



RELEASE NOTES

VallenIQ v1.19

Release Date: December 6, 2021

1. Get-Price-Availability & Get-Nonstock-Price API Updates	3
1.1 Summary	3
1.2 Request Parameters	3
1.2.1 New Request Parameters	5
1.2.1.1 vendor_number	5
1.2.1.2 product_line	5
1.2.1.3 cost1, cost2, cost3, cost4	7
Updating Quote Costs in Cost Details	8
1.2.1.4 product_category	9
1.2.2 New Fields in Response	10
1.2.2.1 is_nonstock	10
2. Convert to Order Updates	12
2.1 Request Parameters	12
2.2 Select Line Item Quantity Break When Converting to Order	16
2.2.1 Individual Lines	16
2.2.2 Group Edit	17
2.3 Requested Ship & Promise Date	20
2.4 Cascading Logic for Product Field	21
3. Adjusted Conversion Factor Cost	22
3.1 Changing Base UM Code	22
3.2 Populating Cost Field in Create & Update Modal	24
3.3 Project View Updates	26
3.4 Edit History	27
3.5 New Filter for Adjusted Cost	28

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3.6 New Custom Export Fields	29
4. Populate Default Warehouse Based on Ship To Suffix in Header	30
5. "Set Usage to 1" Option in Preview and Confirm	31
6. Rename "Price" Column to "Unit Price"	32
7. Quote Totals Improvements	33
7.1 Within Quotes	33
7.2 Recent Projects	34
8. Show Suggestions Even With API Errors	35
9. Assign TI Status to Lines With API Errors	36
10. Gross Profit % Calculation	37
11. Frozen Top Bar While Scrolling	37
12. Part Selection & Add As Alternate Updates	38
13. Manufacturer & Vendor Status Wording Update	39

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1. Get-Price-Availability & Get-Nonstock-Price API Updates

1.1 Summary

The Get-Price-Availability and Get-Nonstock-Price APIs have been updated within recent weeks to align with the CSR team use cases for the APIs.

Previously the two APIs had very different request parameters for each, where each API would only be called in specific scenarios in VallenIQ.

With recent changes, we consolidated the request parameters for both APIs, allowing for flexibility to support scenarios in which the Get-Price-Availability API can pivot to call the Get-Nonstock-Price API when stocking items are not stocked in the specified warehouse for a quote.

Additionally, we've reduced the number of requests VallenIQ must make to the APIs in order to update line items with appropriate pricing and availability.

1.2 Request Parameters

Both Get-Price-Availability and Get-Nonstock-Price APIs now utilize mostly the same request parameters. The only differences are the addition of the company_number field for the Get-Nonstock-Price API and the addition of the uom field for the Get-Price-Availability API.

Field Name	Sample Field Value	Vallen IQ Source Field	Required/Optional/Default
product	504708HYP220937	Get-Price-Availability: Vallen Part Number Get-Nonstock-Price: Vallen Part Number, Customer Part Number, Vendor Part Number, or Manufacturer Part Number in Quoted Part # column	Required
warehouse	DBEL	Warehouse in header	Required
ship_to	01	Ship To Suffix in header	Required
customer_number	100230	Customer Account Number in header	Required
uom	EA	UOM in Quoted Part # column	Required (only for Get-Price-Availability API)
vendor_number	51144	Vendor Code or MFR Code in Vallen MFR/VEN column	Required
cost	3.00	Cost value in Cost column	Value required if cost tag is in the call. Value cannot be null.
cost1	3.00	Quote Cost column value associated with Req. Qty break 1	Value required if cost1 tag is in the call. Value cannot be null.
cost2	2.95	Quote Cost column value associated with Req. Qty break 2	Value required if cost2 tag is in the call. Value cannot be null.
cost3	2.90	Quote Cost column value associated with Req. Qty break 3	Value required if cost3 tag is in the call. Value cannot be null.
cost4	2.85	Quote Cost column value associated with Req. Qty break 4	Value required if cost4 tag is in the call. Value cannot be null.
company_number	1	Company Code - Will always be "1" for Vallen North America	Required (only for Get-Nonstock-Price API)
product_line	1	Product Line Code in Expand View	Required
product_category	1900	Product Category Code in Expand View	Optional
viq_reference	123-45	Project ID - Ref # of line item	Required

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1.2.1 New Request Parameters

The following fields below are those that have been added to both APIs.

1.2.1.1 vendor_number

The vendor_number field is required for both API requests. This field is used as an input to determine what the appropriate pricing and/or availability is for your line items.

The vendor_number is populated first by the vendor code that is associated with a line item, and in the absence of vendor code, VallenIQ will then use the manufacturer code. Note that some line items will only have a manufacturer code or a vendor code, and others will have both.

Based on the codes that are available for a line item, VallenIQ will use the logic below to determine which code to use when populating the vendor_code field for both APIs.

- If manufacturer code and vendor code are available for a line item, use vendor code to populate this field
- If only vendor code is available for a line item, use vendor code to populate this field
- If only manufacturer code is available for a line item, use manufacturer code to populate this field

1.2.1.2 product_line

The product_line field is required for both API requests.

VallenIQ will utilize a new file that has been added to the master data titled product_line to look up and populate the appropriate value for this field in both API requests. The vendor code that is associated with the line item and the warehouse code associated with the quote will be used to look up product_line values in the new table.

Note that after looking up matching product_line values, the system will also display the matching product line and code in Expand View:

Ref #	Req. Part #	Req. MFR/VEN	Quoted Part #	Valten MFR/VEN	Anal. Qty	Req. Qty	Unit Price	Quote Price	Cost	Quote Cost	GP%	Extended Price	Status
1	RPN 662403532008	NO MFR NO VENDOR	MPN 532008 VALLEN P/N 662403532008 VENDOR P/N 532008 532008 M3 0.50 X 10 MET SKT UDM EA Multiple Valten Matches Suggested Parts	MFR BRIGHTON-BEST INTL INC. CODE 662403 NOTES AN/BRANDONCHEN M/V Vendor Notes	-	10 20 30 40	\$0.04000	0.04000 0.04000 0.04000 0.04000	Set Set Set Set	SPA COST INTO STOCK 0.02798 STANDARD COST \$0.02798	30.05 % 30.05 % 30.05 % 30.05 %	\$0.40000 \$0.80000 \$1.20000 \$1.60000	IN DU
<div> <div> Description: 532008 M3 0.50 X 10 MET SKT Part Notes: - Product Category: Fasteners Product Category Code: 600 Product Line: BRIGHTON BEST SOCKET SCR Product Line Code: 1 Company Wide Inventory: 404 Stocking Status: S MSDS Code: N </div> <div> Hazard Code: - Lead Time: 14 List Price: 0.04240 Customer Resale Price: - Stand. Package Size: 100 Purchase UM: - Taxable: Y Non-Tax Type: - Image Link: - </div> <div> SPA Cost: - SPA Type: - Replacement Cost: 0.02690 Cost Change Date: 2010/05/20 Standard Cost: 0.02798 Customer Last Price: - Vendor Type: Manufacturer Vendor Packaging: - Vendor Notes: AN/BrandonChen </div> <div> Misc. 1: - Misc. 2: - Misc. 3: - Misc. 4: - </div> </div>													
+ Add Comment Mon Nov 22 2021 20:25:30 GMT+0000 (Coordinated Universal Time) Refresh													

Product Line fields in Expand View

Additionally, the product line code and name will also appear in the Create & Update tab. Users will have the ability to see what Product Line Codes and Names are available for the Vendor + Warehouse combination for the line item.

Note that users will not be able to free form type into these two fields and only valid options will appear in the dropdown.

Requested Part Number: 662403532008
Manufacturer Part Number: 532008
Valten Part Number: 662403532008

Multiple Valten Matches (6)
Did you mean? (1)
Advanced Search
Create & Update

Part Options
☐ Create New Part
☒ Update Part

Manufacturer Part Number
532008

Vendor Part Number
532008

Valten Part Number
Valten Part Number

Cost
0.02690

Purchase UM Code
Purchase UM Code

Pack Quantity
100

Base UM Code
EA

Lead Time (Days)
14

Manufacturer
Code
662403

Name
Brighton-Best Intl Inc.

Vendor
Code
Vendor Code

Name
Vendor Name

Product Category
Code
600

Name
Fasteners

Product Line
Code
Product Line Code

Name
BRIGHTON BEST SOCKET SCR

Description 1
532008 M3 0.50

Description 2
X 10 MET SKT

BRIGHTON BEST SOCKET SCR 1
Brighton Best- Cerritos 3
Specials/POA Items 888
Obsolete/Mfg Discontinue 999
Need More Information NMI

Save
Cancel

Product Line fields in Create & Update

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1.2.1.3 cost1, cost2, cost3, cost4

New cost fields “cost1-4” have been added to both APIs’ request parameters. These fields are in addition to the “cost” field that also exists in the request for Get-Price-Availability and Get-Nonstock-Price APIs.

The purpose of the cost field vs. cost1-4 is as follows:

- The cost API request parameter is populated for both Get-Price-Availability and Get-Nonstock-Price APIs in the following scenarios:
 - During “Refresh,” which occurs:
 - When line items are uploaded into a quote for the first time
 - When the part number is changed for a line item
 - When Customer Account, Warehouse, or Ship To Suffix fields are changed in the quote header
 - When Cost field is updated using Create & Update
- The cost1-4 API request parameters are only populated for non-stock parts and are only used when calling the Get-Nonstock-Price API. The two use cases for populating these parameters are:
 - When users edit Quote Cost breaks directly in the Quote Cost column for non-stock parts:

Ref #	Req. Part #	Req. MFR/VEN	Quoted Part #	Valien MFR/VEN	Avail. Qty	Req. Qty	Unit Price	Quote Price	Cost	Quote Cost	GP %	Extended Price	Status
4	RPN 1183 6.3 MM	NO MFR NO VENDOR	MPN 1183 6.3M M VALLEN PN 1002568 VENDOR PN 1183 6.3M 6.3 COOLANT DRILL L UOM EA	MFR GUHRING INC CODE 662814 * With Vendor Notes	—	<div><div></div>100</div> <div><div></div>200</div> <div><div></div>300</div> <div><div></div>400</div>	\$115.17810	<div>115.17810 <div>Set</div></div> <div>115.17810 <div>Set</div></div> <div>115.17810 <div>Set</div></div> <div>115.17810 <div>Set</div></div>	<div>REPLACEMENT COST \$84.08000</div> <div><div>84.08000 <div>Set</div></div><div>84.08000 <div>Set</div></div><div>84.08000 <div>Set</div></div><div>84.08000 <div>Set</div></div></div>	<div>27.0% %</div> <div>27.0% %</div> <div>27.0% %</div> <div>27.0% %</div>	<div>\$11,517.8...</div> <div>\$23,035.6...</div> <div>\$34,553.4...</div> <div>\$46,071.2...</div>	<div></div> <div></div> <div></div>	

Quote Cost column in Project View

- Or when cost is changed via the Cost Details modal for non-stock parts:

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Cost Details

Quote History

Order History

Vallen Part Number:
10052568

Manufacturer Part Number:
1183 6.3MM

Vendor Part Number:
1183 6.3MM

Stocking Status:
C

Standard Cost
\$84.08000
QUOTE THIS COST

Last Quoted Cost
-- / --

Replacement Cost
\$84.08000
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	\$84.08000	-	-	-	\$84.08000	-	EA	-	1

Close

Updating Quote Costs in Cost Details

In these two scenarios, only the specific Quote Cost column breaks that were updated will populate cost1-4, and the Get-Nonstock-Price API will only return Quote Prices that correspond with the Quote Cost values that were submitted.

For example, using the non-stock example below:

Ref #	Req. Part #	Req. MFR/VEN	Quoted Part #	Vallen MFR/VEN	Avail. Qty	Req. Qty	Unit Price	Quote Price	Cost	Quote Cost	GP%	Extended Price	Status
6	RPN 91245	NO MFR NO VENDOR	MPN 91245 VENDOR PN 91245 91245 SCRW 6-32X 3/4 SS SLTD PAN M ACHINE SCR UOM EA Multiple Vallen Matches Suggested Parts Created Parts	MFR LAWSON PRODUCTS CODE 401740 VENDOR LEHIGH OUTFITTERS LLC CODE 428677 Mfr/Vendor Notes	—	100 200 300 400	\$178.88000	178.88000 Set 178.88000 Set 178.88000 Set 178.88000 Set	REPLACEMENT COST \$98.99000 RPC REQ QTY QTY RESC	REPLACEMENT COST 98.99000 Set 98.99000 Set 98.99000 Set 98.99000 Set	44.6% 44.6% 44.6% 44.6%	\$17,888.00... \$35,776.00... \$53,664.00... \$71,552.00...	VAL

Unedited non-stock part

Quote Cost breaks 1 and 2 were manually changed directly in the Quote Cost column, and the Get-Nonstock-Price API returned prices for only the corresponding Quote Price values, which were then updated accordingly:

Ref #	Req. Part #	Req. MFR/VEN	Quoted Part #	Vallen MFR/VEN	Avail. Qty	Req. Qty	Unit Price	Quote Price	Cost	Quote Cost	GP%	Extended Price	Status
4	RPN 91245	NO MFR NO VENDOR	MPN 91245 VENDOR PN 91245 91245 SCRW 6-32X 3/4 SS SLTD PAN M ACHINE SCR UOM EA Multiple Vallen Matches Suggested Parts Created Parts	MFR LAWSON PRODUCTS CODE 401740 VENDOR LEHIGH OUTFITTERS LLC CODE 428677 Mfr/Vendor Notes	—	100 200 300 400	\$178.88000	190.17000 Set 186.67000 Set 178.88000 Set 178.88000 Set	REPLACEMENT COST \$98.99000 RPC REQ QTY QTY RESC	REPLACEMENT COST 105.23510 Set 103.29991 Set 98.99000 Set 98.99000 Set	44.6% 44.6% 44.6% 44.6%	\$19,017.00... \$37,334.00... \$53,664.00... \$71,552.00...	VAL

Updated Quote Price values for breaks 1 and 2

Note that the values in the Cost and Unit Price columns did not change.

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1.2.1.4 product_category

The product_category field is an optional field for both APIs. When available, the system will look up the category a line item belongs to within the product_category table in Vallen's master data, and display the matching category in both Expand View and Create & Update.

Requested Part Number:
7000119211

Requested Customer Part Number:
7000119211

Requested Description:
27659 DISC 7X7/8 80
987C CUBITRON II
FIBRE

Requested Manufacturer:
3M

Manufacturer Part Number:
7000119211
Abrasives

Vallen Part Number:
05114127659

Part Cross References (1)

Advanced Search

Create & Update

Part Options

Create New Part

Update Part

Clear All Fields

Manufacturer Part Number

7000119211

Vendor Part Number

7000119211

Vallen Part Number

Vallen Part Number

Cost

3.04200

Purchase UM Code

Purchase UM Code

Pack Quantity

100

Base UM Code

EA

Lead Time (Days)

14

Manufacturer

Code

51144

Name

3M

Vendor

Code

Vendor Code

Name

Vendor Name

Product Category

Code

100

Name

Abrasives

Product Line

Code

Product Line Code

Name

Product Line Name

Description 1

27659 DISC 7X7/8 80

Description 2

987C CUBITRON II FIBRE

Save

Cancel

Product Category fields in Create & Update

Ref #	Req. Part #	Req. MFR/VEN	Quoted Part #	Vallen MFR/VEN	Avail. Qty	Req. Qty	Unit Price	Quote Price	Cost	Quote Cost	GP%	Extended Price	Status
8	RPN 7000119211 CPN 7000119211 27659 DISC 7X7/8 80 9 87C CUBITRON II FIBRE	MFR 3M NO VENDOR	MPN 7000119211 VALLER PN 05114127659 VENDOR PN 7000119211 27659 DISC 7X7/8 80 987C CUBITRON II FIBRE UOM EA	MFR 3M CODE 51144 NOTES EDI M Vendor Notes	100	20 30 40 50	\$3.55000	3.55000 3.55000 3.55000 3.55000	- - - -	REPLACEMENT COST 3.04200 REPLACEMENT COST \$3.04200 3.04200 3.04200 3.04200	14.31 Set 14.31 Set 14.31 Set 14.31 Set	\$71.00000 \$106.50000 \$142.00000 \$177.50000	NEW
<div> <div>Description: 27659 DISC 7X7/8 80 987C CUBITRON II FIBRE</div> <div> <div>Part Notes:</div> <div>Product Category: Abrasives</div> <div>Product Category Code: 100</div> <div>Product Line: -</div> <div>Product Line Code: -</div> <div>Company Wide Inventory: Temporarily Out Of Stock</div> <div>Stocking Status: S</div> <div>MSDS Code: N</div> </div> <div> <div>Hazmat Code: -</div> <div>Lead Time: 14</div> <div>List Price: 5.07000</div> <div>Customer Resale Price: -</div> <div>Stand. Package Size: 100</div> <div>Purchase UM: -</div> <div>Taxable: Y</div> <div>Non-Tax Type: -</div> <div>Image Link: -</div> </div> <div> <div>SPA Cost: -</div> <div>SPA Type: -</div> <div>Replacement Cost: 3.04200</div> <div>Cost Change Date: 2021/09/02</div> <div>Standard Cost: 3.04200</div> <div>Customer Last Price: -</div> <div>Vendor Type: Manufacturer</div> <div>Vendor Packaging: -</div> <div>Vendor Notes: EDI</div> </div> <div> <div>Misc. 1: -</div> <div>Misc. 2: -</div> <div>Misc. 3: -</div> <div>Misc. 4: -</div> </div> </div>													

Product Category fields in Expand View

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1.2.2 New Fields in Response

1.2.2.1 is_nonstock

The new is_nonstock field is not included in the Get-Price-Availability and Get-Nonstock-Price API requests, but will be sent back to VallenIQ in the response we receive from both APIs whenever they are called by our application.

The purpose of this new field is to identify whether a part number is a stocking or non-stock item.

This information is required for two purposes:

- To determine how VallenIQ behaves when line item costs are changed
- To determine price and cost overrides for line items when they are added to an order

Stocking vs. Non-Stock Items

Parts are considered stocking items when:

- They have a valid Vallen part number
- And they have a stocking status of “S” (stocking)

Parts are considered non-stock when:

- They have a valid Vallen part number and a stocking status of “C” (catalog)
- Or the item does not have a valid Vallen part number (true non-stock)

However, there are scenarios in which a part can be a stocking item, but is not stocked in the chosen warehouse in the quote header.

In these scenarios, the item will be considered non-stock, and the Get-Nonstock-Price API, instead of the Get-Price-Availability API will be used to populate pricing for the line item.

In order to conclusively identify whether a line item should be considered stocking or non-stock, when lines are refreshed and either APIs are called, a new is_nonstock field will be included in both API responses, that will let VallenIQ know whether the item is truly stocking or non-stock.

Once received, the is_nonstock value will be stored by Supplyframe and will be utilized for the two purposes stated in the section above.

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Price-Availability Sample Data - Stocking Item
owned by: Eugene Lee

Settings | Header | Edit History | Custom Export | Collapse

220024
Keystone Operating LLC
Project ID: 3171
Status: Open
Due Date: 2021/09/14
Team Lead: Shanna Gobel
Project Type: Blanket

Filter by Category (14)

Category	Count
Abrasives	12
Chemicals/Lube/Adhesives	3
Contractor Supplies	1
Electrical Products	1
Hand Tools	2
Ind Rubber Products	2
Maint Equip and Supplies	3
Material Handling Equip	4
Miscellaneous Products	3

Selecting 0 item(s) | Showing 60/60 results

Select All | Group Edit | Remove | Assign | Ref #

Ref #	Req. Part #	Req. MFR/VEN	Quoted Part #
1	RPN 56-5 CPN 512335 56-5 PLUG MALE	MFR ZSi- Foster Inc. NO VENDOR	MPN 56-5 VALLEN P/N 43254456-5 VALLEN CPN 512335 VENDOR P/N 56-5 56-5 PLUG MALE UCH EA Multiple Values Matched Suggested Parts Part Group Differences

Description: 56-5 PLUG MALE
Part Notes: -
Product Category: Pipe And Fittings
Prod. Category Code: 900
Prod. Line Code: 1
Prod. Line Description: FOSTER MANUFACTURING CO
Company Wide Inventory: Temporarily Out Of Stock
Stocking Status: S
MSDS Code: N

Hazn Lead
List Price: 5.450000
Customer Resale Price: 5.450000
Stand. Package Size: 10
Purchase UM: -
Taxable: Y
Non-Tax Type: -
Image Link: -

Replenishment Cost: 4.02170000
Cost Change Date: 2021/07/16
Standard Cost: 4.02170000
Customer Last Price: -
Vendor Type: Manufacturer
Vendor Packaging: -
Vendor Notes: 4302

Save Header | Cancel

Wed Sep 22 2021 21:03:07 GMT+0000 (Coordinated Universal Time) Refresh

A stocking item may not be stocked in the selected warehouse for your quote

Cost Update Scenarios

When line item costs are changed in VallenIQ, corresponding prices will also update for only non-stock items, and prices will not change for stocking items.

To determine if VallenIQ should ping the Get-Nonstock-Price API, the application will reference the value of the `is_nonstock` field.

Price & Cost Overrides During Order Creation

When line items are selected for Convert to Order, VallenIQ will use the stored `is_nonstock` value for each selected line item, and include this value in the Quote-to-Order API request.

When Converting to Order, the `is_nonstock` value will provide SX.e direction on whether to apply price and cost overrides for the order.

Note that the stocking status of line items will also be listed in the Convert to Order workflow for ease of reference:

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Convert To Order

Order Validation

Review the details of your order below. Please note that once your order is submitted, all changes must be completed in SXe.

Key

Missing Required

Invalid

Order Details

Owner	PO #	Cust. #	Warehouse	Ship To Suffix	Req. Ship Date	Promise Date	Proposal #	Ship Instructions
Eugene Lee	166423	231752	CD32	01	-	-	20211207	-

Item Details

Ref. #	Cust. Product Code	Product	Description	Vendor Code	Qty	Price	Cost	UOM	Comments	Prod. Line	Stocked	VIQ Ref.
8	7000119211	05114127659	27659 DISC 7X7/8 80 987C	51144	20	3.55000	3.04200	EA	-	-	Yes	3720-8

Submit

Back

New "Stocked" field in Order Validation modal

2. Convert to Order Updates

A number of changes were made to the Quote-to-Order API used by the Convert to Order feature, which was originally released in v1.18. These updates will mainly affect the CSR team and not the Q&S team.

2.1 Request Parameters

In this release, two additional request parameters were added for the Quote-to-Order API:

- price
- is_nonstock

A full summary of the data fields the Quote-to-Order API will use when converting lines to orders are listed in the table below:

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Field Name	Format	Description	Sample Value	VIQ Source Field	Notes
customer_number	Decimal	The customer who placed the order	121917	Customer Account Number in header	Required
ship_to	A8	Customer's ship to location	01	Ship To Suffix in header	Required
purchase_order_number	A21	Customer's Purchase Order Number	SPRO-PO02976	No Field in VIQ, must come from Vallen	Required
taken_by	A4	The operator that enters the order. This defaults to the log on operator initials	JNJ	Owner of quote	Optional
warehouse	A4	The warehouse from which product is sold	DWES	Warehouse in header	Required
request_ship_date	MM/DD/Y Y	The date the customer requests shipment of the line	10/13/21	Can be populated or left empty in Convert to Order workflow	Recommended, defaults to today or next business day if null on the order header
promise_date	MM/DD/Y Y	The date the order was promised to the customer. The customer will request the order on the requested ship date.	10/29/21	Can be populated or left empty in Convert to Order workflow	Recommended, defaults to 10 days from requestShipDate on the submitted order header.

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ship_to_instructions	A30	The shipping instructions , defaulted from the customer record.	Plant 5 Dept 078 5F60 - 20490	Located in customer_contact table, associated with Customer Account Number and Ship To Suffix	Optional
customer_product_code	A24	Customer part number	WHT-01615	Customer Part Number (CPN) in Req. Part # column	Recommended, but required if sellerProductCode is null
product	A24	Part Number	504708HYP220937	Vallen Part Number, Manufacturer Part Number, or Vendor Part Number in Quoted Part # column	Recommended, but required if buyerProductCode is null
description	A24	Product Description	HYP220937 ELECTRODE	Description in Quoted Part # column	Required, but it is optional in certain cases
comments	A4000	Internal comments about the quoted line item	CAITLYN RECEIVED QT ON THIS TOOL 5 DAYS AGO FOR MILIPORE PROJECT	Internal Comment for line item	Optional
quantity	Decimal	The quantity of the product that was requested by the customer	7	Selected Req. Qty value	Required, but it does default to 1 if null on the submitted order.
price	Decimal	The quoted price to the customer	13.00	Quote Price value associated with selected Req. Qty value	Required
cost	Decimal	The product cost of the line item	11.17	Quote Cost column value associated with selected Req. Qty value	Required
uom	A4	The unit describes the selling unit of measure	EA	UOM in Quoted Part # column	Required, but it is optional in certain cases

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vendor_number	Decimal	The vendor number field describes the source vendor for the line item	401586	Vendor Code or MFR Code in Vallen MFR/VEN column	Required, but it is optional in certain cases
is_nonstock	A1	Used to identify a non-stock item	1	Only used when the item is a non-stock (1), comes from Get-Price-Availability or Get-Nonstock-Price APIs	Required for non-stocks and the tag is not used for stock products.
viq_reference	Text	The VIQ project id and reference number used to hook back the response to VIQ	123-45	Project ID - Ref # of line item	Required
company_number	Integer	Identifies the Company under which the record was created	1	Company Code - Will always be "1" for Vallen North America	Required, but it does default to 1 if null on the submitted order.
proposalno	Decimal	Proposal Number	20210816	Today's date	Recommended

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2.2 Select Line Item Quantity Break When Converting to Order

In the v1.18 release, when lines were selected to add to an order, the system would by default select the first Requested Quantity break (and associated price and cost break).

Vallen CSR users can now select which Requested Quantity break, as well as the price and cost associated with the break, to use when converting lines to orders.

2.2.1 Individual Lines

To select which quantity break you'd like to use for individual line items when creating new orders, select the appropriate Requested Quantity break for each line item:

Ref #	Req. Part #	Req. MFR/VEN	Quoted Part #	Vallen MFR/VEN	Avail. Qty	Req. Qty	Unit Price	Quote Price	Cost	Quote Cost	GP %	Extended Price	Status
10	RPN 490026 CPN G91500100 3 49002 WD-40 8OZ A EROSOL SMART ST RAW LOW VOC 25 CUST LINE # 10	MFR WD-40 Company NO VENDOR	MPN 490026 VALLER PN 07956749002 VALLER CPN G91500100 VENDOR PN 490026 49002 WD-40 8OZ AER OSOL SMART STRAW L OW VOC 25 UOM EA Multiple Vallen Matches Suggested Parts Part Cross References	MFR WD-40 COMPANY CODE 79667 Mfr/Vendor Notes	58	57	\$3.79000	3.79000	\$3.35000 STANDARD COST NO RPO 100% QH OH	3.35000	11.61 %	\$216.03000	[Info] [Print] [Copy]
						35		3.79000		3.35000			
						55		3.79000		3.35000			
						75		3.79000		3.35000			
						95		3.79000		3.35000			
11	RPN 401742601 00 CPN G51106500 5 60099 BLADE MART OR BLUNT TIP F101 106 CUST LINE # 11	MFR Martor USA NO VENDOR	MPN 60099.70 VALLER PN 4017426099.7 VALLER CPN G51106500 VENDOR PN 60099.70 60099 BLADE MARTOR BLUNT TIP F101106 UOM EA Multiple Vallen Matches Part Cross References Last Price	MFR MARTOR USA CODE 401742 Mfr/Vendor Notes	110	105	\$0.53000	0.53000	\$0.49641 STANDARD COST NO RPO 100% QH OH	0.49641	6.34 %	\$55.65000	[Info] [Print] [Copy]
						100		0.53000		0.49641			
						120		0.53000		0.49641			
						140		0.53000		0.49641			
						160		0.53000		0.49641			

Selection options available in Req. Qty column

When a specific quantity break is selected, VallenIQ will also utilize the price and cost associated with the break when converting the lines to order.

Using the example below, if the highlighted Req. Qty's are added to an order:

Ref #	Req. Part #	Req. MFR/VEN	Quoted Part #	Vallen MFR/VEN	Avail. Qty	Req. Qty	Unit Price	Quote Price	Cost	Quote Cost	GP %	Extended Price	Status
10	RPN 490026 CPN G91500100 3 49002 WD-40 8OZ A EROSOL SMART ST RAW LOW VOC 25 CUST LINE # 10	MFR WD-40 Company NO VENDOR	MPN 490026 VALLER PN 07956749002 VALLER CPN G91500100 VENDOR PN 490026 49002 WD-40 8OZ AER OSOL SMART STRAW L OW VOC 25 UOM EA Multiple Vallen Matches Suggested Parts Part Cross References	MFR WD-40 COMPANY CODE 79667 Mfr/Vendor Notes	58	57	\$3.79000	3.65001	\$3.32009 STANDARD COST NO RPO 100% QH OH	3.32009	9.04 %	\$208.05057	[Info] [Print] [Copy]
						35		3.66284		3.35000			
						55		3.65190		3.31226			
						75		3.61220		3.30120			
						95		3.58399		3.28100			
11	RPN 401742601 00 CPN G51106500 5 60099 BLADE MART OR BLUNT TIP F101 106 CUST LINE # 11	MFR Martor USA NO VENDOR	MPN 60099.70 VALLER PN 4017426099.7 VALLER CPN G51106500 VENDOR PN 60099.70 60099 BLADE MARTOR BLUNT TIP F101106 UOM EA Multiple Vallen Matches Part Cross References Last Price	MFR MARTOR USA CODE 401742 Mfr/Vendor Notes	110	105	\$0.53000	0.53000	\$0.49641 STANDARD COST NO RPO 100% QH OH	0.49641	6.34 %	\$55.65000	[Info] [Print] [Copy]
						100		0.53000		0.49641			
						120		0.53000		0.49641			
						140		0.53000		0.49641			
						160		0.53000		0.49641			

Selected Req. Qty and associated Quote Price and Quote Cost values

The associated Quote Price and Quote Cost values will also be carried over into the Convert to Order workflow:

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Convert To Order

Order Validation

Review the details of your order below. Please note that once your order is submitted, all changes must be completed in SXe.

Key

Missing Required

Invalid

Order Details

Owner	PO #	Cust. #	Warehouse	Ship To Suffix	Req. Ship Date	Promise Date	Proposal #	Ship Instructions
CSR Admin 1	10092853	100777	Y880	01	10/25/21	10/29/2021	20211012	Collect 008600589

Item Details

Ref. #	Cust. Product Code	Product	Description	Vendor Code	Qty	Price	Cost	UOM	Comments	Prod. Line	Stocked	VIQ Ref.
10	G915001003	07956749002	49002 WD-40 8OZ AEROSOL	79567	55	3.65190	3.31226	EA	-	1	Yes	3325-10
11	G511065005	40174260099.7	60099 BLADE MARTOR BLUNT	401742	100	0.53000	0.49641	EA	-	1	Yes	3325-11

Submit

Back

Qty, Price, and Cost values should align with selected quantity break from Project View

Note that the Usage quantity as well as the related price and cost cannot be selected and cannot be added to an order. Only Req. Qty breaks 1-4 and their price / cost values can be selected for an order.

Ref #	Req. Part #	Req. MFR/VEN	Quoted Part #	Valien MFR/VEN	Avail. Qty	Req. Qty	Unit Price	Quote Price	Cost	Quote Cost	GP %	Extended Price	Status
76	RPN 7000119211	NO MFR NO VENDOR	MPN 7000119211 VALLEN P/N 0114127859 VENDOR P/N 7000119211 27859 DISC 70078 80 987C CUBBITRON 8 FIBRE UOM EA	MFR 3M CODE 01144 NOTES E01 # 10176 Vendor Notice	100	25	\$3.55000	3.55000	3.55000	3.04200	14.31 %	\$301.75000	
						30		3.55000	3.55000	3.04200	14.31 %	\$106.50000	
						50		3.55000	3.55000	3.04200	14.31 %	\$177.50000	
						70		3.55000	3.55000	3.04200	14.31 %	\$248.50000	
						90		3.55000	3.55000	3.04200	14.31 %	\$319.50000	

Quantities, Quote Price, and Quote Cost Related to Usage cannot be selected for an order

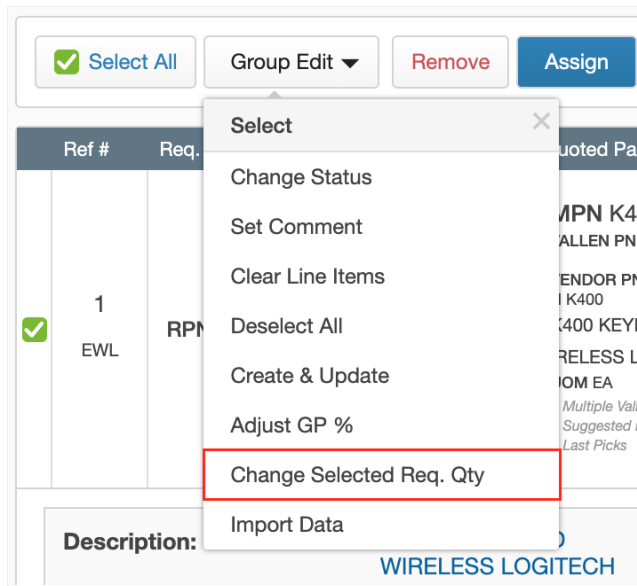
2.2.2 Group Edit

When creating new orders, to select which quantity break you'd like to use for multiple line items at once, select all line items that apply, navigate to the Group Edit dropdown, and click on the new "Change Selected Req. Quantity" button:

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17



Use this option to choose which Req. Qty to select for multiple lines at once

You may encounter scenarios where some of the selected line items do not have the same Req. Qty breaks. For example, in this screenshot Ref # 20 only has Req. Qty's 1-3, but Ref # 76 has Req. Qty's 1-4:

Ref #	Req. Part #	Req. MFR/VEN	Quoted Part #	Vallen MFR/VEN	Avail. Qty	Req. Qty	Unit Price	Quote Price	Cost	Quote Cost	GP %	Extended Price	Status
20	RPN 7000119 169 CPN 7000119 169 27414 DISC ROL L 6IN P80A 216U GOLD STIKIT 12 S/RL	MFR 3M NO VENDOR	MPN 70001191 69 VALLLEN PN 051141274 14 VENDOR PN 70001191 69 27414 DISC ROLL 6I N P80A 216U GOLD STIKIT 125/RL UOM RL Part Cross References	MFR 3M CODE 51144 NOTES EDI Mfr Vendor Notes	10	<div><div></div>5</div> <div><div></div>7</div> <div><div></div>9</div>	\$85.93000	<div>85.93000Set</div> <div>85.93000Set</div> <div>85.93000Set</div>	<div>REPLACEMENT COST \$73.68000</div> <div>73.68000Set</div> <div>73.68000Set</div> <div>73.68000Set</div>	<div>14.2% 14.2% 14.2%</div>	<div>\$429.65000</div> <div>\$601.51000</div> <div>\$773.37000</div>	VAL	
76	RPN 7000119 211	NO MFR NO VENDOR	MPN 70001192 11 VALLLEN PN 051141276 59 VENDOR PN 70001192 11 27659 DISC 7X7/8 8 0 987C CUBITRON I I FIBRE UOM EA Part Cross References	MFR 3M CODE 51144 NOTES EDI Mfr Vendor Notes	100	<div><div></div>85</div> <div><div></div>30</div> <div><div></div>50</div> <div><div></div>70</div> <div><div></div>90</div>	\$3.55000	<div>3.55000Set</div> <div>3.55000Set</div> <div>3.55000Set</div> <div>3.55000Set</div> <div>3.55000Set</div>	<div>REPLACEMENT COST \$3.04200</div> <div>3.04200Set</div> <div>3.04200Set</div> <div>3.04200Set</div> <div>3.04200Set</div>	<div>14.31% 14.31% 14.31% 14.31% 14.31%</div>	<div>\$301.75000</div> <div>\$106.50000</div> <div>\$177.50000</div> <div>\$248.50000</div> <div>\$319.50000</div>	VAL DU	

Req. Qty mismatches for selected line items

If both lines are selected and Req. Qty 4 is chosen in the “Select Requested Quantity” modal, the following error message will appear:

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×

Select Requested Quantity

Only selected groups that have the chosen Requested Quantity were updated

☐ Deselect Req. Qty
 ☐ Req. Qty 1
 ☐ Req. Qty 2
 ☐ Req. Qty 3
 ☒ Req. Qty 4

Save

Cancel

System message for "Select Requested Quantity" modal

After exiting and returning back to the quote, you will notice that VallenIQ has only selected the specified Req. Qty break for the line item(s) that have that Req. Qty.

Ref #	Req. Part #	Req. MFR/VEN	Quoted Part #	Vallen MFR/VEN	Avail. Qty	Req. Qty	Unit Price	Quote Price	Cost	Quote Cost	GP %	Extended Price	Status		
20	EWL	RPN 7000119 169 CPN 7000119 169 27414 DISC ROL L 6IN P80A 216U GOLD STIKIT 12 5/RL	MFR 3M NO VENDOR	MPN 70001191 69 VALLIN PN 051141274 14 VENDOR PN 70001191 69 27414 DISC ROLL 6I N P80A 216U GOLD STIKIT 125/RL UOM RL Part Cross References	10	<input type="radio"/> 5	\$85.93000	<input type="radio"/> 5	85.93000	Set	REPLACEMENT COST \$73.68000 PAC EDC GH ON REED	<input type="radio"/> 5	14.2%	\$429.65000	VAL
						<input type="radio"/> 7		<input type="radio"/> 7							
						<input type="radio"/> 9		<input type="radio"/> 9							
76	EWL	RPN 7000119 211	NO MFR NO VENDOR	MPN 70001192 11 VALLIN PN 051141276 59 VENDOR PN 70001192 11 27659 DISC 7X7/8 8 0 987C CUBITRON I I FIBRE UOM EA Part Cross References	100	<input type="radio"/> 85	\$3.55000	<input type="radio"/> 85	3.55000	Set	REPLACEMENT COST \$3.04200 PAC EDC GH ON REED	<input type="radio"/> 85	14.31%	\$301.75000	VAL
						<input type="radio"/> 30		<input type="radio"/> 30							
						<input type="radio"/> 50		<input type="radio"/> 50							
						<input type="radio"/> 70		<input type="radio"/> 70							
						<input checked="" type="radio"/> 90		<input checked="" type="radio"/> 90							

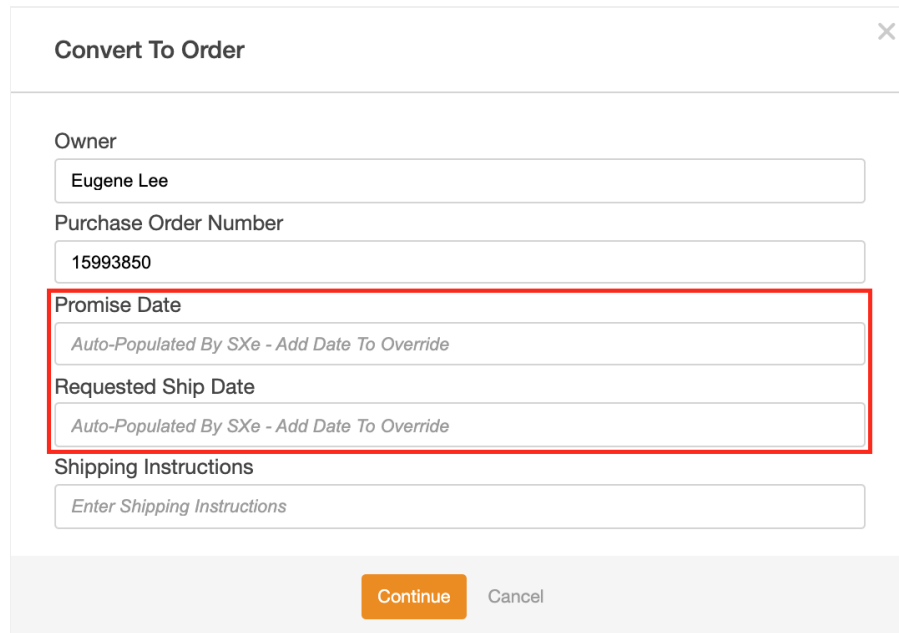
Req. Qty 4 can only be selected for Ref # 76

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2.3 Requested Ship & Promise Date

In the Convert to Order workflow, the Promise Date and the Requested Ship Date are not required fields, and will be automatically populated by SXe if left empty.



The screenshot shows a 'Convert To Order' form with the following fields:

- Owner: Eugene Lee
- Purchase Order Number: 15993850
- Promise Date: Auto-Populated By SXe - Add Date To Override
- Requested Ship Date: Auto-Populated By SXe - Add Date To Override
- Shipping Instructions: Enter Shipping Instructions

The Promise Date and Requested Ship Date fields are highlighted with a red box. At the bottom of the form are 'Continue' and 'Cancel' buttons.

Updated Promise Date and Requested Ship Date behavior

However, users can choose to add dates if appropriate. When adding dates for these two fields, the Requested Ship Date cannot be greater than the Promise Date.

If users attempt to add a Requested Ship Date that is later than the chosen Promise Date, VallenIQ will now change the Promise Date to be the same as the Requested Ship Date.

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2.4 Cascading Logic for Product Field

This cascading logic relates to the Product field in the Convert to Order workflow that will be sent in the Quote-to-Order API request:

Convert To Order

Order Validation

Review the details of your order below. Please note that once your order is submitted, all changes must be completed in SxS.

Key

Missing Required

Invalid

Order Details

Owner	PO #	Cust. #	Warehouse	Ship To Suffix	Req. Ship Date	Promise Date	Proposal #	Ship Instructions
Eugene Lee	232533	231752	CD32	01	-	-	20211208	-

Item Details

Ref. #	Cust. Product Code	Product	Description	Vendor Code	Qty	Price	Cost	UOM	Comments	Prod. Line	Stocked	VIQ Ref.
1	7000148158	05114127655	27655 DISC 7X7/8 60 987C	51144	200	3.76000	5.25000	DI	-	-	Yes	3720-1
3	7000000756	04801105532	05532 DISC 3XNH	51144	500	1.99000	1.70400	EA	test	-	Yes	3720-3
57	02649	69178102649	02649 ENDMILL .047 4FL S	691781	250	19.88000	17.05000	EA	-	-	No	3720-57

Submit

Back

Product field in Convert to Order workflow

There can be a number of part numbers that can be associated with a line item:

- Vallen Part Number (Vallen PN)
- Customer Part Number (CPN)
- Vendor Part Number (Vendor PN)
- Manufacturer Part Number (MPN)

Ref #	Req. Part #	Req. MFR/VEN	Quoted Part #	Vallen MFR/VEN	Avail. Qty	Req. Qty	Unit Price	Quote Price	Cost	Quote Cost	GP %	Extended Price	Status
1	CPN 568837 CPN ED1335 93	NO MFR NO VENDOR	MPN 323 VALLIN PN 697041323 VENDOR PN 323 323 13/16X3 OGRS 2W FLAT AJAX TOO L WORKS UOM EA Multiple Vallen Matches Suggested Parts Last Picks	MFR AJAX TOOL WORKS INC CODE 697041 MFR/Vendor Notes	0	12 24 48 60	\$15.63000	15.63000 Set 15.63000 Set 15.63000 Set 15.63000 Set	REPLACEMENT COST \$10.82000 \$10.82000 \$10.82000 \$10.82000	10.82000 Set 10.82000 Set 10.82000 Set 10.82000 Set	30.77 % 30.77 % 30.77 % 30.77 %	\$187.56000 \$375.12000 \$750.24000 \$937.80000	WVL

Part number types for line items

When populating the product field that will be submitted to the Quote-to-Order API, VallenIQ will determine which part number to use based on the following logic:

- Use Vallen PN if it exists for line item
- If Vallen PN does not exist, use CPN
- If CPN does not exist, use Vendor PN
- If VPN does not exist, use MPN

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3. Adjusted Conversion Factor Cost

When the Price & Warehouse Inventory setting is selected for your quote and Base UM Code is changed for a stocking item, cost, price, and available quantity may update to coincide with the new unit of measure.

There are restrictions however that affect whether or not cost, price, and available quantity will change when Base UM Code is updated:

- These fields will never change when the Create New Part or Group Edit Create New Part features are used and should only change when Update Part is used
- These fields will only change when Base UM Code is updated for stocking items, not non-stock items
- These fields will only change when the new selected Base UM Code has a different conversion factor associated with it. If the new Base UM Code has the same conversion factor as the original, the cost, price, and available quantity should not change
- If the Price & Warehouse Inventory setting is not selected for the quote, only the cost can update; the unit price and available quantity should not change because VallenIQ will not ping the Get-Price-Availability API

3.1 Changing Base UM Code

Change the Base UM Code in the Create & Update modal by selecting the highlighted field in the screenshot below.

Requested Part Number:

4310

Requested Customer Part Number:

568371

Manufacturer Part Number:

C22740
Cutting Tools

Vallen Part Number:

697334C22740

Did you mean? (1)

Part Cross References (53)

Advanced Search

Create & Update

Alternates

Part Options

Create New Part

Update Part

Clear All Fields

Manufacturer Part Number

C22740

Vendor Part Number

C22740

Vallen Part Number

Vallen Part Number

Cost

1.86

Purchase UM Code

Purchase UM Code

Pack Quantity

6

Base UM Code

EA

Lead Time (Days)

30

Manufacturer

Code

451984

Name

GREENFIELD INDUSTRIES

Vendor

Code

Vendor Code

Name

Vendor Name

Product Category

Code

500

Name

Cutting Tools

Product Line

Code

1

Name

Cleveland Twist Drill

Description 1

C22740 DRILL 1899 11/32

Description 2

JOBBER GP BLKX CLE

Save

Cancel

Base UM Code field in Create & Update

When the field is selected, all valid Base UM Codes will appear in a dropdown below. Note that the application will use the Vallen part number for this line item to look up valid Base UM Codes in the product_uom table in Vallen's master data.

Requested Part Number:

4310

Requested Customer Part Number:

568371

Manufacturer Part Number:

C22740
Cutting Tools

Vallen Part Number:

697334C22740

Did you mean? (1)

Part Cross References (53)

Advanced Search

Create & Update

Alternates

Part Options

Create New Part

Update Part

Clear All Fields

Manufacturer Part Number

C22740

Vendor Part Number

C22740

Vallen Part Number

Vallen Part Number

Cost

1.86

Purchase UM Code

Purchase UM Code

Pack Quantity

6

Base UM Code

Base UM Code

Lead Time (Days)

30

Manufacturer

Code

451984

Name

GREENFIELD INDUSTRIES

Vendor

Code

Vendor Code

Name

Vendor Name

Product Category

Code

500

Name

Cutting Tools

Product Line

Code

1

Name

Cleveland Twist Drill

Description 1

C22740 DRILL 1899 11/32

Description 2

JOBBER GP BLKX CLE

Save

Cancel

Valid Base UM Codes for current Vallen part number

Select a new value to change the unit of measure for this line item.

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3.2 Populating Cost Field in Create & Update Modal

Only when the new selected Base UM Code has a conversion factor that is different than the original, VallenIQ will multiply the conversion factor (not visible in the application) with the first cost that is available for the Vallen part according to the specified Cost Preferences (in Project Settings) for the quote.

Cost Preferences:

Specify which costs to auto-load for your line items.

☒ Rebate Cost

☒ Replacement Cost

☒ Standard Cost

☒ Last Quoted Cost

☒ Last Ordered Cost

Cost Preferences for quote

In this case, Vallen part number “697334C22740” does not have a Rebate Cost, but does have a Replacement Cost of 1.86.

VallenIQ will then use this value to multiply against the conversion factor for the new Base UM Code “PK”, which is 12, to arrive at the new adjusted cost of 22.32.

	part_id	company_code	alternate_uom	conversion_factor	uom_description
1	697334C22740	1	EA	1	1 EACH
2	697334C22740	1	PK	12	PACK = 12
3	697334C22740	1	PC	1	PC = 1 Each

Base UM Codes (“alternate_uom”) and associated conversion factors in Vallen master data

When this happens, the application will show “(Adjusted)” to the right of the field name.

Requested Part Number:
4310

Requested Customer Part Number:
568371

Manufacturer Part Number:
C22740
Cutting Tools

Valien Part Number:
697334C22740

Did you mean? (1)

Part Cross References (53)

Advanced Search

Create & Update

Alternates

Part Options

Create New Part

Update Part

Clear All Fields

Manufacturer Part Number

C22740

Vendor Part Number

C22740

Valien Part Number

Valien Part Number

Cost (Adjusted)

22.32

Purchase UM Code

Purchase UM Code

Pack Quantity

6

Base UM Code

PK

Lead Time (Days)

30

Manufacturer

Code

451984

Name

GREENFIELD INDUSTRIES

Vendor

Code

Vendor Code

Name

Vendor Name

Product Category

Code

500

Name

Cutting Tools

Product Line

Code

1

Name

Cleveland Twist Drill

Description 1

C22740 DRILL 1899 11/32

Description 2

JOBBER GP BLKX CLE

Save

Cancel

Adjusted Conversion Factor Cost in Cost field

If the conversion factor of the new Base UM Code is the same as the old value (“PC” for example), the value in the Cost field will not change, and “(Adjusted)” will not appear in the field name.

Note that if the Cost field was changed by the user without updating the Base UM Code, “(Adjusted)” will not appear to the right of the Cost field.

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3.3 Project View Updates

If the new Adjusted Conversion Factor Cost is saved:

- In the Cost column, the system will:
 - Display the new adjusted cost
 - Display “Adjusted Cost” text above the column value
 - Display a new “AC” flag
- In the Quote Cost column, the system will:
 - Display the new Adjusted Cost in all cost breaks

Ref #	Req. Part #	Req. MFR/VEN	Quoted Part #	Vallen MFR/VEN	Avail. Qty	Req. Qty	Unit Price	Quote Price	Cost	Quote Cost	GP %	Extended Price	Status	
2 EWL	RPN 4310 CPN 568371	NO MFR NO VENDOR	MPN C22740			<div><div></div><div></div><div></div><div></div></div>								
			WALLEN PN 697334C22740	MFR GREENFIELD	6.67									
			WALLEN CPN 568371	INDUSTRIES										
			VENDOR PN C22740	CODE 451984										
			C22740 DRILL 1899 11/ 32 JOBBBER GP BLKOK CLE UOM PK											
						20 30 40 50	\$25.32000	<div><div>25.32000</div><div>Set</div></div> <div><div>25.32000</div><div>Set</div></div> <div><div>25.32000</div><div>Set</div></div> <div><div>25.32000</div><div>Set</div></div>	<div>ADJUSTED COST</div> <div>\$22.32000</div> <div><div>FEE</div><div>RPC</div><div>3%</div><div>OH</div><div>PK</div></div>	<div>REPLACEMENT COST</div> <div>22.32000</div> <div>Set</div>	11.85 % 11.85 % 11.85 % 11.85 %	\$506.40000 \$759.60000 \$1,012.80000 \$1,266.00000	<div>VAL</div> <div>DU</div>	<div><div></div><div></div><div></div></div>

Line with Adjusted Conversion Factor Cost

Ref #	Req. Part #	Req. MFR/VEN	Quoted Part #	Vallen MFR/VEN	Avail. Qty	Req. Qty	Unit Price	Quote Price	Cost	Quote Cost	GP %	Extended Price	Status
4 EVL	RPN 4310 CPN 568371	NO MFR NO VENDOR	MPN C22740 WALLEN PN 697334C22740 WALLEN CPN 568371 VENDOR PN C22740 C22740 DRILL 1899 11/ 32 JOBBBER GP BLKOC CLE UOM EA <div>• Suggested Parts • Part Cross References</div>	MFR GREENFIELD INDUSTRIES CODE 451984 # MFR/Vendor Notes	80	<div><div></div><div></div><div></div><div></div></div> <div>20 30 40 50</div>	\$2.11000	<div>2.11000</div> <div>Set</div>	<div>REPLACEMENT COST</div> <div>\$1.86000</div> <div>RE PLAC</div> <div>RE: QH: QH</div> <div>\$1.86000</div> <div>Set</div>	<div>1.86000</div> <div>Set</div>	<div>11.85</div> <div>%</div>	\$42.20000	<div>VAL</div> <div>DU</div> <div></div>
						<div>2.11000</div> <div>Set</div>		<div>1.86000</div> <div>Set</div>		<div>11.85</div> <div>%</div>	\$63.30000		
						<div>2.11000</div> <div>Set</div>		<div>1.86000</div> <div>Set</div>		<div>11.85</div> <div>%</div>	\$84.40000		
						<div>2.11000</div> <div>Set</div>		<div>1.86000</div> <div>Set</div>		<div>11.85</div> <div>%</div>	\$105.50000		
						<div>2.11000</div> <div>Set</div>		<div>1.86000</div> <div>Set</div>		<div>11.85</div> <div>%</div>			

Original Line

Additionally, if the Price & Warehouse Inventory setting is selected, VallenIQ will use the Adjusted Cost value in the Cost column to call the Get-Price-Availability API (Get-Nonstock-Price API will never be called because this feature only works for stocking items).

The Get-Price-Availability API will then return a new Unit Price. This value will update the Unit Price column, as well as all breaks in the Quote Price column.

The Get-Price-Availability API will also return a new Avail. Qty as well, which will be reflected in the line item.

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3.4 Edit History

If the Base UM Code is changed to one that has a different conversion factor than the original, Edit History events will describe the changes that were made to your line item.

Requested Part Number:
4310

Requested Customer Part Number:
568371

Manufacturer Part Number:
C22740
Cutting Tools

Valien Part Number:
697334C22740

×

Line Item Edit History (7)

Ref #	Event	History	User	Date and Time
2	Updated Unit Price	Unit Price was changed from \$2.11000 to \$25.32000	Eugene Lee	2021/12/08 at 5:52 PM EST
2	Updated Available Quantity	Available Quantity was changed from 80 to 6.67	Eugene Lee	2021/12/08 at 5:52 PM EST
2	Updated Cost Based On Base UM Code	Cost was updated: <ul style="list-style-type: none">Replacement Cost \$1.86000 to Adjusted Conversion Factor Cost \$22.32000	Eugene Lee	2021/12/08 at 5:52 PM EST
2	Line Was Updated Using Create & Update	1. Cost: \$1.86000 to \$22.32000 2. Base UM Code: ea to PK	Eugene Lee	2021/12/08 at 5:52 PM EST
2	Updated Unit Price	Unit Price was changed from N/A to \$2.11000	Eugene Lee	2021/12/08 at 2:54 PM EST
2	Updated Available Quantity	Available Quantity was changed from N/A to 80	Eugene Lee	2021/12/08 at 2:54 PM EST
2	Added New Line Item	Added PN 4310 (CPN 568371)	Eugene Lee	2021/12/08 at 2:54 PM EST

Close

Edit History events for Adjusted Conversion Factor Cost

Note that these history events will not appear if a Base UM Code with the same conversion factor as the last Base UM Code is selected.

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3.5 New Filter for Adjusted Cost

Within your projects, you can now filter line items by those that have an adjusted cost.

Eaton RFQ (76 Lines) • 2021/12/06 at 6:55 PM EST • Public • Shared
owned by: Eugene Lee

Settings Header Share Edit History Custom Export Expand Lines Hide Alternates Convert to Order Actions Filters

231752 Eaton Power Systems Project ID 3720 Status Open Due Date 2021/12/15 Yes Team Lead Greg Vinsant Project Type Blanket	Filter by Category (15) Abrasives Brushes Chemicals/Lube/Adhesives Contractor Supplies Cutting Tools Hand Tools Machine Tools and Accys Maint Equip and Supplies Material Handling Equip	Filter by Req. Manufacturer (31) 3M Apex Tool Group LLC BONDHUS CORPORATION Bessey Tools Inc. Black & Decker U.S. Inc. Brady Worldwide Inc. COLDER PRODUCTS CO. Chapin International Inc.	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 Replacement Cost With Rebate Cost With Standard Cost With Adjusted Cost	Filter By Assignee Eugene Lee - EWL	Filter by Status RC Status QU Status VAL Status DU Status TI Status NQ Status OS Status AL Status
--	---	--	--	--	--	---

Selecting 0 Item(s) Showing 76/76 results

Adjusted Cost filter appears in Filter by Cost Source

Eaton RFQ (76 Lines) • 2021/12/06 at 6:55 PM EST • Public • Shared
owned by: Eugene Lee

Settings Header Share Edit History Custom Export Expand Lines Hide Alternates Convert to Order Actions Filters

231752 Eaton Power Systems Project ID 3720 Status Open Due Date 2021/12/15 Yes Team Lead Greg Vinsant Project Type Blanket	Filter by Category (1) Abrasives	Filter by Req. Manufacturer (1) 3M	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 Replacement Cost With Rebate Cost With Standard Cost With Adjusted Cost	Filter By Assignee Eugene Lee - EWL	Filter by Status RC Status QU Status VAL Status DU Status TI Status NQ Status OS Status AL Status
--	-------------------------------------	---------------------------------------	--	--	--	---

Selecting 0 Item(s) Showing 2/2 results With Adjusted Cost x

Select All Group Edit Remove Assign Ref # Search line items

Ref #	Req. Part #	Req. MFR/VEN	Quoted Part #	Valen MFR/VEN	Avail. Qty	Req. Qty	Unit Price	Quote Price	Cost	Quote Cost	GP %	Extended Price	Status
5	RPN 700000039 3 CPN 700000039 3 27402 DISC 7X7/8 36 + BSC CUBITRON II FIBRE LAST PICK	MFR 3M NO VENDOR	MPN 7000000393 WALLEN PN 05114127402 VENDOR PN 7000000393 27402 DISC 7X7/8 36-9 BSC CUBITRON II FIBRE UOM PK + Multiple Valen Matches + Part Cross References + Last Picks + Updated Parts	MFR 3M CODE 91144 + Mfr/Vendor Notes	-	125 300 425	\$4.24000	4.24000 4.24000 4.24000	Set Set Set	REPLACEMENT COST ADJUSTED COST \$0.89400 78.08000 78.08000 78.08000	-1,741.1 % -1,741.1 % -1,741.1 %	\$530.00000 \$1,272.00000 \$1,802.00000	VAL
13	RPN 700000075 2 CPN 700000075 2 05528 SURF COND DISC TR SC-OR 28X NH A CRS 50IN	MFR 3M NO VENDOR	MPN 7000000752 WALLEN PN 0511405028 VENDOR PN 7000000752 05528 SURF COND DIS C TR SC-OR 28XNH A CRS 50IN UOM EA + Multiple Valen Matches + Part Cross References + Updated Parts	MFR 3M CODE 51144 + Mfr/Vendor Notes	-	15 30 45 60	\$1.04000	1.04000 1.04000 1.04000 1.04000	Set Set Set Set	REPLACEMENT COST ADJUSTED COST \$0.89400 0.89400 0.89400 0.89400	14.04 % 14.04 % 14.04 % 14.04 %	\$15.60000 \$31.20000 \$46.80000 \$62.40000	VAL

When Adjusted Cost filter is applied

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3.6 New Custom Export Fields

A number of new fields, including Adjusted Cost, have been added to Custom Export:

Export Preferences

Export Options

☒ User Export
 ☐ Customer Export

Select Columns for Export

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

☒ Adjusted Cost
 ☐ Assignee
 ☐ Available Quantity
 ☐ Base UM Code
 ☐ Company Wide Inventory
 ☒ Cost
 ☐ Cost Change Date
 ☒ Cost Type
 ☐ Customer Description
 ☐ Customer Last Price
 ☐ Customer Line #
 ☐ Customer Part Number
 ☐ Customer UOM
 ☐ Extended Price
 ☐ Extended Price Usage
 ☐ External Comment
 ☐ GP %
 ☐ GP % Usage
 ☐ Image Link
 ☐ Internal Comment
 ☒ Last Ordered Cost
 ☒ Last Quoted Cost

☐ 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
 ☐ Purchase UM Code
 ☐ Quantity Breaks
 ☐ Quote Cost Breaks
 ☐ Quote Cost Type
 ☐ Quote Cost Usage
 ☐ Quote Price Breaks
 ☐ Quote Price Usage
 ☒ Rebate Cost
 ☐ Ref #
 ☐ Replacement Cost

☐ Requested Manufacturer
 ☐ Requested Part Number
 ☐ Requested Vendor Name
 ☐ SPA Cost
 ☐ Standard Cost
 ☐ Standard Package Size
 ☐ Status
 ☐ Stocking Status
 ☐ Taxable
 ☐ Unit Price
 ☐ Usage
 ☐ 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. Cost

2. Cost Type

3. Adjusted Cost

4. Rebate Cost

5. Last Quoted Cost

6. Last Ordered Cost

New Custom Export columns

- **Cost:** Exports value in Cost column
- **Cost Type:** Exports name of selected cost type in Cost column
- **Adjusted Cost:** Exports adjusted costs for line items if available, export column is blank if not
- **Rebate Cost:** Exports rebate costs for line items if available, export column is blank if not
- **Last Quoted Cost:** Exports the Last Quoted Cost for line items in your list if available, export column is blank if not
- **Last Ordered Cost:** Exports the Last Ordered Cost for line items in your list if available, export column is blank if not

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4. Populate Default Warehouse Based on Ship To Suffix in Header

In the quote header, VallenIQ will use the chosen Customer Account and Ship To Suffix in the quote header to automatically populate the default warehouse for the quote.

For example, for customer “Eaton Power Systems 231752,” there are a number of Ship To Suffix options for this account:

Header

Customer Account:

Eaton Power Systems 231752

Ship To Suffix:

Add Ship To Suffix

Warehouse:

06: EATON-SO MILWAUKEE MGMT FEE

Contact Name:

05: EATON-NORTH STREET MGMT FEE

Contact Phone:

04: EATON-LINCOLN AVE MGMT FEE

Contact Email:

03: EATON-BADGER MGMT FEE

Contact Email:

02: Eaton Power Systems

Address:

Add Address

Project Lead:

Please Select

Project Due Date:

Fri Dec 10 2021

Project Type:

Please Select

Alternates Allowed:

Please Select

Project Description:

Add Project Description

0 of 1000 characters

Next

Back

Ship To Suffixes associated with selected Customer Account

After choosing a Ship To Suffix, VallenIQ will automatically look up the default warehouse related to the Customer Account + Ship To Suffix combination and add this to the Warehouse field.

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Customer Account:

Eaton Power Systems 231752

Ship To Suffix:

06: EATON-SO MILWAUKEE MGMT FEE ▾

Warehouse:

Vallen Brookfield WI CD32

Default warehouse is auto-populated

Although VallenIQ now automatically populates default warehouses, users are still able to look up and choose a different warehouse for the quote header.

5. "Set Usage to 1" Option in Preview and Confirm

This enhancement will mainly apply to the Q&S team, because the CSR team does not use the Usage column.

When using the Upload Project feature, users now have a new option to “Set Usage to 1.” This option will always be available for this column, regardless of the RFQ file that is selected.

Preview and Confirm Project Data

×

Project Name

Test RFQ

Select Sheet

Vallen ▾

Description	Manufacturer	Vendor	Usage	Quantity 1	Quantity 2
Vallen Description ▾	Vallen Manufacturer Name ▾	Select Vendor ▾	Set Usage to 1 ▾	Ignore Quantity 1 ▾	Ignore Quantity 2
PLT2S-C0 TIE CABLE BLK	Panduit Sales Corp	No Vendor found	1	No part quantity found	No part quantity fi
708SC GLOVE 100PCT COTTON MENS STD WEIGHT	Protective Industrial Products	No Vendor found	1	No part quantity found	No part quantity fi
1100-80D WARMERS HAND HOT ROD 40/PACK	OCCUNOMIX INTERNATIONAL LLC	No Vendor found	1	No part quantity found	No part quantity fi
22475 10X14 SIGN RIGHT ARROW THIS WAY OUT	Brady Worldwide Inc.	No Vendor found	1	No part quantity found	No part quantity fi
28IN REFL TRAFFIC CONE W/BLK BASE 4 6 COLLARS	JBC SAFETY PLASTIC INC.	No Vendor found	1	No part quantity found	No part quantity fi
FB-C3730 KNIT LINER WHIT THERMASTAT MACHINE	International Sourcing Co Inc	No Vendor found	1	No part quantity found	No part quantity fi

Next

Cancel

New option available for Usage column

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6. Rename "Price" Column to "Unit Price"

The "Price" column in the main quote page has been renamed to "Unit Price" to provide a more accurate description of the values that will appear here:

100721 - 4 (16 Lines) • 2021/10/07 at 7:38 PM EST • Public • Shared
owned by: CSR Admin 1

Settings | Header | Share | Edit History | Custom Export | Expand Lines | Hide Alternates | Convert to Order | Actions | Filters

100777
Trane Technologies- TRENTON ...
Project ID: 3325
Status: Open
Due Date: 2021/10/11
Team Lead: Shanna Gobel
Project Type: RFQ

Filter by Category (8)
Chemicals/Lubs/Adhesives 1
Cutting Tools 3
Electrical Products 2
Hand Tools 3
Maint Equip and Supplies 1
Miscellaneous Products 1
Power Tools 1
Safety Products 4

Filter by Req. Manufacturer (15)
Becton & Dickinson 1/1
Channellock 1/1
ENGERRIZER 1/1
Essendant 1/1
General Tools & Instr. 1/1
Honeywell Safety Products USA Inc 1/1
Ingersoll Rand 1/1

Filter by Intelligence
Multiple Valen Matches 7
Cross References 0
Part Cross References 8
Suggested Parts 5
Changed RPN 3
Changed CPN 0
Updated Parts 0
Created Parts 0
Last Picks 1

Filter by Cost Source
With Order History 13
With Quote History 11
With Replacement Cost 15
With Reusable Cost 0
With Standard Cost 16
With Adjusted Cost 0

Filter By Assignee
CSR Admin 1 - CSRADMIN1 16

Filter by Status
RC Status 7
ORD Status 0
QU Status 0
VAL Status 0
DU Status 0
TI Status 0
NQ Status 0
OS Status 0
AL Status 0

Selecting 0 item(s) | Showing 16/16 results

Select All | Group Edit | Remove | Assign | Ref # | Search line items

Total Price: 253,85450 | Total Cost: 231,81530 | Refresh All

Ref #	Req. Part #	Req. MFR/VEN	Quoted Part #	Valen MFR/VEN	Avail. Qty	Req. Qty	Unit Price	Quote Price	Cost	Quote Cost	GP %	Extended Price	Status
1	RPN 100-75 CPN AH4990 11090100RH2 LA NDYARD 1/2IN 2 PLY BLK/AN RH OOK2 CUST. LINE # 1	MFR United Scientific NO VENDOR	MPN 10075 VALLEN PN 091781100 75 VENDOR PN 10075 10075 BUR SA-3 C SAO3P UOM EA Multiple Valen Matches Suggested Parts	MFR ATA TOOLS INC CODE 502307 J&J Vendor Notes	0	220 100 200	\$9.66000	9.66000 9.66000 9.66000	STANDARD COST \$8.79620 RPC REC QH CH 8.79620 8.79620	8.79620 8.79620 8.79620	8.94 % 8.94 % 8.94 %	\$2,125.20... \$966.00000 \$1,932.00...	
2	RPN S2960H S CPN 3GG6H C1599	MFR Honeywell Safety	MPN S2960HS VALLEN PN 603390131 228 VENDOR PN S2960HS S2960HS UVEX HYP	MFR HONEYWELL SAFETY PRODUCTS USA	0	1,000 1,160	\$6.49000	6.49000 6.49000	STANDARD COST \$5.91220 5.91220	5.91220 5.91220	8.90 % 8.90 %	\$6,490.00... \$6,735.12...	

Help

Unit Price column

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7. Quote Totals Improvements

We've updated the quote totals that appear within your quotes and within the Dashboard tab in the Recent Projects section to now show a summary of both price as well as cost.

7.1 Within Quotes

Total Price and Total Cost will appear under the Filter Toolbar, to the left of the Refresh All button.

The screenshot displays the 'Eaton RFQ (76 Lines)' interface. At the top, it shows the project name, date, and ownership. Below this is a toolbar with various filters and actions. The main area is divided into several sections: 'Filter by Category (15)', 'Filter by Req. Manufacturer (31)', 'Filter by Intelligence', 'Filter by Cost Source', 'Filter by Assignee', and 'Filter by Status'. Each section contains a list of items with their respective counts. At the bottom, there is a table with columns for 'Ref #', 'Req. Part #', 'Req. MFR/VEN', 'Quoted Part #', 'Vallen MFR/VEN', 'Avail. Qty', 'Req. Qty', 'Unit Price', 'Quote Price', 'Cost', 'Quote Cost', 'GP %', 'Extended Price', and 'Status'. The table shows two line items. The first item has a 'Req. Qty' of 100, 200, 250, and 300. The second item has a 'Req. Qty' of 56. At the bottom right, there is a 'Help' button.

Ref #	Req. Part #	Req. MFR/VEN	Quoted Part #	Vallen MFR/VEN	Avail. Qty	Req. Qty	Unit Price	Quote Price	Cost	Quote Cost	GP %	Extended Price	Status
1	RPN 7000148 158 CPN 7000148 158 27655 DISC 7X7/ # 60 987C CUBIT RON II FIBRE	MFR 3M NO VENDOR	MPN 70001481 58 VALLIN PN 051141276 55 VENDOR PN 70001481 58 27655 DISC 7X7/8 6 0 987C CUBITRON I I FIBRE UCOM DI Part Cross References	MFR 3M CODE 51144 NOTES EDI Mfr/Vendor Notes	0	100 200 250 300	\$3.76000	3.76000 3.76000 3.76000 3.76000	3.76000 3.76000 3.76000 3.76000	3.22800 3.22800 3.22800 3.22800	14.1% 14.1% 14.1% 14.1%	\$376.00000 \$752.00000 \$940.00000 \$1,128.00...	VAL
	RPN 7000000 754		MPN 70000007 56										

Total Price and Total Cost within quotes

Only line items where a Req. Qty is selected will count towards Total Price and Total Cost calculations.

These totals are calculated as follows:

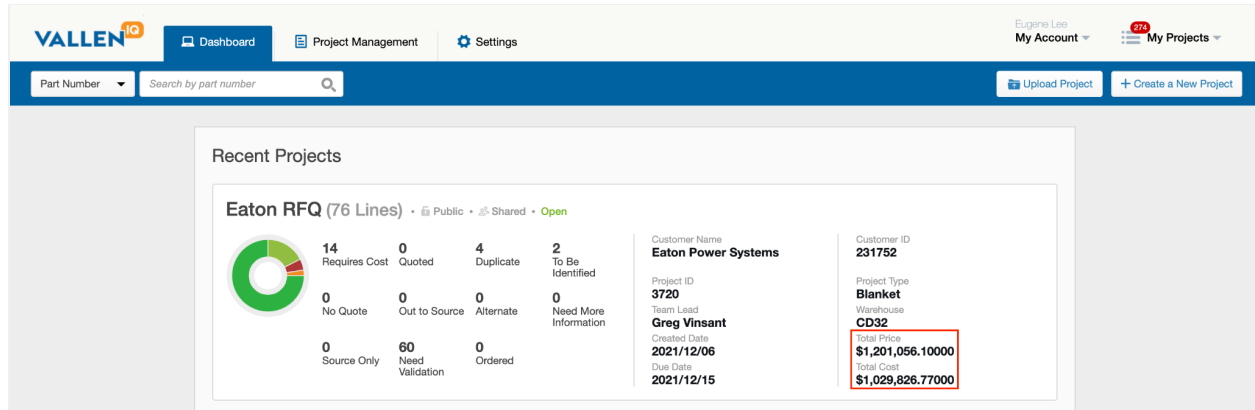
- **Total Price:** Sum of Extended Prices that correspond to selected Req. Qty breaks across all line items
 - For Ref #1 in the screenshot above, because Req. Qty 2 (200) is selected, VallenIQ will use Extended Price for qty 2 (\$752.00000) for the Total Price calculation
 - The app will add up the Extended Prices for all lines where a Req. Qty break is selected in the quote to populate the value for "Total Price"
- **Total Cost:** Sum of Extended Costs (quote cost * qty) that correspond to the selected Req. Qty breaks across all line items
 - In Ref #1, because Req. Qty 2 (200) is selected, VallenIQ will use Extended Cost \$645.60000 (\$3.22800*200) for the Total Price calculation

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- The app will add up the Extended Costs for all lines where a Req. Qty break is selected in the quote to populate the value for “Total Cost”

7.2 Recent Projects

The Total Price and Total Cost figures in Recent Projects will be calculated the same as the totals within your quotes.



Total Price and Total Cost in Recent Projects

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8. Show Suggestions Even With API Errors

<https://supplyframe.atlassian.net/browse/EFSVAL-1192>

This enhancement will only apply to CSR quotes where the Price & Warehouse Inventory setting is selected.

Previously, when API errors would occur, VallenIQ would not display suggestions for these line items:

Ref #	Req. Part Number	Req. MFR/Vendor	Quoted Part Number	Vallen MFR/Vendor	Avail. Qty	Req. Qty	Price	Quote Price	Cost	Quote Cost	GP %	Extended Price	Status
2	RPN 110542	NO MFR NO VENDOR	110542 MODEL 320CR CHEM RESISTANT TRIG GER SP UOM EA Multiple Vallen Matches Suggested Parts Part Cross References	MFR: TOLDO CORP CODE: 22169 MFR/Vendor Notes	28		\$1.55000		LAST QUOTED COST \$0.94000 SC OH OH LP SC				VAL
3	RPN G8442712	NO MFR NO VENDOR	No Vallen Match	No Vallen Match	-		-						
4	RPN 00162383	NO MFR NO VENDOR	No Vallen Match	No Vallen Match	-		-						
5	RPN PLATINUM GLAZE	NO MFR NO VENDOR	No Vallen Match	No Vallen Match	-		-						

Line items with API errors previously would not show part suggestions

The application will now show available suggestions even when errors occur from either the Get-Price-Availability or Get-Nonstock-Price API:

Ref #	Req. Part #	Req. MFR/VEN	Quoted Part #	Vallen MFR/VEN	Avail. Qty	Req. Qty	Unit Price	Quote Price	Cost	Quote Cost	GP %	Extended Price	Status
3	RPN 67405	NO MFR NO VENDOR	MPN 67405 Vallen PN 085937674 05 VENDOR PN 67405 67405 BLACK LUM BER CRAVO N Multiple Vallen Matches Updated Parts	No Vallen Match		10 20 30 40 50	\$1.80000	1.80000 Set 1.80000 Set 1.80000 Set 1.80000 Set 1.80000 Set	REPLACEMENT COST \$1.54000 RPN RPN RPN RPN RPN	1.54000 Set 1.54000 Set 1.54000 Set 1.54000 Set 1.54000 Set	14.44 % 14.44 % 14.44 % 14.44 % 14.44 %	\$18.00000 \$36.00000 \$54.00000 \$72.00000 \$90.00000	TI

Suggestions appear despite API errors

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9. Assign TI Status to Lines With API Errors

This enhancement will only apply to CSR quotes where the Price & Warehouse Inventory setting is selected.

Previously, when API errors would occur, VallenIQ would not assign statuses to these line items:

Vallen GET NONSTOCK PRICE API RETURNED A MISSING REQUIRED FIELD ERROR FOR FIELDS: PRODUCT, VENDOR, CODE, COST.													
3	RPN G8442712 LAST PICK	NO MFR NO VENDOR	No Vallen Match	No Vallen Match	-	-							
4	RPN 00162383	NO MFR NO VENDOR	No Vallen Match	No Vallen Match	-	-							
5	RPN PLATINUM GLAZE	NO MFR NO VENDOR	No Vallen Match	No Vallen Match	-	-							

VallenIQ would not assign statuses to line items that experience API errors

In order to be consistent with status assignment behavior for line items that do not auto-match to part numbers when the Price & Warehouse Inventory setting is not selected, the application will now assign the TI status to lines that experience API errors.

Ref #	Req. Part #	Req. MFR/VEN	Quoted Part #	Vallen MFR/VEN	Avail. Qty	Req. Qty	Unit Price	Quote Price	Cost	Quote Cost	GP %	Extended Price	Status	
Vallen GET PRICE AVAILABILITY API RETURNED A MISSING REQUIRED FIELD ERROR FOR FIELDS: SHIP_TO.														
1	RPN 01011	NO MFR NO VENDOR	MPN 01011 Vallen PN 11513540 VENDOR PN 01011 01011 031 ENDMILL 4F L B N SER M4BX 031X 1/8X.372 UOM EA	MFR KYOCERA SGS PRECISION TOOLS CODE 681781 MFR/Vendor Match	—	10 20 30 40 50	\$9.74000	9.74000 9.74000 9.74000 9.74000 9.74000	Set Set Set Set Set	SELECT COST TYPE 8.43350 8.43350 8.43350 8.43350 8.43350	Set Set Set Set Set	13.41 % 13.41 % 13.41 % 13.41 % 13.41 %	\$97.40000 \$194.80000 \$292.20000 \$389.60000 \$487.00000	TI
Vallen GET PRICE AVAILABILITY API RETURNED A MISSING REQUIRED FIELD ERROR FOR FIELDS: SHIP_TO.														
2	RPN 700000039 3 LAST PICK	NO MFR NO VENDOR	MPN 7000000393 Vallen PN 05114127402 VENDOR PN 7000000393 27402 DISC 7X7/8 36+ 9 82C CUBITRON II FIBRE UOM EA	MFR 3M CODE 51144 NOTES EDI MFR/Vendor Match Last Pick	—	10 20 30 40 50	\$4.24000	4.24000 4.24000 4.24000 4.24000 4.24000	Set Set Set Set Set	SELECT COST TYPE 3.63600 3.63600 3.63600 3.63600 3.63600	Set Set Set Set Set	14.25 % 14.25 % 14.25 % 14.25 % 14.25 %	\$42.40000 \$84.80000 \$127.20000 \$169.60000 \$212.00000	TI
Vallen GET NONSTOCK PRICE API RETURNED A MISSING REQUIRED FIELD ERROR FOR FIELDS: VENDOR_CODE.														
3	RPN 67405	NO MFR NO VENDOR	MPN 67405 Vallen PN 0860767405 VENDOR PN 67405 67405 BLACK LUMBER CRAYO N	No Vallen Match	—	10 20 30 40 50	\$1.80000	1.80000 1.80000 1.80000 1.80000 1.80000	Set Set Set Set Set	REPLACEMENT COST 1.54000 1.54000 1.54000 1.54000 1.54000	Set Set Set Set Set	14.44 % 14.44 % 14.44 % 14.44 % 14.44 %	\$18.00000 \$36.00000 \$54.00000 \$72.00000 \$90.00000	TI

TI status is assigned

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10. Gross Profit % Calculation

This enhancement will primarily apply to CSR quotes where the Price & Warehouse Inventory setting is selected.

The calculation of Gross Profit % (GP%) has been updated to the following:

- Quote Price - Quote Cost = Gross Profit
- (Gross Profit / Quote Price) * 100 = **Gross Profit %**

The columns that are used to calculate GP% are the following:

Ref #	Req. Part #	Req. MFR/VEN	Quoted Part #	Valien MFR/VEN	Avail. Qty	Req. Qty	Unit Price	Quote Price	Cost	Quote Cost	GP %	Extended Price	Status
11	CSRAMI N1	00 CPN G51106500 5 60099 BLADE MART OR BLUNT TIP F/101 106 CUST. LINE # 11	MFR Martor USA NO VENDOR	MPN 60099.70 VALLEN PN 401742601.7 VALLEN CPN G51106500.5 VENDOR PN 60099.70 60099 BLADE MARTOR BLUNT TIP F/101106 UOM EA Multiple Valien Matches Part Cross References Last Price		105 100 120 140 160	\$0.53000	0.53000 0.53000 0.53000 0.53000 0.53000	0.49641 0.49641 0.49641 0.49641 0.49641	6.34 6.34 6.34 6.34 6.34	% % % % %	\$55.65000 \$53.00000 \$63.60000 \$74.20000 \$84.80000	

Values in Quote Price and Quote Cost are used to calculate GP%

Two points to note regarding GP% calculations are:

- GP% will always be below 100%
- 0% GP% is valid - eg. when Quote Price and Quote Cost are the same

11. Frozen Top Bar While Scrolling

When scrolling through quotes, the following section will be frozen:

<div> <div> </div> <div> Dashboard Project Management Settings </div> <div> Engineer Lee My Account 274 My Projects </div> </div>													
<div> <div> Selecting 0 item(s) Showing 76/76 results </div> <div> <div> Select All Group Edit Remove Assign Ref # Search line items </div> <div> Total Price: 1,206,026.10000 Total Cost: 1,034,493.67000 Refresh All </div> </div> </div>													
Ref #	Req. Part #	Req. MFR/VEN	Quoted Part #	Valien MFR/VEN	Avail. Qty	Req. Qty	Unit Price	Quote Price	Cost	Quote Cost	GP %	Extended Price	Status
EWL	NOSE DISC CSRAMC TOP SIZED ROLL	ABRASIVES NO VENDOR	OLOR ED SETS KEYED ALIKE LOCK UOM KIT Multiple Valien Matches	CODE 754473 MFR Vendor Notes		300 400	\$192.411000	192.411000 192.411000		184.99000 184.99000	14.25 14.25	% %	\$57,723.00... \$76,964.00...
8	RPN 700011921 1 CPN 700011921 1 27669 DISC 7X7/8 80 96TC CUBITRON II FI BRE	MFR 3M NO VENDOR	MPN 7000119211 VALLEN PN 0114127669 VENDOR PN 7000119211 27669 DISC 7X7/8 80 98 7C CUBITRON II FIBRE UOM EA Multiple Valien Matches Part Cross References	MFR 3M CODE 61144 NOTES ED MFR Vendor Notes		20 30 40 50	\$3.550000	3.55000 3.55000 3.55000 3.55000	REPLACEMENT COST \$3.04200 REPLACEMENT COST \$3.04200 REPLACEMENT COST \$3.04200 REPLACEMENT COST \$3.04200	3.04200 3.04200 3.04200 3.04200	14.31 14.31 14.31 14.31	% % % %	\$71.00000 \$106.50000 \$142.00000 \$177.50000
9	RPN 67381 CPN 67381 67381 4-1/2X7/8 CU RVE PL AP DISC SG P CER CK 60GR	MFR Pford Inc. NO VENDOR	MPN 67381 VALLEN PN 01775867381 VENDOR PN 67381 PL AP DISC 6GP CER O X 60GR UOM EA Multiple Valien Matches Part Cross References	MFR PFERD INC. CODE 87758 MFR Vendor Notes		550 1,000 1,550 2,000	\$10.440000	10.44000 10.44000 10.44000 10.44000	REPLACEMENT COST \$8.95000 REPLACEMENT COST \$8.95000 REPLACEMENT COST \$8.95000 REPLACEMENT COST \$8.95000	8.95000 8.95000 8.95000 8.95000	14.27 14.27 14.27 14.27	% % % %	\$5,742.00000 \$10,440.00... \$16,182.00... \$20,880.00...

Highlighted section will be frozen as users navigate the lower sections of their quotes

This will allow users to see how many line items and filters are selected as they quote their line items, instead of requiring them to scroll to the top of the page to see these details.

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12. Part Selection & Add As Alternate Updates

We've updated the user interface for loading new parts into line items and how parts are added as alternates in the following tabs in Quoted Part Number modal:

- Multiple Vallen Matches
- Did you mean?
- Part Xref
- Advanced Search
- Last Pick

Requested Part Number:
818

Requested Customer Part Number:
818

Requested Description:
53048 PUNCH
AUTOMATIC CENTER
818 5/8x5

Requested Manufacturer:
L.S. Starrett Company

Manufacturer Part Number:
818
Quality Control Products

Vallen Part Number:
04965953048

Multiple Vallen Matches (34)

Did you mean? (104)

Part Cross References (72)

Advanced Search

Create & Update

Alternates

Vallen Part Number	MPN	VPN	MFR/Vendor	Vendor Code	Vendor Type	Description	S/C	Lead Time	Cost	Cost Change Date	
8183436402-J3	36402-J3	36402-J3	C H Hanson Co	81834	Manufacturer	STAMP HAND 1/8 HVY DTY	S	14	\$23.40000	2020/02/10	<div>Replace</div> <div>Add</div>
8183436402-H6	36402-H6	36402-H6	C H Hanson Co	81834	Manufacturer	STAMP HAND 1/8 HVY DTY	S	14	\$23.40000	2020/02/10	<div>Replace</div> <div>Add</div>
8183436402-H3	36402-H3	36402-H3	C H Hanson Co	81834	Manufacturer	STAMP HAND 1/8 HVY DTY	S	14	\$23.40000	2020/02/10	<div>Replace</div> <div>Add</div>
8183436402-E3	36402-E3	36402-E3	C H Hanson Co	81834	Manufacturer	STAMP HAND 1/8 HVY DTY	S	14	\$23.40000	2020/02/10	<div>Replace</div> <div>Add</div>
8183436402-E1	36402-E1	36402-E1	C H Hanson Co	81834	Manufacturer	STAMP HAND 1/8 HVY DTY	S	14	\$23.40000	2020/02/10	<div>Replace</div> <div>Add</div>
8183436402-E4	36402-E4	36402-E4	C H Hanson Co	81834	Manufacturer	STAMP HAND 1/8 HVY DTY	S	14	\$23.40000	2020/02/10	<div>Replace</div> <div>Add</div>
8183436402-6R	36402-6R	36402-6R	C H Hanson Co	81834	Manufacturer	STAMP HAND 1/8 HVY DTY	S	14	\$23.40000	2020/02/10	<div>Replace</div> <div>Add</div>

New "Replace" and "Add" buttons for suggestions tabs in Quoted Part Number modal

Selecting "Replace" will replace the current part in Quoted Part # column with the selected record.

Selecting "Add" will add the record as an Alternate to the current line item. Note that the "Add" button will only appear when the Alternates Allowed setting is set to "Yes."

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13. Manufacturer & Vendor Status Wording Update

In the Create & Update tab, we show dropdowns that display Manufacturers and Vendors from Vallen’s master data in the following areas:

Requested Part Number: 7000000393 Requested Customer Part Number: 7000000393 Requested Description: 27402 DISC 7X7/8 36+ 982C CUBITRON II FIBRE Requested Manufacturer: 3M Manufacturer Part Number: 7000000393 Vallen Part Number: 05114127402

Multiple Vallen Matches (3) Part Cross References (1) Advanced Search **Create & Update** Alternates Last Picks

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

Manufacturer Part Number: 7000000393 Vendor Part Number: 7000000393 Vallen Part Number: Vallen Part Number Cost: 3.63600

Purchase UM Code: Purchase UM Code Pack Quantity: 100 Base UM Code: EA Lead Time (Days): 14

Manufacturer
Code: 3M Name: Manufacturer Name Vendor
Code: Vendor Code Name: Vendor Name

3M 21203 (Active)
3M-Dispenser Parts 21373 (Inactive)
3M Company 401412 (Active)
3M Remittance Processing 402164 (Active)
3M 402238 (Active)
3M Fall Protection 406129 (Active)
982C CUBITRON II FIBRE

Product Line
Code: Product Line Code Name: Product Line Name

Save Cancel

Manufacturer Code / Name & Vendor Code / Name fields in Create & Update

Within the dropdowns, we also show the status of these manufacturers and vendors.

The statuses used to display as “Active” and “Deleted,” but the deleted statuses have been renamed to “Inactive” to align better with SXe terminology.