RELEASE NOTES

VallenIQ v1.16

Released May 27th, 2021

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	DW5 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	0211783C996BT	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 EFFECIENCY,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	YQ356443	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:
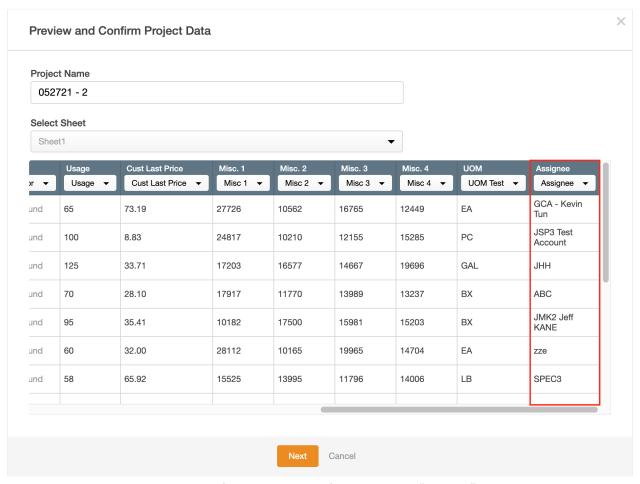
- JGD (just employee ID)
- JGD - John Doe (employee ID - employee first and last name)

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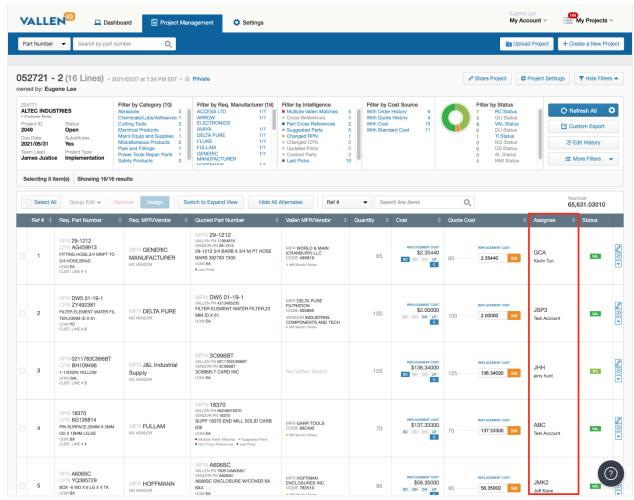
In the "Preview and Confirm Project Data" modal, a new "Assignee" column has been added to the very right of the table.

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

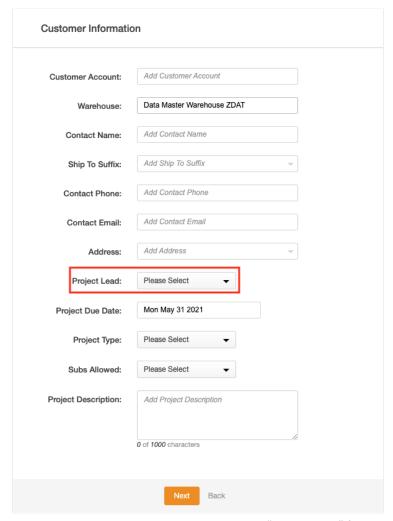*1.2 Map assignees from customer RFQ file into the new "Assignee" column*

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

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

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.

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