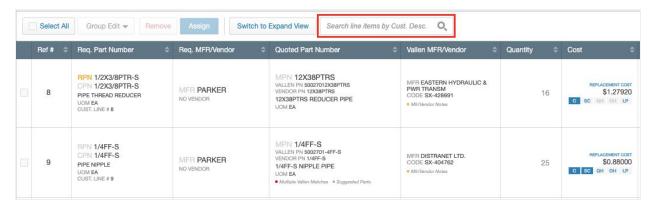


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Improved Search Within Projects

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.



1.1 Search by Customer Description

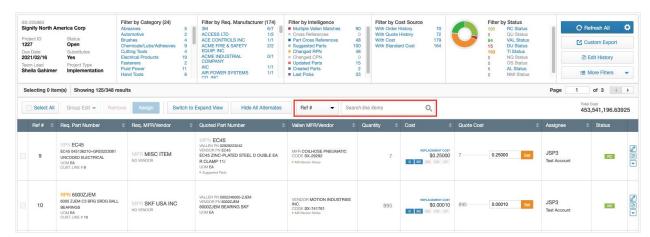
Users will now have additional categories to search by, which should make the search process more efficient and require less manual involvement.

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

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



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

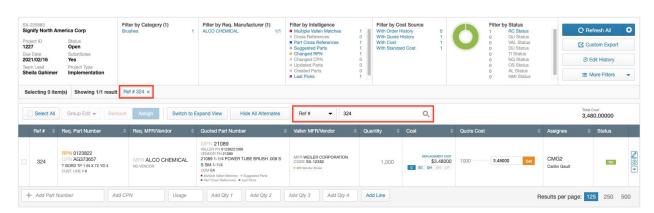
Search Features

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:

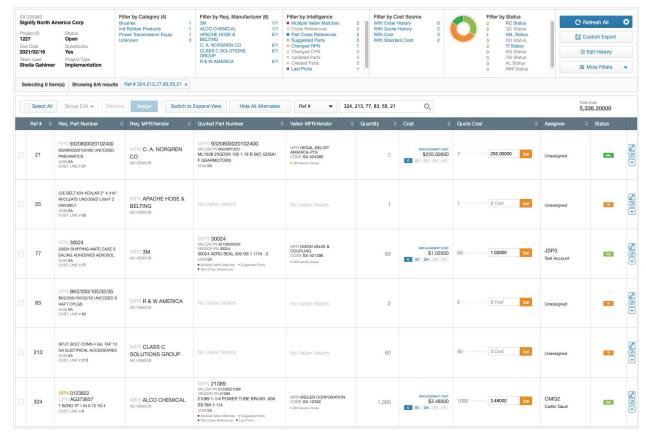


1.3 Search for a single ref #

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

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:



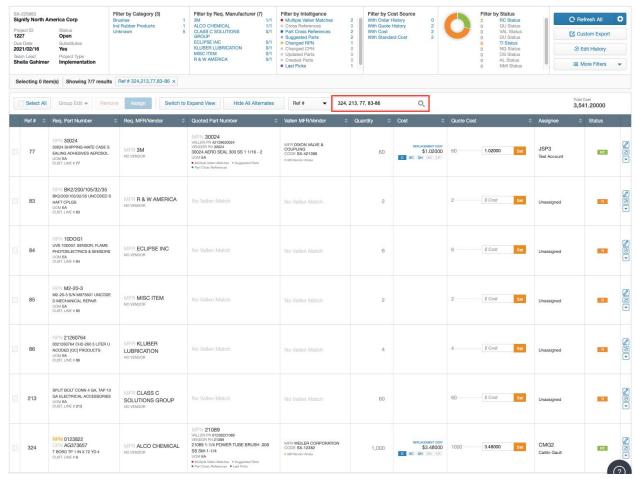
1.4 Searching for multiple ref #'s separated by commas

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.

Search Ref #'s by Range

Another ref # specific search feature is the ability to search ref #'s by range. This means users can type in a first and last number, separating the two with a dash.

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.

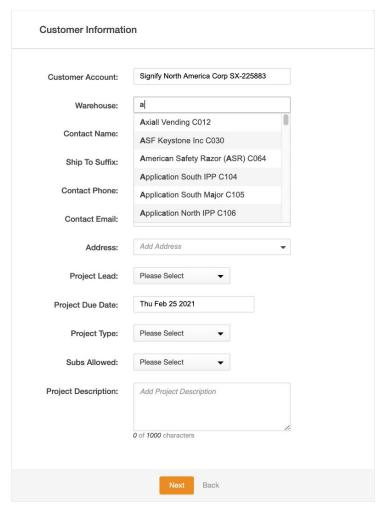
Add Warehouse During Project Upload/Creation

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.



2.1 Warehouse field in Customer Information modal showing autocomplete dropdown suggestions

The behavior of this field is as follows:

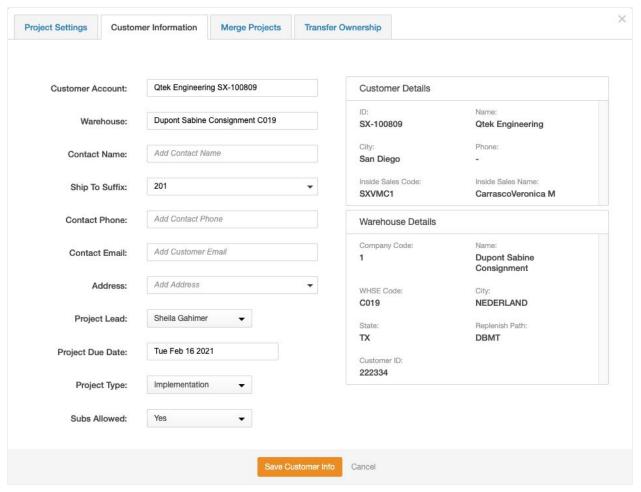
- Warehouse is a required field
- Default warehouse that is populated is "Data Master Warehouse ZDAT"
- Users can type into this field if a different warehouse other than "ZDAT" is required
- User must select a valid warehouse from the autocomplete dropdown suggestions, otherwise the specified warehouse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

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.



2.2 Customer and Warehouse Details in Customer Information tab

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:

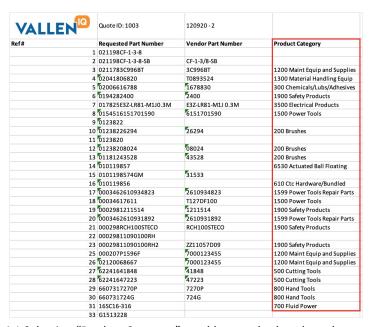
- "Ship To Suffix" is not a required field
- When users click the down arrow, this field will display available values that they can select
- Only valid values that are selected from the dropdown suggestions will be accepted by the system



3.1 "Ship To Suffix" field in Customer Information modal

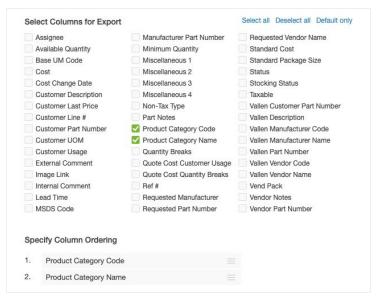
Product Category Custom Export Updates

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.



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:



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

Create & Update Improvements

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

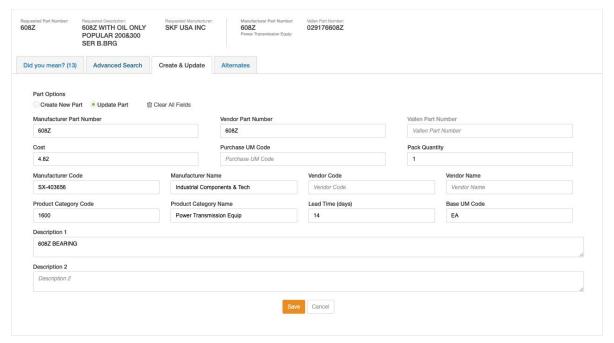
Carry Over Populated Fields to Create New Part

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.

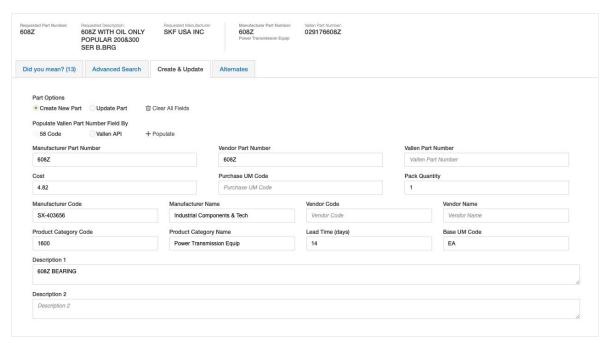
This update may be particularly useful in situations where the Import Data feature is used to import data from a vendor quote into certain line items in an Implementation, and after the import has concluded, some of the line items must be converted into new part records.

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



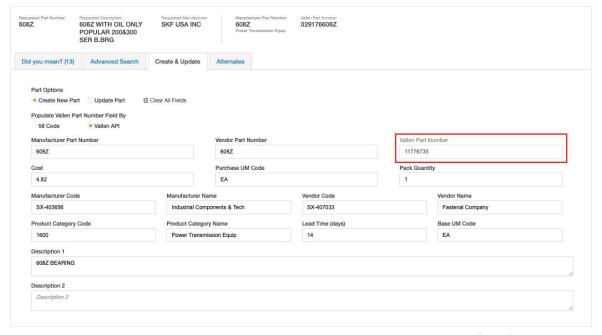
5.1 "Update Part" will open by default when "Create & Update" tab is opened

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."



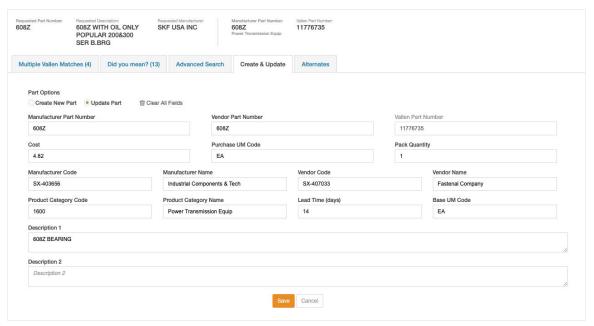
5.2 The fields will remain populated when switching over to "Create New Part"

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



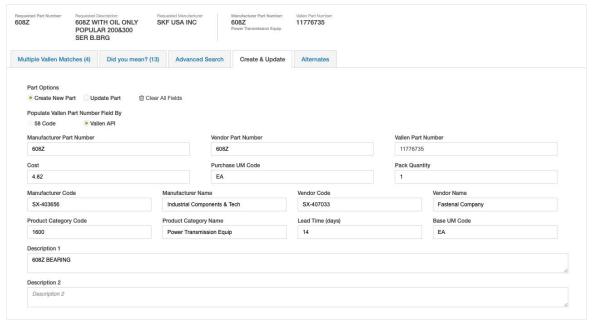
5.3 Fields are updated, a Vallen Part Number is generated, user selects "Save"

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."



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:

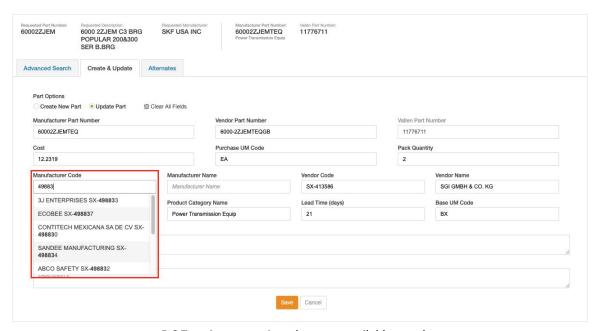


5.5 Details remain consistent with values in "Update Part"

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

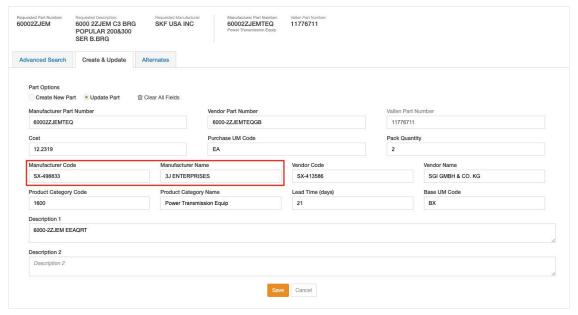
Auto-Complete Dropdowns

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.



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.



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

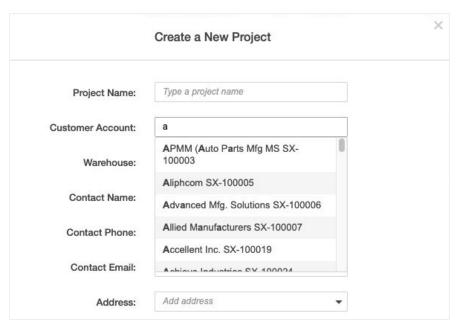
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Hide Inactive Customers & Vendors

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.



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

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

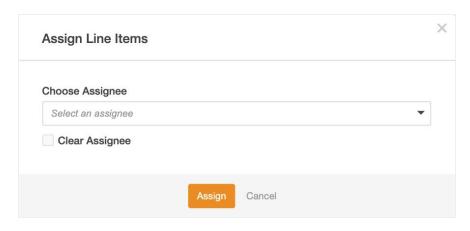
Assign Line Items Modal Updates

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.



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.



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7.2 "Assign Line Items" modal