RELEASE NOTES

VallenIQ v1.23

Release Date: May 18, 2022

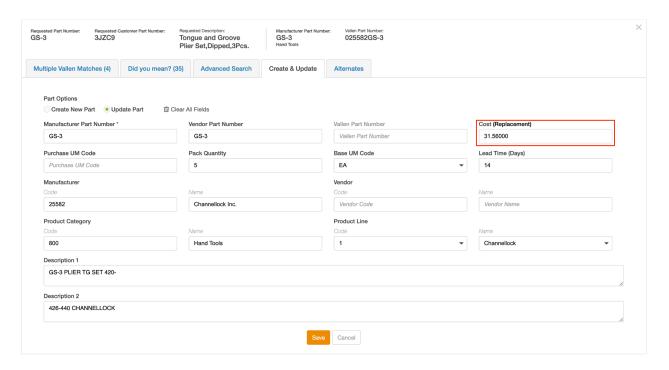# 1. Create & Update Cost Field Name

The purpose of the Cost field in Create & Update is to show and allow users to change Replacement Cost, and to display adjusted conversion factor costs when users change the Base UM Code.

The default title of this field will now show as "Cost (Replacement)" to clarify that this cost corresponds to Replacement Cost.

In Project View, even if a cost type other than Replacement Cost is currently loaded into the Cost column in Project View:

When users open Create & Update, Replacement Cost should appear in the Cost field.

Note that if Base UM Code was previously changed, and an Adjusted Conversion Factor Cost was applied to the line item, when users open the Create & Update tab again for this line, they should expect to see "Cost (Adjusted)" for the title of the cost field, along with the adjusted cost value in this field.

2. Update Part For Stocking Parts

For stocking parts, when cost is changed using the Update Part feature, only the following fields in the Cost column should be updated:

- Cost Type: Change to "Replacement Cost"
- Cost Value: Update to new cost
- Cost Flags: Highlight "RPC"
- Cost Flag Tooltip: Show new cost in "RPC" tooltip

2.1 Stocking vs. Non-Stock Definition

Stocking parts are those that:

- Have a valid Vallen part number
- And the stocking status for this Vallen part number is "S" in part_master

Non-stock parts are those that either:

- Has a valid Vallen part number *and* the stocking_status for this part number is "C"
- Or parts that don't have a Vallen part number at all

2.2 Example

For the stocking part example below:

When users open the Create & Update tab and access the Update Part feature, they should see that the current Replacement Cost is 21.84000:

If they change the cost for this part to 25 and save:

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p: 626.793.7732 | f: 626.793.7914 | w: www.supplyframe.com

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Only the Cost column should change as is shown in the screenshot below:

The color of the highlights above correspond to the bullet points below:

- **Cost Type (red)**: Change to "Replacement Cost"
- **Cost Value (blue)**: Update to new cost
- **Cost Flags (green)**: Highlight "RPC"
- **Cost Flag Tooltip (pink)**: Show new cost in "RPC" tooltip

3. Update Part For Non-Stock Parts

For non-stock parts, when cost is changed using the Update Part feature, the following fields in the Cost and Quote Cost columns should be updated:

- Cost Type: Change to "Replacement Cost"
- Cost Value: Update to new cost
- Cost Flags: Highlight "RPC"
- Cost Flag Tooltip: Show new cost in "RPC" tooltip

Refer to section 2.1 for definitions of stocking vs. non-stock parts.

3.1 Example
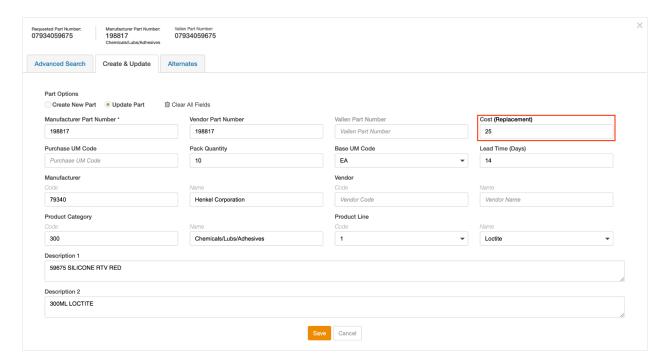
For the non-stock part example below:

When users open the Create & Update tab and access the Update Part feature, you'll notice that the Replacement Cost for this line item is 107.26000:

If they change the cost for this part to 120 and save:

Both the Cost and Quote Cost columns should change as is shown in the screenshot below:

The Cost column should show these changes (not highlighted in screenshot, see section 2.2 for details):

- Cost Type: Change to "Replacement Cost"
- Cost Value: Update to new cost
- Cost Flags: Highlight "RPC"
- Cost Flag Tooltip: Show new cost in "RPC" tooltip

The Quote Cost column should show the changes below, where the color of the highlights in the screenshot above correspond to the following bullet points:

- **Quote Cost Type (red)**: Change to "Replacement Cost"
- **Quote Cost Break Values (pink)**: Change all to new cost entered in Create & Update

4. Quote Price Interactions With Cost Updates

4.1 Stocking Parts

For Stocking parts, when updating cost in Create & Update, the Get-Price-Availability API may be called and the Unit Price (only) may be updated. If this occurs, the values in the Quote Price column will not change.

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 EWL	RPN 179054660 2	NO MFR NO VENDOR	MPN 6602 VALLEN PN 1790546602 VENDOR PN 6602 6602 GLOVES THICKST ER LATEX 14 MIL UOM BX • Multiple Vallen Matches • Suggested Parts • Updated Parts	MFR SAS SAFETY CORP. CODE 179054 • Mfr Notes	–	10 20 30 40	$23.81000	13.06000 Set 13.06000 Set 13.06000 Set 13.06000 Set	REPLACEMENT COST $20.00000 RSC RPC SC QH OH	REPLACEMENT COST 10.97000 Set 10.97000 Set 10.97000 Set 10.97000 Set	16.00 % 16.00 % 16.00 % 16.00 %	$130.60000 $261.20000 $391.80000 $522.40000	VAL

Description:	6602 GLOVES THICKSTER LATEX 14 MIL	Hazmat Code:	-	SPA Cost:	-	Misc. 1:	-
Part Notes:	-	Lead Time:	14	SPA Type:	-	Misc. 2:	-
Product Category:	Safety Products	List Price:	21.94000	Replacement Cost:	10.97000	Misc. 3:	-
Product Category Code:	1900	Customer Resale Price:	-	Cost Change Date:	2022/01/12	Misc. 4:	-
Product Line:	Sas Safety Corp.	Stand. Package Size:	10	Standard Cost:	10.97000		
Product Line Code:	1	Purchase UM:	-	Customer Last Price:	-		
Company Wide Inventory:	199	Base UM Code:	BX	Vendor Type:	Manufacturer		
Stocking Status:	S	Taxable:	Y	Vendor Packaging:	-		
MSDS Code:	N	Non-Tax Type:	-	Vendor Notes:	-		
		Image Link:	-				

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When individual Quote Cost breaks are manually changed in the Quote Cost column for stocking parts, the corresponding Quote Price breaks will not change.
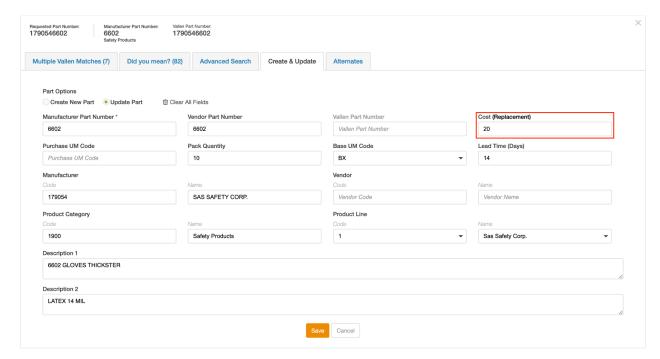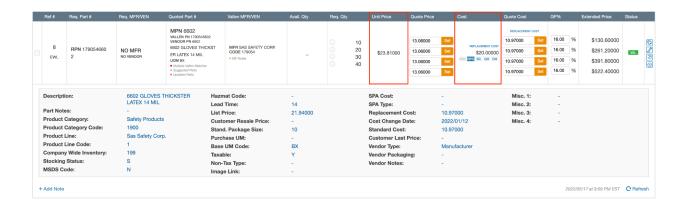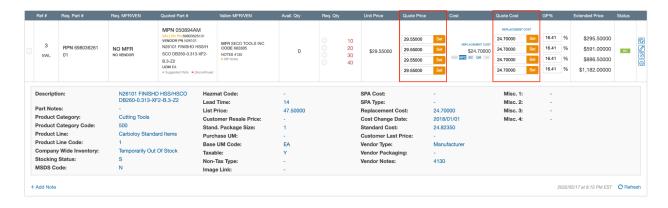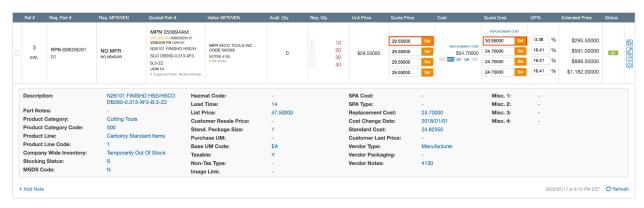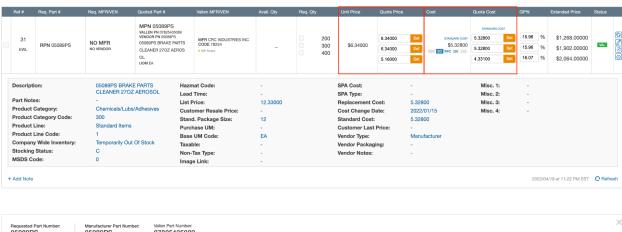
When Quote Cost breaks for stocking parts are manually changed, VallenIQ will not call the pricing APIs, and the corresponding Quote Price breaks will not be updated.
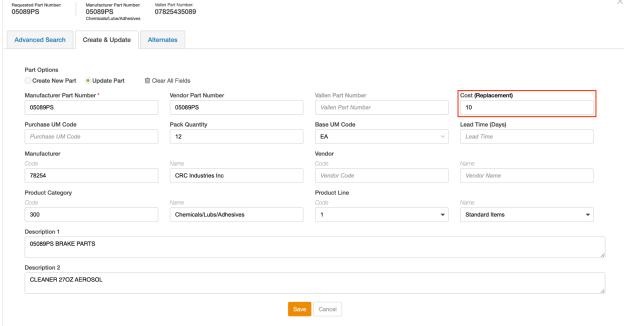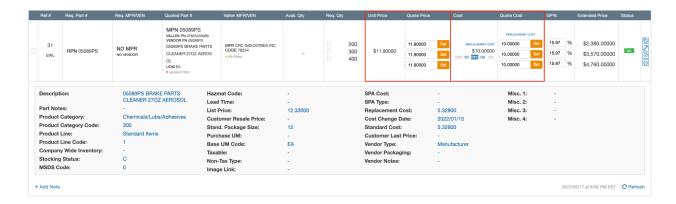

Ref #	Req. Part #	Req. MFR/VEN	Quoted Part #	Vallen MFR/VEN	Avail. Qty	Req. Qty	Unit Price	Quote Price	Cost	Quote Cost	GP%	Extended Price	Status
3 EWL	RPN 698036261 01	NO MFR NO VENDOR	MPN 050894AM VALLEN PN 69803626101 VENDOR PN N26101 N26101 FINISHD HSS/H SCO DB260-0.313-XF2- B.3-Z2 UOM EA • Suggested Parts • Discontinued	MFR SECO TOOLS INC CODE 662885 NOTES 4130 • Mfr Notes	0	10 20 30 40	$29.55000	29.55000 Set 29.55000 Set 29.55000 Set 29.55000 Set	REPLACEMENT COST $24.70000 RSC RPC SC QH OH	REPLACEMENT COST 24.70000 Set 24.70000 Set 24.70000 Set 24.70000 Set	16.41 % 16.41 % 16.41 % 16.41 %	$295.50000 $591.00000 $886.50000 $1,182.00000	INC

Description:	N26101 FINISHD HSS/HSCO DB260-0.313-XF2-B.3-Z2	Hazmat Code:	-	SPA Cost:	-	Misc. 1:	-
Part Notes:	-	Lead Time:	14	SPA Type:	-	Misc. 2:	-
Product Category:	Cutting Tools	List Price:	47.50000	Replacement Cost:	24.70000	Misc. 3:	-
Product Category Code:	500	Customer Resale Price:	-	Cost Change Date:	2018/01/01	Misc. 4:	-
Product Line:	Carboloy Standard Items	Stand. Package Size:	1	Standard Cost:	24.82350		
Product Line Code:	1	Purchase UM:	-	Customer Last Price:	-		
Company Wide Inventory:	Temporarily Out Of Stock	Base UM Code:	EA	Vendor Type:	Manufacturer		
Stocking Status:	S	Taxable:	Y	Vendor Packaging:	-		
MSDS Code:	N	Non-Tax Type:	-	Vendor Notes:	4130		
		Image Link:	-				

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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 EWL	RPN 698036261 01	NO MFR NO VENDOR	MPN 050894AM VALLEN PN 69803626101 VENDOR PN N26101 N26101 FINISHD HSS/H SCO DB260-0.313-XF2- B.3-Z2 UOM EA • Suggested Parts • Discontinued	MFR SECO TOOLS INC CODE 662885 NOTES 4130 • Mfr Notes	0	10 20 30 40	$29.55000	29.55000 Set 29.55000 Set 29.55000 Set 29.55000 Set	REPLACEMENT COST $24.70000 RSC RPC SC QH OH	REPLACEMENT COST 30.55000 Set 24.70000 Set 24.70000 Set 24.70000 Set	-3.38 % 16.41 % 16.41 % 16.41 %	$295.50000 $591.00000 $886.50000 $1,182.00000	INC

Description:	N26101 FINISHD HSS/HSCO DB260-0.313-XF2-B.3-Z2	Hazmat Code:	-	SPA Cost:	-	Misc. 1:	-
Part Notes:	-	Lead Time:	14	SPA Type:	-	Misc. 2:	-
Product Category:	Cutting Tools	List Price:	47.50000	Replacement Cost:	24.70000	Misc. 3:	-
Product Category Code:	500	Customer Resale Price:	-	Cost Change Date:	2018/01/01	Misc. 4:	-
Product Line:	Carboloy Standard Items	Stand. Package Size:	1	Standard Cost:	24.82350		
Product Line Code:	1	Purchase UM:	-	Customer Last Price:	-		
Company Wide Inventory:	Temporarily Out Of Stock	Base UM Code:	EA	Vendor Type:	Manufacturer		
Stocking Status:	S	Taxable:	Y	Vendor Packaging:	-		
MSDS Code:	N	Non-Tax Type:	-	Vendor Notes:	4130		
		Image Link:	-				

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4.2 Non-Stock Parts

For non-stock parts, when updating cost in Create & Update, the Get-Nonstock-Price API may be called. If this occurs, both the Unit Price column and all values in the Quote Price column will be updated.
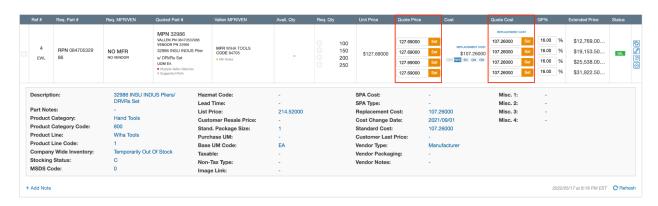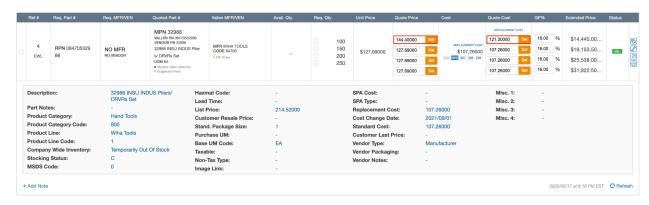
When individual Quote Cost breaks are manually changed in the Quote Cost column, the corresponding Quote Price break is updated.

When Quote Cost breaks for non-stock parts are manually changed, VallenIQ will call the appropriate pricing API, and the corresponding Quote Price breaks will be updated.

5. Standard Cost Added To Select Cost Type Modal

Previously, the Cost Type modal used to contain only the following values:
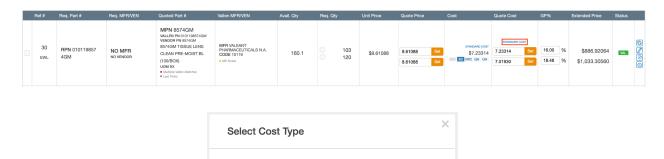
● SPA Cost: Into Stock
● SPA Cost: Ship & Debit
● Replacement Cost
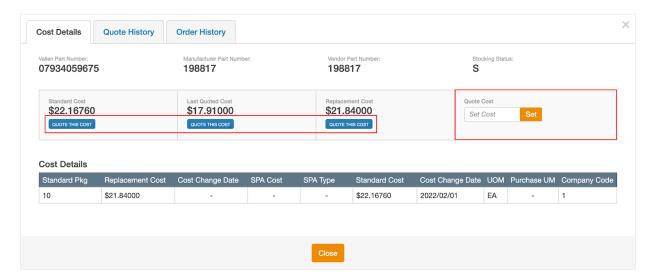
We've added Standard Cost to the available Cost Types:

6. Remove Cost Update Features From Cost Details

The following cost update features have been removed from Cost Details modal, as there are limited use cases for changing costs in this modal:

This Cost Details modal remains available for reference, but all cost changes should be made in Project View, or in the Create & Update tab.