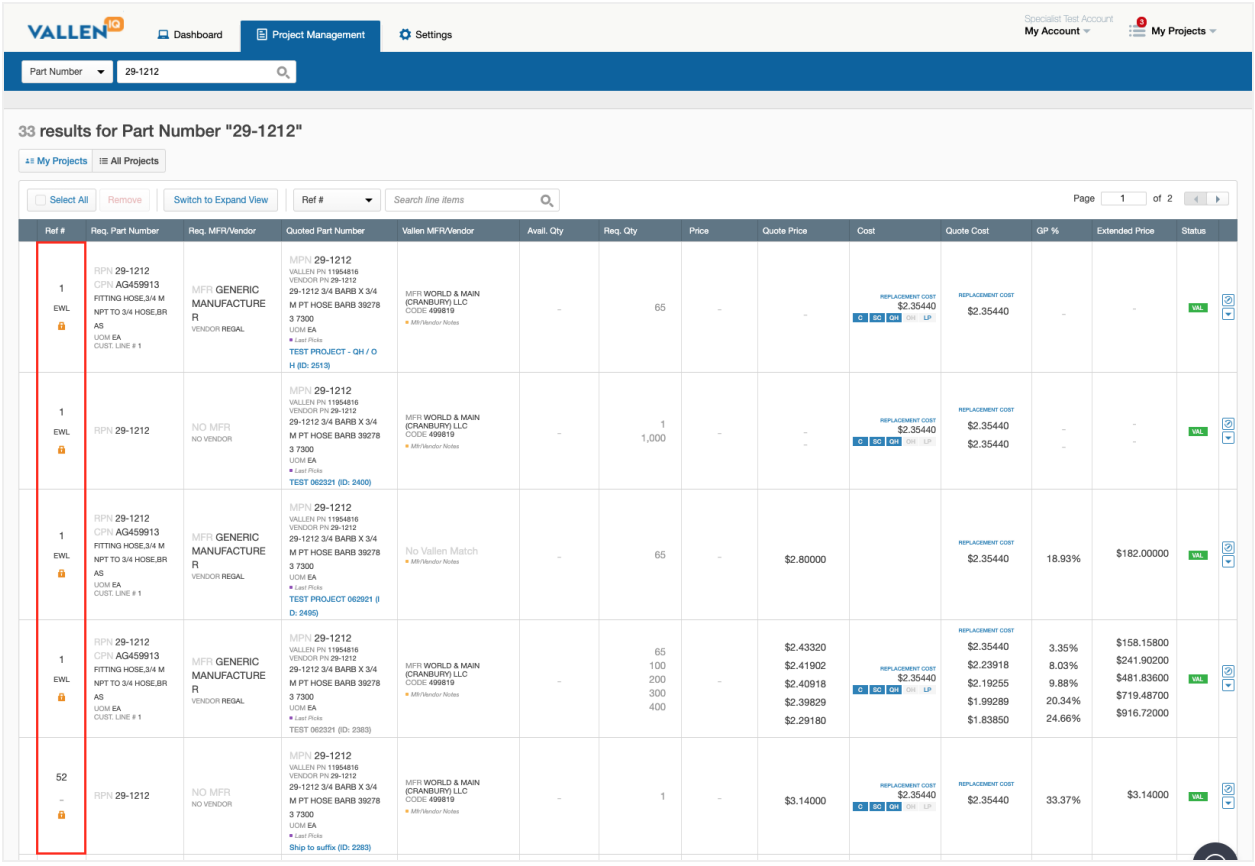
Specialist users previously could only search across projects they were assigned to. When using the Global Search feature, specialists can now search across “All Projects,” not just “My Projects.”

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:



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.

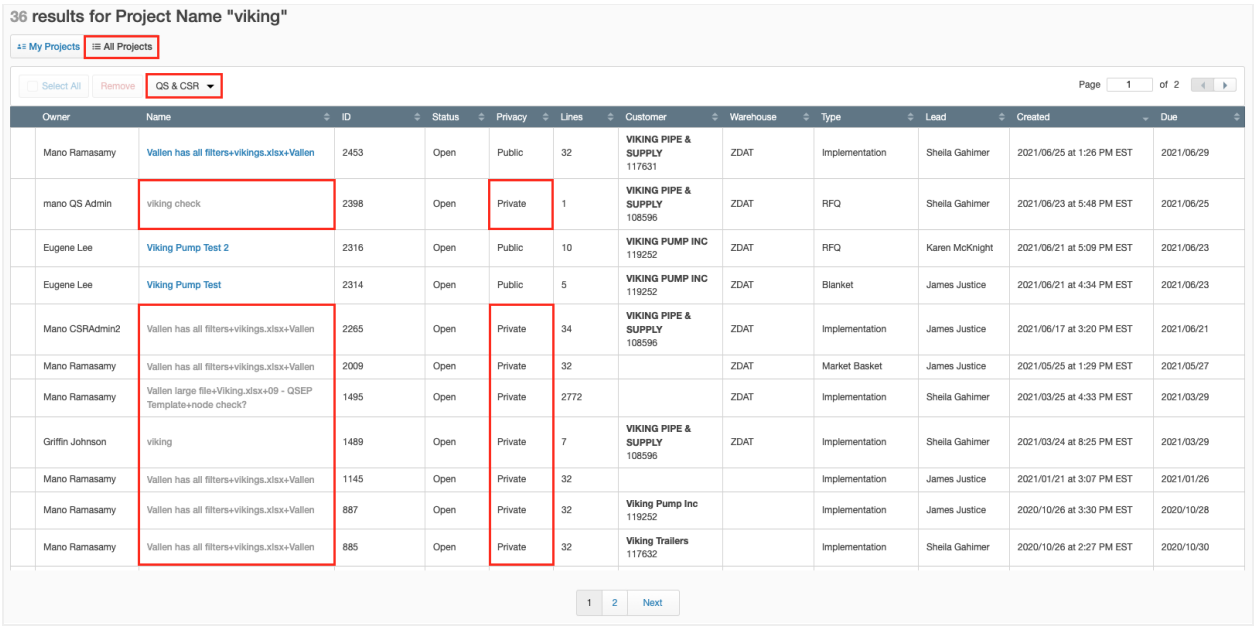
This means that specialist users should not be able to open these private projects to see the entire quote, but should be able to see the line item in the Part Search results page.

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.



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.

14.2.1 Part Number Search Results

14.2.1.1 Public Project Results

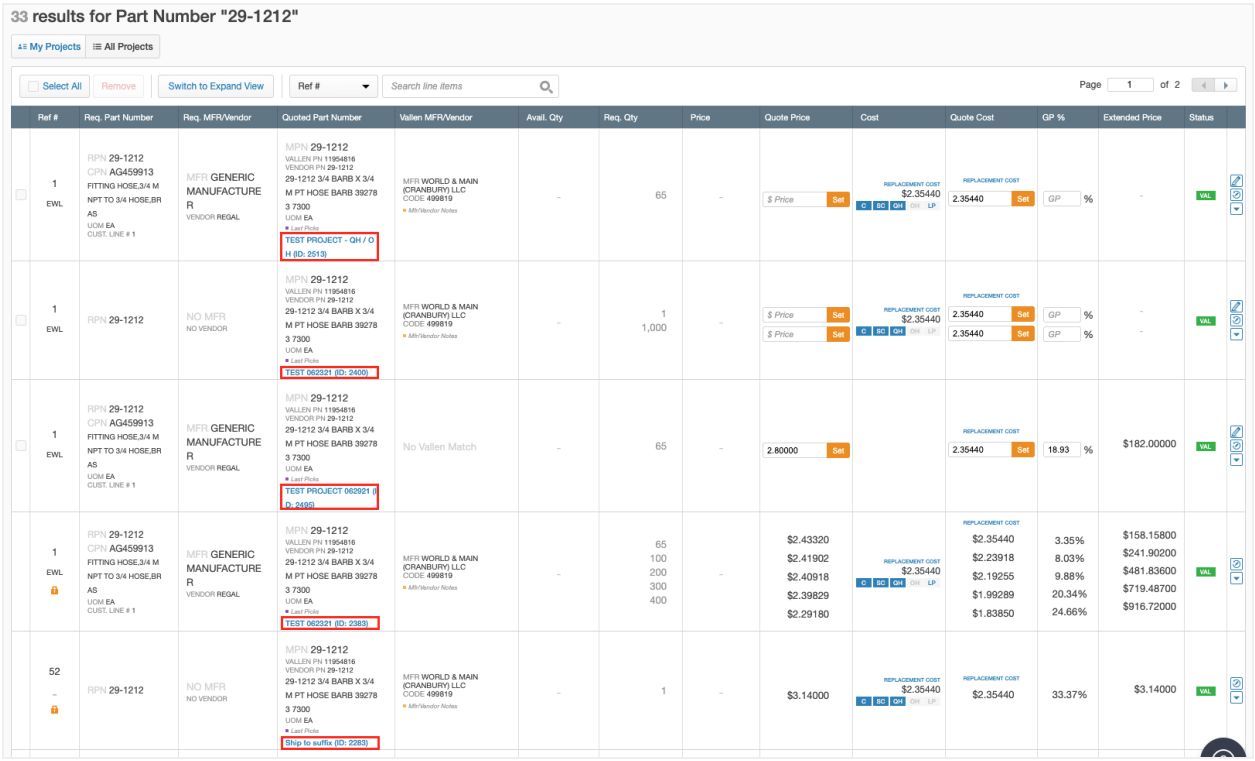
When the “Part Number” search category is used, super admins and admins will now see matches from both public and private projects.

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.

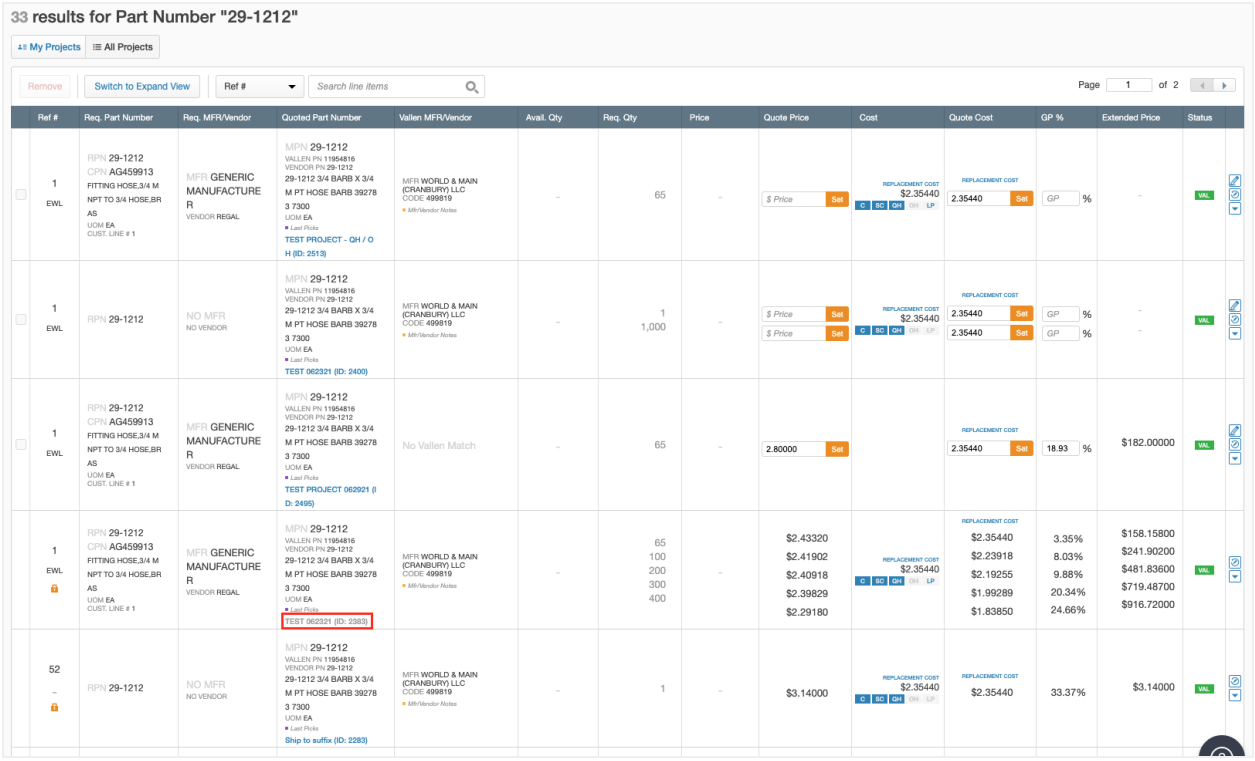
14.2.1.2 Private Project Results

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.



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

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.



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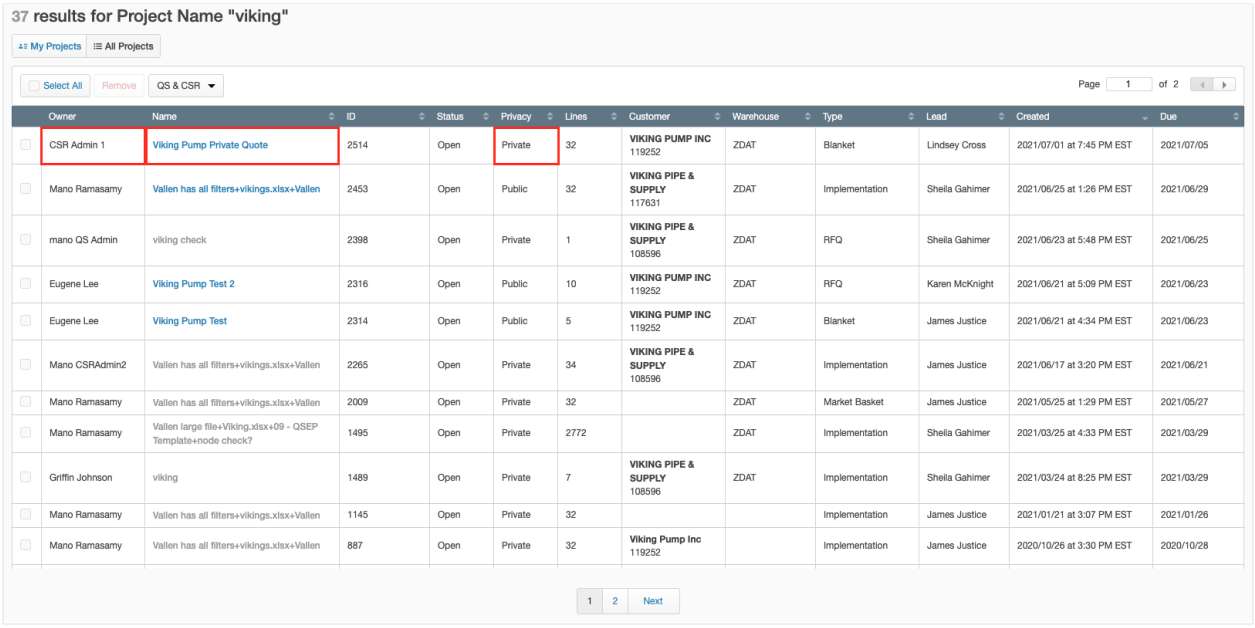
For admin users, all public projects and private projects they own will appear blue and selectable, but private projects they don't own will display as grey and will not be selectable.



37 results for Project Name "viking"

My Projects | All Projects

Select All | Remove | QS & CSR

Page 1 of 2

Owner	Name	ID	Status	Privacy	Lines	Customer	Warehouse	Type	Lead	Created	Due
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
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

1 2 Next

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

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”

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

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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