



RELEASE NOTES

VallenIQ v1.24

Release Date: June 29, 2022

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1. "Set Quantity To 1" Option For Quantities 1-4

When uploading new projects into VallenIQ, you now have the option to populate the Quantity 1-4 columns to a value of 1 in the Preview and Confirm Project Data modal.

This feature is similar to the “Set Usage to 1” option that is available in the Usage column.

Preview and Confirm Project Data

Name

Test

Select Sheet

Sheet1

Quantity 1	Quantity 2	Quantity 3	Quantity 4	Cust Last Price	Misc. 1
Set Quantity to 1	Set Quantity to 1	Set Quantity to 1	Set Quantity to 1	Ignore Cust Last Price	Ignore Misc.
1	1	1	1	No Last Price found	No Misc. found
1	1	1	1	No Last Price found	No Misc. found
1	1	1	1	No Last Price found	No Misc. found
1	1	1	1	No Last Price found	No Misc. found
1	1	1	1	No Last Price found	No Misc. found
1	1	1	1	No Last Price found	No Misc. found
1	1	1	1	No Last Price found	No Misc. found
1	1	1	1	No Last Price found	No Misc. found

Next

Cancel

Note that when setting your quantities to one, it's best to do so sequentially (set Quantity 1 to value of 1, then Quantity 2 to value of 1 and so on).

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When your project is uploaded, it will now show values of 1 for whichever quantity columns you selected this new option for:

Test (13 Lines) • 2022/06/27 at 5:51 PM EST • Public • Shared

owned by: Eugene Lee

SettingsHeaderNotesShareEdit HistoryCustom ExportExpand LinesHide AlternatesConvert to S/LActions

Filters

225766

BASF CORP-WYANDOTTE PLAN-ARI...

• Customer notes

Project IDStatusOpen4909

Due Date2022/06/29

Team LeadShanna Gobel

Project TypeRFQ

Filter by Category (4)

Maint Equip and Supplies1

Miscellaneous Products10

Safety Products1

Unknown1

Filter by Req. Manufacturer (0)

Filter by Intelligence

Multiple Vallen Matches7

Cross References0

Part Cross References3

Suggested Parts4

Changed RPN0

Changed CPN0

Updated Parts13

Created Parts0

Filter by Cost Source

With Order History12

With Quote History8

With Replacement Cost12

With Rebate Cost0

With Standard Cost12

With Adjusted Cost0

Filter By Assignee

EWL - Eugene Lee13

Filter by Status

RC Status7

CRD Status0

QI Status0

VAL Status5

DU Status0

TR Status1

NO Status0

OS Status0

Selecting 0 item(s)Showing 13/13 results

Select AllGroup EditRemoveAssignRef #Search line items

Total Price0.00000Total Cost0.00000Refresh All

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		
<input type="checkbox"/>	1	RPN 720476214	NO MFR NO VENDOR	MPN 21475 VALLIN PN 72047621475 VENDOR PN 21475 21475 VEST SOLID 8255 HL L7/L FR LIME UOM EA Multiple Vallen Matches Suggested Parts Updated Parts	MFR ERGODYNE CORPORATION CODE 720476 VENDOR GUY M TURNER INC CODE 126570 Multiple Vallen Matches Suggested Parts Vendor Notes Updated Parts	--	1	\$23.70000	23.70000 23.70000 23.70000 23.70000	Set Set Set Set	REPLACEMENT COST \$15.90000 16.37700 16.37700 16.37700 16.37700	Set Set Set Set Set	30.90 % 30.90 % 30.90 % 30.90 %	\$23.70000 \$23.70000 \$23.70000 \$23.70000	RC
<input type="checkbox"/>	2	RPN 792360AQ1	NO MFR NO VENDOR	MPN AQ120 VALLIN PN 792360AQ120 VENDOR PN AQ120 AQUARION PRESERVE D PRE- FILLED FLUID C ARTTRIDGE UOM ST Multiple Vallen Matches Suggested Parts Updated Parts	MFR ENCON SAFETY PRODUCTS INC CODE 428597 VENDOR GUY M TURNER INC CODE 126570 Multiple Vallen Matches Suggested Parts Vendor Notes Updated Parts	--	1	\$142.62000	142.62000 142.62000 142.62000 142.62000	Set Set Set Set	REPLACEMENT COST \$112.80000 112.80000 112.80000 112.80000	Set Set Set Set	20.91 % 20.91 % 20.91 % 20.91 %	\$142.62000 \$142.62000 \$142.62000 \$142.62000	RC

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2. Custom Export Improvements

We've made two improvements to Custom Export:

1. Users can now export only selected values for Requested Quantity, Quote Price, Quote Cost, GP% and Extended Prices columns (these are available as five new export options)
2. The previously available export options for the values mentioned in 1 have been renamed to be consistent with functionality

2.1 Export Selected Values

Previously, when Custom Exporting Requested Quantities, Quote Prices, Quote Costs, GP Percentages, and Extended Prices, VallenIQ would export all breaks for these fields.

In this release, you will now be able to export only the values that are selected to your downloaded file.

For example, for a project that contains the following line items:

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 720476214 75	NO MFR NO VENDOR	MPN 21475 VALLIN PN 72047621475 VENDOR PN 21475 21475 VEST SOLID 8255 HL LXL FR LIME UOM EA Multiple Vallen Matches Suggested Parts Updated Parts	MFR ERGODYNE CORPORATION CODE 720475 VENDOR GUY M TURNER INC CODE 126570 Mfr Notes Vendor Notes	-	1 1 1 1 1	\$23.70000	23.70000	Set	REPLACEMENT COST \$15.90000 16.37700 Set 16.37700 Set 16.37700 Set 16.37700 Set	30.90	%	\$23.70000	RC
								23.70000	Set		30.90	%	\$23.70000	
								23.70000	Set		30.90	%	\$23.70000	
								23.70000	Set		30.90	%	\$23.70000	
								23.70000	Set		30.90	%	\$23.70000	
2	RPN 792360AQ1 20	NO MFR NO VENDOR	MPN AQ120 VALLIN PN 792360AQ120 VENDOR PN AQ120 AQUARIUM PRESERVE D PRE-FILLED FLUID C ARTTRIDGE UOM ST Multiple Vallen Matches Suggested Parts Updated Parts	MFR ENCON SAFETY PRODUCTS INC CODE 429527 VENDOR GUY M TURNER INC CODE 126570 Mfr Notes Vendor Notes	-	1 1 1 1 1	\$142.62000	142.62000	Set	REPLACEMENT COST \$112.80000 112.80000 Set 112.80000 Set 112.80000 Set 112.80000 Set	20.91	%	\$142.62000	RC
								142.62000	Set		20.91	%	\$142.62000	
								142.62000	Set		20.91	%	\$142.62000	
								142.62000	Set		20.91	%	\$142.62000	
								142.62000	Set		20.91	%	\$142.62000	
3	RPN 010119856 5GM	NO MFR NO VENDOR	MPN 8565GM VALLIN PN 010119856GM VENDOR PN 8565GM 8565GM STATION LENS CLEANING DISPOSABL E UOM EA Part Cross References Updated Parts	MFR VALEANT PHARMACEUTICALS N.A. CODE 10119 VENDOR GUY M TURNER INC CODE 126570 Product Notes Mfr Notes Vendor Notes	-	1 1 1 1 1	\$12.09000	12.09000	Set	REPLACEMENT COST \$9.27000 9.32562 Set 9.32562 Set 9.32562 Set 9.32562 Set	22.87	%	\$12.09000	RC
								12.09000	Set		22.87	%	\$12.09000	
								12.09000	Set		22.87	%	\$12.09000	
								12.09000	Set		22.87	%	\$12.09000	
								12.09000	Set		22.87	%	\$12.09000	
4	RPN 496711FTB DX100	NO MFR NO VENDOR	VALLIN PN 496711FTB0X1 00 VENDOR PN FTB0X100 FTB0X100 FOGTECH D X WIPES ANTI FOG 100/ BOX UOM BX Updated Parts	MFR MOTOSOLUTIONS CODE 496711 VENDOR GUY M TURNER INC CODE 126570 Mfr Notes Vendor Notes	-	1 1 1 1 1	\$44.33000	44.33000	Set	REPLACEMENT COST \$34.00000 35.02000 Set 35.02000 Set 35.02000 Set 35.02000 Set	21.00	%	\$44.33000	RC
								44.33000	Set		21.00	%	\$44.33000	
								44.33000	Set		21.00	%	\$44.33000	
								44.33000	Set		21.00	%	\$44.33000	
								44.33000	Set		21.00	%	\$44.33000	
5	RPN 511384645 7	NO MFR NO VENDOR	Custom Part has n o MPN	No Vallen Match	-	1 1 1 1 1	-	\$ Price	Set	SELECT COST TYPE \$ Cost Set \$ Cost Set \$ Cost Set \$ Cost Set	GP	%	-	Tr
								\$ Price	Set		GP	%	-	
								\$ Price	Set		GP	%	-	
								\$ Price	Set		GP	%	-	
								\$ Price	Set		GP	%	-	

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You now have the option to select the following new Custom Export options:

And in your exported file, you will now only see the values associated with the Requested Quantity you've selected:

Vallen IQ		Quote ID: 4909	Quote Name: Test		
Selected Requested Quantity	Selected Quote Price	Selected Quote Cost	Selected GP Percentage	Selected Extended Price	
1	23.7	16.377	0.308987342	23.7	
1	142.62	112.8	0.209087085	142.62	
1	12.09	9.32562	0.228650124	12.09	
1	44.33	35.02	0.210015791	44.33	
1					
1	5.96	6.96	-0.167785235	5.96	
1	4.06	3.17	0.219211823	4.06	
1	0.39	0.3232	0.171282051	0.39	
1	1.56	1.212	0.223076923	1.56	
1	0.82	0.67568	0.176	0.82	
1	9.55	8.4	0.120418848	9.55	
1	4.91	4.4805	0.087474542	4.91	
1	3.96	2.80395	0.291931818	3.96	

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2.2 Custom Export Field Name Changes

Now that we've introduced the five new Custom Export fields discussed above, we've renamed the previously available export options to be more descriptive.

The following Custom Export option names have been changed:

- Extended Price → All Extended Prices
- GP % → All GP Percentages
- GP % Usage → GP Percentage Usage
- Quantity Breaks → All Requested Quantities
- Quote Cost Breaks → All Quote Costs
- Quote Price Breaks → All Quote Prices

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3. Show Transaction Details From SX.e In Edit History After Submission

When a transaction is successfully submitted to SX.e, VallenIQ will now show the transaction type, the transaction #, and any SX.e acknowledgement messages that are returned from SX.e in Project Level Edit History to help users keep track of transactions they've submitted.

For example, if the following two line items are selected and are added to a new transaction:

Test (13 Lines)

• 2022/06/27 at 5:51 PM EST • Public • Shared

owned by: Eugene Lee

Settings

Header

Notes

Share

Edit History

Custom Export

Expand Lines

Hide Alternates

Convert to SX.e

Actions

222766

BASF CORP-WYANDOTTE PLAN-ARI...

Project ID

4909

Due Date

2022/06/29

Team Lead

Shanna Gobel

Filter by Category (4)

Maint Equip and Supplies

Miscellaneous Products

Safety Products

Unknown

Filter by Req. Manufacturer (0)

Filter by Intelligence

Multiple Vallen Matches

Cross References

Part Cross References

Suggested Parts

Changed RPN

Changed CPN

Updated Parts

Created Parts

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

EWL - Eugene Lee

7

8

3

4

0

13

0

12

12

12

0

12

0

13

Filter by Status

RC Status

ORD Status

QU Status

VAL Status

DU Status

TI Status

NO Status

OS Status

Selecting 2 item(s)

Showing 13/13 results

Select All

Group Edit

Remove

Assign

Ref #

Search line items

Total Price

253.95000

Total Cost

201.54795

Refresh All

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 720476214	NO MFR NO VENDOR	MPN 21475 VALLIN PN 72047621475 VENDOR PN 21475 21475 VEST SOLID 8255 HL LXL FR LIME UOM EA Multiple Vallen Matches Suggested Parts Updated Parts	MFR ERGODYNE CORPORATION CODE 720476 VENDOR GUY M TURNER INC CODE 128570 Mfr Notes Vendor Notes	-	1	\$23.70000	23.70000 23.70000 23.70000 23.70000	REPLACEMENT COST \$15.90000 REG SC DC CR OH	16.37700 16.37700 16.37700 16.37700	30.90 % 30.90 % 30.90 % 30.90 %	\$23.70000 \$23.70000 \$23.70000 \$23.70000	RC
2	RPN 792360AQ1	NO MFR NO VENDOR	MPN AQ120 VALLIN PN 792360AQ120 VENDOR PN AQ120 AQUARION PRESERVE D PRE-FILLED FLUID C ARTRIDGE UOM ST Multiple Vallen Matches Suggested Parts Updated Parts	MFR ENCON SAFETY PRODUCTS INC CODE 620257 VENDOR GUY M TURNER INC CODE 128570 Mfr Notes Vendor Notes	-	1	\$142.62000	142.62000 142.62000 142.62000 142.62000	REPLACEMENT COST \$112.80000 REG SC DC CR OH	112.80000 112.80000 112.80000 112.80000	20.91 % 20.91 % 20.91 % 20.91 %	\$142.62000 \$142.62000 \$142.62000 \$142.62000	RC

Convert To SX.e

Transaction Type

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

Owner

Eugene Lee

Purchase Order Number

115326

Promise Date

Auto-Populated by SX.e When Left Empty

Requested Ship Date

Auto-Populated by SX.e When Left Empty

Shipping Instructions

Enter Shipping Instructions

Continue

Cancel

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7

If these are the confirmation details for your successful transaction submission:

Convert To SX.e

Customer Transaction

Stock Order # 115326 has been created. Please note that once your transaction is submitted, all changes must be completed in SX.e.

SX.e Acknowledgement

Transaction: 17286663-00, has been created., Order Placed On Hold

Close

The details above will appear in the Project Level Edit History event that was created for this transaction:

Project ID
4909

Project Name
Test

Customer ID
222766

Customer Name
BASF CORP-WYANDOTTE PLAN-ARIBA

Project Edit History (3)

Line Item Edit History (53)

Event	History	User	Date and Time
Line Items Were Submitted to SX.e	<div>Stock Order # 115326 has been created. Transaction: 17286663-00, has been created., Order Placed On Hold</div> <div>Ref #'s 1, 2 were submitted to SX.e. Transaction details are as follows:</div> <ul style="list-style-type: none">Acknowledgement Type: ADBuying Party: -Cancel Date: -Company Number: 1Core Charge: -Current Date: 06/27/22Customer Purchase Order: 115326Datc Cost: -Department: -Down Payment: -Enter Date: 06/27/22Event: -GST Tax Amount: -Invoice Date: -Invoice Number: 17286663Invoice Suffix: 00	EWL - Eugene Lee	2022/06/27 at 6:34 PM EST

Close

Note that these details will not appear in Line Item Edit History for the items submitted in your transaction. SX.e order details will only appear in the Project Level Edit History.

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4. Quick Search

The Advanced Search feature has been added to the top navigation bar and can be accessed from any page of the app.

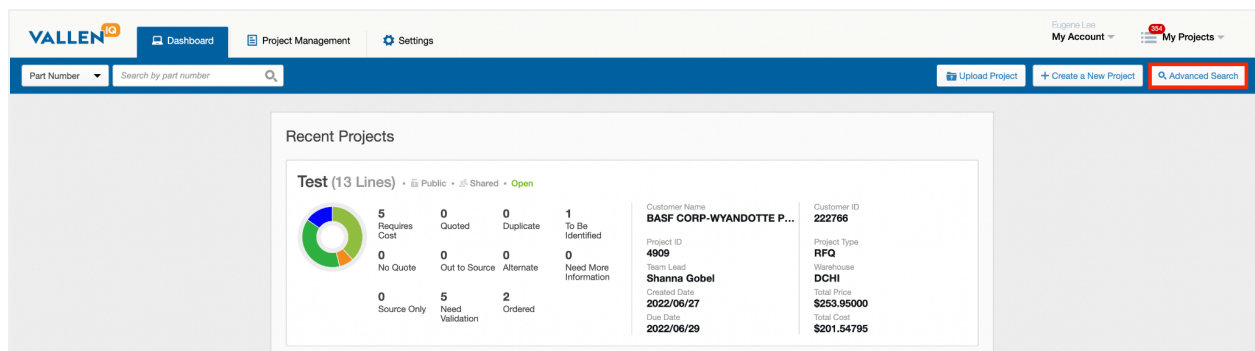
You can use this feature to search for customer requested items more efficiently, check availability, and add search results to existing or new projects.

This enhancement is particularly helpful for single line item customer requests, where users will no longer have to immediately create a new project or open an existing project to use Advanced Search in order to search for requested items from customers.

Ultimately, this option may help save a number of steps in the quoting workflow.

4.1 New Advanced Search Button & Modal

Advanced Search is now available on the top right of VallenIQ's navigation bar:



When selected, the Advanced Search modal will appear:

The screenshot shows the 'Advanced Search' modal. It has a title bar with a close button. Below the title bar, there are 'Search Options' with radio buttons for 'Part Master' (selected) and 'Modified Parts'. There are three input fields: 'Part Number' (with a placeholder 'Part ID'), 'Description' (with a placeholder 'Description'), and 'MFR/Vendor' (with a placeholder 'MFR/Vendor'). A 'Search' button and a 'Cancel' button are at the bottom right.

The same options and search requirements available in the Advanced Search tab in Quoted Part # modal within your projects applies to this modal.

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“Part Master” searches will search for items in Vallen’s master part table and the “Modified Parts” option will run your search against previously updated parts.

Users have the ability to search using one or more categories (Part Number, Description, and MFR/Vendor) but keep in mind that the minimum number of characters you need to conduct a search is three characters per field.

In the search results, it’s important to note that results will be limited to 500, just like Advanced Search in the Quoted Part # modal:

Advanced Search

Search Options

☒ Part Master
 ☐ Modified Parts

Part Number

Description

MFR/Vendor

164

Description

MFR/Vendor

Search

Cancel

500 Part Master table result(s) for "164"

Vallen PN	MPN	VPN	MFR/Vendor	Vendor Code	Vendor Type	Description	S/C	QOH	Discontinued	Lead Time	Cost	Cost Change Date	
01449516423	WDW100	WDW100	Miller Electric Mfg Co	403354	Distributor	WDW100 GASAVER PROPYLENE OXYGEN W/PILOT LIGHT	C	0	No		\$186.77000	2021/06/21	Add to Project
01449516424	WDW101	WDW101	Miller Electric Mfg Co	403354	Distributor	WDW101 GASAVER W/PILOT ACETYLENE OXYGEN	C	0	No		\$165.37000	2021/06/21	Add to Project
01449516429	WDW103	WDW103	Miller Electric Mfg Co	403354	Distributor	WDW103 GASAVER LO-PRESS GAS W/PILOT LIGHT	C	0	No		\$213.96000	2021/06/21	Add to Project
01449516431	WDW104	WDW104	Miller Electric Mfg Co	403354	Distributor	WDW104 GASAVER PROPANE NAT GAS W/PILOT LIGHT	C	0	No		\$165.37000	2021/06/21	Add to Project
01449516442	WDW10005	WDW10005	Miller Electric Mfg Co	403354	Distributor	WDW10005 SADDLE GASAVER	C	0	No		\$16.73000	2021/06/21	Add to Project
01449516449	WDW1506	WDW1506	Miller Electric Mfg Co	403354	Distributor	WDW1506 ASSY LP PILOT ADAPTOR	C	0	No		\$46.97000	2021/06/21	Add to Project

Within the results table above, we’ve added another column titled “QOH.” This column stands for Quantity On Hand, and is the same field we show in Line Item Expand view:

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 720476214 75	NO MFR NO VENDOR	MPN 21475 WALLEN PN 72047621475 VENDOR PN 21475 21475 VEST SOLID 825 5HL L/XL FR LIME UOM EA <div> <div>Multiple Vallen Matches</div> <div>Suggested Parts</div> <div>Updated Parts</div> </div>	MFR ERGODYNE CORPORATION CODE 720476 VENDOR GUY M TURNER INC CODE 126670 <div> <div>Self Items</div> <div>Vendor Notes</div> </div>	-	<div>1</div> <div>1</div> <div>1</div> <div>1</div>	\$23.70000	<div>23.70000</div> <div>23.70000</div> <div>23.70000</div> <div>23.70000</div>	<div>Set</div> <div>Set</div> <div>Set</div> <div>Set</div>	<div>REPLACEMENT COST</div> <div>\$15.90000</div> <div>REPLACEMENT COST</div> <div>16.37700</div>	<div>16.37700</div> <div>16.37700</div> <div>16.37700</div> <div>16.37700</div>	<div>30.90</div> <div>30.90</div> <div>30.90</div> <div>30.90</div>	<div>%</div> <div>%</div> <div>%</div> <div>%</div>	<div>\$23.70000</div> <div>\$23.70000</div> <div>\$23.70000</div> <div>\$23.70000</div>	<div>CRD</div> <div></div> <div></div> <div></div>
<div> <div> <div>Description:</div> <div>21475 VEST SOLID 825HLL L/XL FR LIME</div> </div> <div> <div>Part Notes:</div> <div>-</div> </div> <div> <div>Product Category:</div> <div>Safety Products</div> </div> <div> <div>Product Category Code:</div> <div>-</div> </div> <div> <div>Product Line:</div> <div>-</div> </div> <div> <div>Product Line Code:</div> <div>-</div> </div> <div> <div>Company Wide Inventory (QOH):</div> <div>20</div> </div> <div> <div>Stocking Status:</div> <div>S</div> </div> <div> <div>MSDS Code:</div> <div>N</div> </div> <div> <div>Hazmat Code:</div> <div>-</div> </div> <div> <div>Lead Time:</div> <div>14</div> </div> <div> <div>List Price:</div> <div>31.85000</div> </div> <div> <div>Customer Resale Price:</div> <div>-</div> </div> <div> <div>Stand. Package Size:</div> <div>24</div> </div> <div> <div>Purchase UOM:</div> <div>-</div> </div> <div> <div>Base UM Code:</div> <div>EA</div> </div> <div> <div>Taxable:</div> <div>Y</div> </div> <div> <div>Non-Tax Type:</div> <div>-</div> </div> <div> <div>Image Link:</div> <div>-</div> </div> <div> <div>SPA Cost:</div> <div>-</div> </div> <div> <div>SPA Type:</div> <div>-</div> </div> <div> <div>Replacement Cost:</div> <div>15.90000</div> </div> <div> <div>Cost Change Date:</div> <div>2021/02/15</div> </div> <div> <div>Standard Cost:</div> <div>16.37700</div> </div> <div> <div>Customer Last Price:</div> <div>-</div> </div> <div> <div>Vendor Type:</div> <div>Manufacturer</div> </div> <div> <div>Vendor Packaging:</div> <div>-</div> </div> <div> <div>Vendor Notes:</div> <div>-</div> </div> <div> <div>Misc. 1:</div> <div>-</div> </div> <div> <div>Misc. 2:</div> <div>-</div> </div> <div> <div>Misc. 3:</div> <div>-</div> </div> <div> <div>Misc. 4:</div> <div>-</div> </div> </div>															

+ Add Note

2022/06/27 at 6:34 PM EST

Refresh

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4.2 Adding A Result To Project

Once you've found the item you're looking for, select the "Add to Project" button in the results table:

Advanced Search

Search Options

Part Master

Modified Parts

Part Number

164

Description

MFR/Vendor

Search

Cancel

500 Part Master table result(s) for "164"

Vallen PN	MPN	VPN	MFR/Vendor	Vendor Code	Vendor Type	Description	S/C	QOH	Discontinued	Lead Time	Cost	Cost Change Date	
018582W164-1-4X3-4	W164 1/4X3/4	W164 PINK ST			Do Not Use	W164 PINK STONE ABR STONE 1/4D X 1/8SHK X	S	9000	No	10			<div>My Projects</div> <div>Test BASF CORP-WYANDOTTE PLA... 13 lines</div> <div>Test Solar Turbines - Coupa 17 lines</div> <div>test 062322.xlsx+Sheet1 SOFTEX PAPER INC.</div> <div>+ Create New Project</div> <div>Add to Project</div>
018582W164-3IN	W164 3IN	WES-COR			Do Not Use	WES-COR MOUNTED WHEEL W164 PINK WITH 3IN LONG	S	0	No	10			<div>Add to Project</div>
00076308643164	7100094063	7100094063	3M	51144	Manufacturer	3M 00076308643164 9X7/BX1/4	C	0	No				<div>Add to Project</div>
01614504577	7100016434	7100016434	3M	51144	Manufacturer	3M PARTS CARTRIDGE PEDES TAL 6343433	C	0	No				<div>Add to Project</div>
01614506450	7100016413	7100016413	3M	51144	Manufacturer	CUNO SELF CLEANING EDGE FILTER MODEL EG 70020105	C	0	No		\$1,535.85970	2022/02/01	<div>Add to Project</div>
01614507357	7000001643	7000001643	3M	51144	Manufacturer	07357 CFS11S WATER FILTRATION PROD MODEL	C	0	No		\$56.20160	2022/02/01	<div>Add to Project</div>

A pop up will appear that shows you the 20 most recently created projects within your account, and also an option to "Create New Project."

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If an existing project is selected in “My Projects,” VallenIQ will add the selected search result to the bottom of the project with a Usage value of 1 and a Requested Quantity value of 1, and will take you to the project page:

272766

BASF CORP-WYANDOTTE PLAN-ARI...

Customer Detail

Project ID

4909

Doc Date

2022/06/29

Team Lead

Shanna Gobel

Status

Open

Alternates

Yes

Project Type

RFQ

Filter by Category (5)

Cutting Tools

Maint Equip and Supplies

Miscellaneous Products

Safety Products

Unknown

1

1

1

10

1

Filter by Req. Manufacturer (0)

Filter by Intelligence

Multiple Vallen Matches

Cross References

Part Cross References

Suggested Parts

Changed RPN

Changed CPN

Updated Parts

Created Parts

7

0

3

4

0

0

13

0

--

--

--

--

--

--

--

--

Filter by Cost Source

With Order History

With Quote History

With Replacement Cost

With Rebate Cost

With Standard Cost

With Adjusted Cost

12

8

13

0

13

0

--

--

--

--

--

--

Filter By Assignee

EWL - Eugene Lee

14

Filter by Status

RC Status

ORD Status

QU Status

VAL Status

DU Status

TI Status

NO Status

OS Status

0

2

0

5

0

1

0

0

--

--

--

--

--

--

--

--

Selecting 0 item(s)

Showing 14/14 results

Select All

Group Edit

Remove

Assign

Ref #

Search line items

Total Price

253.95000

Total Cost

201.54795

Refresh All

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
EWL	210	NO MFR NO VENDOR	NF11HD10XL GLOVE C OLD WEATHER 10XL UOM PR	VENDOR GUY M TURNER INC CODE 126570	-	1	\$4,910.000	4.91000	Set	\$4.35000	8.75 %	\$4,910.000	VAL
								4.91000	Set	4.80500	8.75 %	\$4,910.000	
								4.91000	Set	4.80500	8.75 %	\$4,910.000	
EWL	48	NO MFR NO VENDOR	MPN 68-163/XL VALLIN PN 61631400848 VENDOR PN 68-163/XL 68-163/XL GLOVE DRV ERS TOP GRAIN COWHI DE UOM PR	MFR PROTECTIVE INDUSTRIAL PRODUCTS CODE 616314 VENDOR GUY M TURNER INC CODE 126570	-	1	\$3,960.000	3.96000	Set	2.80395	29.19 %	\$3,960.000	VAL
								3.96000	Set	2.80395	29.19 %	\$3,960.000	
								3.96000	Set	2.80395	29.19 %	\$3,960.000	
EWL	14	NO MFR NO VENDOR	MPN W164 1/4X3/4 VALLIN PN 018582W16-1- 4X3-4 VENDOR PN W164 PINK ST W164 PINK STONE ABR STONE 1/4D X 1/8SHK X UOM EA	No Vallen Match	-	1	\$0	\$ Price	Set	0.50000	GP	-	RC
								\$ Price	Set	0.50000	GP	-	

Add New Line

Results per page:

125

250

500

Alternatively, if the “Create New Project” option is selected, VallenIQ will open the new project header modal and prompt you to walk through the same steps as if you’ve selected the “Create a New Project” button in the top right navigation bar of the application:

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 *

Wed Jun 29 2022

Type *

Please Select

Alternates Allowed *

Please Select

Notes

Add Notes

Next

Cancel

Once the project header and preference details are populated, VallenIQ will take you to the new list you've created, with the selected search result loaded into Project View:

Search Test (1 Line) • 2022/06/27 at 7:10 PM EST • Public • Shared

owned by: Eugene Lee

Settings

Header

Notes

Share

Edit History

Custom Export

Expand Lines

Hide Alternates

Convert to SK#

Actions

Filters

222765

BASF CORP-WYANDOTTE PLAN-ARI...

Customer Order

Project ID

4910

Status

Open

Due Date

2022/06/29

Alternates

Yes

Team Lead

Shanna Gobel

Project Type

Blanket

Filter by Category (1)

Cutting Tools

1

Filter by Req. Manufacturer (0)

Filter by Intelligence

Multiple Vallen Matches

0

Cross References

0

Part Cross References

0

Suggested Parts

0

Changed RPN

0

Changed CPN

0

Updated Parts

0

Created Parts

0

Filter by Cost Source

With Order History

0

With Quote History

0

With Replacement Cost

1

With Rebate Cost

0

With Standard Cost

1

With Adjusted Cost

0

Filter By Assignee

EWL - Eugene Lee

1

Filter by Status

RC Status

1

CRD Status

0

QU Status

0

VAL Status

0

DU Status

0

TI Status

0

NQ Status

0

OS Status

0

Selecting 0 item(s)

Showing 1/1 result

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 #	Vallen MFR/VEN	Avail. Qty	Req. Qty	Unit Price	Quote Price	Cost	Quote Cost	GP %	Extended Price	Status
1	RPN 018582W16 4-1-4X3-4	NO MFR NO VENDOR	MPN W164 1/4X3/4 VALLIN PN 018582W16-1-4X3-4 VENDOR PN W164 PINK ST W164 PINK STONE ABR STONE 1/4D X 1/8SHK X UOM EA	No Vallen Match	-	1	\$0	\$ Price \$ Price	\$0.50000 \$0.50000	\$0.50000 \$0.50000	GP % GP %	- -	RC

Add New Line

Results per page: 125 250 500

The same quantities (Usage value of 1 and Requested Quantity 1 value of 1) mentioned above will appear in the line item.

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5. Frozen Header Improvements

As you scroll through your projects, the entire Filter Toolbar section will now be frozen by default:

The screenshot displays the VALLEN IQ Project Management interface. The top navigation bar includes 'Dashboard', 'Project Management', and 'Settings'. The 'Filter By' section is frozen at the top, showing various filter categories like 'Filter by Category', 'Filter by Req. Manufacturer', 'Filter by Intelligence', 'Filter by Cost Source', 'Filter by Assignee', and 'Filter by Status'. Below the filters, the main table displays project data with columns for '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', and 'Status'. The table is scrollable, while the filter toolbar remains fixed at the top.

To hide the Filter Toolbar, select the “Filter” button on the top right of the page, and select “Hide Filters:”

This screenshot shows the same VALLEN IQ Project Management interface, but with the 'Filter' button on the top right selected. A dropdown menu is visible, showing the option 'Hide Filters' highlighted. The main table content remains the same, but the filter toolbar is no longer visible, demonstrating the 'Hide Filters' functionality.

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6. Notable Bug Fixes

- Shipping Instructions now match Ship To Suffixes in the Project Header, and match to those in SX.e
- When using the Convert to SX.e feature, SX.e will populate default dates consistently when Requested Ship and Promise Dates are not provided
- All formatting has been removed from fields that had currency and percentage formatting (price, cost, GP%, etc.) exported using Custom Export feature

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