



RELEASE NOTES

VallenIQ v1.22

Release Date: March 30, 2022

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1. Support For Transaction Types

Support for Transaction Types is an expansion of the Convert To SX.e feature that is currently available in VallenIQ.

Previously, after configuring quotes in VallenIQ, users only had the ability to convert quotes to Stock Orders in SX.e.

VallenIQ will now allow users to convert their quotes to the transaction types below:

- Stock Order (SO)
- Future Order (FO)
- Direct Order (DO)
- Quote (QU)

1.1 User Flow

The user flow for this feature will remain mostly unchanged. The following screenshots illustrate the updates to the Convert to SX.e feature.

First select the “Convert to SX.e” button in the Quote Actions bar:

The screenshot displays the VallenIQ interface for a quote titled "033022 - 1 (37 Lines)". The interface includes a header with navigation options like Settings, Header, Notes, Share, Edit History, Custom Export, Expand Lines, Hide Alternates, and a highlighted "Convert to SX.e" button. Below the header, there are several filter panels: "Filter by Category (9)", "Filter by Req. Manufacturer (0)", "Filter by Intelligence", "Filter by Cost Source", "Filter by Assignee", and "Filter by Status". The main table shows a list of items 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 first item is "RPN 198817 CPN 4KM26" with a status of "VAL".

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 198817 CPN 4KM26 RTV Silicone Seal ant_300mL Cartri digs_Red	NO MFR NO VENDOR	MPN 198817 VALLIN PN 079340596 75 VENDOR PN 198817 59575 SILICONE RT V RED 300ML LOCT ITE UOM EA	MFR HENKEL CORPORATION CODE 79340 MFR Notes	6	1 3 15	\$22.61000	22.61000 22.61000 22.61000	22.16760 22.16760 22.16760	1.96 1.96 1.96	%	\$22.61000 \$67.83000 \$339.15000	VAL DU

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Choose the transaction type that applies to your quote:

Convert To SX.e

Transaction Type

☐ Stock Order (SO)
☐ Future Order (FO)
☒ Direct Order (DO)
☐ Quote (QU)

Owner

Eugene Lee

Purchase Order Number

Enter Purchase Order Number

Promise Date

Auto-Populated by SX.e When Left Empty

Requested Ship Date

Auto-Populated by SX.e When Left Empty

Shipping Instructions

COLLECT 75487E

Continue

Cancel

In the Transaction Validation modal, a new “Transaction Type” field will be available to reference in the Transaction Details section.

Convert To SX.e

Transaction Validation

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

Key

Missing Required

Invalid

Transaction Details

Owner	Transaction Type	PO #	Cust. #	Warehouse	Ship To Suffix	Req. Ship Date	Promise Date	Proposal #	Ship Instructions
Eugene Lee	DO	1532664	225574	DPAS	200	-	-	20220330	COLLECT 75487E

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	22.16760	EA	-	1	Yes	4406-1	-	-

Submit

Back

The rest of the steps required to submit your transaction to SX.e will remain the same.

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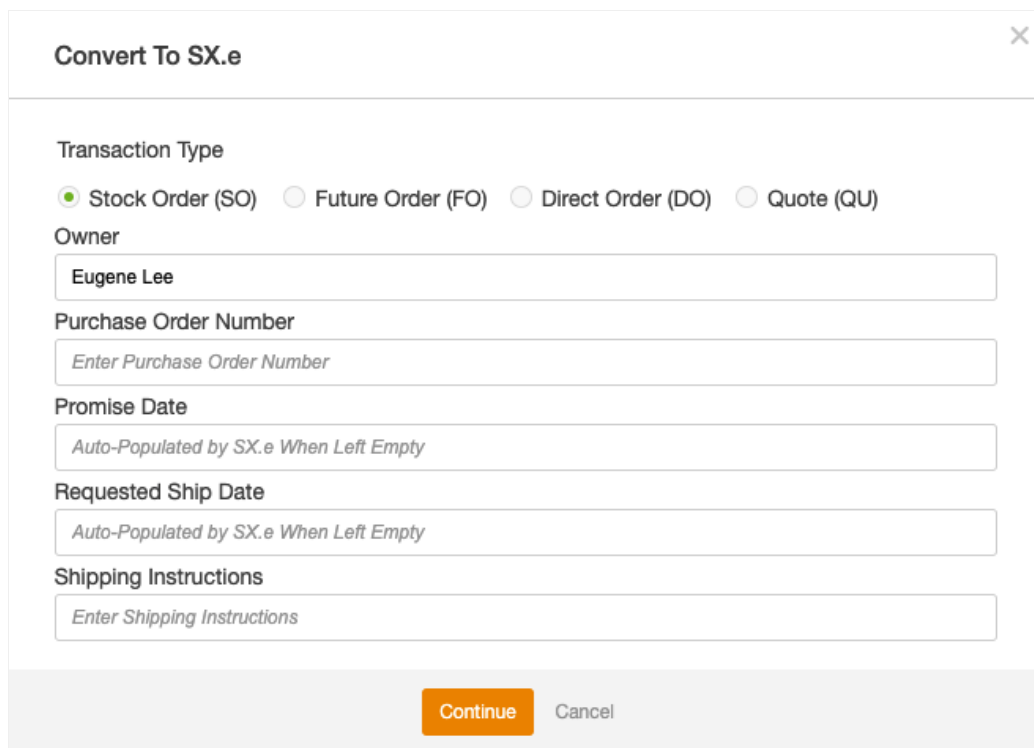
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1.1.1 Text Changes

As a result of the enhancement to allow users to choose from different transaction types, we've changed mentions of "Convert to Order" to "Convert to SX.e" and also updated mentions of "Order" to "Transaction" within the transaction submission workflow.

1.1.2 Default Transaction Type

In the Convert to SX.e workflow, the default transaction type that is selected will be "Stock Order (SO)", but users will be able to choose the transaction type that is appropriate for their quote.



The screenshot shows a modal window titled "Convert To SX.e" with a close button (X) in the top right corner. The form contains the following fields:

- Transaction Type:** A row of four radio buttons: "Stock Order (SO)" (selected), "Future Order (FO)", "Direct Order (DO)", and "Quote (QU)".
- Owner:** A text input field containing "Eugene Lee".
- Purchase Order Number:** A text input field with the placeholder text "Enter Purchase Order Number".
- Promise Date:** A text input field with the placeholder text "Auto-Populated by SX.e When Left Empty".
- Requested Ship Date:** A text input field with the placeholder text "Auto-Populated by SX.e When Left Empty".
- Shipping Instructions:** A text input field with the placeholder text "Enter Shipping Instructions".

At the bottom of the modal, there are two buttons: "Continue" (highlighted in orange) and "Cancel".

1.2 Edit History

After submission, the transaction type that was selected in the first Convert to SX.e modal will be shown in Project Edit History.

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2. Product Notes

Currently, users can access Customer Notes and Manufacturer/Vendor Notes within VallenIQ. In this release, we're expanding the notes we support to include Product Notes.


Certain Vallen part numbers that are loaded into your line items may have notes associated with them that may assist you in the quoting process.

2.1 New Indicator & Filter

If product notes exist for a Vallen part number, we'll show a new indicator titled "Product Notes" in the Vallen MFR/VEN column.

Ref #	Req. Part #	Req. MFR/VEN	Quoted Part #	Vallen MFR/VEN	Avail. Qty	Req. Qty
75 EWL	RPN 0101198 13303	NO MFR NO VENDOR	MPN 813303 VALLEN PN 010119813 303 VENDOR PN 813303 813303 MAGNIFIER 2X RND 3IN W/ERG O GRIP UOM EA Updated Parts	MFR VALEANT PHARMACEUTICALS N.A. CODE 10119 VENDOR WEILER CORPORATION CODE 12382 Product Notes Mfr Notes Vendor Notes	0	10 20 40 60

A corresponding filter has been added to the Filter by Intelligence section of the Filter Toolbar.




225574 Solar Turbines - Coupa Project ID: 4101 Status: Open Due Date: 2022/02/17 Alternates: Yes Team Lead: Karen McKnight Project Type: Blanket	Filter by Category (12) Brushes 1 Chemicals/Lubs/Adhesives 5 Contractor Supplies 1 Cutting Tools 2 Electrical Products 2 Hand Tools 7 Maint Equip and Supplies 1 Misc Items 1	Filter by Req. Manufacturer (14) 3M 1/1 CHANNELLOCK 1/1 CRC 1/1 ERGODYNE 1/1 HENKEL/LOCTITE 1/1 HUSKY RACK & WIRE 1/1 KLEENGUARD 2/2 MASTER LOCK 1/1	Filter by Intelligence Created Parts 2 Last Picks 14 CPN Match 0 Don't Match Stock 2 Discontinued 0 Mfr Notes 27 Vendor Notes 3 Product Notes 2	Filter by Cost Source With Order History 15 With Quote History 17 With Replacement Cost 29 With Rebate Cost 2 With Standard Cost 25 With Adjusted Cost 0	Filter By Assignee EWL - Eugene Lee 30	Filter by Status  RC Status 6 ORD Status 4 QU Status 0 VAL Status 18 DU Status 8 TI Status 2 NQ Status 0 OS Status 0
Selecting 0 item(s) Showing 30/30 results						

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2.2 Notes Modal

To view Product Notes (as well as Customer Notes, Manufacturer Notes, and Vendor Notes), users must now select the new “Notes” button in the rightmost column of your line items.

GP %	Extended Price	Status	
10.60 %	\$8.94000		
10.60 %	\$223.50000	VAL	
10.60 %	\$268.20000		

The new Notes modal will show all available notes for the line item. If there are multiple notes available, the application will by default sort the notes by most recent date, but the sorting can be changed by selecting the column headers in the notes tables.

VALLIN PART NUMBER:
402752WL23-2P2430

Customer Notes

Product Notes

Manufacturer Notes

Page #	Date	Note
1	2021/12/10	DISCONTINUED BY MANUFACTURERSICK INC. WL23-2P2430 Suggested replacement = W23-2 = \$240.00/ea PHOTOELECTRIC RETRO-REFLECTIVE SENSOR DUAL LENS COMPACT W23-2 0.1-10 M SENSING RANGE LED VISIBLE RED LIGHT PNP COMPLEMENTARY LIGHT/DARK SWITCHING 10-30 VDC 4 PIN M12 MALE CONNECTOR 1027785

Users can view existing notes in this new modal, but will not be able to edit or add new notes.

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3. Discontinued Products

VallenIQ will now indicate whether Vallen part numbers loaded into your line items are discontinued.

3.1 New Indicators & Filter

The application will show a new “Discontinued” flag in the Quoted Part # column in your quotes for Vallen part numbers that are discontinued.

Additionally, the “Vallen PN” field in Quoted Part # column will be highlighted orange to provide better visibility for users.

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 4038259 -39840 CPN 1000025 3 9-39840 PROTTRACTOR	MFR Sears Brand Management Corp NO VENDOR	MPN 9-39840 Vallen PN 4038259-3 9840 VENDOR PN 9-39840 9-39840 PROTTRACTOR OR MAGNETIC UOM EA Discontinued	MFR BLACK & DECKER (U.S.) INC. CODE 28876 My Notes	-	1 5 10 15	\$10.25000	10.25000 Set	STANDARD COST \$9.33333 RPC OH REC	9.33333 Set	8.94 %	\$10.25000	ORD
								10.25000 Set		9.33333 Set		\$51.25000	
								10.25000 Set		9.33333 Set		\$102.50000	
								10.25000 Set		9.33333 Set		\$153.75000	
14	RPN 402752 WL23-2P2430	NO MFR NO VENDOR	Vallen PN 402752WL 23-2P2430 VENDOR PN WL23-2P2430 WL23-2P2430 RETRO O REFLECTIVE SENS SOR UOM EA Part Cross References Discontinued	MFR RADWELL INTERNATIONAL CODE 402752 Product Notes My Notes	-	10 20 30 40	\$282.86000	282.86000 Set	STANDARD COST \$257.50000 RPC OH REC	257.50000 Set	8.97 %	\$2,828.60...	VAL
								282.86000 Set		257.50000 Set		\$5,657.20...	
								282.86000 Set		257.50000 Set		\$8,485.80...	
								282.86000 Set		257.50000 Set		\$11,314.4...	

A new filter titled “Discontinued” will also be available in the “Filter by Intelligence” section of the filter toolbar.

100777 Trane Technologies- TRENTON ... Customer Notes Project ID 4337 Status Open Due Date 2022/03/25 Alternates Yes Team Lead Catie Bassett Project Type RFQ	Filter by Category (2) Hand Tools 1 Maint Equip and Supplies 1	Filter by Req. Manufacturer (1) Sears Brand Management Corp 1/1	Filter by Intelligence Created Parts 0 Last Picks 0 CPN Match 0 Don't Match Stock 0 Discontinued 2 My Notes 2 Product Notes 1	Filter by Cost Source With Order History 1 With Quote History 0 With Replacement Cost 2 With Rebate Cost 0 With Standard Cost 2 With Adjusted Cost 0	Filter By Assignee EWL - Eugene Lee 2	Filter by Status RC Status 0 ORD Status 1 QU Status 0 VAL Status 1 DU Status 0 TI Status 0 NQ Status 0 OS Status 0
Selecting 2 item(s) Showing 2/2 results With Discontinued x						

3.2 New Column in Quoted Part # Modal Tabs

A new “Discontinued” column will be added to suggestions and search results in the following tabs of the Quoted Part # modal:

- Multiple Vallen Matches

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- Did you mean?
- Part Cross References
- Cross References
- Last Picks
- Advanced Search Results

This should provide additional helpful context when determining which suggestions and search results to use for line items.

Requested Part Number:
FB-FOAM-ORANGE

Requested Customer Part Number:
18M458

Requested Description:
Fire Block Sealant,12
oz.,Orange,Aerosol

Requested Manufacturer:
3M

Manufacturer Part Number:
05089
Electrical Products

Vallen Part Number:
88861419223

Multiple Vallen Matches (9)

Did you mean? (45)

Advanced Search

Create & Update

Alternates

Last Picks

Part Master

Vallen Part Number	MPN	VPN	MFR/Vendor	Vendor Code	Vendor Type	Description	S/C	Discontinued	Lead Time	Cost	Cost Change Date	
07825435089	05089PS	05089PS	CRC Industries Inc	78254	Manufacturer	05089PS BRAKE PARTS CLEANER 27OZ AEROSOL	C	No		\$5.32800	2022/01/15	<div>Replace</div> <div>Add</div>
07825415089	05089T	05089T	CRC Industries Inc	78254	Manufacturer	05089T BRAKLEEN 20OZ AER W/ TRIGGER	S	No		\$5.05440	2022/01/17	<div>Replace</div> <div>Add</div>
13523647	050890AM85	050890AM85	Regal Cutting Tool/ New York	697172	Manufacturer	050890AM85 1/4X3/8X3/8X2 -7/8 2 FLT DE BALL CC EN	C	No		\$26.61000	2022/02/08	<div>Replace</div> <div>Add</div>
13525780	050890AM94	050890AM94	Regal Cutting Tool/ New York	697172	Manufacturer	050890AM94 1/4X3/8X3/8X2 -7/8 2 FLT DE BALL CC EN	C	No		\$28.59000	2022/02/08	<div>Replace</div> <div>Add</div>
13526851	050892AM95	050892AM95	Regal Cutting Tool/ New York	697172	Manufacturer	050892AM95 9/32X3/8X9/16 X3-3/8 2 FLT DE BALL CC	C	No		\$27.31000	2022/02/08	<div>Replace</div> <div>Add</div>
13525785	050897AM94	050897AM94	Regal Cutting Tool/ New York	697172	Manufacturer	050897AM94 3/8X3/8X9/16X 3-1/2 2 FLT DE BALL CC E	C	No		\$33.12000	2022/02/08	<div>Replace</div> <div>Add</div>
						050898AM88 1X1Y2X1N						<div>Replace</div> <div>Add</div>

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4. Custom Export Quote Header

When quotes are downloaded using Custom Export:

032322 - 2 (38 Lines) • 2022/03/23 at 7:36 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

109224
ELMORE SUPPLY COMPANY
Project ID 4338 Status Open
Due Date 2022/03/25 Alternates Yes
Team Lead Christina Carca... Blanket

Filter by Category (10)
Chemicals/Lube/Adhesives 9
Contractor Supplies 1
Cutting Tools 4
Hand Tools 8
Misc Items 1
Miscellaneous Products 3
Power Tools 1
Safety Products 5
Scale Service 1

Filter by Req. Manufacturer (0)

Filter by Intelligence
Multiple Valien Matches 11
Cross References 0
Part Cross References 9
Suggested Parts 23
Changed RPN 1
Changed CPN 0
Updated Parts 1
Created Parts 0
Last Picks 15


Filter by Cost Source
With Order History 19
With Quote History 24
With Replacement Cost 33
With Rebate Cost 0
With Standard Cost 32
With Adjusted Cost 0

Filter By Assignee
EWL - Eugene Lee 38

Filter by Status
RC Status 7
ORD Status 0
QU Status 0
VAL Status 26
DU Status 13
TI Status 5
NQ Status 0
OS Status 0
AL Status 0

Selecting 1 item(s) Showing 38/38 results

Users will now see a new sheet in your downloaded file titled “Header.”

	A	B
1		
2	Vallen Address	Vallen Distribution, Inc. 2100 Oaks Pkwy Belmont, NC 28012
3	Customer ID	225574
4	Customer Name	Solar Turbines - Coupa
5	Ship To	904 SOLAR TURBINE WAY, Hwy 90, MABANK, TX, 75147-8126
6	Contact Name	John Doe
7	Contact Phone	111-222-3333
8	Contact Email	jdoe@test.com
9	Quote ID	4101
10	Quote Name	Test Quote 032422
11	Quoted Date	03/24/22
12	Quoted By	Eugene Lee elee@supplyframe.com (153) 352-1599
13	Terms	Prices valid 30 days from quote date unless stated above. Valid for quote quantity only. Freight/Handling charges may apply. Vallen reserves the right to amend, withdraw, or otherwise alter this submission without penalty or charge as a result of any event beyond its control arising from or related to the COVID-19 epidemic or events subsequent thereto, including related changes in laws, regulations, orders, or guidance from a competent authority

This new sheet will contain header information related to your quote, and will also show Vallen terms at the bottom of the page.

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4.1 Mapping of Header Fields

Vallen Address

Vallen address will always show the Vallen corporate HQ address in Belmont, NC:

Vallen Distribution, Inc.
2100 Oaks Pkwy
Belmont, NC 28012

Customer ID & Name

Customer ID and name come from the first field in the quote header:

The screenshot displays a software interface with a 'Header' tab selected. The interface is divided into several sections:

- Customer Account:** A red box highlights the field 'Solar Turbines - Coupa 225574'.
- Ship To Suffix:** A dropdown menu showing '200: Solar Turbines - Coupa'.
- Warehouse *:** A text field containing 'Vallen Pasadena TX DPAS'.
- Contact Name:** A text field containing 'John Doe'.
- Contact Phone:** A text field containing '111-222-3333'.
- Contact Email:** A text field containing 'jdoe@test.com'.
- Address:** A text field containing '904 SOLAR TURBINE WAY, Hwy 90, MAB/▼'.
- Lead *:** A dropdown menu showing 'Karen McKnight'.
- Due Date *:** A text field containing 'Thu Feb 17 2022'.
- Type *:** A dropdown menu showing 'Blanket'.
- Alternates Allowed *:** A dropdown menu showing 'Yes'.

On the right side, there are two summary panels:

- Customer Details:**
 - ID: 225574
 - Name: Solar Turbines - Coupa
 - City: MABANK
 - Phone: -
 - Inside Sales Code: tlm1
 - Inside Sales Name: Tabitha L McGee
- Warehouse Details:**
 - Company Code: 1
 - Name: Vallen Pasadena TX
 - WHSE Code: DPAS
 - City: PASADENA
 - State: TX
 - Replenish Path: -
 - Customer ID: 0

At the bottom right, there are two buttons: 'Save Header' (orange) and 'Cancel' (grey).

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Ship To

Ship To comes from whichever address is entered into the field below in the quote header.

If an address from Vallen's master data is accepted, the address will come from customer_contacts table, where the following fields are combined:

- customer_address1, customer_address2, customer_address3, customer_city, customer_state, customer_zip_code, customer_country_code

Project Settings

Header

Merge Projects

Transfer Ownership

Customer Account

Solar Turbines - Coupa 225574

Ship To Suffix

200: Solar Turbines - Coupa

Warehouse *

Vallen Pasadena TX DPAS

Contact Name

John Doe

Contact Phone

111-222-3333

Contact Email

jdoe@test.com

Address

904 SOLAR TURBINE WAY, Hwy 90, MAB/

Lead *

Karen McKnight

Due Date *

Thu Feb 17 2022

Type *

Blanket

Alternates Allowed *

Yes

Customer Details

ID:

225574

Name:

Solar Turbines - Coupa

City:

MABANK

Phone:

-

Inside Sales Code:

t1m1

Inside Sales Name:

Tabitha L. McGee

Warehouse Details

Company Code:

1

Name:

Vallen Pasadena TX

WHSE Code:

DPAS

City:

PASADENA

State:

TX

Replenish Path:

-

Customer ID:

0

Save Header

Cancel

Contact Name, Phone & Email

These three fields come from the values entered into the following three locations in your quote header:

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Project Settings

Header

Merge Projects

Transfer Ownership

Customer Account

Solar Turbines - Coupa 225574

Ship To Suffix

200: Solar Turbines - Coupa

Warehouse *

Vallen Pasadena TX DPAS

Contact Name

John Doe

Contact Phone

111-222-3333

Contact Email

jdoe@test.com

Address

904 SOLAR TURBINE WAY, Hwy 90, MAB/

Lead *

Karen McKnight

Due Date *

Thu Feb 17 2022

Type *

Blanket

Alternates Allowed *

Yes

Customer Details

ID: 225574

Name: Solar Turbines - Coupa

City: MABANK

Phone: -

Inside Sales Code: tlm1

Inside Sales Name: Tabitha L. McGee

Warehouse Details

Company Code: 1

Name: Vallen Pasadena TX

WHSE Code: DPAS

City: PASADENA

State: TX

Replenish Path: -

Customer ID: 0

Save Header

Cancel

Quote ID, Quote Name, Quote Date

These three fields come from the following locations in your Filter Toolbar:

032322 - 2 (38 Lines)

2022/03/23 at 7:38 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

109224

ELMORE SUPPLY COMPANY

Project ID

4338

Status

Open

Due Date

2022/03/25

Alternates

Yes

Team Lead

Christina Carca...

Project Type

Blanket

Filter by Category (10)

Chemicals/Lubs/Adhesives 9

Contractor Supplies 1

Cutting Tools 4

Hand Tools 8

Misc Items 1

Miscellaneous Products 3

Power Tools 1

Safety Products 5

Scale Service 1

Filter by Req. Manufacturer (0)

Filter by Intelligence

Multiple Vallen Matches 11

Cross References 0

Part Cross References 9

Suggested Parts 23

Changed RPN 1

Changed CPN 0

Updated Parts 1

Created Parts 0

Last Picks 15

Filter by Cost Source

With Order History 19

With Quote History 24

With Replacement Cost 33

With Rebate Cost 0

With Standard Cost 32

With Adjusted Cost 0

Filter By Assignee

EWL - Eugene Lee 38

Filter by Status

RC Status 7

ORD Status 0

OU Status 0

VAL Status 26

DU Status 13

TI Status 5

NQ Status 0

OS Status 0

AL Status 0

Selecting 1 item(s)

Showing 38/38 results

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Quoted By

This field will show user profile information for the user who downloaded the Custom Export file.

The screenshot shows a web interface for user profile management. On the left is a sidebar with navigation links: General Settings (with sub-links Account and Profile), User Settings (with sub-links User Management and Auto-Assignments), Reports (with sub-links Teams & Projects and Auto-Match Metrics), and Support (with link support@supplyframe.com). The main content area is titled 'Profile' and contains five text input fields: First Name (Eugene), Last Name (Lee), Phone Number ((153) 352-1599), Title (Supplyframe Engineering Team), and Office Location (Los Angeles, CA). A blue 'Save' button is located at the bottom left of the profile form.

Terms

The terms section of the quote header will rarely change. Therefore, it was requested that the message below should always appear on the bottom of the quote header sheet:

- Prices valid 30 days from quote date unless stated above. Valid for quote quantity only. Freight/Handling charges may apply. Vallen reserves the right to amend, withdraw, or otherwise alter this submission without penalty or charge as a result of any event beyond its control arising from or related to the COVID-19 epidemic or events subsequent thereto, including related changes in laws, regulations, orders, or guidance from a competent authority

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5. User Adoption Reports

In the Settings page, ISR Super Admin and Admin users can now access three “Teams & Projects” reports that will provide information on the quotes that are uploaded into VallenIQ as well as the owners of the quotes.

General Settings	Teams & Projects
Account	
Profile	
User Settings	
User Management	
Auto-Assignments	
Reports	
Teams & Projects	
Auto-Match Metrics	
Support	
support@supplyframe.com	

Project	Project Name	Owner	Customer ID	Customer Name	Type	
4406	033022 - 1	EWL - Eugene Lee	225574	Solar Turbines - Coupa	Blanket	F
4391	Test	ADM3 - Mano CSRAAdmin2	204253	WHEEL KRAFT NW	Blanket	L
4388	create+ISR	ADM3 - Mano CSRAAdmin2	208706	RIEKES EQUIPMENT COMPANY	RFQ	Σ
4387	Order(shipping instruction)-Milliken & CO. M-235.xlsx+Sheet1	ADM3 - Mano CSRAAdmin2	6407	Milliken & CO. M-235	RFQ	F
4368	ESFVAL-1452	SSG - Shanna Gobel	109224	ELMORE SUPPLY COMPANY	RFQ	Σ
4367	TEST 1448	TLE1 - TRACIE EMINETH	100777	Trane Technologies-TRENTON NJ	RFQ	Σ
4366	Mano	ADM3 - Mano CSRAAdmin2	121639	SABINE UNIVERSAL PRODUCTS INC	Blanket	C
4364	Pricing API+ 100089+Y800.xlsx+Sheet1	ADM3 - Mano CSRAAdmin2	100089	Hussmann Int. (Bridgeton)	Blanket	F
4353	032822 - 1	EWL - Eugene Lee	119166	TECTON PRODUCTS	Blanket	C
4352	create and upload	ADM3 - Mano CSRAAdmin2	100089	Hussmann Int. (Bridgeton)	Blanket	C
4341	create+CSR_test	ADM3 - Mano CSRAAdmin2	223361	HUSQVARNA FORESTRY PRODUCTS NA	Implementation	Σ
4340	Bearing quote for Coats America acct 216401.xlsx+Sheet1	ADM3 - Mano CSRAAdmin2	216401	COATS AMERICAN INC	RFQ	F

5.1 Teams Dropdown

Users can toggle between which teams they'd like to view reports for by selecting the dropdown immediately underneath the “Teams & Projects” title.

5.2 Quotes, Summary, & Owners Reports

The ISR Quotes, Summary, and Owners reports will only contain data from quotes uploaded by ISR users, while the QS Summary and Owners reports should contain only data from quotes uploaded by QS users.

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Users are able to sort each report by selecting the sort icons in each column.

Teams & Projects

ISR | Quotes | Summary | Owners | Download Format

Project	Project Name	Owner	Customer ID	Customer Name	Type	Lead	Created	Du
4352	create and upload	ADM3 - Mano CSRAAdmin2	100089	Hussmann Int. (Bridgeton)	Blanket	Christina Carcache	03/25/22	03.
4341	create+CSR_test	ADM3 - Mano CSRAAdmin2	223361	HUSQVARNA FORESTRY PRODUCTS NA	Implementation	Shanna Gobel	03/23/22	03.
4340	Bearing quote for Coats America acct 216401.xlsx+Sheet1	ADM3 - Mano CSRAAdmin2	216401	COATS AMERICAN INC	RFQ	Ryan Barnett	03/23/22	03.
4338	032322 - 2	EWL - Eugene Lee	109224	ELMORE SUPPLY COMPANY	Blanket	Christina Carcache	03/23/22	03.
4337	032322 - 1	EWL - Eugene Lee	100777	Trane Technologies- TRENTON NJ	RFQ	Catie Bassett	03/23/22	03.
4328	Canada(CSR)-FASTENAL(221828).xlsx+Sheet1	ADM3 - Mano CSRAAdmin2	221828	FASTENAL	Blanket	Ryan Barnett	03/23/22	03.
4305	Ship to check	SUPADM2 - Mano CSRSuperadmin2	222617	DELTA INDUSTRIAL SOLUTIONS IN	Blanket	Ryan Barnett	03/22/22	03.
4285	Create and add parts	SUPADM2 - Mano CSRSuperadmin2	204253	WHEEL KRAFT NW	Implementation	Lou McCormack	03/22/22	03.
4277	New export check	SUPADM2 - Mano CSRSuperadmin2	204253	WHEEL KRAFT NW	Blanket	Shanna Gobel	03/22/22	03.
4276	Order(shipping instruction)-Milliken & CO. M-235.xlsx+Sheet1	SUPADM2 - Mano CSRSuperadmin2	121639	SABINE UNIVERSAL PRODUCTS INC	Implementation	Ryan Barnett	03/22/22	03.
4275	Order check	SUPADM2 - Mano CSRSuperadmin2	204253	WHEEL KRAFT NW	RFQ	Ryan Barnett	03/22/22	03.
4274	ISR project	SUPADM2 - Mano CSRSuperadmin2	100089	Hussmann Int. (Bridgeton)	Market Basket	Ryan Barnett	03/22/22	03.
4259	v1.22 Cost 3	EWL - Eugene Lee	109224	ELMORE SUPPLY COMPANY	Blanket	Lindsey Cross	03/17/22	03.
4258	v1.22 Cost 3	EWL - Eugene Lee	109224	ELMORE SUPPLY COMPANY	Blanket	Lindsey Cross	03/17/22	03.

5.3 Permissions

Super Admin and Admin users from both ISR and QS teams will have the ability to access these reports.

Both user types will also be able to toggle between ISR and QS reports using the team dropdown, but Specialist users will only be able to see their own Owners report.

5.4 Quotes Report Fields

Total Price

Total Price is calculated based on the prices associated with the break selected for your line items in the Requested Quantity column of your quotes.

If a requested quantity break is not selected for line items, prices for this line will not count towards the Total Price.

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Converted

The values for the "Converted" column in the Quotes report will appear as "Yes" if at least one line item in the quote has been converted to SX.e. If not, the value for this field will appear as "No."

5.5 Download

Users will have the ability to download each of the reports in csv, tsv, and excel file types.

Teams & Projects									
ISR	Quotes	Summary	Owners	Download Format					
Project	Project Name	Owner	Customer ID	Customer Name	Type	Lead	Created	Due	
4352	create and upload	ADM3 - Mano CSRAAdmin2	100089	Hussmann Int. (Bridgeton)	Blanket	Christina Carcache	03/25/22	03/25/22	
4341	create+CSR_test	ADM3 - Mano CSRAAdmin2	223361	HUSQVARNA FORESTRY PRODUCTS NA	Implementation	Shanna Gobel	03/23/22	03/23/22	
4340	Bearing quote for Coats America acct 216401.xlsx+Sheet1	ADM3 - Mano CSRAAdmin2	216401	COATS AMERICAN INC	RFQ	Ryan Barnett	03/23/22	03/23/22	
4338	032322 - 2	EWL - Eugene Lee	109224	ELMORE SUPPLY COMPANY	Blanket	Christina Carcache	03/23/22	03/23/22	
4337	032322 -1	EWL - Eugene Lee	100777	Trane Technologies- TRENTON NJ	RFQ	Catie Bassett	03/23/22	03/23/22	
4328	Canada(CSR)-FASTENAL(221828).xlsx+Sheet1	ADM3 - Mano CSRAAdmin2	221828	FASTENAL	Blanket	Ryan Barnett	03/23/22	03/23/22	
4305	Ship to check	SUPADM2 - Mano CSRSuperadmin2	222617	DELTA INDUSTRIAL SOLUTIONS IN	Blanket	Ryan Barnett	03/22/22	03/22/22	
4285	Create and add parts	SUPADM2 - Mano CSRSuperadmin2	204253	WHEEL KRAFT NW	Implementation	Lou McCormack	03/22/22	03/22/22	
4277	New export check	SUPADM2 - Mano CSRSuperadmin2	204253	WHEEL KRAFT NW	Blanket	Shanna Gobel	03/22/22	03/22/22	
4276	Order(shipping instruction)-Milliken & CO. M-235.xlsx+Sheet1	SUPADM2 - Mano CSRSuperadmin2	121639	SABINE UNIVERSAL PRODUCTS INC	Implementation	Ryan Barnett	03/22/22	03/22/22	
4275	Order check	SUPADM2 - Mano CSRSuperadmin2	204253	WHEEL KRAFT NW	RFQ	Ryan Barnett	03/22/22	03/22/22	
4274	ISR project	SUPADM2 - Mano CSRSuperadmin2	100089	Hussmann Int. (Bridgeton)	Market Basket	Ryan Barnett	03/22/22	03/22/22	
4259	v1.22 Cost 3	EWL - Eugene Lee	109224	ELMORE SUPPLY COMPANY	Blanket	Lindsey Cross	03/17/22	03/17/22	
4258	v1.22 Cost 2	EWL - Eugene Lee	109224	ELMORE SUPPLY COMPANY	Blanket	Lindsey Cross	03/17/22	03/17/22	

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