



RELEASE NOTES

VallenIQ v1.12

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Import Data Into Projects

Users will now be able to mass import data from an external excel spreadsheet into selected fields in specific line items within a project. This may be particularly useful when updating line items with information from a vendor quote.

Pre-Conditions

Reference Numbers

Users must ensure that the excel file selected for import contains a reference number column. These reference numbers must match with the reference numbers of the selected line items within the chosen project in order to import correctly.

Manufacturer Part Numbers

The import data process is, in effect, the same thing as updating multiple parts at the same time using the 'Create & Update' feature in Group Edit.

As a result, a requirement of this feature is that an MPN must exist in the line items that have been selected for Import Data, or if selected lines do not currently have an MPN specified for the line, a part number must be imported into the MPN column during the Import Data process.

If MPN does not exist for a selected line item, or is not mapped in during the import process, import cannot be completed for these lines.

Supported File Types

The Import Data feature will only allow users to import data from excel (.xlsx) documents. Other file types, such as PDF, are not supported.

Alternates

Importing data into alterates is not supported at this time.

Role Permissions

All users should be able to use the Import Data feature in VallenIQ:

- Specialists
- Admins
- Super Admins

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Initiating Import

To start the import process, first select all line items that you'd like to import data into in your project.

The screenshot shows the Valen Project Management interface for project 012721 (202 Parts). The interface includes a top navigation bar with 'Dashboard' and 'Project Management' tabs. Below the navigation bar, there are filters for 'Filter by Category (16)', 'Filter by Reg. Manufacturer (8)', 'Filter by Intelligence', 'Filter by Cost Source', and 'Filter by Status'. The main table displays line items with columns for 'Ref #', 'Select', 'MFR/Vendor', 'Quoted Part Number', 'Valen MFR/Vendor', 'Quantity', 'Cost', 'Quote Cost', 'Assignee', and 'Status'. The first line item (Ref # 1) is selected, and the 'Import Data' option is highlighted in the 'Group Edit' menu.

1.1 Select line items for which you'd like to import data, then select 'Import Data' in Group Edit

After all required lines are selected, the system will allow you to choose the excel file for your import. Select the appropriate file and select 'Open.'

The screenshot shows the Valen Project Management interface with the 'Import Data Test RFQ's' dialog box open. The dialog box displays a list of files for selection, including 'Base UM Code Test.xlsx', 'Combined - All Fields Test.xlsx', 'Cost Test.xlsx', 'Line Item Test.xlsx', 'Manufacturer Code Test.xlsx', 'Manufacturer Name Test.xlsx', 'Manufacturer Part Number Test.xlsx', 'Part Category Code Test.xlsx', 'Product Category Name Test.xlsx', 'Purchase UM Code Test.xlsx', 'Ref # + Description Test.xlsx', 'Sample RFQ 012521...rp SK-219994 v2.xlsx', and 'Vendor Code Test.xlsx'. The 'Sample RFQ 012521...rp SK-219994 v2.xlsx' file is selected. The 'Open' button is highlighted.

1.2 Select the file you will use for import

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Column Mapping

The system will then take users to the 'Preview and Confirm Import Data' modal. This modal will display the project ID, file name, and allow users to choose the sheet that contains the data that will be imported if multiple sheets exist in the selected excel file.

When users first arrive to the 'Preview and Confirm Import Data' modal, the 'VallenIQ Ref #' column will be pre-populated with the reference numbers of the selected line items from the project (blue highlight below).

012721 (202 Parts) • 2021/01/27 @ 9:49 AM EST • Private
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Filter by Category (16)
Automotive 2
Chemicals/Lubricants/Adhesives 1
Cnc Hardware/Bundled 1
Cutting Tools 3
Electrical Products 2
Fasteners 1
Hand Tools 1
Machine Tools and Assemblies 1
Maint Equip and Supp 1

Filter by Req. Manufacturer (3)
Automotive 2
Chemicals/Lubricants/Adhesives 1
Cnc Hardware/Bundled 1
Cutting Tools 3
Electrical Products 2
Fasteners 1
Hand Tools 1
Machine Tools and Assemblies 1
Maint Equip and Supp 1

Filter by Intelligence
Multiple Vallen Matches 67
Cross References 0
Part Cross References 92
Suggested Parts 80
Changed RPN 4
Changed CPN 0

Filter by Cost Source
With Order History 115
With Quote History 138
With Cost 168
With Standard Cost 168

Filter by Status
RC Status 17
CU Status 0
VAL Status 181
DU Status 16
TI Status 34
NG Status 0
CS Status 0
AL Status 0
NM Status 0

Project ID: 1175
File Name: Sample RFQ 012521 - Robert Bosch Corp SX-213994 v2.xlsx+Sheet1
Select Sheet: Sheet1

VallenIQ Ref #	Ref #	Manufacturer Part Number	Vendor Part Number	Cost	Purchase UM Code	Pack Qty
1	1	No Manufacturer Part Number found	No Vendor Part Number found	No Cost found	No Purchase UM Code found	No Pack C
2	2	No Manufacturer Part Number found	No Vendor Part Number found	No Cost found	No Purchase UM Code found	No Pack C
3	3	No Manufacturer Part Number found	No Vendor Part Number found	No Cost found	No Purchase UM Code found	No Pack C
4	4	No Manufacturer Part Number found	No Vendor Part Number found	No Cost found	No Purchase UM Code found	No Pack C
5	5	No Manufacturer Part Number found	No Vendor Part Number found	No Cost found	No Purchase UM Code found	No Pack C
6	6	No Manufacturer Part Number found	No Vendor Part Number found	No Cost found	No Purchase UM Code found	No Pack C

Import Cancel

1.3 Reference numbers must match between selected lines in project and lines in excel sheet

To start the import process, it is required that the reference number column in the external excel file is mapped into the 'Ref #' column in this modal (red highlight in screenshot above).

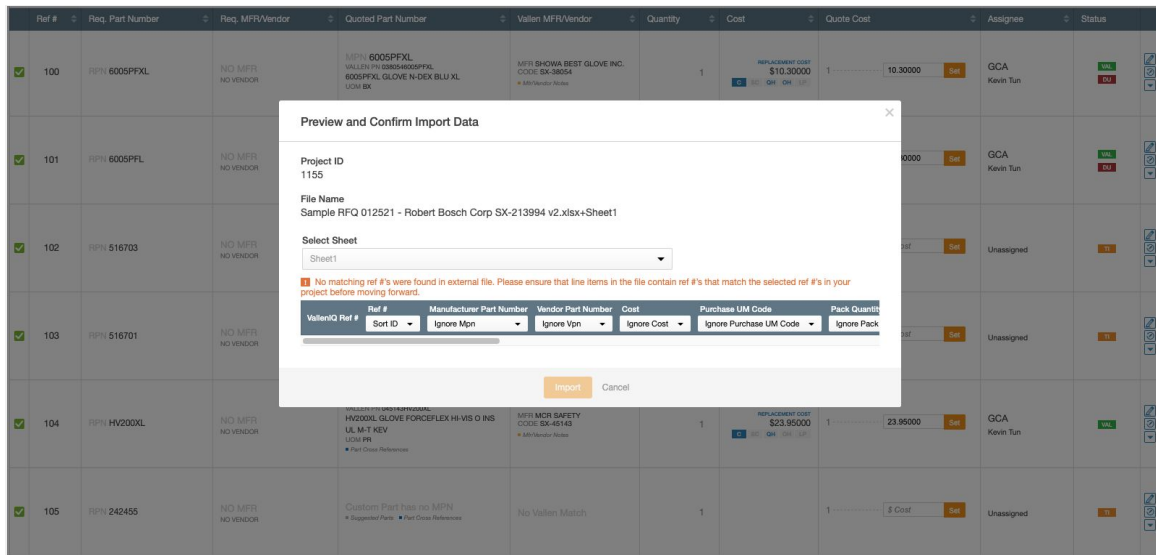
The system will only import data from lines that have a matching reference numbers between 'VallenIQ Ref #' (selected line items in your project) and 'Ref #' column (reference numbers from excel file).

In the import process, the system will essentially pull data that exists in the mapped columns for the reference numbers you specified in the file, and import them into the appropriate fields in the line items in your project.

Once reference numbers from the excel file are mapped into the 'Ref #' column in this modal, the system will only display line items that match with the values in the 'VallenIQ Ref #' column.

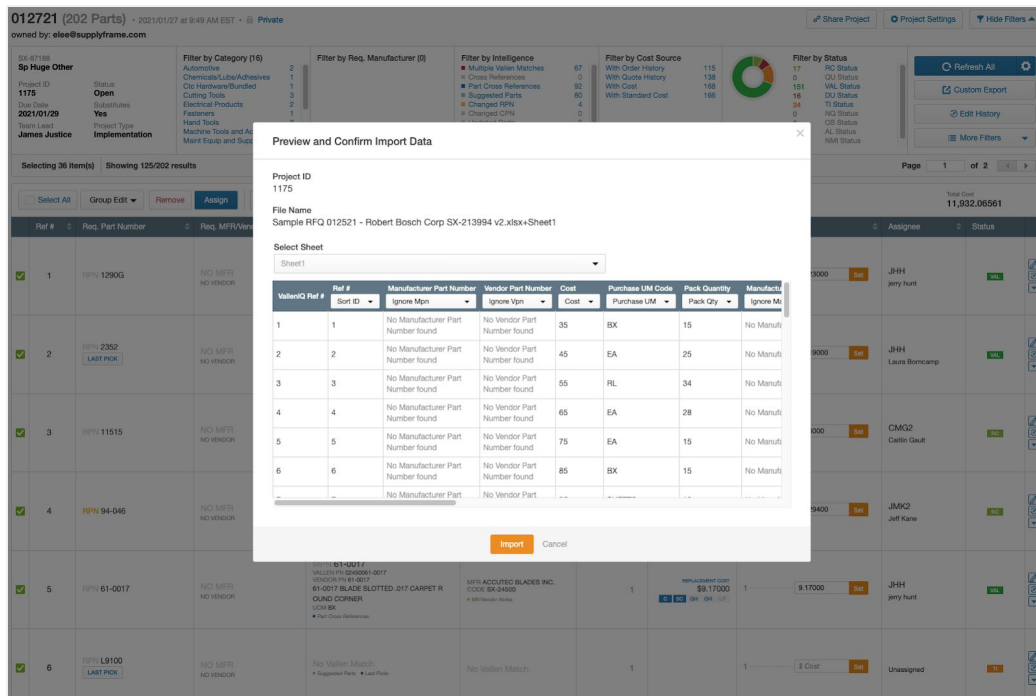
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This means that if the reference numbers in the excel file do not match to those that were selected in the project, no matching line items will show in the table. In this scenario, the system will display the message below that tells the user that matching reference numbers were not found:



1.4 Error message when matching reference numbers are not found

If the system is able to find matching reference numbers, VallenIQ will show the rows that match, and allow users to map the rest of the columns on the right.



1.5 Matching ref #'s are found, users can continue mapping the columns they want to import
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Note that the columns that are available for mapping are the same fields that exist in the Create & Update modal:

Requested Part Number: 6005PFXL Manufacturer Part Number: 6005PFXL Vallen Part Number: 0380546005PFXL

Advanced Search Create & Update Alternates

Part Options
☐ Create New Part ☒ Update Part

Manufacturer Part Number: 6005PFXL Vendor Part Number: Vendor Part Number Vallen Part Number: Vallen Part Number

Cost: 10.3 Purchase UM Code: Purchase UM Code Pack Quantity: 20

Manufacturer Code: SX-38054 Manufacturer Name: Showa Best Glove Inc. Vendor Code: Vendor Code Vendor Name: Vendor Name

Product Category Code: Product Category Code Product Category Name: Safety Products Lead Time (days): 14 Base UM Code: BX

Description 1: 6005PFXL GLOVE N-DEX BLU

Description 2: XL

Save Cancel

1.6 Columns in Import Data are the same fields in Create & Update modal

In the example above (screenshot 1.5), the following fields from the excel file have been mapped for import:

- Cost
- Purchase UM Code
- Pack Quantity
- Lead Time
- Description

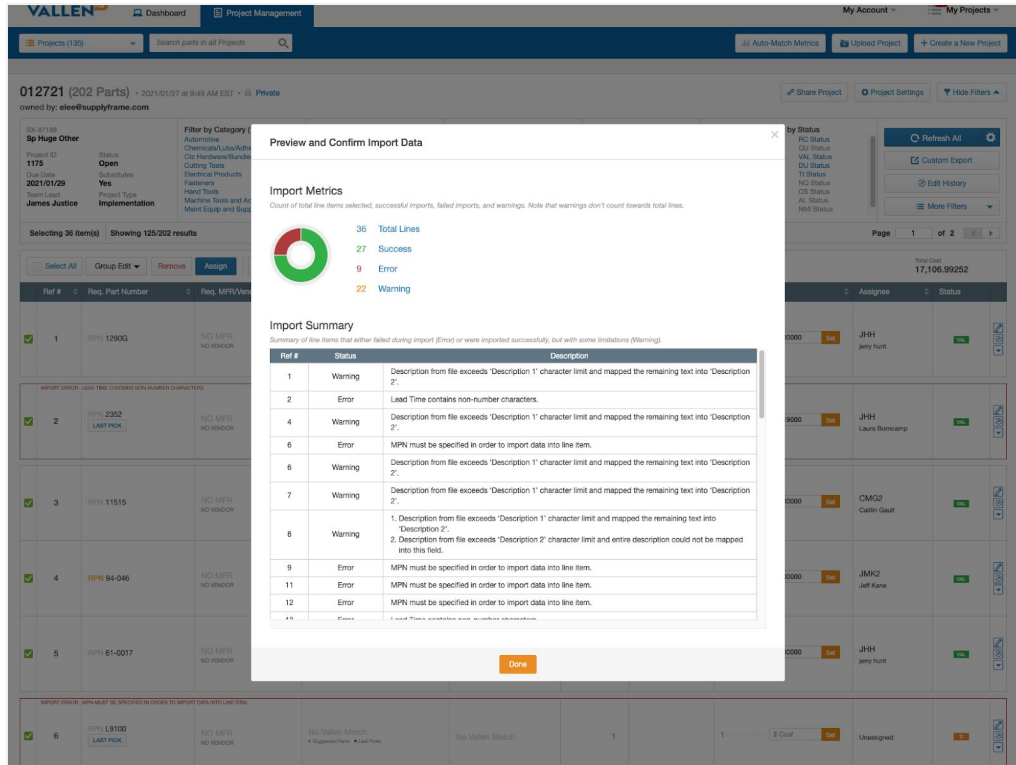
When mapping has concluded, select the orange 'Import' button on the bottom of the modal to start the import process.

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Import Summary and Metrics

After the import process is completed, users will be taken to modal in which they will see a summary of their import.



1.7 'Import Metrics' and 'Import Summary'

The first section, 'Import Metrics' will show a high level summary of import metrics. This table will contain the following:

- **Total Lines:** Total line items chosen for export
- **Success:** Number of lines where import was successful
- **Error:** Number of lines where import failed
- **Warning:** Number of lines where import was successful, but with some limitations

Note: Warnings do not count towards the count of Total Lines

The next section 'Import Summary' will describe the reference numbers in which errors or warnings were identified. A detailed description is provided for users to utilize in the troubleshooting process. Using the Ref #, Status, and Descriptions, users can fix relevant issues in their excel file, and re-import the line items that failed or displayed warnings.

The following is a summary of the errors that users might encounter in the import process:

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Affected Column	Status	Description	Explanation
Ref #	Error	"Ref # contains non-number characters."	Ensure the ref #'s in the excel file do not contain any characters other than numbers (eg. letters, special characters)
Manufacturer Part Number	Error	"MPN must be specified in order to import data into line item."	Ensure selected line in the project has an MPN, or the MPN field is mapped in the Preview and Confirm Import Data modal and this field contains an MPN in the file
Manufacturer Name	Error	"Manufacturer Name is greater than 100 characters."	Ensure this field has < or = 100 characters
Manufacturer Code	Error	"Manufacturer Code is greater than 16 characters."	Ensure this field has < or = 16 characters
Vendor Name	Error	"Vendor Name is greater than 100 characters."	Ensure this field has < or = 100 characters
Vendor Code	Error	"Vendor Code is greater than 15 characters."	Ensure this field has < or = 15 characters
Pack Quantity	Error	"Pack quantity contains non-number characters."	Ensure this field only contains numbers and does not contain other types of characters (eg. letters, special characters)
Cost	Error	"Cost contains non-number characters."	Ensure this field only contains numbers and does not contain other types of characters (eg. letters, special characters)
Lead Time	Error	"Lead time contains non-number characters."	Ensure this field only contains numbers and does not contain other types of characters (eg. letters, special characters)
Purchase UM Code	Error	"Purchase UM Code is greater than 15 characters."	Ensure this field has < or = 15 characters
Base UM Code	Error	"Base UM Code is greater than 15 characters."	Ensure this field has < or = 15 characters
Product Category Code	Error	"Product Category Code contains non-number characters."	Ensure this field only contains numbers and does not contain other types of characters (eg. letters, special characters)
Product Category Code	Warning	"Category code is greater than 20 characters."	Ensure this field has < or = 20 characters
Description	Warning	"Description from file exceeds 'Description 1' character limit and mapped the remaining text into 'Description 2.'"	Value in field is > 24 characters. All remaining characters were mapped into 'Description 2'
Description	Warning	"Description from file exceeds 'Description 2' character limit and entire description could not be mapped into this field."	System mapped as much of value into 'Description 1,' and attempted to map the rest of the characters into 'Description 2,' but entire description could not fit. Remaining characters in description were cut off

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To supplement the errors and warnings shown in the 'Import Summary' section, the system will also call out line items in which errors occurred in the project itself (warnings will not be identified).

Note that these error call outs will only display temporarily, and will no longer show if the page is refreshed.

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Share Project

Project Settings

Hide Filters

SK-87188

Sp Huge Other

Project ID

1175

Status

Open

Due Date

2021/01/29

Team Lead

James Justice

Project Type

Implementation

Filter by Category (16)

Automotive

Chemicals/Lube/Adhesives

Cnc Hardware/Bundled

Cutting Tools

Electrical Products

Fasteners

Hand Tools

Machine Tools and Accys

Maint Equip and Supplies

Filter by Req. Manufacturer (0)

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

OU Status

VAL Status

DU Status

TI Status

NQ Status

OS Status

AL Status

NMI Status

Selecting 36 Item(s)

Showing 125/202 results

Page 1 of 2

Select All

Group Edit

Remove

Assign

Switch to Expand View

Hide All Alternates

Search line items by Cust. Desc.

Total Cost 17,106.99252

Ref #	Req. Part Number	Req. MFR/Vendor	Quoted Part Number	Valen MFR/Vendor	Quantity	Cost	Quote Cost	Assignee	Status
1	RPN 1290G	NO MFR NO VENDOR	MPN 1290G VALLEN PN 001030171 FITTING HOSE 3/4 MNPT TO 3/4 HOSE BR AS UCM EA Suggested Parts • Part Cross References	MFR APEX TOOL GROUP LLC CODE BX-781412 Mfr/Vendor Notes	1	REPLACEMENT COST \$35.00000	1 35.00000 Set	JHH jerry hunt	VAL
2	RPN 2352 LAST PICK	NO MFR NO VENDOR	MPN 2352 VALLEN PN 00596903225 VENDOR PN 2352 2352 SCREW 4-4 UNC-2A 100/PK 1996699 UCM EA Multiple Valen Matches • Suggested Parts Part Cross References • Last Picks	MFR FLUKE ELECTRONICS CORPORATION CODE SX-908699 Mfr/Vendor Notes	1	REPLACEMENT COST \$51.19000	1 51.19000 Set	JHH Laura Boncamp	VAL
3	RPN 11515	NO MFR NO VENDOR	MPN 11515 VALLEN PN 0014811515 1-1/2XIN YELLOW UCM EA Multiple Valen Matches • Suggested Parts Part Cross References	MFR LAWSON PRODUCTS CODE SX-401740 Mfr/Vendor Notes	1	REPLACEMENT COST \$5.00000	1 5.00000 Set	CMG2 Caitin Gault	VAL
4	RPN 94-046	NO MFR NO VENDOR	MPN 94046 VALLEN PN 7332994046 PIN SURFACE 25MM X 3MM OD X 18MM L Q.BS UCM EA Multiple Valen Matches • Suggested Parts Part Cross References	MFR KEO CUTTERS CODE SX-735299 Mfr/Vendor Notes	1	REPLACEMENT COST \$65.00000	1 65.00000 Set	JMK2 Jeff Kane	VAL
5	RPN 61-0017	NO MFR NO VENDOR	MPN 61-0017 VALLEN PN 00148081-0017 BOX -6 WD X 6 LG X 4 TK UCM BX Part Cross References	MFR ACCUTEC BLADES INC. CODE BX-24500 Mfr/Vendor Notes	1	REPLACEMENT COST \$75.00000	1 75.00000 Set	JHH jerry hunt	VAL
6	RPN L9100 LAST PICK	NO MFR NO VENDOR	No Valen Match Suggested Parts • Last Picks	No Valen Match	1		1 \$ Cost Set	Unassigned	TI
			MPN 7000002028 VALLEN PN 001384142	MFR 3M		REPLACEMENT COST			

1.8 Error call outs within line items in project

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Edit History

After the import process has concluded, VallenIQ will display the following edit history events:

1. Project Edit History

The screenshot shows the VallenIQ interface with a modal open for Project Edit History. The modal has two tabs: 'Project Edit History (2)' and 'Line Item Edit History (260)'. The 'Project Edit History' tab is active, showing a table with the following data:

Event	History	User	Date and Time
Imported Data	Data was imported from external file "Sample RFQ 012521 - Robert Bosch Corp SX-213994 v2.xlsx". There were 36 Total lines, 27 Successes, 9 Errors, and 22 Warnings.	Eugene Lee	2021/01/28 at 6:08 PM EST
Project Created	Project was created	Eugene Lee	2021/01/27 at 9:49 AM EST

1.9 Project Edit History Import Data event

2. Line Item Edit History Tab in Project Edit History Modal (both warnings and errors are shown)

The screenshot shows the VallenIQ interface with the same modal open, but the 'Line Item Edit History (260)' tab is active. The table displays the following data:

Ref #	Event	History	User	Date and Time
1	Imported Data	Line was updated with data imported from external file "Sample RFQ 012521 - Robert Bosch Corp SX-213994 v2.xlsx"	Eugene Lee	2021/01/28 at 6:08 PM EST
1	Imported Data	Warning: Description from file exceeds "Description 1" character limit and mapped the remaining text into "Description 2".	Eugene Lee	2021/01/28 at 6:08 PM EST
2	Imported Data	Error: Lead Time contains non-number characters.	Eugene Lee	2021/01/28 at 6:08 PM EST
3	Imported Data	Line was updated with data imported from external file "Sample RFQ 012521 - Robert Bosch Corp SX-213994 v2.xlsx"	Eugene Lee	2021/01/28 at 6:08 PM EST
4	Imported Data	Line was updated with data imported from external file "Sample RFQ 012521 - Robert Bosch Corp SX-213994 v2.xlsx"	Eugene Lee	2021/01/28 at 6:08 PM EST
4	Imported Data	Warning: Description from file exceeds "Description 1" character limit and mapped the remaining text into "Description 2".	Eugene Lee	2021/01/28 at 6:08 PM EST

1.10 Line Item Edit History Import Data events

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3. Line Item Edit History Tab (both warnings and errors are shown)

- Only line items that were imported successfully will show the first 'Imported Data' event in the table below.

"Line was updated with data imported from external file "Sample RFQ 012521 - Robert Bosch Corp SX-213994 v2.xlsx""

Ref #	Event	History	User	Date and Time
1	Imported Data	Line was updated with data imported from external file "Sample RFQ 012521 - Robert Bosch Corp SX-213994 v2.xlsx"	Eugene Lee	2021/01/28 at 6:08 PM EST
1	Imported Data	Warning: Description from file exceeds 'Description 1' character limit and mapped the remaining text into 'Description 2'.	Eugene Lee	2021/01/28 at 6:08 PM EST
1	Added New Line Item	Added PN 1290G	Eugene Lee	2021/01/27 at 9:49 AM EST

1.11 Line Item Edit History for successful import

- Line items that contain errors will only show the related error message in the 'Imported Data' edit history event and will not show the message above because import was unsuccessful

Ref #	Event	History	User	Date and Time
2	Imported Data	Error: Lead Time contains non-number characters.	Eugene Lee	2021/01/28 at 6:08 PM EST
2	Added New Line Item	Added PN 2352	Eugene Lee	2021/01/27 at 9:49 AM EST

1.12 Line Item Edit History for unsuccessful import

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Edit History

This feature will allow users to see an edit history for their projects within VallenIQ. Most edits that are made to project details or line items will be captured as an Edit History event.

Having visibility into what changes were made, by who, and when, will allow both admins and specialists to clearly see how their projects change over time. Additionally, correcting mistakes and troubleshooting issues will become a much simpler process moving forward.

Note that existing projects will not contain edit history events, but all projects created in VallenIQ moving forward will track edits.

There are two components to the Edit History feature - project edit history and line item edit history.

Project Edit History

Project Edit History gives users an understanding of what changes were made at the project level. All events in Project Edit History will be sorted chronologically from newest to oldest.

Some examples of events that qualify for Project Edit History include:

- Project creation
- Any changes made to Customer Information
- Project Status updates
- Merged projects
- Changes to Last Pick setting
- Transfer of ownership
- Project refresh
- Custom Export
- Etc.

Project Edit History can be accessed by selecting the 'Edit History' button located under Custom Export at the right of the Filter Toolbar:

The screenshot shows the Valen IQ Project Management dashboard. At the top, there's a navigation bar with 'Dashboard' and 'Project Management' tabs. Below this is a search bar and buttons for 'Auto-Match Metrics', 'Upload Project', and 'Create a New Project'. The main area displays a project titled 'Kasai Madison MS-ILA.xlsx+09 - QSEP Template (1043 Parts)'. On the right side of the project details, there's a 'Filter by Status' section with a 'Refresh All' button and a 'Custom Export' button. Below these, the 'Edit History' button is highlighted with a red box. The main table below shows project details with columns for Ref #, Req. Part Number, MFR/Vendor, Quoted Part Number, Valen MFR/Vendor, Quantity, Cost, Quote Cost, Assignee, and Status.

2.1 Location of Project Edit History button

When the Edit History modal is opened, users will first see the 'Project Edit History' tab. The columns in this tab will show:

- **Event:** Short summary of history event
- **History:** Description that covers what changes were made
- **User:** User that made the change
- **Date and Time:** When the change was made

The screenshot shows the 'Project Edit History (3)' modal. It has tabs for 'Project Edit History (3)' and 'Line Item Edit History (48)'. The 'Project Edit History' tab is active, showing a table with columns: Event, History, User, and Date and Time. The table contains three rows of data:

Event	History	User	Date and Time
Updated Customer Information	1. Project due date was changed from 2021/01/22 to 2021/01/28 2. Warehouse was changed from N/A to WZUDA 3. Contact name was changed from N/A to Jack Bauer 4. Contact phone number was changed from N/A to 153-220-3910 5. Contact email was changed from N/A to jbauer@goodyear.com 6. Address was changed from N/A to 108 Business Park Drive, Statesville, NC, 28677	Eugene Lee	2021/01/25 at 11:46 PM EST
Merged Projects	Auto-Assignment Test (ID #1033), Create New Project Test (ID #1043), were merged into 012021 - 1 (ID #1117).	Eugene Lee	2021/01/21 at 12:03 AM EST
Project Created	Project was created	Eugene Lee	2021/01/20 at 1:28 PM EST

At the bottom of the modal is a 'Close' button.

2.2 Project Edit History tab

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The 'Line Item Edit History' tab will be a running list of all edits made to all line items within a project. These events should align with the edit history events shown in each individual line and all events in this tab will be sorted chronologically from newest to oldest.

For this reason, along with the columns described in the previous section, we've included 'Ref #' to the left of the 'Event' column.

Project ID
1155

Project Name
RFQ Sp Huge Other SX-87188.xlsx+Vallen

Customer ID
SX-87188

Customer Name
Sp Huge Other

Project Edit History (4)

Line Item Edit History (397)

Ref #	Event	History	User	Date and Time
200	Updated Quote Cost	Cost Break 1: \$80.91398 to \$81.55315	Eugene Lee	2021/01/25 at 5:50 PM EST
200	Updated Quote Cost	Usage: \$80.91398 to \$82.31523	Eugene Lee	2021/01/25 at 5:49 PM EST
200	Last Pick Was Selected	Last pick Vallen PN 041788L91002 was selected from Last Pick Tab	Eugene Lee	2021/01/25 at 5:49 PM EST
200	Updated Requested Quantities	Qty Break 1: N/A to 100 Qty Break 2: N/A to 150 Qty Break 3: N/A to 300	Eugene Lee	2021/01/25 at 5:49 PM EST
200	Added Comment	External comment was added: test	Eugene Lee	2021/01/25 at 5:49 PM EST
200	Line Was Assigned	Line item was assigned to Laura Borncamp (JJJ)	Eugene Lee	2021/01/25 at 5:48 PM EST
205	Added New Line Item	Added PN 5056	Wei-Cheng Tsai	2021/01/25 at 5:25 PM EST
204	Added New Line Item	Added PN 70328771	Eugene Lee	2021/01/25 at 4:51 PM EST
203	Added New Line Item	Added PN 72199242	Eugene Lee	2021/01/25 at 4:50 PM EST
2 (Alternate)	Added Alternate	Added PN 5004852352 as an alternate to Ref # 2	Eugene Lee	2021/01/22 at 8:38 PM EST
2	Added Alternate	Added PN 5004852352 as an alternate	Eugene Lee	2021/01/22 at 8:38 PM EST
3	Line Was Updated Using Create & Update	Manufacturer Name: 11094 3" CRIMPED WIRE WHEEL STRAIGHT WHEELS to AIR TOUCH	Eugene Lee	2021/01/21 at 10:41 PM EST

Close

2.3 Line Item Edit History tab

Line Item Edit History

Line Item Edit History gives users an understanding of what changes were made at the line item level. All events in Line Item Edit History will be sorted chronologically from newest to oldest.

Some examples of events that qualify for Line Item Edit History include:

- Line Was Assigned
- Changed Status
- Line Was Updated Using Create & Update
- New Part Was Created Using Create & Update
- Accepted Multiple Vallen Match Suggestion
- Accepted Did You Mean Suggestion
- Added/Removed Alternate
- Added Comment
- Etc.

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Line Item Edit History can be accessed by clicking the new Edit History logo located in the rightmost column of every line item:

Ref #	Req. Part Number	Req. MFR/Vendor	Quoted Part Number	Valien MFR/Vendor	Quantity	Cost	Quote Cost	Assignee	Status
631	RPN PTF60 CPN 30-01-006 CUTTERS, GATE 6" P/N PTF 60	MFR GATE PRO NO VENDOR	MPN TWK3115032AC VALLEN PN 425073PTF60 VENDOR PN PTF60 PTF60 PLIERS - SIDE CUT SM GAT E CUTTER UCM EA	MFR TASCO INDUSTRIES CODE SX-10374 VENDOR PLASTIC PROCESS EQUIPMENT CODE SX-401947 MFR/Vendor/Part	292 300 350 400	REPLACEMENT COST \$10.00000 SG GH OH UP G	292 \$ Cost Set 300 \$ Cost Set 350 \$ Cost Set 400 \$ Cost Set	JMK2 Jeff Kane	VAL

2.4 Edit History button at the line item level

Once opened, the Edit History table will look the same as the tables covered above:

Requested Part Number:
PTF60

Requested Customer Part
Number:
30-01-006

Requested Description:
CUTTERS, GATE 6"
P/N PTF60

Requested Manufacturer:
GATE PRO

Manufacturer Part Number:
TWK3115032AC
Machine Tools And Accys

Valien Part Number:
425073PTF60

Line Item Edit History (7)

Ref #	Event	History	User	Date and Time
631	Line Was Updated Using Create & Update	1. Manufacturer Part Number: N/A to TWK3115032AC 2. Manufacturer Code: N/A to SX-10374 3. Manufacturer Name: N/A to Tasco Industries	Test Account	2021/01/26 at 8:17 PM EST
631	Added Comment	Internal comment was added: Need to validate new costs.	Test Account	2021/01/26 at 8:16 PM EST
631	Updated Quote Cost	Cost Break 3: \$10 to \$9.63411	Test Account	2021/01/26 at 8:15 PM EST
631	Updated Quote Cost	Cost Break 2: \$10 to \$9.70117	Test Account	2021/01/26 at 8:15 PM EST
631	Updated Quote Cost	Cost Break 1: \$10 to \$9.73812	Test Account	2021/01/26 at 8:15 PM EST
631	Updated Requested Quantities	Qty Break 1: N/A to 300 Qty Break 2: N/A to 350 Qty Break 3: N/A to 400	Test Account	2021/01/26 at 8:15 PM EST
631	Added New Line Item	Added PN PTF60 (CPN 30-01-006)	Mano Ramasamy	2021/01/14 at 3:58 PM EST

Close

2.5 Line Item Edit History modal

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Go To Page

We've introduced a new Go To Page feature that will allow users to navigate the pages in larger projects much more efficiently.

This feature is located underneath 'More Filters' on the bottom right side of the Filter Toolbar.

Westlake Mill Sample Project (6362 Parts) • 2020/08/07 at 6:58 PM EST • Shared

owned by: elee@supplyframe.com

Filter by Category (33): Abrasives 66, Accessories 2, Automotive 24, Brushes 31, Chemicals/Lubs/Adhesives 86, Contractor Supplies 31, Cutting Tools 349, Electrical Products 118

Filter by Req. Manufacturer (560): 16933 0/3, 3M 23/107, 5100258 0/2, 5440 0/4, ABILITY ONE 0/2, ACCUFORM 0/1, ACCUFORM SIGNS 0/2, AERVOE INDUSTRIES INC 0/1

Filter by Intelligence: Multiple Valien Matches 1474, Cross References 12, Part Cross References 0, Suggested Parts 1744, Changed RPN 291, Changed CPN 0, Updated Parts 0, Created Parts 0, Last Picks 0

Filter by Cost Source: With Order History 1433, With Quote History 1698, With Cost 2750, With Standard Cost 0

Filter by Status: 726 RC Status, 0 OU Status, 2029 VAL Status, 582 DU Status, 3607 TI Status, 0 NO Status, 0 OS Status, 0 AL Status, 0 NMI Status

Selecting 0 Item(s) Showing 125/6362 results

Page 1 of 51

3.1 Location of new Go To Page feature

Because Go To Page is included in the Filter Toolbar, it will always be accessible from any location on the page, as long as the filters are shown.

Westlake Mill Sample Project (6362 Parts) • 2020/08/07 at 6:58 PM EST • Shared

owned by: elee@supplyframe.com

Filter by Category (33): Abrasives 66, Accessories 2, Automotive 24, Brushes 31, Chemicals/Lubs/Adhesives 86, Contractor Supplies 31, Cutting Tools 349, Electrical Products 118

Filter by Req. Manufacturer (560): 16933 0/3, 3M 23/107, 5100258 0/2, 5440 0/4, ABILITY ONE 0/2, ACCUFORM 0/1, ACCUFORM SIGNS 0/2, AERVOE INDUSTRIES INC 0/1

Filter by Intelligence: Multiple Valien Matches 1474, Cross References 12, Part Cross References 0, Suggested Parts 1744, Changed RPN 291, Changed CPN 0, Updated Parts 0, Created Parts 0, Last Picks 0

Filter by Cost Source: With Order History 1433, With Quote History 1698, With Cost 2750, With Standard Cost 0

Filter by Status: 726 RC Status, 0 OU Status, 2029 VAL Status, 582 DU Status, 3607 TI Status, 0 NO Status, 0 OS Status, 0 AL Status, 0 NMI Status

Selecting 0 Item(s) Showing 125/6362 results

Page 1 of 51

Ref #	Req. Part Number	Req. MFR/Vendor	Quoted Part Number	Valien MFR/Vendor	Quantity	Cost	Quote Cost	Assignee	Status
71	RPN 702 CPN 554324 HANDLE COMPASS SAW M AGIC SLOT UOM EA CUST. LINE # 71	MFR Klein Tools, Inc. NO VENDOR	MPN 702 VALLEN PN 78461024702 VENDOR PN 702 702 1-BEAM CLAMP MALLEABLE IR ON 3/8IN-16 UOM EA Multiple Valien Matches Suggested Parts	MFR MINERALLAC COMPANY CODE SX-85937	5	REPLACEMENT COST \$3.45560	5 3.45560 Set	JHH Jerry Hunt	VAL DU
72	RPN 702 CPN 554324 SAW COMPASS 12IN X 8PT KLEIN #702 AND 70 UOM EA CUST. LINE # 72	MFR Klein Tools, Inc. NO VENDOR	MPN 702 VALLEN PN 78461024702 VENDOR PN 702 702 1-BEAM CLAMP MALLEABLE IR ON 3/8IN-16 UOM EA Multiple Valien Matches Suggested Parts	MFR MINERALLAC COMPANY CODE SX-85937	1	REPLACEMENT COST \$3.45560	1 3.45560 Set	JHH Jerry Hunt	VAL DU
73	RPN 704 CPN 696730 BLADE COMPASS SAW 1 2"X8"IN UOM EA CUST. LINE # 73	MFR Klein Tools, Inc. NO VENDOR	MPN 704 VALLEN PN 704 VENDOR PN 704 HAMMER BRASS NON-SPARK 2 UOM EA Multiple Valien Matches Suggested Parts	MFR LAPEER MANUFACTURING COMPANY CODE SX-697868	14	REPLACEMENT COST \$28.64000	14 28.64000 Set	JHH Jerry Hunt	VAL DU
74	RPN 704 CPN 696730 BLADE COMPASS SAW 12 I N 8 PT KLEIN #704 UOM EA CUST. LINE # 74	MFR Klein Tools, Inc. NO VENDOR	MPN 704 VALLEN PN 704 VENDOR PN 704 HAMMER BRASS NON-SPARK 2 UOM EA Multiple Valien Matches Suggested Parts	MFR LAPEER MANUFACTURING COMPANY CODE SX-697868	1	REPLACEMENT COST \$28.64000	1 28.64000 Set	JHH Jerry Hunt	VAL DU

3.2 Go To Page is always accessible, from any location within projects

This should help reduce the time it takes to find specific reference numbers on specific pages. This process could previously take multiple minutes, especially in larger projects, because of the scrolling involved as well as the limitations of the page picker on the bottom of each project.

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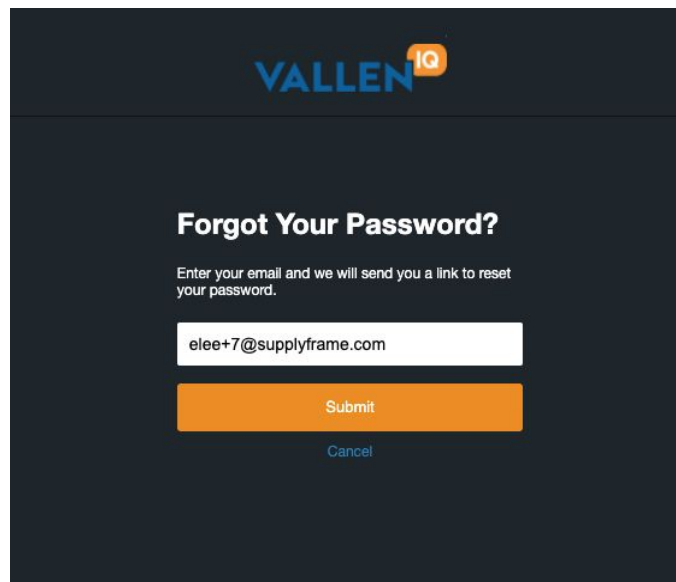
Password Reset Improvements

We've made improvements to the password reset process. Users can find the 'Forgot Password?' button underneath the password field in the VallenIQ Sign In page:



4.1 'Forgot Password?' button in Sign In page

When this button is selected, the system will take the user to the 'Forgot Your Password?' page where they can enter their email address.

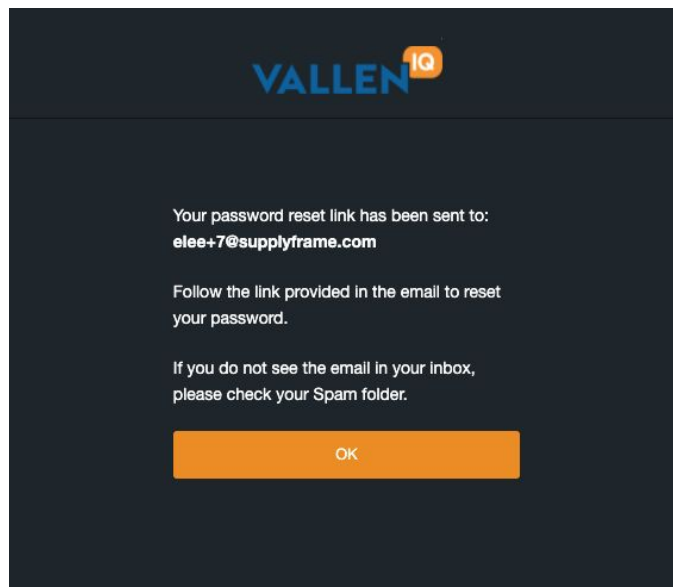


4.2 Enter your email address and select 'Submit'

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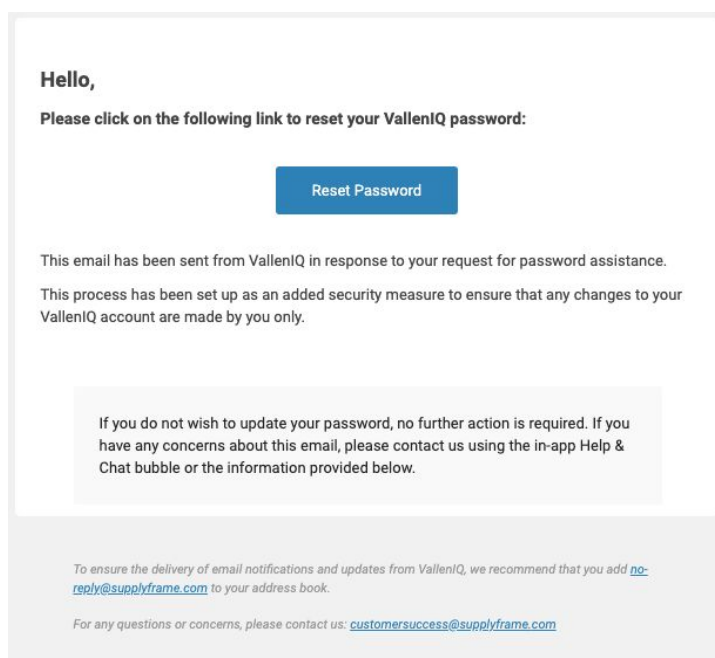
Once submitted, the system will first show confirmation that a password reset link has been sent to the provided email address.



4.3 Confirmation that password reset link has been sent to provided email

Users can expect to receive an email from 'no-reply@supplyframe.com' with the email title 'Information to Reset VallenIQ Password.'

Within the email, a 'Reset Password' button can be found. When selected, the system will open another tab and take the user to the temporary password reset page.



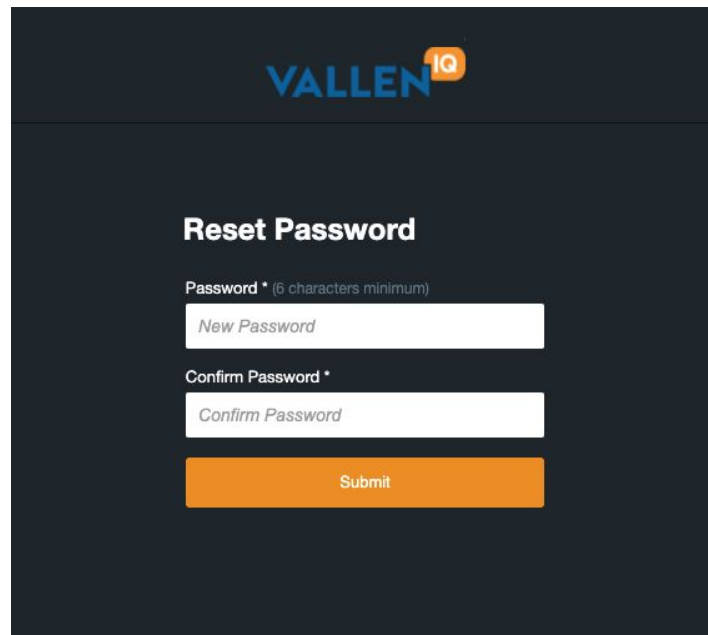
4.4 Password Reset email

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This temporary password reset link will only be available for 10 minutes. If the password is not reset within this timeframe, users must go back to the Sign In page, select 'Forgot Password?' and repeat the steps above.

Users must enter their new password, confirm their password in the field below (passwords must match), and click 'Submit.'



4.5 Temporary Reset Password page

If password reset is successful, the system will take the user back to the Sign In page, where they can enter their email address, their new password, and sign into the application.