



RELEASE NOTES

VallenIQ v1.14

Released April 1st, 2021

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Vallen Data Updates

Add Company Code

Vallen has included a new field `company_code` to all tables for VallenIQ. This should have no impact on current application functionality.

This ensures that only data relevant to the North America Q&S team (`company_code 1`) will be utilized in VallenIQ moving forward.

Additionally, the `company_code` field has been added to the `quote_history_header` feed. Company code values of 1 have been added to all historic records and all future activity from the North America Q&S team will have company code values of 1 as well.

Removal of “SX-” Prefix

We’ve removed the “SX-” prefix from the fields below from all tables used in VallenIQ:

- `manufacturer_cd`
- `vendor_cd`
- `customer_id`

We’ve also removed the “SX-” prefix from all historic records for the following columns in the feeds below:

- `quote_history_header` feed
 - `customer_account_number`
- `quote_history_detail` feed
 - `vendor_code`
 - `mfr_code`

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SPA Cost

VallenIQ users will now have visibility into SPA Cost and SPA Type (if available) for line items. Additionally, when manually changing cost, users can now specify Cost Type as well.

SPA Cost & Type

When line items are uploaded into VallenIQ, the system will check if SPA Cost and SPA Type is available for each line. If so, auto-matched records that have SPA Cost will be selected at a higher priority than those without SPA Cost.

An example of a record that has SPA Cost is shown below:

Ref #	Req. Part Number	Req. MFR/Vendor	Quoted Part Number	Vallen MFR/Vendor	Quantity	Cost	Quote Cost	Assignee	Status
1	RPN 08834196911	NO MFR NO VENDOR	MFRN 08834196911 VALLIN P/N 08834196911 VENDOR P/N 08834196911 96911 DRUM EXPAND 3/4X1 RUBBER UOM EA	MFR SAINT-GOBAIN ABRASIVES INC. CODE 662611 NOTES AR/JOANLANGLOIS * MFR/Vendor Notes	81	<div>SPA COST: SHIP & DEBIT \$2.83000</div>	<div>SPA COST: SHIP & DEBIT 2.83000</div>	JMK2 Jeff Kane	VAL

Description: 96911 DRUM EXPAND 3/4X1 RUBBER

Part Notes: -

Product Category: Abrasives

Prod. Category Code: 100

Stock: 14

Stocking Status: S

MSDS Code: N

Hazmat Code: -

Lead Time: 28

List Price: 7.86000000

Customer Resale Price: -

Stand. Package Size: 1

Purchase UM: -

Taxable: Y

Non-Tax Type: -

Image Link: -

SPA Cost: 2.83000000

SPA Type: Ship & Debit

Replacement Cost: 3.17000000

Cost Change Date: 2021/01/01

Standard Cost: 3.26510000

Vendor Type: Manufacturer

Vendor Packaging: -

Vendor Notes: AR/JoanLanglois

Misc. 1: -

Misc. 2: -

Misc. 3: -

Misc. 4: -

[+ Add Comment](#)Thu Apr 01 2021 23:27:07 GMT+0000 (Coordinated Universal Time) [Refresh](#)

1.1 SPA Cost and Type in line item and Expand View

Note that SPA Cost and SPA Type will display in the “Cost” column. If “Expand View” is selected, the application will also display SPA Cost and SPA Type right under the “Cost” column as well.

SPA Cost and Type will be shown in the “Cost Details” tab of the “Cost” modal here:

Cost Details

Quote History

Order History

Vallen Part Number:
08834196911

Manufacturer Part Number:
08834196911

Vendor Part Number:
08834196911

Stocking Status:
S

Standard Cost
\$3.26510

Last Quoted Cost
\$2.71000
[QUOTE THIS COST](#)

Replacement Cost
\$3.17000
[QUOTE THIS COST](#)

Quote Cost
 [Set](#)

Cost Details

Standard Pkg	Replacement Cost	Cost Change Date	SPA Cost	SPA Type	Standard Cost	Cost Change Date	UOM	Purchase UM	Company Code
1	\$3.17000	2020/12/31	\$2.83000	Ship & Debit	\$3.26510	2021/01/01	ea	-	1

[Close](#)

1.2 SPA Cost and Type in “Cost Details” tab

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Choosing Cost Type

When manually changing cost, users can now also choose Cost Type. This can be done in the “Quote Cost” column and in the “Cost” modal as well.

Quote Cost Column

To update Cost Type in the “Quote Cost” column, after manually editing cost, click the Cost Type text here:

Ref #	Req. Part Number	Req. MFR/Vendor	Quoted Part Number	Valien MFR/Vendor	Quantity	Cost	Quote Cost	Assignee	Status
1	RPN 08834196911	NO MFR NO VENDOR	MPN 08834196911 VALLEN PN 08834196911 VENDOR PN 08834196911 96911 DRUM EXPAND 3/4X1 RUBBER UCM EA	MFR SAINT-GOBAIN ABRASIVES INC CODE 662611 NOTES ARJUANLANGLOIS MFR Vendor Notes	81	SPA COST: SHIP & DEBIT \$2.83000 SC QH OH UP	SPA COST: SHIP & DEBIT 2.83000 Set	JMK2 Jeff Kane	VAL
+ Add Part Number Add CPN Usage Add Qty 1 Add Qty 2 Add Qty 3 Add Qty 4 Add Line Results per page: 125 250 500									

1.3 Cost Type in “Quote Cost” column

The system should open the “Select Cost Type” modal, from which they can select the appropriate type and save.

×

Select Cost Type

☐ SPA Cost: Into Stock

☒ SPA Cost: Ship & Debit

☐ Replacement Cost

Save Cancel

1.4 “Select Cost Type” modal

In this example, “Replacement Cost” was selected. The Cost Type text in the “Cost” column will be updated accordingly.

Ref #	Req. Part Number	Req. MFR/Vendor	Quoted Part Number	Valien MFR/Vendor	Quantity	Cost	Quote Cost	Assignee	Status
1	RPN 08834196911	NO MFR NO VENDOR	MPN 08834196911 VALLEN PN 08834196911 VENDOR PN 08834196911 96911 DRUM EXPAND 3/4X1 RUBBER UCM EA	MFR SAINT-GOBAIN ABRASIVES INC CODE 662611 NOTES ARJUANLANGLOIS MFR Vendor Notes	81	SPA COST: SHIP & DEBIT \$2.83000 SC QH OH UP	REPLACEMENT COST 2.83000 Set	JMK2 Jeff Kane	VAL
+ Add Part Number Add CPN Usage Add Qty 1 Add Qty 2 Add Qty 3 Add Qty 4 Add Line Results per page: 125 250 500									

1.5 Selected cost type is updated in “Quote Cost” column

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Cost Modal

Users can also change cost and cost type from the “Cost” modal as well. If a new “Quote Cost” is added, when “Set” is selected, the system will show the options below:

Cost Details | Quote History | Order History

Vallen Part Number: 08834196911 | Manufacturer Part Number: 08834196911 | Vendor Part Number: 08834196911 | Stocking Status: S

Standard Cost: \$3.26510 | Last Quoted Cost: \$2.71000 | Replacement Cost: \$3.17000 | Quote Cost: 2.9831

Cost Details

Standard Pkg	Replacement Cost	Cost Change Date	SPA Cost	SPA Type	Standard Cost	Cost Change Date	UOM
1	\$3.17000	2020/12/31	\$2.83000	Ship & Debit	\$3.26510	2021/01/01	ea

Choose Cost Type

- ☒ SPA Cost: Into Stock
- ☐ SPA Cost: Ship & Debit
- ☐ Replacement Cost

Choose Quantity

81

Close

1.6 Change cost and choose cost type in “Cost Details” tab

The same options will appear when the “Quote This Cost” button is clicked:

Cost Details | Quote History | Order History

Vallen Part Number: 08834196911 | Manufacturer Part Number: 08834196911 | Vendor Part Number: 08834196911 | Stocking Status: S

Standard Cost: \$3.26510 | Last Quoted Cost: \$2.71000 | Replacement Cost: \$3.17000 | Quote Cost: Set Cost

Cost Details

Standard Pkg	Replacement Cost	Cost Change Date	SPA Cost	SPA Ty	Cost Change Date	UOM	Purchase UM	Company Code
1	\$3.17000	2020/12/31	\$2.83000	Ship &	2021/01/01	ea	-	1

Choose Cost Type

- ☐ SPA Cost: Into Stock
- ☐ SPA Cost: Ship & Debit
- ☒ Replacement Cost

Choose Quantity

81

Close

1.7 Choose cost type and select which quantity to apply the cost to

In the tooltip that appears, select the desired Cost Type and select the appropriate quantity to apply the new cost and type to. The system will then close the “Cost” modal and return the user back to the project.

Purchase UM Code

Purchase UM Code has been added as a new field to part_master (purchase_um).

This field is also available in the following areas of VallenIQ:

- “Expand View”
- “Cost Details” tab (Cost modal)
- “Quote History” tab (Cost modal)
- New “Purchase UM Code” field in Custom Export modal

When line items are uploaded into VallenIQ, if Purchase UM exists in part_master, the system will automatically pull this value into the line item and display in all locations above.

However, when the “Purchase UM Code” field is updated using the Update Part and Create New Part features:

The screenshot shows the 'Update Part' form in VallenIQ. At the top, there is a header section with fields for Requested Part Number (29-1212), Requested Customer Part Number (AG459913), Requested Description (FITTING HOSE, 3/4 MNPT TO 3/4 HOSE, BRAS), Requested Manufacturer (GENERIC MANUFACTURER), Manufacturer Part Number (29-1212), and Vallen Part Number (4018347037). Below this is a navigation bar with 'Advanced Search', 'Create & Update', and 'Alternates' tabs. The main form area is titled 'Part Options' and includes a 'Create New Part' button and an 'Update Part' button. The 'Update Part' button is selected. The form contains several input fields: Manufacturer Part Number (29-1212), Vendor Part Number (Vendor Part Number), Vallen Part Number (Vallen Part Number), Cost (1), Purchase UM Code (ABC), Pack Quantity (1), Manufacturer Code (45256), Manufacturer Name (GENERIC MANUFACTURER), Vendor Code (Vendor Code), Vendor Name (Regal), Product Category Code (Product Category Code), Product Category Name (Hand Tools), Lead Time (days) (10562), and Base UM Code (EA). The 'Purchase UM Code' field is highlighted with a red box. At the bottom of the form are 'Save' and 'Cancel' buttons.

2.1 “Purchase UM Code” field in Update Part

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The updated value will display in “Expand View:”

Ref #	Req. Part Number	Req. MFR/Vendor	Quoted Part Number	Vallen 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:ABC CUST LINE # 1	MFR: GENERIC MANUFACTURER VENDOR REGAL	MPN: 29-1212 VALLN PN 4018347037 FITTING HOSE,3/4 MNPT TO 3/4 HOSE,BRA S UOM:EA	MFR: GENERIC MANUFACTURER CDDC 42556 VENDOR REGAL Mfr/Vendor Notes	65	REPLACEMENT COST \$1.00000	REPLACEMENT COST 65 1.00000 Set	Unassigned	VAL

Description: FITTING HOSE,3/4 MNPT TO 3/4 HOSE,BRAS

Part Notes: -

Product Category: Hand Tools

Prod. Category Code: -

Stock: Temporarily Out Of Stock

Stocking Status: -

MSDS Code: -

Hazmat Code: -

Lead Time: 10562

List Price: -

Customer Resale Price: -

Stand. Package Size: 1

Purchase UM: ABC

Taxable: -

Non-Tax Type: -

Image Link: -

SPA Cost: -

SPA Type: -

Replacement Cost: -

Cost Change Date: -

Standard Cost: -

Vendor Type: -

Vendor Packaging: -

Vendor Notes: -

Misc. 1: 27726

Misc. 2: 10562

Misc. 3: 16765

Misc. 4: 12449

+ Add Comment

Mon Mar 29 2021 23:22:35 GMT+0000 (Coordinated Universal Time) Refresh

2.2 “Purchase UM Code” field in “Expand View”

And will also display in “Cost Details” tab of Cost modal:

Cost Details
Quote History
Order History

Vallen Part Number:
4018347037
Manufacturer Part Number:
29-1212
Vendor Part Number:

Standard Cost
-- / --
Last Quoted Cost
\$15.30000
QUOTE THIS COST
Replacement Cost
\$1.00000
QUOTE THIS COST
Quote Cost
Set Cost Set

Cost Details

Standard Pkg	Replacement Cost	Cost Change Date	SPA Cost	SPA Type	Standard Cost	Cost Change Date	UOM	Purchase UM	Company Code
1	\$1.00000	-	-	-	-	-	EA	ABC	-

Close

2.3 “Cost Details” tab

“Quote History” tab of Cost modal will only contain purchase UM for historic quotes and will display in the quote history table:

Customer ID	Customer Name	Project ID	Quote Date	Replacement Cost	Standard Cost	Change Date	UOM	Purchase UM	General Comments	Internal Comments	Alt/Sub Comments
103008	Husqvarna Outdoor Products	10001618.000000	2012/11/27	\$15.30000	\$16.03134	2012/11/19	EA	EA	-	-	-

2.4 “Purchase UM” field in “Quote History” tab of Cost modal

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This field can also be exported - a new “Purchase UM Code” field has been added to Export Preferences modal, and this value can be included when downloading projects from VallenIQ.

Select Columns for Export

[Select all](#)
[Deselect all](#)
[Default only](#)

<input type="checkbox"/> Assignee	<input type="checkbox"/> Miscellaneous 1	<input type="checkbox"/> Requested Vendor Name
<input type="checkbox"/> Available Quantity	<input type="checkbox"/> Miscellaneous 2	<input type="checkbox"/> SPA Cost
<input type="checkbox"/> Base UM Code	<input type="checkbox"/> Miscellaneous 3	<input type="checkbox"/> Standard Cost
<input type="checkbox"/> Cost Change Date	<input type="checkbox"/> Miscellaneous 4	<input type="checkbox"/> Standard Package Size
<input type="checkbox"/> Customer Description	<input type="checkbox"/> Non-Tax Type	<input type="checkbox"/> Status
<input type="checkbox"/> Customer Last Price	<input type="checkbox"/> Part Notes	<input type="checkbox"/> Stocking Status
<input type="checkbox"/> Customer Line #	<input type="checkbox"/> Product Category Code	<input type="checkbox"/> Taxable
<input type="checkbox"/> Customer Part Number	<input type="checkbox"/> Product Category Name	<input type="checkbox"/> Vallen Customer Part Number
<input type="checkbox"/> Customer UOM	<input type="checkbox"/> Purchase UM Code	<input type="checkbox"/> Vallen Description
<input type="checkbox"/> Customer Usage	<input type="checkbox"/> Quantity Breaks	<input type="checkbox"/> Vallen Manufacturer Code
<input type="checkbox"/> External Comment	<input type="checkbox"/> Quote Cost Customer Usage	<input type="checkbox"/> Vallen Manufacturer Name
<input type="checkbox"/> Image Link	<input type="checkbox"/> Quote Cost Quantity Breaks	<input type="checkbox"/> Vallen Part Number
<input type="checkbox"/> Internal Comment	<input type="checkbox"/> Quote Cost Type	<input type="checkbox"/> Vallen Vendor Code
<input type="checkbox"/> Lead Time	<input type="checkbox"/> Ref #	<input type="checkbox"/> Vallen Vendor Name
<input type="checkbox"/> MSDS Code	<input type="checkbox"/> Replacement Cost	<input type="checkbox"/> Vend Pack
<input type="checkbox"/> Manufacturer Part Number	<input type="checkbox"/> Requested Manufacturer	<input type="checkbox"/> Vendor Notes
<input type="checkbox"/> Minimum Quantity	<input type="checkbox"/> Requested Part Number	<input type="checkbox"/> Vendor Part Number

2.5 New “Purchase UM Code” field in Export Preferences modal

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Global Header Improvements

The header shown on all pages of VallenIQ has been improved. Previously, the header would vary based on the current page you were on, where certain features were only accessible on certain pages.

However, we've now made the header consistent across all pages of VallenIQ to allow for more efficient navigation within the application.

The header for Super Admins and Admins will now look like the following on all pages:



3.1 Updated header for Super Admin and Admin users

The header for Specialists will look similar, but without the “Upload Project” and “Create a New Project” features on the top right.



3.2 Updated header for Specialist users

Search Updates

In the process of improving the VallenIQ header, we've also made updates to the search feature within the application.

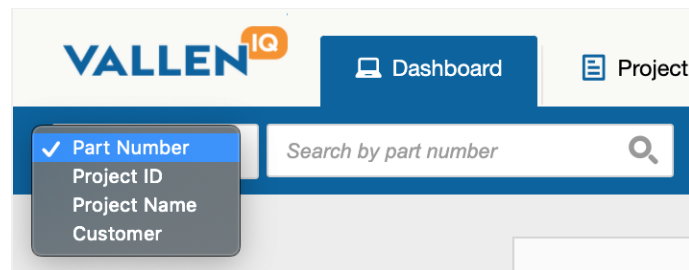
Previously, search was only available in the “Recent Projects” section of Dashboard tab and also in Project Management tab. Additionally, Part Number search was available in the top left header when inside specific projects.

In this release, we've combined the two search features into a single feature that is available on the top left of our updated header. Search will be available on every page of the application.

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Users will have the option to search using four search categories:



3.3 Search categories

Part Number Search

Super Admins & Admins

When Super Admins and Admins use the “Part Number” search category, the entered part number will be searched across all part types (below) across all projects (not only projects the super admin or admin themselves have uploaded).

- Requested Part Numbers
- Customer Part Numbers
- Manufacturer Part Numbers
- Vendor Part Numbers
- Vallen Part Numbers

Specialists

When Specialists use the “Part Number” search category, the entered part number will be searched across all part types (listed above) across all line items that have been assigned to them.

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Results Page

Results will appear in a new part number search results page:

Ref #	Req. Part Number	Req. MFR/Vendor	Quoted Part Number	Valen MFR/Vendor	Quantity	Cost	Quote Cost	Assignee	Status
3	RPN 021200-43185 CPN 500283 764 TAPE VINYL 2X36YD SM	MFR 3M NO VENDOR	MPN 7000028956 VALLEN PN 02120043185 VENDOR PN 7000028956 764 TAPE VINYL 2X36YD SM IL WHT UCM EA CROSS REFERENCE: Part Cross References Last Photo 119252 (ID: 1544)	MFR 3M CODE 51144 NOTES EDI MFR/Vendor Notes	272	REPLACEMENT COST \$4.27800	REPLACEMENT COST 272 4.27800 Set	JHH jerry hunt	VAL
3	RPN 2749350 CPN 500283 7/8-9 H4 TAP SET	MFR Widia North America VENDOR FCX PERFORMANCE	MPN 2749350 VALLEN PN 0220014502 VENDOR PN 2749350 5303 7/8-9 H4 TAP SET GTD UCM EA CROSS REFERENCE: Part Cross References Last Photo 032821 (ID: 1543)	MFR WIDIA NORTH AMERICA CODE 062355 MFR/Vendor Notes	11	LAST QUOTED COST \$84.16000	84.16000 Set	JMK2 Jeff Kane	PG
18	RPN 021200-43185 CPN 500283 764 TAPE VINYL 2X36YD SM	MFR 3M VENDOR AIM	MPN 7000028956 VALLEN PN 02120043185 VENDOR PN 7000028956 764 TAPE VINYL 2X36YD SM IL WHT UCM EA CROSS REFERENCE: Part Cross References Last Photo 032821 (ID: 1543)	MFR 3M CODE 51144 NOTES EDI MFR/Vendor Notes	210	REPLACEMENT COST \$4.27800	REPLACEMENT COST 210 4.27800 Set	JHH jerry hunt	VAL
3	RPN 021200-43185 CPN 500283 764 TAPE VINYL 2X36YD SM	MFR 3M NO VENDOR	MPN 7000028956 VALLEN PN 02120043185 VENDOR PN 7000028956 764 TAPE VINYL 2X36YD SM IL WHT UCM EA CROSS REFERENCE: Part Cross References Last Photo upload from home page (ID: 1481)	MFR 3M CODE 51144 NOTES EDI MFR/Vendor Notes	177	REPLACEMENT COST \$4.27800	REPLACEMENT COST 177 4.27800 Set	JHH jerry hunt	VAL

3.4 Part number search results for Super Admin / Admin user (notice results are filtered by “All Projects” on top left)

On this results page, if more than 25 results are found, users can use the go-to-page feature on the top right of the page to see the rest of their search results.

Assignee	Status
JHH jerry hunt	VAL

3.5 Go-to-page feature

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The page picker feature on the bottom of the page is available as well:

<input type="checkbox"/>	3	RPN 2749350 CPN 500283 718-9 H4 TAP SET UOM EA CUST. LINE # 354	MFR Widia North America VENDOR FOX PERFORMANCE	MPN 2749350 VALLEN PN 6625544502 VENDOR PN 2749350 5393 718-9 H4 TAP SET GTD UOM EA ■ Autofill Values ■ Match ■ Last Pick 111220 (ID: 944)	MFR WIDIA NORTH AMERICA CODE 662350 ■ Mfr/Vendor Notes	11	REPLACEMENT COST \$95.56000 C BG OK CH LP	11	SELECT COST TYPE 95.56000 Set	Unassigned	VAL			
<input type="checkbox"/>	3	RPN 021200-43185 CPN 500283 764 TAPE VINYL 2X36YD 5M	MFR 3M NO VENDOR	MPN 7000028956 VALLEN PN 02120043185 VENDOR PN 7000028956 764 TAPE VINYL 2X36YD 5M IL WHT UOM EA ■ Cross References ■ Part Cross References ■ Last Picks Final check for wed (ID: 941)	MFR 3M CODE 51144 NOTES EDI ■ Mfr/Vendor Notes	172	REPLACEMENT COST \$4.27800 C BG OK CH LP	172	SELECT COST TYPE 4.27800 Set	JHH Jerry Hunt	VAL			
<input type="checkbox"/>	3	RPN 021200-43185 CPN 500283 764 TAPE VINYL 2X36YD 5M	MFR 3M NO VENDOR	MPN 7000028956 VALLEN PN 02120043185 VENDOR PN 7000028956 764 TAPE VINYL 2X36YD 5M IL WHT UOM EA ■ Cross References ■ Part Cross References ■ Last Picks Test Project 051520 - SX-119252(Vallen).xls x-Sheet2 (ID: 934)	MFR 3M CODE 51144 NOTES EDI ■ Mfr/Vendor Notes	146	REPLACEMENT COST \$4.27800 C BG OK CH LP	146	SELECT COST TYPE 4.27800 Set	JHH Jerry Hunt	VAL			

1 2 3 4 Next

3.6 Page picker is available on the bottom of each results page when more than 25 results are found

We've also included the same part number and customer description search feature that is available within projects in this results page as well. This can be valuable when drilling down further into search results:

81 results for Part Number "500283"

My Projects All Projects

☐ Select All Remove Switch to Expand View

Ref # Search line items

Ref #	Req. Part Number	Req. MFR/Vendor	Quoted Part Number	Vallen MFR/Ve
<input type="checkbox"/> 3	RPN 021200-43185 CPN 500283 764 TAPE VINYL 2X36YD 5M	MFR 3M NO VENDOR	MPN 7000028956 VALLEN PN 02120043185 VENDOR PN 7000028956 764 TAPE VINYL 2X36YD 5M IL WHT UOM EA ■ Cross References ■ Part Cross References ■ Last Picks 119252 (ID: 1544)	MFR 3M CODE 51144 NOTES EDI ■ Mfr/Vendor Notes

3.7 Part number and customer description search feature can be used to more efficiently find specific search results

Within this results page, users can also edit line items as they can within projects themselves. For example, users can open the "Quoted Part Number" modal, accept suggested parts, update cost, change assignees, select different statuses, as well as most other changes you can make to line items within projects.

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Lastly, if you'd like to go to the specific project a particular search result is from, select the Project Name and Project ID that is shown in the "Quoted Part Number" column:

81 results for Part Number "500283"

My Projects All Projects

Select All Remove Switch to Expand View Ref # Search line items Page 1 of 4

Ref #	Req. Part Number	Req. MFR/Vendor	Quoted Part Number	Valen MFR/Vendor	Quantity	Cost	Quote Cost	Assignee	Status
3	RPN 021200-43185 CPN 500283 764 TAPE VINYL 2X36YD SM	MFR 3M NO VENDOR	MPN 7000028956 VALLEN PN 02120043185 VENDOR PN 7000028956 764 TAPE VINYL 2X36YD SM IL WHT UCM EA 119252 (ID: 1549)	MFR 3M CODE S1144 NOTES EDI MFR Vendor Notes	272	REPLACEMENT COST \$4.27800	272 REPLACEMENT COST 4.27800 Set	JHH jerry hunt	VAL
3	RPN 2749350 CPN 500283 7/8" H H4 TAP SET UCM EA CUST. LINE # 354	MFR Widia North America VENDOR FOX PERFORMANCE	MPN 2749350 VALLEN PN 6925014502 VENDOR PN 2749350 5/32" 7/8" H4 TAP SET GTD UCM EA 032821 (ID: 1549)	MFR WIDIA NORTH AMERICA CODE 66235 MFR Vendor Notes	11	LAST QUOTED COST \$4.16000	11 BPA CODE INFO STOCK 84.16000 Set	JMK2 Jeff Kane	RC
18	RPN 021200-43185 CPN 500283 764 TAPE VINYL 2X36YD SM UCM EA CUST. LINE # 95	MFR 3M VENDOR AIM	MPN 7000028956 VALLEN PN 02120043185 VENDOR PN 7000028956 764 TAPE VINYL 2X36YD SM IL WHT UCM EA 032821 (ID: 1549)	MFR 3M CODE S1144 NOTES EDI MFR Vendor Notes	210	REPLACEMENT COST \$4.27800	210 REPLACEMENT COST 4.27800 Set	JHH jerry hunt	VAL

3.8 Select the project name and ID shown in blue in "Quoted Part Number" column to go to the project

After selecting the Project Name / ID, the system should take you to the project itself and automatically filter on the specific line item you were looking at in the prior results page:

119252 (32 Lines) • 2021/03/29 at 2:14 PM EST • Private

owned by: Mano Ramassamy

Share Project Project Settings Hide Filters

119252
VIKING PUMP INC
Project ID 1544
Status Open
Due Date 2021/03/31
Substitutes Yes
Team Lead Lou McCormack
Project Type Market Basket

Filter by Category (1)
Tapes 1

Filter by Req. Manufacturer (1)
3M 1/1

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

Filter by Cost Source
With Order History 1
With Quote History 1
With Cost 1
With Standard Cost 1

Filter by Status
RC Status 0
CU Status 0
VAL Status 1
DU Status 0
TI Status 0
NQ Status 0
OS Status 0
AL Status 0
NMI Status 0

Selecting 0 item(s) Showing 1/1 result Ref # 3

Select All Group Edit Remove Assign Switch to Expand View Hide All Alternates Ref # 3

Ref #	Req. Part Number	Req. MFR/Vendor	Quoted Part Number	Valen MFR/Vendor	Quantity	Cost	Quote Cost	Assignee	Status
3	RPN 021200-43185 CPN 500283 764 TAPE VINYL 2X36YD SM	MFR 3M NO VENDOR	MPN 7000028956 VALLEN PN 02120043185 VENDOR PN 7000028956 764 TAPE VINYL 2X36YD SM IL WHT UCM EA Cross References Part Cross References Last Picks	MFR 3M CODE S1144 NOTES EDI MFR Vendor Notes	272	REPLACEMENT COST \$4.27800	272 REPLACEMENT COST 4.27800 Set	JHH jerry hunt	VAL

Add Part Number Add CPN Usage Add Qty 1 Add Qty 2 Add Qty 3 Add Qty 4 Add Line

Results per page: 125 250 500

3.9 After clicking on the desired project, system takes you to the specific line item within the project

If you'd like to see all line items in the project, simply clear the applied filter.

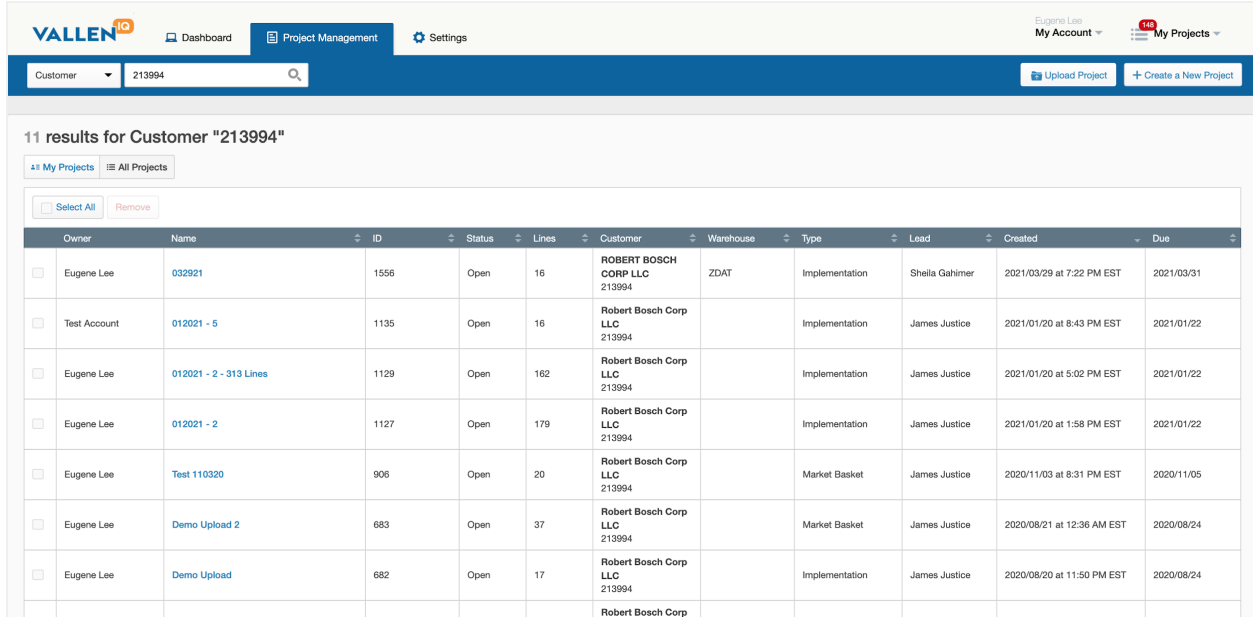
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Project ID, Project Name, Customer Search

As was possible before, users can search projects by their ID, name, or by the customer accounts that were added to the project.

Search results for all three search categories will display in the same “Project Management” page as did before:



The screenshot shows the VALLEN IQ Project Management interface. At the top, there's a navigation bar with 'Dashboard', 'Project Management' (active), and 'Settings'. A search bar is set to 'Customer' with the value '213994'. On the right, there are links for 'My Account' and 'My Projects' (with a red notification badge). Below the search bar, it says '11 results for Customer "213994"'. There are tabs for 'My Projects' and 'All Projects'. A table of results is displayed with columns: Owner, Name, ID, Status, Lines, Customer, Warehouse, Type, Lead, Created, and Due. The results list various projects owned by Eugene Lee and Test Account, all associated with Robert Bosch Corp LLC 213994.

Owner	Name	ID	Status	Lines	Customer	Warehouse	Type	Lead	Created	Due
<input type="checkbox"/>	Eugene Lee	032921	Open	16	ROBERT BOSCH CORP LLC 213994	ZDAT	Implementation	Sheila Gahimer	2021/03/29 at 7:22 PM EST	2021/03/31
<input type="checkbox"/>	Test Account	012021 - 5	Open	16	Robert Bosch Corp LLC 213994		Implementation	James Justice	2021/01/20 at 8:43 PM EST	2021/01/22
<input type="checkbox"/>	Eugene Lee	012021 - 2 - 313 Lines	Open	162	Robert Bosch Corp LLC 213994		Implementation	James Justice	2021/01/20 at 5:02 PM EST	2021/01/22
<input type="checkbox"/>	Eugene Lee	012021 - 2	Open	179	Robert Bosch Corp LLC 213994		Implementation	James Justice	2021/01/20 at 1:58 PM EST	2021/01/22
<input type="checkbox"/>	Eugene Lee	Test 110320	Open	20	Robert Bosch Corp LLC 213994		Market Basket	James Justice	2020/11/03 at 8:31 PM EST	2020/11/05
<input type="checkbox"/>	Eugene Lee	Demo Upload 2	Open	37	Robert Bosch Corp LLC 213994		Market Basket	James Justice	2020/08/21 at 12:36 AM EST	2020/08/24
<input type="checkbox"/>	Eugene Lee	Demo Upload	Open	17	Robert Bosch Corp LLC 213994		Implementation	James Justice	2020/08/20 at 11:50 PM EST	2020/08/24
					Robert Bosch Corp					

3.10 Search results page for Project ID, Project Name, and Customer

Similar to the part search results, Super Admins and Admins will see results across all projects uploaded by all users, and Specialists will only see results for the projects they have assigned lines in.

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Update Part and Created Part Flags

To help differentiate between line items that were updated or were used to create new parts from the rest of the line items within projects, we're now adding "Created Parts" and "Updated Parts" flags in the "Quoted Part Number" column.

Ref #	Req. Part Number	Req. MFR/Vendor	Quoted Part Number	Valien MFR/Vendor	Quantity	Cost	Quote Cost	Assignee	Status	
1	RPN 29-1212 CPN AG459913 FITTING HOSE,3/4 MNPT TO 3/4 HOSE,BRAS LOM ABC CUST. LINE # 1	MFR: GENERIC MANUFACTURER VENDOR REGAL	MPN 29-1212 VALLEN PN 1172626 FITTING HOSE,3/4 MNPT TO 3/4 HOSE,B RAS LOM EA Created Part	MFR: GENERIC MANUFACTURING CORP CODE 50010 VENDOR REGAL INDUSTRIES INC CODE 400414	65	REPLACEMENT COST \$1.00000 C B QH LP	65 REPLACEMENT COST 1.00000 Set	JHH jerry hunt	VAL	
2	RPN DWS 01-19-1 CPN AG492381 FILTER ELEMENT WATER FILTER, 23MM ID X 61 LOM DEP CUST. LINE # 2	MFR: DELTA PURE VENDOR INDUSTRIAL COMPONENTS AND TECH	MPN DWS 01-19-1 VALLEN PN 421848235 FILTER ELEMENT WATER FILTER,23MM I D X 61 LOM EA Created Part	MFR: DELTA PURE FILTRATION CODE 503895 VENDOR INDUSTRIAL COMPONENTS AND TECH JHH Vendor Notes	100	REPLACEMENT COST \$2.00000 C B QH LP	100 REPLACEMENT COST 2.00000 Set	Unassigned	VAL	
3	RPN 0211783C996BT CPN AG109496 1-1/2X2X1/2 YELLOW LOM GHS CUST. LINE # 3	MFR: J&L Industrial Supply VENDOR 300M	MPN 3C996BT VALLEN PN 0211783C996BT VENDOR PN 3C996BT 3C996B-T CARD NIC LOM EA Updated Part	MFR: SENTRY INSURANCE CODE 126517 VENDOR STAFFING SOLUTIONS CODE 10065	125	REPLACEMENT COST \$136.34000 C B QH LP	125 REPLACEMENT COST 136.34000 Set	CMG2 Majka Mara Specialist	VAL	

4.1 "Created Parts" and "Updated Parts" flags

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Vendor & Manufacturer Field Updates

Two updates were made to Vendor & Manufacturer related fields in “Create & Update” tab.

Display Both Active and Deleted Records

For both “Update Part” and “Create New Part,” if users type into any of the fields below, the system should show all records, whether the record is active or deleted. Both active and deleted records can be added to each of the four fields below:

- Manufacturer Code
- Manufacturer Name
- Vendor Code
- Vendor Name

The status of the manufacturer or vendor will display at the end of each record:

Manufacturer Code	Manufacturer Name
<input type="text" value="5"/>	<input type="text" value="Manufacturer Name"/>
5AA - PRAXAIR DIST *****DO NO 1290002 (Deleted)	Product Category Name
5 STAR FABRICATIONS 129251 (Deleted)	<input type="text" value="Hand Tools"/>
5541 BEAR LANE LC 179559 (Deleted)	
5ME LLC 407269 (Active)	
5S Supply 407876 (Active)	
580 GRAPHICS 410443 (Active)	

5.1 Both active and deleted records will appear in the auto-suggest drop downs and can be added

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Adding New Manufacturers & Vendors

Update Part

Only when “Update Part” is selected, users can add manufacturer names and vendor names that do not match to an existing manufacturer or vendor record in Vallen’s master data.

This use case is valuable when new manufacturers or vendors must be added to Market Baskets for quoting purposes and these manufacturers or vendors will not be added as new records to Vallen’s ERP system.

Requested Part Number: 29-1212 Requested Customer Part Number: AG459913 Requested Description: FITTING HOSE,3/4 MNPT TO 3/4 HOSE,BRAS Requested Manufacturer: GENERIC MANUFACTURER Manufacturer Part Number: 29-1212 Vallen Part Number: 11778226

Advanced Search Create & Update Alternates

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

Manufacturer Part Number: 29-1212 Vendor Part Number: Vendor Part Number Vallen Part Number: 11778226

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

Manufacturer Code: Manufacturer Code Manufacturer Name: New Manufacturer Vendor Code: 11050 Vendor Name: New Vendor

Product Category Code: 800 Product Category Name: Hand Tools Lead Time (days): 10562 Base UM Code: EA

Description 1: FITTING HOSE,3/4 MNPT TO

Description 2: 3/4 HOSE,BRAS

Save Cancel

5.2 New Manufacturers and Vendors can be added when using “Update Part”

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Create New Part

New manufacturers and vendors cannot be added to “Manufacturer Name” and “Vendor Name” fields when using “Create New Part.”

When creating a new part, users must add valid existing records to the fields below. Both active and deleted records can be used when creating new parts:

The screenshot shows the 'Create New Part' form with the following data:

Requested Part Number:	Requested Customer Part Number:	Requested Description:	Requested Manufacturer:	Manufacturer Part Number:	Vallen Part Number:
29-1212	AG459913	FITTING HOSE,3/4 MNPT TO 3/4 HOSE,BRAS	GENERIC MANUFACTURER	29-1212 Hand Tools	11778226

Buttons: Advanced Search, Create & Update, Alternates

Part Options: ☒ Create New Part, ☐ Update Part,

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

Manufacturer Part Number	Vendor Part Number	Vallen Part Number
29-1212	Vendor Part Number	11778226

Cost	Purchase UM Code	Pack Quantity
1	EA	1

Manufacturer Code	Manufacturer Name	Vendor Code	Vendor Name
10054	Wirthco Engineering Inc	127929	Grainger

Product Category Code	Product Category Name	Lead Time (days)	Base UM Code
800	Hand Tools	10562	EA

Description 1: FITTING HOSE,3/4 MNPT TO

Description 2: 3/4 HOSE,BRAS

5.3 Valid manufacturer and vendor records must be used when creating new parts

If a new manufacturer or vendor that does not exist in Vallen’s master data is used when creating a new part, the system will display an error and prevent you from saving the new part:

The screenshot shows the 'Create New Part' form with the following data:

Requested Part Number:	Requested Customer Part Number:	Requested Description:	Requested Manufacturer:	Manufacturer Part Number:	Vallen Part Number:
29-1212	AG459913	FITTING HOSE,3/4 MNPT TO 3/4 HOSE,BRAS	GENERIC MANUFACTURER	29-1212 Hand Tools	11778226

Buttons: Advanced Search, Create & Update, Alternates

Part Options: ☒ Create New Part, ☐ Update Part,

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

Manufacturer Part Number	Vendor Part Number	Vallen Part Number
29-1212	Vendor Part Number	11778226

Cost	Purchase UM Code	Pack Quantity
1	EA	1

Manufacturer Code	Manufacturer Name	Vendor Code	Vendor Name
Please enter a Manufacturer Code	New Manufacturer	Please enter a Vendor Code	New Vendor

Product Category Code	Product Category Name	Lead Time (days)	Base UM Code
800	Hand Tools	10562	EA

Description 1: FITTING HOSE,3/4 MNPT TO

Description 2: 3/4 HOSE,BRAS

Buttons: Save, Cancel

5.4 Only valid manufacturer and vendor records can be used when creating new parts

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Expand View Improvements

We've made improvements to how "Expand View" fields display under line items.

Ref #	Req. Part Number	Req. MFR/Vendor	Quoted Part Number	Valen MFR/Vendor	Quantity	Cost	Quote Cost	Assignee	Status
1	RPN 08834196911	NO MFR NO VENDOR	MPN: 08834196911 VALLEN P/N: 08834196911 VENDOR P/N: 08834196911 96911 DRUM EXPAND 3/4X1 RUBBER JOM EA	MPN: SAINT-GOBAIN ABRASIVES INC. CODE: 662611 NOTES: AR/JOANLANGLOIS MFR/Vendor Notes	81	SPA COST: SHIP & DEBIT \$2.830000 C SC QH QH	REPLACEMENT COST 81 2.9831 Set	JMK2 Jeff Kane	URL
<div><div><div>Description: 96911 DRUM EXPAND 3/4X1 RUBBER</div><div>Part Notes: -</div><div>Product Category: Abrasives</div><div>Prod. Category Code: 100</div><div>Stock: 14</div><div>Stocking Status: S</div><div>MSDS Code: N</div><div>Hazmat Code: -</div></div><div><div>Lead Time: 28</div><div>List Price: 7.86000000</div><div>Customer Resale Price: -</div><div>Stand. Package Size: 1</div><div>Purchase UM: -</div><div>Taxable: Y</div><div>Non-Tax Type: -</div><div>Image Link: -</div></div><div><div>SPA Cost: 2.83000000</div><div>SPA Type: Ship & Debit</div><div>Replacement Cost: 3.17000000</div><div>Cost Change Date: 2021/01/01</div><div>Standard Cost: 3.26510000</div><div>Vendor Type: Manufacturer</div><div>Vendor Packaging: -</div><div>Vendor Notes: AR/JoanLanglois</div></div><div><div>Misc. 1: -</div><div>Misc. 2: -</div><div>Misc. 3: -</div><div>Misc. 4: -</div></div></div>									
<div>+ Add Comment</div> <div>Thu Apr 01 2021 23:27:07 GMT+0000 (Coordinated Universal Time) Refresh</div>									

6.1 Updated layout of fields in "Expand View"

Previously, we would only show fields that had values and hide the rest. We're now showing all fields whether they have values or not.

Additionally, all cost related fields will display together, underneath the "Cost" column so that users can find and reference these fields more efficiently.

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