



RELEASE NOTES

VallenIQ v1.16

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Map Assignees Into Projects

VallenIQ Super Admins and Admins can now add VallenIQ users to a customer RFQ file and map these users directly into VallenIQ as line item assignees.

This feature allows Super Admins and Admins to save time in the project creation process, by not having to manually assign users in the system using the various filter options.

Customer RFQ

Within the customer RFQ file, users can type their desired assignees into a new column like so:

Sort ID	Internal Part #	Part Number	Description	Manufacturer	Vendor	Usage	Cust Last Price	Misc 1	Misc 2	Misc 3	Misc 4	UOM Test	Assignee
1	AG459913	29-1212	FITTING HOSE,3/4 MNPT TO 3/4 HOSE,BRAS	GENERIC MANUFACTURER	Regal	65	73.19	27726	10562	16765	12449	EA	GCA - Kevin Tun
2	ZY492381	DWS 01-19-1	FILTER ELEMENT WATER FILTER,23MM ID X 61	DELTA PURE	Industrial Components and Tech	100	8.83	24817	10210	12155	15285	PC	JSP3 Test Account
3	BH109496	0211783C9968T	1-1/2X2IN YELLOW	J&L Industrial Supply	3COM	125	33.71	17203	16577	14667	19696	GAL	JHH
4	6G126814	18370	PIN SURFACE,25MM X 3MM OD X 18MM LG,SS	FULLAM	OMRON	70	28.10	17917	11770	13989	13237	BX	ABC
5	YQ385729	A606SC	BOX -6 WD X 6 LG X 4 TK	HOFFMANN	Chicago Pneumatic Tool Co	95	35.41	10182	17500	15981	15203	BX	JMK2 Jeff KANE
6	MM373657	302067	LABEL THERMAL TRANSFER PAPER,4 WD X 6	ID TECHNOLOGIES	WEILER	60	32.00	28112	10165	19965	14704	EA	zze
7	OL433694	051138-72071	AIR FILTER HIGH EFFICIENCY,140MMX142MM	MAGID GLOVE	Seco Tools	58	65.92	15525	13995	11796	14006	LB	SPEC3
8	GH407196	155022-43	FILTER TASTE/ODOR/SEDIMENT,27MM ID	PENTEK	Weiler Corp.	145	27.55	19872	12366	19877	19505	FT	Jhh
9	EE367284	010119857	X36YD 4MIL CLR	ACCESS LTD	Valeant	75	13.21	16208	16524	13698	11253	LB	jsP3
10	PQ220304	0101198574GM	TRANSPARENT 2X36YD	AVAYA	VALEANT Pharma	78	18.24	20940	16170	10694	10473	GAL	ABC
11	VQ356443	010119856	SCORE RL TRANSP 2X72YD	Hopkins Manufacturing Co	VALEANT Pharma	62	53.87	19299	11233	10719	14219	EA	ABC
12	FE384808	0003462610931892	PRTBL LT GRN 1X60YD 6.7	MONOLITH CORPORATION	BOSCH	100	8.93	10757	19229	17751	14776	EA	zze
13	AA244407	00029811090100RH	810 3/4 IN X 1296 IN	NEXTEL COMMUNICATIONS	Chums Inc.	90	78.37	12147	13866	16448	13545	FT	Test Account
14	BY385030	00029811057D	48MMX914M CLR	ARROW ELECTRONICS	Chums Inc.	82	41.75	28237	13673	16262	19249	PC	ZZE
15	KL285809	000207P1596F	CLR 3/4X60YD 2MIL	STAPLES BUSINESS ADVANTAGE	DETROIT DIESEL CORP	79	12.11	10199	10426	13227	18737	PC	GCA Tun
16	BA186588	FLUKE-TL223	Test Lead Kit,5 ft. 3" L,10A	FLUKE	Seco Tools	61	38.04	31514	32532	21215	35135	EA	JHH

1.1 Add line item assignees into a new column in the customer RFQ file

Note that the system uses the employee ID to assign lines to the correct user. Therefore, please ensure the employee ID has been added to each line item that must be assigned.

The system is able to pick out the employee ID in a variety of different formats. For example, all variations of employee ID and employee name shown in the screenshot above should result in a successful line assignment, as long as the ID is included.

However, to ensure there are no issues with the assignment process, we recommend using one of the following formats:

- JGD (just employee ID)
- JGD - John Doe (employee ID - employee first and last name)

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Mapping to New Assignees Column

After assignees have been added to the customer RFQ file, upload the file into VallenIQ using either “Upload Project” or “Create New Project.”

In the “Preview and Confirm Project Data” modal, a new “Assignee” column has been added to the very right of the table.

Select which customer file column to map into the system and confirm the values are consistent:

Preview and Confirm Project Data

Project Name

052721 - 2

Select Sheet

Sheet1

	Usage	Cust Last Price	Misc. 1	Misc. 2	Misc. 3	Misc. 4	UOM	Assignee
	Usage	Cust Last Price	Misc 1	Misc 2	Misc 3	Misc 4	UOM Test	Assignee
und	65	73.19	27726	10562	16765	12449	EA	GCA - Kevin Tun
und	100	8.83	24817	10210	12155	15285	PC	JSP3 Test Account
und	125	33.71	17203	16577	14667	19696	GAL	JHH
und	70	28.10	17917	11770	13989	13237	BX	ABC
und	95	35.41	10182	17500	15981	15203	BX	JMK2 Jeff KANE
und	60	32.00	28112	10165	19965	14704	EA	zze
und	58	65.92	15525	13995	11796	14006	LB	SPEC3

Next

Cancel

1.2 Map assignees from customer RFQ file into the new “Assignee” column

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Once the upload process is complete, the system should map the appropriate users to the line items they were added to.

Dashboard
Project Management
Settings

Eugene Lee
My Account
104 My Projects

Part Number
Search by part number
Upload Project
Create a New Project

052721 - 2 (16 Lines)
2021/05/27 at 7:34 PM EST
Private
Share Project
Project Settings
Hide Filters

owned by: Eugene Lee

224771
ALTEC INDUSTRIES
* Customer Notes
Project ID: 2049
Status: Open
Due Date: 2021/05/31
Yes
Team Lead: James Justice
Project Type: Implementation

Filter by Category (10)
Abrasives 3
Chemicals/Lube/Adhesives 1
Cutting Tools 2
Electrical Products 1
Maint Equip and Supplies 1
Miscellaneous Products 2
Pipe and Fittings 1
Power Tools Repair Parts 1
Safety Products 3

Filter by Req. Manufacturer (16)
ACCESS LTD 1/1
ARROW 1/1
ELECTRONICS 1/1
AVAYA 1/1
DELTA PURE 1/1
FLUKE 1/1
FULLAM 1/1
GENERIC 1/1
MANUFACTURER 1/1

Filter by Intelligence
Multiple Valen Matches 5
Cross References 0
Part Cross References 2
Suggested Parts 5
Changed RPN 1
Changed CPN 0
Updated Parts 0
Created Parts 0
Last Picks 10

Filter by Cost Source
With Order History 6
With Quote History 4
With Cost 15
With Standard Cost 11

Filter by Status
RC Status 7
CU Status 0
VAL Status 8
DU Status 0
TI Status 1
NG Status 0
OS Status 0
AL Status 0
NMI Status 0

Refresh All
Custom Export
Edit History
More Filters

Selecting 0 item(s)
Showing 16/16 results

Select All
Group Edit
Remove
Assign
Switch to Expand View
Hide All Alternates
Ref #
Search line items

Total Cost: 65,631.03010

Ref #	Req. Part Number	Req. MFR/Vendor	Quoted Part Number	Valen MFR/Vendor	Quantity	Cost	Quote Cost	Assignee	Status
1	RPN 29-1212 CPN AG459913 FITTING HOSE,3/4 MNPT TO 3/4 HOSE,BRAS UOM EA CUST. LINE # 1	MFR GENERIC MANUFACTURER NO VENDOR	MPN 29-1212 VALLEN PN 11954816 VENDOR PN 29-1212 29-1212 3/4 BARB X 3/4 M PT HOSE BARB 392783 7300 UOM EA Last Pick	MFR WORLD & MAIN (CRANBURY) LLC CODE:499819 Mfr/Vendor Notes	65	REPLACEMENT COST \$2,354.40 SC OH LP C	REPLACEMENT COST 2,354.40 Set	GCA Kevin Tun	VAL
2	RPN DW5 01-19-1 CPN ZY492381 FILTER ELEMENT WATER FIL TER,23MM ID X 61 UOM PC CUST. LINE # 2	MFR DELTA PURE NO VENDOR	MPN DW5 01-19-1 VALLEN PN 4213485235 VENDOR PN 29-1212 FILTER ELEMENT WATER FILTER,23 MM ID X 61 UOM EA	MFR DELTA PURE FILTRATION CODE:603895 VENDOR INDUSTRIAL COMPONENTS AND TECH Mfr/Vendor Notes	100	REPLACEMENT COST \$2,000.00 SC OH LP C	REPLACEMENT COST 2,000.00 Set	JSP3 Test Account	VAL
3	RPN 0211783C996BT CPN BH108496 1-1/2X2IN YELLOW UOM GAL CUST. LINE # 3	MFR J&L Industrial Supply NO VENDOR	MPN 3C996BT VALLEN PN 0211783C996BT VENDOR PN 3C996BT 3C996BT T CARD NIC UOM EA	No Valen Match	125	REPLACEMENT COST \$136,340.00 SC OH LP C	REPLACEMENT COST 136,340.00 Set	JHH jerry hunt	RC
4	RPN 18370 CPN 6G126814 PIN SURFACE,25MM X 3MM OD X 18MM LG,SS UOM BX CUST. LINE # 4	MFR FULLAM NO VENDOR	MPN 18370 VALLEN PN 66249018370 VENDOR PN 18370 SUPP 18370 END MILL SOLID CARB IDE UOM EA Multiple Valen Matches * Suggested Parts Part Cross References * Last Pick	MFR GARR TOOLS CODE:662490 Mfr/Vendor Notes	70	REPLACEMENT COST \$137,333.00 SC OH LP C	REPLACEMENT COST 137,333.00 Set	ABC Test Account	VAL
5	RPN A606SC CPN YQ385729 BOX -6 WID X 6 LG X 4 TK UOM BX	MFR HOFFMANN NO VENDOR	MPN A606SC VALLEN PN 783510A606SC VENDOR PN A606SC A606SC ENCLOSURE W/COVER 6X 6X4 UOM EA Mfr/Vendor Notes	MFR HOFFMAN ENCLOSURES INC. CODE:783510 Mfr/Vendor Notes	95	REPLACEMENT COST \$56,350.00 SC OH LP C	REPLACEMENT COST 56,350.00 Set	JMK2 Jeff Kane	VAL

1.3 Users from customer file will be mapped to the "Assignee" column in the new project

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CSR Team Leads Added to Project Lead Field

CSR Team Leads have been added to the “Project Lead” field in VallenIQ as we prepare to add CSR users to the current production environment.

The screenshot shows a web form titled "Customer Information". It contains several input fields and dropdown menus. The "Project Lead" dropdown menu is highlighted with a red rectangle. The form includes fields for Customer Account, Warehouse, Contact Name, Ship To Suffix, Contact Phone, Contact Email, Address, Project Due Date, Project Type, Subs Allowed, and Project Description. The "Project Lead" dropdown menu is currently set to "Please Select".

1.4 CSR Team Leads will be selectable in the “Project Lead” field

The following users have been added to this dropdown:

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

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