



RELEASE NOTES

VallenIQ v1.21

Release Date: February 22, 2022

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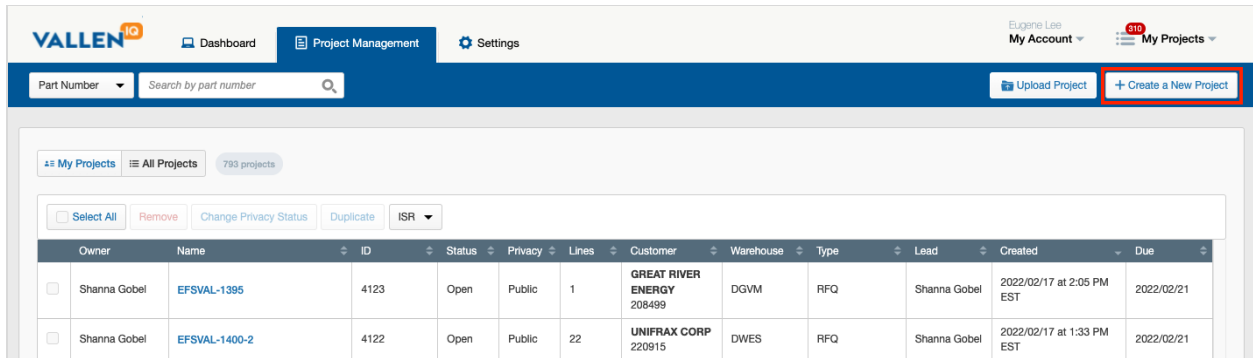
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1. Create New Project Improvements

We've improved the Create a New Project workflow in VallenIQ. These improvements make it easier to create new projects when customer RFQ files are not available for upload, and lines must manually be added to quotes.

1.1 Header & Project Details

To start off, select the Create a New Project button on the top right part of any page in VallenIQ:



The screenshot shows the VallenIQ Project Management interface. The top navigation bar includes the VallenIQ logo, a search bar for 'Part Number', and buttons for 'Dashboard', 'Project Management', and 'Settings'. On the right, there are links for 'My Account' and 'My Projects' (with a notification badge). The 'Create a New Project' button is highlighted with a red box. Below the navigation bar, there are tabs for 'My Projects' and 'All Projects' (showing 793 projects). A table of projects is displayed with columns: Owner, Name, ID, Status, Privacy, Lines, Customer, Warehouse, Type, Lead, Created, and Due. Two projects are listed:

Owner	Name	ID	Status	Privacy	Lines	Customer	Warehouse	Type	Lead	Created	Due
Shanna Gobel	EFSVAL-1395	4123	Open	Public	1	GREAT RIVER ENERGY 208499	DGVM	RFQ	Shanna Gobel	2022/02/17 at 2:05 PM EST	2022/02/21
Shanna Gobel	EFSVAL-1400-2	4122	Open	Public	22	UNIFRAX CORP 220915	DWES	RFQ	Shanna Gobel	2022/02/17 at 1:33 PM EST	2022/02/21

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Fill out the header details of your new project:

Create a New Project

Name

Add Name

Customer Account

Add Customer Account

Ship To Suffix

Add Ship To Suffix

Warehouse *

Add Warehouse Code

Contact Name

Add Contact Name

Contact Phone

Add Contact Phone

Contact Email

Add Customer Email

Address

Add Address

Lead *

Please Select

Due Date *

Thu Feb 24 2022

Type *

Please Select

Alternates Allowed *

Please Select

Notes

Add Notes

Next

Cancel

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Then choose your Project Preferences in the next modal:

Project Preferences

Pricing & Avail. Preferences:
Choose whether to auto-load price and available inventory data for your line items. Note that this data will not be available when a customer account has not been added to the quote header.

☒ Price & Warehouse Inventory

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

☒ Rebate Cost

☒ Replacement Cost

☒ Standard Cost

☒ Last Quoted Cost

☒ Last Ordered Cost

Last Pick Settings:
Automatically load the last picked Vallen Part Number for recognized RPNs during project upload.

☐ Use Last Pick

Create Project

Back

1.2 Create a New Project Page

Once you've selected Create Project in the prior step, VallenIQ will take you to the Create a New Project page, where you will add your line items to the quote you've just created.

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Within this page, three options exist for adding line items to your new project. These options are detailed in the sections below.

1.2.1 Paste A Project Or Add Part Numbers Manually

This option is best if you have multiple items you'd like to add to your project at once.

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For example, if a customer requests a quote and lists part numbers and quantities directly in their email:

Good morning,

I'd like to request a quote for the following lines:

031SA400C000030	10
DW5 01-19-1	7
18370	18
1941	31
A606SC	11
68514410621	9

Thank you,
Jane Doe

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This feature lets you copy over the part numbers and requested quantities and paste them into the text entry box:

Paste a project or add part numbers manually

031SA400C000030 10
DW5 01-19-1, 7
18370, 18
1941, 31
A606SC, 11
68514410621, 9

Continue

After pressing Continue, VallenIQ will ask you to map the data you've added to the appropriate columns in the application:

Preview and Confirm Project Data
×

Requested Part Number (RPN)	Description	Manufacturer	Vendor	Usage	Quantity 1
(column 1) ▼	Ignore Description ▼	Select Manufacturer ▼	Select Vendor ▼	Ignore Usage ▼	(column 1) ▼
031SA400C000030 10	No Description found	No Manufacturer found	No Vendor found	No part quantity found	3,140,000,003,010
DW5 01-19-1	No Description found	No Manufacturer found	No Vendor found	No part quantity found	501,191
18370	No Description found	No Manufacturer found	No Vendor found	No part quantity found	18,370
1941	No Description found	No Manufacturer found	No Vendor found	No part quantity found	1,941
A606SC	No Description found	No Manufacturer found	No Vendor found	No part quantity found	606
68514410621	No Description found	No Manufacturer found	No Vendor found	No part quantity found	68,514,410,621

Save Project

Cancel

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When finished, select the **Save Project** button to save the line items to your new project. The application will then take you to the quote you've created and show you the line items you've uploaded:

[Dashboard](#)
[Project Management](#)
[Settings](#)

Eugene Lee

My Account

311

My Projects

Part Number

Search by part number

Upload Project

Create a New Project

Test (6 Lines)

2022/02/21 at 8:56 PM EST

Public

Shared

owned by: Eugene Lee

Settings

Header

Notes

Share

Edit History

Custom Export

Expand Lines

Hide Alternates

Convert to Order

Actions

Filters

224583

SIEMENS INDUSTRY INC

Customer Notes

Project ID

4153

Due Date

2022/02/24

Team Lead

Shanna Gobel

Status

Open

Alternates

Yes

Project Type

Blanket

Filter by Category (6)

Contractor Supplies

Cutting Tools

Electrical Products

Fluid Power

Miscellaneous Products

Power Transmission Equip

Filter by Req. Manufacturer (0)

Filter by Intelligence

Multiple Valleen 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

3

RC Status

ORF Status

QU Status

VAL Status

DU Status

TI Status

NO Status

OS Status

AL Status

Selecting 0 item(s)

Showing 6/6 results

Select All

Group Edit

Remove

Assign

Ref #

Search line items

Total Price

0.00000

Total Cost

0.00000

Refresh All

Ref #	Req. Part #	Req. MFR/VEN	Quoted Part #	Valleen MFR/VEN	Avail. Qty	Req. Qty	Unit Price	Quote Price	Cost	Quote Cost	GP %	Extended Price	Status
1	RPN 031SA40	NO MFR	WALLEN PN 417383031 SA40CC000030 VENDOR PN 0315A400 C000030 0315A400C000030	MFR NUMATICS INC. CODE 417383 Mfr/Vendor Notes	-	31	\$58.37000	58.37000	\$47.86000	47.86000	18.01 %	\$1,809.47...	RC
2	RPN DW5 01-19-1	NO MFR	MPN DW5 01-19-1 WALLEN PN 421348523 5 FILTER ELEMENT W ATER FILTER,23MM ID X 61 UOM EA	MFR DELTA PURE FILTRATION CODE 503895 VENDOR INDUSTRIAL COMPONENTS AND TECH Mfr/Vendor Notes	-	1	-	\$ Price	\$2.00000	2.00000	GP %	-	RC
3	RPN 18370	NO MFR	MPN 18370 WALLEN PN 662490183 TO VENDOR PN 18370 SUPP 18370 END M ILL SOLID CARBIDE UOM EA	MFR GARR TOOLS CODE 662490 Mfr/Vendor Notes	-	18,370	\$167.48000	167.48000	\$137.33300	137.33300	18.00 %	\$3,076.60...	RC

Keep in mind that when using the Paste a project feature, VallenIQ will allow you to add multiple columns of information for the line items you are entering.

This can be done by separating each column of line item information (ex. requested quantities, UOMs, CPNs, Descriptions, etc.) by comma:

Paste a project or add part numbers manually

TLK43-LRRRRR, ABC123, SIKA, 26

Continue

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In the Preview and Confirm Project Data step, VallenIQ will allow you to map the comma separated data into their appropriate columns, so the application will load your data into your line items correctly:

Preview and Confirm Project Data

Cust. Line #	Customer Part Number (CPN)	Requested Part Number (RPN)	Description	Manufacturer	Vendor
Select Cust. Line # ▾	(column 2) ▾	manufacturer_part_number ▾	Ignore Description ▾	(column 3) ▾	Select Vendor ▾
No Cust. Line # found	ABC123	TLK43-LRRRR	No Description found	SIKA	No Vendor

Save Project

Cancel

1.2.2 Upload A File From Your Device

This option will allow you to upload a customer RFQ from your computer.

Upload a file from your device

Upload a Project or list of components from your device.
You can also drag and drop your file in this box.

Supported formats: .csv, .tsv, .xls, .xlsx, Eagle .sch, KiCad.sch, .SchDoc

Import Project from your Device

This feature is the same as the Upload Project feature, with a very similar user flow.

The only difference is that the application will not ask you to fill out Header information, nor Project Preference information, because this was done at the start of the Create a New Project workflow.

1.2.3 Add New Line

The Add New Line feature improves the process of manually adding line items to your quotes. Add New Line will be available in both the Create a New Project page, as well as in populated quotes.

We've replaced the old Add Line bar:

The screenshot displays the Valen IQ Project Management interface. At the top, there's a navigation bar with 'Dashboard', 'Project Management', and 'Settings'. Below this is a search bar for 'Part Number' and buttons for 'Upload Project' and 'Create a New Project'. The main content area shows a project titled 'abs (0 Lines)' owned by 'Eugene Lee'. It includes a sidebar with project details (Project ID: 3861, Status: Open, Due Date: 2022/01/18, Team Lead: Kevin Kellums) and a central area with various filters (Filter by Category, Filter by Req. Manufacturer, Filter by Intelligence, Filter by Cost Source, Filter by Assignee, Filter by Status). Below the filters, there's a section for 'Selecting 0 item(s)' with a 'Continue' button. At the bottom, there's a red-bordered bar with buttons for 'Add Part Number', 'Add CPN', 'Usage', 'Add Qty 1', 'Add Qty 2', 'Add Qty 3', 'Add Qty 4', and 'Add Line'. The 'Add Line' button is highlighted. To the right of this bar, it says 'Results per page: 125 250'.

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With a new button in the same location that expands into a dropdown when selected:

ValLEN

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Dashboard

Project Management

Settings

Eugene Lee

My Account

102 My Projects

Part Number

Search by part number

Upload Project

Create a New Project

Test (0 Lines) • 2022/02/22 at 2:20 PM EST • Public • Shared

owned by: Eugene Lee

SettingsHeaderNotes (1)ShareEdit HistoryCustom ExportExpand LinesHide AlternatesConvert to OrderActionsFilters

224583
SIEMENS INDUSTRY INC
Customer Name
Project ID
4161
Status
Open
Due Date
2022/02/24
Alternates
Yes
Team Lead
Shanna Gobel
Project Type
RFQ

Filter by Category (0)
Nothing to filter or project is empty

Filter by Req. Manufacturer (0)
Nothing to filter or project is empty

Filter by Intelligence
Multiple Valen Matches0
Cross References0
Part Cross References0
Suggested Parts0
Changed RPN0
Changed CPN0
Updated Parts0
Created Parts0
Last Picks0

Filter by Cost Source
With Order History0
With Quote History0
With Replacement Cost0
With Rebate Cost0
With Standard Cost0
With Adjusted Cost0

Filter By Assignee

Filter by Status
RC Status0
ORD Status0
QU Status0
VAL Status0
DU Status0
TI Status0
NQ Status0
OS Status0
AL Status0

Selecting 0 item(s)Showing 0/0 results

Select AllGroup EditRemoveAssignRef #Search line items

Total Price0.00000Total Cost0.00000Refresh All

Paste a project or add part numbers manually

Enter your Project here

Continue

Upload a file from your device

Upload a Project or list of components from your device.
You can also drag and drop your file in this box.

Supported formats: .csv, .tsv, .xls, .xlsx, Eagle .sch, KiCad.sch, .SchDoc

Import Project from your Device

Add New LineResults per page: 125250500

Select AllGroup EditRemoveAssignRef #Search line items

Total Price0.00000Total Cost0.00000Refresh All

Paste a project or add part numbers manually

Enter your Project here

Continue

Upload a file from your device

Upload a Project or list of components from your device.
You can also drag and drop your file in this box.

Supported formats: .csv, .tsv, .xls, .xlsx, Eagle .sch, KiCad.sch, .SchDoc

Import Project from your Device

Cust. Line #	Customer Part Number (CPN)	Requested Part Number (RPN)	Description	Manufacturer
Cust. Line #	Customer Part Number (CPN)	Requested Part Number (RPN)	Description	Manufacturer
Vendor	Usage	Quantity 1	Quantity 2	Quantity 3
Vendor	Usage	Quantity 1	Quantity 2	Quantity 3
Quantity 4	Cust. Last Price	Misc. 1	Misc. 2	Misc. 3
Quantity 4	Cust. Last Price	Misc. 1	Misc. 2	Misc. 3
Misc. 4	Unit of Measure (UOM)	Assignee		
Misc. 4	Unit of Measure (UOM)	Assignee		

Add New LineClose

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Within this dropdown, you will find 18 fields that can be specified for the new line item.

These fields are the same that exist in the Preview and Confirm Project Data modal when using the Upload Project feature:

Preview and Confirm Project Data

Name

Split Qty 1 121421.xlsx+Sheet1

Change Name

Select Sheet

Sheet1

Cust. Line #	Customer Part Number (CPN)	Requested Part Number (RPN)	Description	Manufacturer	W
Select Cust. Line #	Select Cpn	Select Pn	Ignore Description	Select Manufacturer	
No Cust. Line # found	No cpn found	No part number found	No Description found	No Manufacturer found	No
No Cust. Line # found	No cpn found	No part number found	No Description found	No Manufacturer found	No
No Cust. Line # found	No cpn found	No part number found	No Description found	No Manufacturer found	No
No Cust. Line # found	No cpn found	No part number found	No Description found	No Manufacturer found	No
No Cust. Line # found	No cpn found	No part number found	No Description found	No Manufacturer found	No
No Cust. Line # found	No cpn found	No part number found	No Description found	No Manufacturer found	No
No Cust. Line # found	No cpn found	No part number found	No Description found	No Manufacturer found	No
No Cust. Line # found	No cpn found	No part number found	No Description found	No Manufacturer found	No
No Cust. Line # found	No cpn found	No part number found	No Description found	No Manufacturer found	No
No Cust. Line # found	No cpn found	No part number found	No Description found	No Manufacturer found	No
No Cust. Line # found	No cpn found	No part number found	No Description found	No Manufacturer found	No
No Cust. Line # found	No cpn found	No part number found	No Description found	No Manufacturer found	No
No Cust. Line # found	No cpn found	No part number found	No Description found	No Manufacturer found	No
No Cust. Line # found	No cpn found	No part number found	No Description found	No Manufacturer found	No
No Cust. Line # found	No cpn found	No part number found	No Description found	No Manufacturer found	No

Next

Cancel

Add the information that must be loaded and select the Add New Line button. When you're finished, select the Close button to collapse the dropdown.

The only required fields when manually adding line items are either a RPN or a CPN. Users must add at least one of these two part numbers to their new line items in order to use this feature.

Please enter a RPN or CPN.

Cust. Line #	Customer Part Number (CPN)	Requested Part Number (RPN)	Description	Manufacturer
<input type="text" value="Cust. Line #"/>	<input style="border: 1px solid #f08080;" type="text" value="Customer Part Number (CPN)"/>	<input style="border: 1px solid #f08080;" type="text" value="Requested Part Number (RPN)"/>	<input type="text" value="Description"/>	<input type="text" value="Manufacturer"/>
Vendor	Usage	Quantity 1	Quantity 2	Quantity 3
<input type="text" value="Vendor"/>	<input type="text" value="Usage"/>	<input type="text" value="Quantity 1"/>	<input type="text" value="Quantity 2"/>	<input type="text" value="Quantity 3"/>
Quantity 4	Cust. Last Price	Misc. 1	Misc. 2	Misc. 3
<input type="text" value="Quantity 4"/>	<input type="text" value="Cust. Last Price"/>	<input type="text" value="Misc. 1"/>	<input type="text" value="Misc. 2"/>	<input type="text" value="Misc. 3"/>
Misc. 4	Unit of Measure (UOM)	Assignee		
<input type="text" value="Misc. 4"/>	<input type="text" value="Unit of Measure (UOM)"/>	<input type="text" value="Assignee"/>		

Lastly, after a new line item is added, VallenIQ will show an edit history event that displays all fields that were populated:

Requested Part Number:
05089

Requested Customer Part Number:
TLQ11043

Requested Description:
WIRING DUCT 80X80 8/12 SLOT

Requested Manufacturer:
ABB

Manufacturer Part Number:
05089
Chemicals/Lube/Adhesives

Vallen Part Number:
07825405089

Line Item Edit History (2)

Ref #	Event	History	User	Date and Time
1	Updated Unit Price	Unit Price was changed from N/A to \$3.91000	Eugene Lee	2022/02/22 at 3:00 PM EST
1	Added New Line Item	1. CPN: TLQ11043 2. RPN: 05089 3. Description: WIRING DUCT 80X80 8/12 SLOT 4. Manufacturer: ABB 5. Usage: 15 6. Qty 1: 10 7. Qty 2: 15 8. Qty 3: 20 9. Cust. Last Price: 52.1192 10. Misc. 1: 88861419223 11. Misc. 2: 697172050895AM 12. Misc. 3: 69803626081 13. Misc. 4: 11512672 14. UOM: EA 15. Assignee: AAA - Test Account	Eugene Lee	2022/02/22 at 3:00 PM EST

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2. Notes

We've made improvements to Project Description in VallenIQ. The new project level description section has been renamed to Notes, and includes a number of improvements from Project Description.

When filling out header information, the Project Description section has been renamed, but otherwise remains similar to what it looked like previously:

Create a New Project

Name

Test

Customer Account

SIEMENS INDUSTRY INC 224583

Ship To Suffix

200: Siemens Assembly Machine

Warehouse *

Seimens Assembly Machine C562

Contact Name

Add Contact Name

Contact Phone

Add Contact Phone

Contact Email

Add Customer Email

Address

Add Address

Lead *

Shanna Gobel

Due Date *

Thu Feb 24 2022

Type *

RFQ

Alternates Allowed *

Yes

Notes

Sample description and related notes

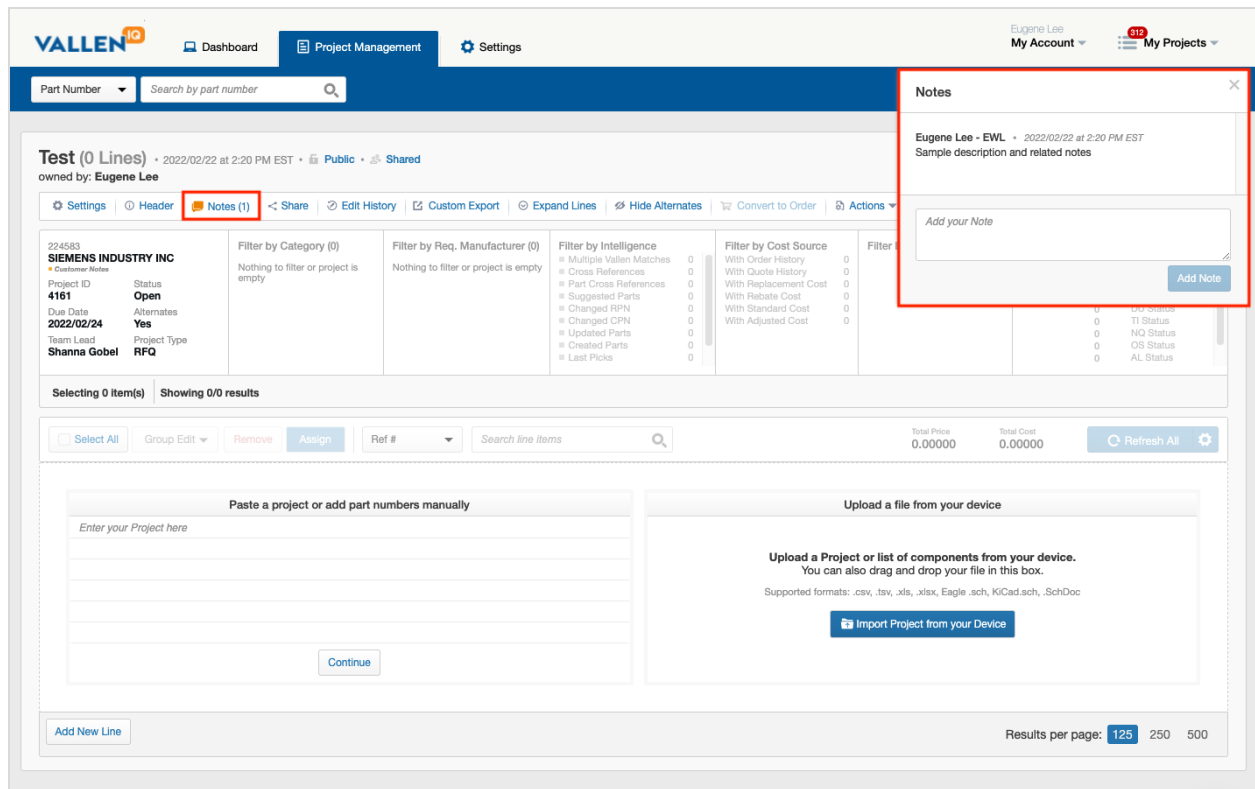
Next

Cancel

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However, when your project is saved, the comments you've added in the header will now appear in a new Notes modal that's accessible via the Quote Actions bar at the top of the page.



We will no longer show Project Descriptions in the header underneath the title, and all notes will now appear in this new modal.

Notes will show the name and employee ID of the user who added the comment, along with a timestamp (in EST) that displays when the comment was added.

This improvement will allow users to continue to add comments as they complete their projects, and may improve communication in the quoting process.

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3. Line Level Promise & Requested Ship Dates

Users can now add Promise Dates and Requested Ship Dates at the line item level. This can be done for single line items or for multiple at once using Group Edit.

3.1 Relationship Between Dates

Similar to the Promise Date and Requested Ship Date fields in the Convert to Order modal, at the line item level, the Requested Ship date cannot be later than the Promise date.

If a Promise Date is added, then a user attempts to add a Requested Ship Date that is later than the Promise Date, VallenIQ will change the Promise Date to the same date as the Requested Ship Date.

3.2 Individual Lines

To add Requested Ship and Promise Dates to individual line items, click into the Ref # column:

Ref #	Req. Part #	Req. MFR/VEN	Quoted Part #	Vallen MFR/VEN
1 EWL	RPN 198817 CPN 4KM26 RTV Silicone Seal ant,300mL Cartri dge,Red	MFR HENKEL/LOC TITE NO VENDOR	MPN 198817 VALLEN PN 079340596 75 VENDOR PN 198817 59675 SILICONE RT V RED 300ML LOCT ITE UOM EA Updated Parts	MFR HENKEL CORPORATION CODE 79340 Mfr/Vendor Notes

A new tab titled Set Order Dates has been added to the modal, from which you can choose Promise and Requested Ship Dates:

Assign Line Items

Set Order Dates

✕

Promise Date

Line Level Dates Override Order Header Dates

Requested Ship Date

Line Level Dates Override Order Header Dates

Save

Cancel

After adding, the dates should be visible in the Ref # column:

	Ref #	Req. Part #	Req. MFR/VEN	Quoted Part #
<input type="checkbox"/>	<div>2</div> <div>JMK2</div> <div>Promise Date 02/17/2022</div> <div>Req. Ship Date 02/17/2022</div>	<div>RPN 594.75.4572</div> <div>A</div> <div>CPN E2007456</div>	<div>NO MFR</div> <div>NO VENDOR</div>	<div>MPN 594.75.4572A</div> <div>VALLN PN 11781424</div> <div>VENDOR PN 594.75.4572A</div> <div>594.75.4572A SP DAH 81</div> <div>3-STEP SOLID REAMER P</div> <div>CD</div> <div>UOM EA</div> <div> <div>Multiple Vallen Matches</div> <div>Created Parts</div> </div>

3.3 Group Edit

Users can now set line item level Promise Dates and Requested Ship Dates using the new Set Order Dates feature in the Group Edit dropdown.

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<input type="checkbox"/> Select All		Group Edit ▼	Remove	Assign	Ref # ▼	Search line items
Ref #	Quoted Part #	Vallen MFR/VEN				
9	MPN 22475 VALLEN PN 03600022475 VENDOR PN 22475 22475 EYEWEAR NEMES IS SMOKE ANTI-FOG/BL ACK FRM UOM EA ■ Multiple Vallen Matches ■ Suggested Parts	MFR KIMBERLY-CLARK CODE 36000 ■ Mfr/Vendor Notes				
10	MPN 25676 VALLEN PN 03600025676 VENDOR PN 25676 25676 EYEWEAR NEMES IS V30 BLK FRM CLR LE NS UOM EA ■ Multiple Vallen Matches ■ Suggested Parts ■ Part Cross References ■ Last Picks	MFR KIMBERLY-CLARK CODE 36000 ■ Mfr/Vendor Notes				

Select the line items you'll be adding dates to, open the Group Edit dropdown, and select the new Set Order Dates option.

Set Order Dates

Promise Date

Line Level Dates Override Order Header Dates

Requested Ship Date

Line Level Dates Override Order Header Dates

Save

Cancel

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The same behavior mentioned under Individual Lines applies when using Group Edit. The chosen dates will appear in the Ref # column once dates have been added.

Ref #	Req. Part #	Req. MFR/VEN	Quoted Part #	Vallen MFR/VEN
<div>9</div> <div>EWL</div> <div> <div>✓</div> <div>Promise Date 03/04/2022</div> <div>Req. Ship Date 02/01/2022</div> </div>	<div>RPN 22475</div> <div>CPN 21A163</div> <div>Safety Glasses,Smoke</div>	<div>MFR</div> <div>KLEENGUARD</div> <div>NO VENDOR</div>	<div>MPN 22475</div> <div>VALLN PN 03600022475</div> <div>VENDOR PN 22475</div> <div>22475 EYEWEAR NEMES</div> <div>IS SMOKE ANTI-FOG/BL</div> <div>ACK FRM</div> <div>UOM EA</div> <div> <div>Multiple Vallen Matches</div> <div>Suggested Parts</div> </div>	<div>MFR KIMBERLY-CLARK</div> <div>CODE 36000</div> <div>Mfr/Vendor Notes</div>
<div>10</div> <div>EWL</div> <div> <div>✓</div> <div>Promise Date 03/04/2022</div> <div>Req. Ship Date 02/01/2022</div> </div>	<div>RPN 25676</div> <div>CPN 2UYF3</div> <div>Safety Glasses,Clear</div>	<div>MFR</div> <div>KLEENGUARD</div> <div>NO VENDOR</div>	<div>MPN 25676</div> <div>VALLN PN 03600025676</div> <div>VENDOR PN 25676</div> <div>25676 EYEWEAR NEMES</div> <div>IS V30 BLK FRM CLR LE</div> <div>NS</div> <div>UOM EA</div> <div> <div>Multiple Vallen Matches</div> <div>Suggested Parts</div> <div>Part Cross References</div> <div>Last Picks</div> </div>	<div>MFR KIMBERLY-CLARK</div> <div>CODE 36000</div> <div>Mfr/Vendor Notes</div>

3.4 Order Validation

When converting your quote into an order, a header level Promise Date and Requested Ship Date can also be specified.

Convert To Order

Owner

Eugene Lee

Purchase Order Number

15233384

Promise Date

Fri Mar 11 2022

Requested Ship Date

Wed Mar 09 2022

Shipping Instructions

Enter Shipping Instructions

Continue

Cancel

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In the Order Validation step of the Convert to Order process, VallenIQ will display these two sets of dates:

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	15233384	225574	DPAS	200	03/09/22	03/11/22	20220219	-

Item Details

Ref. #	Cust. Product Code	Product	Description	Vendor Code	Qty	Price	Cost	UOM	Comments	Prod. Line	Stocked	VIQ Ref.	Req. Ship Date	Promise Date
1	4KM26	07934059675	59675 SILICONE RTV RED 3	79340	3	22.61000	22.00000	EA	-	1	Yes	4101-1	02/23/22	02/25/22
9	21A163	03600022475	22475 EYEWEAR NEMESIS SM	36000	25	4.07000	3.42000	EA	-	1	Yes	4101-9	02/01/22	03/04/22
10	2UYF3	03600025676	25676 EYEWEAR NEMESIS V3	36000	80	2.86000	2.40580	EA	-	1	Yes	4101-10	02/01/22	03/04/22
11	26X233	08470532986	32986 INSU INDUS Pliers/	84705	15	130.17000	109.33920	EA	-	1	No	4101-11	03/07/22	03/09/22

Submit

Back

Both order level and line item level Promise and Requested Ship Dates can exist simultaneously.

During such scenarios, SX.e line item level Promise and Requested Ship Dates will take higher priority than order level Promise and Requested Ship Dates, and will override these quote level dates. This override behavior will occur in SX.e, not in VallenIQ.

3.5 Edit History

When line item level Promise and Requested Ship Dates are added, VallenIQ will show the following Edit History event:

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Requested Part Number: 22475

Requested Customer Part Number: 21A163

Requested Description: Safety Glasses,Smoke

Requested Manufacturer: KLEENGUARD

Manufacturer Part Number: 22475
Safety Products

Vallen Part Number: 03600022475

Line Item Edit History (8)

Ref #	Event	History	User	Date and Time
		<ul style="list-style-type: none">User 5: -User 6: -User 7: -User 8: -User 9: -User 10: -VIQ Reference: 4101-9		
9	Selected Requested Quantity Was Changed	Selected Requested Quantity was changed from Req. Qty N/A to Req. Qty 1 (25)	Eugene Lee	2022/02/18 at 7:09 PM EST
9	Updated Line Item Order Dates	1. Promise Date was changed from N/A to 03/04/2022 2. Requested Ship Date was changed from N/A to 02/01/2022	Eugene Lee	2022/02/18 at 7:01 PM EST
9	Updated Requested Quantities	Qty Break 1: N/A to 25 Qty Break 2: N/A to 35	Eugene Lee	2022/02/18 at 6:56 PM EST
9	Updated Unit Price	Unit Price was changed from N/A to \$4.07000	Eugene Lee	2022/02/14 at 11:19 PM EST
9	Updated Available Quantity	Available Quantity was changed from N/A to 261	Eugene Lee	2022/02/14 at 11:19 PM EST
9	Added New Line Item	Added PN 22475 (CPN 21A163)	Eugene Lee	2022/02/14 at 11:18 PM EST

Close

When orders are submitted from VallenIQ, the line item level Promise and Requested Ship Dates will appear in line item Edit History:

Requested Part Number:
22475

Requested Customer Part
Number:
21A163

Requested Description:
Safety Glasses,Smoke

Requested Manufacturer:
KLEENGUARD

Manufacturer Part Number:
22475
Safety Products

Vallen Part Number:
03600022475

Line Item Edit History (8)

Ref #	Event	History	User	Date and Time
9	Line Item Was Submitted For Order	<ul style="list-style-type: none">Back Order Type: yBuyer Product Code: -Change Code: -Cross Reference Product Type: -Description: 22475 EYEWEAR NEMESIS SMDiscount Amount: -Line Identifier: 2Order Status Code: -Price: 4.07000Product Service Code: -Promise Date: 03/04/22Quantity Ordered: 25.00000Quantity Ship: 25.00000Quantity Unit Of Measure: EARequested Ship Date: 02/01/22Restock Charge: 0.00000Seller Product Code: 03600022475Special Cost Type: -Special Cost Unit Of Measure: 1.00000Special Cost Unit Of Measure 2: -Special Non Stock Type: -SX Enterprise Line Number: 0002	Eugene Lee	2022/02/18 at 7:19 PM EST

Close

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4. Update Behavior For Expand View Fields

We've made updates to how the fields in Expand View change when users Update Parts or Create New Parts.

Note that because the fields below are specified when adding new lines to quotes or are mapped into VallenIQ during the quote creation process, they are therefore associated with the line item, and not the part in the Quoted Part # column.

- Customer Last Price
- Misc. 1
- Misc. 2
- Misc. 3
- Misc. 4

This means that these fields should be retained throughout the quoting process, even when the part in Quoted Part # column is replaced, updated, or a new part is created for the line item.

4.1 Base UM Code

A new Base UM Code field has been added to Expand View. This field corresponds with the Base UM Code field in the Create & Update tab.

4.2 Update Part

When the Update Part feature is used:

Requested Part Number:
GS-30

Requested Customer Part Number:
ABC2256

Requested Description:
Description Test

Requested Manufacturer:
Mfr Test

Manufacturer Part Number:
GS-30
Miscellaneous Products

Vallen Part Number:
07836693381

Did you mean? (2)

Advanced Search

Create & Update

Alternates

Part Options

Create New Part

Update Part

Clear All Fields

Manufacturer Part Number *

GS-30

Vendor Part Number

GS-30

Vallen Part Number

Vallen Part Number

Cost

9.85750

Purchase UM Code

Purchase UM Code

Pack Quantity

50

Base UM Code

EA

Lead Time (Days)

Lead Time

Manufacturer

Code

499175

Name

SP/ILSCO-UTILCO - C/O US BANK

Vendor

Code

Vendor Code

Name

Vendor Name

Product Category

Code

9900

Name

Miscellaneous Products

Product Line

Code

1

Name

Standard Items

Description 1

GS-30 CU MEC 3/8-3 B LIG

Description 2

HT 0.25 THIC K

Save

Cancel

Only the following Expand View fields should change (if the fields below were left empty, VallenIQ will populate the fields in Expand View with “-”):

- Description
- Product Category
- Product Category Code
- Product Line
- Product Line Code
- Lead Time
- Stand. Package Size (corresponds to “Pack Quantity” field in Create & Update)
- Purchase UM
- Base UM

The following fields should retain the data from the original part number that was loaded into this line item:

- Part Notes
- Company Wide Inventory
- MSDS Code
- Hazmat Code
- List Price
- Customer Resale Price
- Taxable
- Non-Tax Type

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- Image Link
- SPA Cost
- SPA Type
- Replacement Cost (even if the Cost field was changed while using Update Part, VallenIQ will keep the replacement cost associated with the original part that was loaded into this line)
- Cost Change Date
- Standard Cost
- Vendor Type
- Vendor Packaging
- Vendor Notes

4.3 Create New Part

When the Create New Part feature is used:

Only the following Expand View fields should reflect the details of the new part you've created:

- Description
- Product Category
- Product Category Code
- Product Line
- Product Line Code

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- Lead Time
- Stand. Package Size (corresponds to “Pack Quantity” field in Create & Update)
- Purchase UM
- Base UM
- Replacement Cost (corresponds to “Cost” in Create & Update)

The following fields should be cleared and populated with “-”:

- Part Notes
- Company Wide Inventory
- Stocking Status
- MSDS Code
- Hazmat Code
- List Price
- Customer Resale Price
- Taxable
- Non-Tax Type
- Image Link
- SPA Cost
- SPA Type
- Standard Cost
- Vendor Type
- Vendor Packaging
- Vendor Notes
- Cost Change Date (will be populated by Vallen backend team when they add the new part record to part_master)

5. Notable Improvements & Bugs Fixes

5.1 Convert to Order Field Encoding

When orders were submitted from VallenIQ, the Shipping Instructions and Description fields were showing special characters in SX.e.

5.2 Mark Required Fields

Required fields have been marked with an asterisk at the end of each field name:

Requested Part Number:
05089

Requested Customer Part Number:
5YK77

Requested Description:
Brake Parts Cleaner,20
oz. Aerosol

Requested Manufacturer:
CRC

Manufacturer Part Number:
05089
Chemicals/Lubs/Adhesives

Vallen Part Number:
07825405089

Multiple Vallen Matches (7)

Did you mean? (9)

Part Cross References (2)

Advanced Search

Create & Update

Alternates

Last Picks

Part Options

Create New Part

Update Part

Clear All Fields

Populate Vallen Part Number Field By

58 Code

Vallen API

+ Populate

Manufacturer Part Number *

05089

Vendor Part Number

05089

Vallen Part Number

Vallen Part Number

Cost *

2.78600

Purchase UM Code *

Purchase UM Code

Pack Quantity *

12

Base UM Code *

EA

Lead Time (Days) *

14

Manufacturer

Code *

78254

Name *

CRC Industries Inc

Vendor

Code *

Vendor Code

Name *

Vendor Name

Product Category

Code *

300

Name *

Chemicals/Lubs/Adhesives

Product Line

Code *

1

Name *

Standard Items

Description 1 *

05089 BRAKLEEN 20OZ

Description 2

AERCRC

Save

Cancel

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