



RELEASE NOTES

VallenIQ v1.13

Released February 24, 2021

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Improved Search Within Projects

Previously, it was only possible to search line items in projects by Customer Description. In order to find specific line items, users would have to use the Filter Toolbar, use “Control” + “F,” or manually search through each line.

<div> <input type="checkbox"/> Select All Group Edit ▼ Remove Assign Switch to Expand View Search line items by Cust. Desc. 🔍 </div>							
Ref #	Req. Part Number	Req. MFR/Vendor	Quoted Part Number	Vallen MFR/Vendor	Quantity	Cost	
8	RPN 1/2X3/8PTR-S CPN 1/2X3/8PTR-S PIPE THREAD REDUCER UOM EA CUST. LINE # 8	MFR PARKER NO VENDOR	MPN 12X38PTRS VALLIN PN 50027012X38PTRS VENDOR PN 12X38PTRS 12X38PTRS REDUCER PIPE UOM EA	MFR EASTERN HYDRAULIC & PWR TRANSM CODE SX-428691 Mfr/Vendor Notes	16	REPLACEMENT COST \$1.27920 C SC GH OH LP	
9	RPN 1/4FF-S CPN 1/4FF-S PIPE NIPPLE UOM EA CUST. LINE # 9	MFR PARKER NO VENDOR	MPN 1/4FF-S VALLIN PN 5002701-4FF-S VENDOR PN 1/4FF-S 1/4FF-S NIPPLE PIPE UOM EA Multiple Vallen Matches Suggested Parts	MFR DISTRANET LTD. CODE SX-404762 Mfr/Vendor Notes	25	REPLACEMENT COST \$0.88000 C SC GH OH LP	

1.1 Search by Customer Description

Users will now have additional categories to search by, which should make the search process more efficient and require less manual involvement.

Search Categories

The categories that are available to use are the following:

- Ref # - Reference #
- CPN - Customer Part Number
- MPN - Manufacturer Part Number
- RPN - Requested Part Number
- Cust. Desc. - Customer Description
- Vallen PN - Vallen Part Number
- Vendor PN - Vendor Part Number

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The system will by default pre-select the “Ref #” search category:

The screenshot shows the VallenIQ search interface. At the top, there are several filter sections: 'Filter by Category (24)', 'Filter by Req. Manufacturer (174)', 'Filter by Intelligence', 'Filter by Cost Source', and 'Filter by Status'. Below these filters, the search bar is highlighted with a red box, showing 'Ref #' as the selected category and 'Search line items' as the search term. The search results table below shows two items, 9 and 10, with columns for Ref #, Req. Part Number, Req. MFR/Vendor, Quoted Part Number, Vallen MFR/Vendor, Quantity, Cost, Quote Cost, Assignee, and Status.

1.2 Updated search feature - the system will select “Ref #” as the default search category

Search Features

In order to start your search, select which category to search by, then type or copy/paste the desired search term into the search field.

Note that all search categories except for ref # will only allow users to search for one search term at a time. However, searching by ref # will allow users to look up multiple specific ref #'s at once and also search for a range of ref #'s.

Search For Individual Ref #'s

VallenIQ now supports searching for ref #'s. When conducting a ref # search, users can look for individual numbers by typing them into the search field:

The screenshot shows the VallenIQ search interface with a search for a single ref #. The search bar is highlighted with a red box, showing 'Ref #' as the selected category and '324' as the search term. The search results table below shows one item, 324, with columns for Ref #, Req. Part Number, Req. MFR/Vendor, Quoted Part Number, Vallen MFR/Vendor, Quantity, Cost, Quote Cost, Assignee, and Status.

1.3 Search for a single ref #

To clear results, users can click the “x” in the filter tag underneath the Filter Toolbar.

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Search For Multiple Ref #'s

Users can also search for multiple ref #'s at the same time by typing each number and separating them using commas:

The screenshot shows the SupplyFrame software interface. At the top, there are several filter sections: 'Filter by Category (4)', 'Filter by Req. Manufacturer (6)', 'Filter by Intelligence', 'Filter by Cost Source', and 'Filter by Status'. Below these filters is a search bar with the text 'Ref # 324,213,77,83,55,21'. The search results are displayed in a table with columns: Ref #, Req. Part Number, Req. MFR/Vendor, Quoted Part Number, Valien MFR/Vendor, Quantity, Cost, Quote Cost, Assignee, and Status. The table shows results for each of the six reference numbers entered in the search bar.

Ref #	Req. Part Number	Req. MFR/Vendor	Quoted Part Number	Valien MFR/Vendor	Quantity	Cost	Quote Cost	Assignee	Status
21	RPN 9320800020102400 9320800020102400 UNCODED PNEUMATICS UOM EA CUST. LINE # 21	MFR C. A. NORGREN CO NO VENDOR	MPN 9320800020102400 VALLEN PN 6622810251 ML1638 25GDSA 100 1.19 B 56C GDSA/ F GEARMOTORS UOM EA	MFR REGAL-BELOIT AMERICA-PTS CODE SX-424080 Mfr/Vendor Notes	7	REPLACEMENT COST \$255.00000	7 255.00000 Set	Unassigned	VAL
55	O/E BELT 104 KEVLAR 2" X 416" WIDELEATS UNCODED LIGHT C OWN BELT UOM EA CUST. LINE # 55	MFR APACHE HOSE & BELTING NO VENDOR	No Valien Match	No Valien Match	1	\$ Cost	1 \$ Cost Set	Unassigned	TI
77	RPN 30024 30024 SHIPPING-MATE CASE S EALING ADHESIVES AEROSOL UOM EA CUST. LINE # 77	MFR 3M NO VENDOR	MPN 30024 VALLEN PN 42139630024 VENDOR PN 30024 30024 AERO SEAL 300 SS 1 1/16 - 2 UOM EA Multiple Valien Matches Suggested Parts Part Cross References	MFR DIXON VALVE & COUPLING CODE SX-421396 Mfr/Vendor Notes	60	REPLACEMENT COST \$1.02000	60 1.02000 Set	JSP3 Test Account	RC
83	RPN BK2/200/105/32/35 BK2/200/105/32/35 UNCODED S WAFI CPLOS UOM EA CUST. LINE # 83	MFR R & W AMERICA NO VENDOR	No Valien Match	No Valien Match	2	\$ Cost	2 \$ Cost Set	Unassigned	TI
213	SPLIT BOLT CONN 4 GA. TAP 10 GA ELECTRICAL ACCESSORIES UOM EA CUST. LINE # 213	MFR CLASS C SOLUTIONS GROUP NO VENDOR	No Valien Match	No Valien Match	60	\$ Cost	60 \$ Cost Set	Unassigned	TI
324	RPN 0123822 CPN AC373657 T BORD TP 1 IN X 72 YD 4 CUST. LINE # 6	MFR ALCO CHEMICAL NO VENDOR	MPN 21089 VALLEN PN 01238221089 VENDOR PN 21089 21089 1-1/4 POWER TUBE BRUSH .008 SS SM-1-1/4 UOM EA Multiple Valien Matches Suggested Parts Part Cross References Last Picks	MFR WEILER CORPORATION CODE SX-12382 Mfr/Vendor Notes	1,000	REPLACEMENT COST \$3.48000	1000 3.48000 Set	CMG2 Caitlin Gault	RC

1.4 Searching for multiple ref #'s separated by commas

The order of the reference numbers typed into the search field should not matter. Note that this feature is only available when searching for ref #'s. Users should not be able to search for multiple terms separated by comma for the other search categories.

When searched, the system will bring up all ref #'s within the specified range. This feature can also be combined with search for multiple ref #'s.

1.5 Search for range of ref #'s

Support for Warehouse

VallenIQ will now support a new warehouse table. This table will allow super admins and admins to use the warehouse field in Customer Information (Create New Project, Upload Project, Project Settings) to specify a warehouse for each project.

Add Warehouse During Project Upload/Creation

The warehouse field has always existed in the Customer Information modal in VallenIQ. However the field was previously a free form field, where super admins and admins could add any text without validation.

Vallen is now sending us a new warehouse table that contains the following fields:

Field	Comment
COMPANY_CODE	Vallen Company Code that is the owner of the warehouse
CODE	Warehouse code assigned to a warehouse
NAME	Warehouse name
CITY	Warehouse city
STATE	Warehouse state
CUSTOMER_ID	Customer assigned to the warehouse
REPLENISHMENT_PATH	Replenishment path for the warehouse

Super admin and admin users will now be able to type into the warehouse field in Customer Information, see a list of autocomplete dropdown suggestions, and select the appropriate warehouse for their project.

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Customer Information

Customer Account:

Signify North America Corp SX-225883

Warehouse:

a|

Axiall Vending C012

ASF Keystone Inc C030

American Safety Razor (ASR) C064

Application South IPP C104

Application South Major C105

Application North IPP C106

Contact Name:

Ship To Suffix:

Contact Phone:

Contact Email:

Address:

Add Address

Project Lead:

Please Select

Project Due Date:

Thu Feb 25 2021

Project Type:

Please Select

Subs Allowed:

Please Select

Project Description:

Add Project Description

0 of 1000 characters

Next

Back

2.1 Warehouse field in Customer Information modal showing autocomplete dropdown suggestions

The behavior of this field is as follows:

- Warehouse is a required field
- Default warehouse that is populated is “Data Master Warehouse ZDAT”
- Users can type into this field if a different warehouse other than “ZDAT” is required
- User must select a valid warehouse from the autocomplete dropdown suggestions, otherwise the specified warehouse will not be added to the field

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See Warehouse and Customer Details

Additionally, if a warehouse is added, super admin and admin users will be able to see the warehouse details when navigating to “Project Settings” and going to the “Customer Information” tab.

Similarly, if a customer account has been added to a project, super admins and admins will have the ability to see the customer account details if they go to Project Settings and open the Customer Information tab.

When the values in these fields are changed, the system will update the Warehouse and Customer Details sections with the correct information to the right of the modal.

Project Settings Customer Information Merge Projects Transfer Ownership

Customer Account: Qtek Engineering SX-100809

Warehouse: Dupont Sabine Consignment C019

Contact Name: Add Contact Name

Ship To Suffix: 201

Contact Phone: Add Contact Phone

Contact Email: Add Customer Email

Address: Add Address

Project Lead: Sheila Gahimer

Project Due Date: Tue Feb 16 2021

Project Type: Implementation

Subs Allowed: Yes

Customer Details

ID: SX-100809 Name: Qtek Engineering

City: San Diego Phone: -

Inside Sales Code: SXVMC1 Inside Sales Name: CarrascoVeronica M

Warehouse Details

Company Code: 1 Name: Dupont Sabine Consignment

WHSE Code: C019 City: NEDERLAND

State: TX Replenish Path: DBMT

Customer ID: 222334

Save Customer Info Cancel

2.2 Customer and Warehouse Details in Customer Information tab

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Ship To Suffix

We've also added a field titled "Ship To Suffix" to Customer Information (Create New Project, Upload Project, Project Settings).

This field will display underneath "Contact Name" and will contain the values in the customer_contact_id field in customer_contacts table.

The behavior of the field will be as follows:

- "Ship To Suffix" is not a required field
- When users click the down arrow, this field will display available values that they can select
- Only valid values that are selected from the dropdown suggestions will be accepted by the system

The screenshot shows a "Customer Information" modal form. The fields are as follows:

- Customer Account: Signify North America Corp SX-225883
- Warehouse: Data Master Warehouse ZDAT
- Contact Name: Add Contact Name
- Ship To Suffix: Add Ship To Suffix (dropdown menu)
- Contact Phone: 000
- Contact Email: 205
- Address: 202
- Project Lead: Please Select (dropdown menu)
- Project Due Date: Fri Feb 26 2021
- Project Type: Please Select (dropdown menu)
- Subs Allowed: Please Select (dropdown menu)
- Project Description: Add Project Description (text area)

At the bottom of the form, there is a "Next" button (orange) and a "Back" button (grey). Below the Project Description field, it says "0 of 1000 characters".


3.1 "Ship To Suffix" field in Customer Information modal

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Product Category Custom Export Updates

Previously, only one “Product Category” option was available when choosing columns to export in Custom Export modal. When this was selected, VallenIQ would export both the Product Category Code and the Product Category Name in the downloaded file.

			
Quote ID: 1003		120920 - 2	
Ref#	Requested Part Number	Vendor Part Number	Product Category
1	021198CF-1-3-8		
2	021198CF-1-3-8-SB	CF-1-3/8-SB	
3	0211783C996BT	3C996BT	1200 Maint Equip and Supplies
4	02041806820	T0893524	1300 Material Handling Equip
5	02006616788	1678830	300 Chemicals/Lubs/Adhesives
6	0194282400	2400	1900 Safety Products
7	017825E3Z-LR81-M1J0.3M	E3Z-LR81-M1J 0.3M	3500 Electrical Products
8	0154516151701590	6151701590	1500 Power Tools
9	0123822		
10	01238226294	26294	200 Brushes
11	0123820		
12	01238208024	08024	200 Brushes
13	01181243528	43528	200 Brushes
14	010119857		6530 Actuated Ball Floating
15	0101198574GM	31533	
16	010119856		610 Ctc Hardware/Bundled
17	0003462610934823	2610934823	1599 Power Tools Repair Parts
18	00034617611	T127DF100	1500 Power Tools
19	0002981211514	1211514	1900 Safety Products
20	0003462610931892	2610931892	1599 Power Tools Repair Parts
21	000298RCH100STECO	RCH100STECO	1900 Safety Products
22	00029811090100RH		
23	00029811090100RH2	ZZ11057D09	1900 Safety Products
25	000207P1596F	7000123455	1200 Maint Equip and Supplies
26	02120068667	7000123455	1200 Maint Equip and Supplies
27	62241641848	41848	500 Cutting Tools
28	62241647223	47223	500 Cutting Tools
29	6607317270P	7270P	800 Hand Tools
30	660731724G	724G	800 Hand Tools
31	165C16-316		700 Fluid Power
33	G1513228		

4.1 Selecting “Product Category” would export both code and name

Exporting the name along with the code would previously cause issues in the Vallen backend process. To address this issue, we’re now allowing users to export Product Category Code and Name independently. Both options are available in the Custom Export modal:

Select Columns for Export

Select all

Deselect all

Default only

☐ Assignee
 ☐ Available Quantity
 ☐ Base UM Code
 ☐ Cost
 ☐ Cost Change Date
 ☐ Customer Description
 ☐ Customer Last Price
 ☐ Customer Line #
 ☐ Customer Part Number
 ☐ Customer UOM
 ☐ Customer Usage
 ☐ External Comment
 ☐ Image Link
 ☐ Internal Comment
 ☐ Lead Time
 ☐ MSDS Code

☐ Manufacturer Part Number
 ☐ Minimum Quantity
 ☐ Miscellaneous 1
 ☐ Miscellaneous 2
 ☐ Miscellaneous 3
 ☐ Miscellaneous 4
 ☐ Non-Tax Type
 ☐ Part Notes
 ☒ Product Category Code
 ☒ Product Category Name
 ☐ Quantity Breaks
 ☐ Quote Cost Customer Usage
 ☐ Quote Cost Quantity Breaks
 ☐ Ref #
 ☐ Requested Manufacturer
 ☐ Requested Part Number

☐ Requested Vendor Name
 ☐ Standard Cost
 ☐ Standard Package Size
 ☐ Status
 ☐ Stocking Status
 ☐ Taxable
 ☐ Vallen Customer Part Number
 ☐ Vallen Description
 ☐ Vallen Manufacturer Code
 ☐ Vallen Manufacturer Name
 ☐ Vallen Part Number
 ☐ Vallen Vendor Code
 ☐ Vallen Vendor Name
 ☐ Vend Pack
 ☐ Vendor Notes
 ☐ Vendor Part Number

Specify Column Ordering

1.

Product Category Code

2.

Product Category Name

4.2 Users will now see two separate options to either export the code or the name

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Create & Update Improvements

The following enhancements are all related to features and functionality available in the “Create & Update” tab.

Carry Over Populated Fields to Create New Part

In Implementation projects, users can now open the “Create & Update” tab for a line item, select the “Create New Part” radio button in “Part Options,” and the system will carry over all populated fields in “Update Part,” into “Create New Part.”

Note that this enhancement does not affect Market Basket project types.

This update may be particularly useful in situations where the Import Data feature is used to import data from a vendor quote into certain line items in an Implementation, and after the import has concluded, some of the line items must be converted into new part records.

For example, if we go to the “Create & Update” tab for a line item:

The screenshot displays the 'Create & Update' tab of a software interface. At the top, there are several input fields for part identification: 'Requested Part Number' (608Z), 'Requested Description' (608Z WITH OIL ONLY POPULAR 200&300 SER B.BRG), 'Requested Manufacturer' (SKF USA INC), 'Manufacturer Part Number' (608Z), and 'Vallen Part Number' (029176608Z). Below these are four tabs: 'Did you mean? (13)', 'Advanced Search', 'Create & Update' (which is selected), and 'Alternates'. The 'Part Options' section contains three radio buttons: 'Create New Part', 'Update Part' (which is selected), and 'Clear All Fields'. The main form area is divided into several sections with input fields: 'Manufacturer Part Number' (608Z), 'Vendor Part Number' (608Z), 'Vallen Part Number' (Vallen Part Number), 'Cost' (4.82), 'Purchase UM Code' (Purchase UM Code), 'Pack Quantity' (1), 'Manufacturer Code' (SX-403656), 'Manufacturer Name' (Industrial Components & Tech), 'Vendor Code' (Vendor Code), 'Vendor Name' (Vendor Name), 'Product Category Code' (1600), 'Product Category Name' (Power Transmission Equip), 'Lead Time (days)' (14), and 'Base UM Code' (EA). There are also two text areas for 'Description 1' (608Z BEARING) and 'Description 2' (Description 2). At the bottom right, there are 'Save' and 'Cancel' buttons.

5.1 “Update Part” will open by default when “Create & Update” tab is opened

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If “Create New Part” is selected, users can expect to see the same fields that were populated in “Update Part” now populate in “Create New Part.”

Requested Part Number: 608Z Requested Description: 608Z WITH OIL ONLY POPULAR 200&300 SER B.BRG Requested Manufacturer: SKF USA INC Manufacturer Part Number: 608Z Power Transmission Equip Vallen Part Number: 029176608Z

Did you mean? (13) Advanced Search Create & Update Alternates

Part Options
☒ Create New Part ☐ Update Part Clear All Fields

Populate Vallen Part Number Field By
☐ 58 Code ☐ Vallen API + Populate

Manufacturer Part Number: 608Z Vendor Part Number: 608Z Vallen Part Number: Vallen Part Number

Cost: 4.82 Purchase UM Code: Purchase UM Code Pack Quantity: 1

Manufacturer Code: SX-403656 Manufacturer Name: Industrial Components & Tech Vendor Code: Vendor Code Vendor Name: Vendor Name

Product Category Code: 1600 Product Category Name: Power Transmission Equip Lead Time (days): 14 Base UM Code: EA

Description 1: 608Z BEARING

Description 2: Description 2

5.2 The fields will remain populated when switching over to “Create New Part”

If certain fields are updated in “Create New Part,” a new Vallen Part Number is generated, and the user saves the new part record:

Requested Part Number: 608Z Requested Description: 608Z WITH OIL ONLY POPULAR 200&300 SER B.BRG Requested Manufacturer: SKF USA INC Manufacturer Part Number: 608Z Power Transmission Equip Vallen Part Number: 029176608Z

Did you mean? (13) Advanced Search Create & Update Alternates

Part Options
☒ Create New Part ☐ Update Part Clear All Fields

Populate Vallen Part Number Field By
☐ 58 Code ☒ Vallen API

Manufacturer Part Number: 608Z Vendor Part Number: 608Z Vallen Part Number: 11776735

Cost: 4.82 Purchase UM Code: EA Pack Quantity: 1

Manufacturer Code: SX-403656 Manufacturer Name: Industrial Components & Tech Vendor Code: SX-407033 Vendor Name: Fastenal Company

Product Category Code: 1600 Product Category Name: Power Transmission Equip Lead Time (days): 14 Base UM Code: EA

Description 1: 608Z BEARING

Description 2: Description 2

5.3 Fields are updated, a Vallen Part Number is generated, user selects “Save”

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The next time the user opens “Create & Update,” the new part details should be populated in both “Update Part,” as well as “Create New Part.”

Requested Part Number: 608Z Requested Description: 608Z WITH OIL ONLY POPULAR 200&300 SER B.BRG Requested Manufacturer: SKF USA INC Manufacturer Part Number: 608Z Power Transmission Equip Vallen Part Number: 11776735

Multiple Vallen Matches (4) Did you mean? (13) Advanced Search Create & Update Alternates

Part Options
☐ Create New Part ☒ Update Part Clear All Fields

Manufacturer Part Number: 608Z Vendor Part Number: 608Z Vallen Part Number: 11776735
 Cost: 4.82 Purchase UM Code: EA Pack Quantity: 1
 Manufacturer Code: SX-403656 Manufacturer Name: Industrial Components & Tech Vendor Code: SX-407033 Vendor Name: Fastenal Company
 Product Category Code: 1600 Product Category Name: Power Transmission Equip Lead Time (days): 14 Base UM Code: EA
 Description 1: 608Z BEARING
 Description 2: Description 2

Save Cancel

5.4 Details of new part that was created now appear in “Update Part”

Same details appear in “Create New Part” when this option is selected:

Requested Part Number: 608Z Requested Description: 608Z WITH OIL ONLY POPULAR 200&300 SER B.BRG Requested Manufacturer: SKF USA INC Manufacturer Part Number: 608Z Power Transmission Equip Vallen Part Number: 11776735

Multiple Vallen Matches (4) Did you mean? (13) Advanced Search Create & Update Alternates

Part Options
☒ Create New Part ☐ Update Part Clear All Fields

Populate Vallen Part Number Field By
☐ 58 Code ☒ Vallen API

Manufacturer Part Number: 608Z Vendor Part Number: 608Z Vallen Part Number: 11776735
 Cost: 4.82 Purchase UM Code: EA Pack Quantity: 1
 Manufacturer Code: SX-403656 Manufacturer Name: Industrial Components & Tech Vendor Code: SX-407033 Vendor Name: Fastenal Company
 Product Category Code: 1600 Product Category Name: Power Transmission Equip Lead Time (days): 14 Base UM Code: EA
 Description 1: 608Z BEARING
 Description 2: Description 2

5.5 Details remain consistent with values in “Update Part”

Note that the “+” icon to the right of “Vallen API” will only re-appear when “Clear All Fields” is selected.

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Auto-Complete Dropdowns

The “Manufacturer Code,” “Vendor Code,” and “Product Category Code” fields in both “Update Part” and “Create New Part” will now let users enter a numeric code, and allow them to select the desired option from the autocomplete dropdown suggestions.

The screenshot shows the 'Create & Update' form with the 'Manufacturer Code' dropdown menu open. The dropdown list contains the following suggestions:

- 49883
- 3J ENTERPRISES SX-498833
- ECOBEE SX-498837
- CONTITECH MEXICANA SA DE CV SX-498830
- SANDEE MANUFACTURING SX-498834
- ABCO SAFETY SX-498832

The form fields are as follows:

Requested Part Number:	Requested Description:	Requested Manufacturer:	Manufacturer Part Number:	Vallen Part Number:
60002ZJEM	6000 2ZJEM C3 BRG POPULAR 200&300 SER B.BRG	SKF USA INC	60002ZJEMTEQ <small>Power Transmission Equip</small>	11776711

Buttons: Advanced Search, Create & Update, Alternates

Part Options: ☐ Create New Part ☒ Update Part

Manufacturer Part Number: 60002ZJEMTEQ

Vendor Part Number: 6000-2ZJEMTEQGB

Vallen Part Number: 11776711

Cost: 12.2319

Purchase UIM Code: EA

Pack Quantity: 2

Manufacturer Code: 49883

Manufacturer Name: Manufacturer Name

Vendor Code: SX-413586

Vendor Name: SGI GMBH & CO. KG

Product Category Name: Power Transmission Equip

Lead Time (days): 21

Base UIM Code: BX

Buttons: Save, Cancel

5.6 Type in a numeric code to see available matches

When a suggestion is selected, the system will populate the details of the selected manufacturer, vendor, or product category code in both the “Code” and “Name” fields.

The screenshot shows the 'Create & Update' form with the 'Manufacturer Code' and 'Manufacturer Name' fields populated. The dropdown list is no longer visible.

The form fields are as follows:

Requested Part Number:	Requested Description:	Requested Manufacturer:	Manufacturer Part Number:	Vallen Part Number:
60002ZJEM	6000 2ZJEM C3 BRG POPULAR 200&300 SER B.BRG	SKF USA INC	60002ZJEMTEQ <small>Power Transmission Equip</small>	11776711

Buttons: Advanced Search, Create & Update, Alternates

Part Options: ☐ Create New Part ☒ Update Part

Manufacturer Part Number: 60002ZJEMTEQ

Vendor Part Number: 6000-2ZJEMTEQGB

Vallen Part Number: 11776711

Cost: 12.2319

Purchase UIM Code: EA

Pack Quantity: 2

Manufacturer Code: SX-498833

Manufacturer Name: 3J ENTERPRISES

Vendor Code: SX-413586

Vendor Name: SGI GMBH & CO. KG

Product Category Code: 1600

Product Category Name: Power Transmission Equip

Lead Time (days): 21

Base UIM Code: BX

Description 1: 6000-2ZJEM EEAQRT

Description 2: Description 2

Buttons: Save, Cancel

5.7 Both “Manufacturer Code” and “Manufacturer Name” fields will populate when a suggestion is selected

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Hide Inactive Customers & Vendors

When viewing dropdown suggestions for the following fields within VallenIQ, the system will no longer show customer and vendor records that are inactive.

- “Customer Account” field in the following locations:
 - Create a New Project modal (Create New Project workflow)
 - Customer Information modal (Upload Project workflow)
 - Customer Information tab (Project Settings)
- “Manufacturer Code,” “Manufacturer Name,” “Vendor Code,” and “Vendor Name” fields in Create & Update tab (both “Update Part” and “Create New Part”)

Note that “inactive” customer and vendor records will be records in customer_master and vendor_master that have a delete_indicator value of true.

The screenshot shows a modal titled "Create a New Project". It contains several input fields: "Project Name" with a placeholder "Type a project name", "Customer Account" with a dropdown menu showing suggestions, "Warehouse", "Contact Name", "Contact Phone", "Contact Email", and "Address" with a placeholder "Add address". The "Customer Account" dropdown is open, displaying a list of suggestions: "APMM (Auto Parts Mfg MS SX-100003)", "Aliphcom SX-100005", "Advanced Mfg. Solutions SX-100006", "Allied Manufacturers SX-100007", "Accellent Inc. SX-100019", and "Achive Industries SX-100004".

6.1 Inactive customers (and vendors) will no longer appear in autocomplete dropdown suggestions

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Ref # Ordering After Merge

Previously, when merging projects, the ref #'s of merged line items would overlap with the ref #'s in the destination project. In this release, we've made an update that will now keep the ref #'s unique after merging.

The order in which the ref #'s will be numbered is based on the ID of each project, where the lower project ID's will be numbered first after the merge has been completed.

Consider a scenario where we have four projects (Project 1, 2, 3, 4), that each contain 10 lines. If projects 1, 2, and 3 are merged into destination project 4, the ordering of the ref #'s would be:

- Project 4 - Ref #'s 1-10
- Project 1 - Ref #'s 11-20
- Project 2 - Ref #'s 21-30
- Project 3 - Ref #'s 31-40

Assign Line Items Modal Updates

Super admin and admin users can now open the “Assign” modal by clicking into the “Assignee” cell of the line item they'd like to assign. This will allow super admin and admin users to more easily assign single line items.

Ref #	Req. Part Number	Req. MFR/Vendor	Quoted Part Number	Valien MFR/Vendor	Quantity	Cost	Quote Cost	Assignee	Status
13	RPW SI 8 SI 8 C ROD END ROD ENDS UCM EA QUOT. LINE # 13	MFR SKF USA INC NO VENDOR	MFR: SIB VALLEN PN 1029763 VENDOR PN SIB STOCK INDICATOR 8 DON PAYNE UCM EA * Suggested Parts	MFR CREDIT CARD VENDOR CODE SX-999999999999 NOTES: 999999999999 * MFR Vendor Notes	150	REPLACEMENT COST \$0.01000	150 0.01000	Unassigned	RS

7.1 Click into “Assignee” cell to open “Assign Line Items” modal

Once opened, the “Assign Line Items” modal should appear and behave as it does when lines are selected and the “Assign” button in the actions bar is clicked.

Assign Line Items

Choose Assignee

Select an assignee

☐ Clear Assignee

Assign

Cancel

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7.2 “Assign Line Items” modal

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