



RELEASE NOTES

# VallenIQ v1.25

Release Date: August 10, 2022

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# 1. Results Per Page & Pagination For Teams & Projects Reports

We've made the following three enhancements to the Teams & Projects reports page in the Settings tab:

- Results Per Page
- Go-To-Page and Pagination
- Default sorting for all reports

The screenshot shows the VALLEN.io interface with the 'Settings' tab selected. On the left, there's a sidebar with 'General Settings', 'User Settings', 'Reports', 'Teams & Projects', and 'Support'. The 'Teams & Projects' section is active, displaying a table of projects. The table has columns for Project, Project Name, Owner, Customer ID, Customer Name, and Type. The 'Results per page' dropdown is set to 125, and the pagination shows 'Page 1 of 6'.

Project	Project Name	Owner	Customer ID	Customer Name	Type
5005	Steve Competitor Xrefs pt. 1	EWL - Eugene Lee	104088	SOUTHWEST PIPE TRADES ASSOC	RFQ
5004	111	ADM3 - Mano CSRAAdmin2	227049	1BW OILFIELD SUPPLY LLC	Market Basket
5001	Pricing API+ 100089-Y800.xlsx+Sheet1	ADM3 - Mano CSRAAdmin2	100089	Hussmann Int. (Bridgeton)	Blanket
4974	Product code	ADM3 - Mano CSRAAdmin2	204253	WHEEL KRAFT NW	RFQ
4973	Product line code check	ADM3 - Mano CSRAAdmin2	204253	WHEEL KRAFT NW	Blanket
4947	Order check	ADM3 - Mano CSRAAdmin2	100089	Hussmann Int. (Bridgeton)	Blanket
4946	Order(hipping instruction)- Miliken & CO. M-235.xlsx+Sheet1	ADM3 - Mano CSRAAdmin2	6407	Miliken & CO. M-235	Blanket
4926	LISTADO PARA COTIZAR A1 - Pasted Into New File. No Formatting.xlsx+Sheet1	EWL - Eugene Lee	230118	NISSAN NORTH AMERICA	Implementation
4925	Sample Project	EWL - Eugene Lee	230118	NISSAN NORTH AMERICA	Implementation
4924	Cost RFQ - 225574 - Ship To 200 - WHSE DPAS.xlsx+Vallen	EWL - Eugene Lee	225574	Solar Turbines - Coupa	Blanket
4923	062322 - Cust ID 222766.xlsx+Sheet1	EWL - Eugene Lee	215987	SOFTEX PAPER INC.	Implementation
		SUPADM2 -			

These enhancements apply to all reports for both the ISR and Q&S teams available on this page.

## 1.1 Results Per Page

Similar to the Results Per Page feature within projects, users can now choose how many results they'd like to see in their report.

The default selected option will be 125 results per page, but the number of results can also be set to 250 or 500.

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## 1.2 Go-To-Page & Pagination

On the bottom right of each report, users now have access to a go-to-page feature with left and right arrows to navigate to different pages in their reports.

To use the go-to-page feature, either type in the page you want to go to into the highlighted text entry box below, or click the up and down arrows to find the page you want to view, then press the enter button on your keyboard:



## 1.3 Default Sorting For All Reports

All reports will now be sorted by the “Project” column in descending order. This means the most recently created projects in VallenIQ will show at the top of each report.

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## 2. Retain Lines In Filter

Previously, when a user selected a filter and edited a line item such that it no longer qualifies for the filter, the line item would drop from view.

This could be disruptive to the quoting process, especially for larger projects, because the user would no longer have visibility into the dropped line.

If the line had to be edited further, the user would have to search for the line item again within the project, then edit the line as necessary.

Now, when a filter is applied:

Sample Project (2001 Lines) • 2022/07/26 at 5:41 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 Filters

230119  
NISSAN NORTH AMERICA  
Project ID: 4925  
Status: Open  
Due Date: 2022/07/28  
Team Lead: Lindsey Cross  
Project Type: Implementation

Filter by Category (7)  
Electrical Products 4  
Ind Rubber Products 2  
Maint Equip and Supplies 2  
Miscellaneous Products 9  
Pipe and Fittings 2  
Power Tools 4  
Power Transmission Equip 4

Filter by Req. Manufacturer (9)  
ALTOS HORNS 2/2  
ANCLO 1/1  
COMMERCIAL 12/12  
GATES 1/1  
IVOSTUD 1/1  
MOMENTO 1/1  
NELSON STUD WELDING 1/1  
SMC 4/4  
TREGASKISS 1/1

Filter by Intelligence  
Multiple Vallen Matches 21  
Cross References 0  
Part Cross References 3  
Suggested Parts 7  
Changed RPN 23  
Changed CPN 0  
Updated Parts 0  
Created Parts 0  
Last Picks 0

Filter by Cost Source  
With Order History 11  
With Quote History 6  
With Replacement Cost 27  
With Rebate Cost 0  
With Standard Cost 27  
With Adjusted Cost 0

Filter by Assignee  
EWL - Eugene Lee 27

Filter by Status  
321 RC Status  
0 ORD Status  
1 OU Status  
219 VAL Status  
27 DU Status  
1460 TI Status  
0 HQ Status  
0 OS Status  
0 AL Status

Selecting 0 item(s) Showing 27/27 results With Status: DU x

Select All Group Edit Remove Assign Ref # Search 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
82	RPN 1* CPN 401011606 1RA, FASE - BAJA R OTACION	MFR ANCLO NO VENDOR	VALLIN PN 10461569 VENDOR PN 1 SPREC/SCHU CA7-23-1 0-120 SPA XCOLD LOW V LM RS 1/28 UOM EA Multiple Vallen Matches	MFR UPSTATE CONTROL INC CODE 403530 M Notes	-	1	\$398.05000	398.05000 Set	STANDARD COST \$334.56000 \$334.56000 Set	15.95 %	\$398.05000	VAL DU	
116	RPN 1* CPN 401371210 2DA, FASE - SPOT IT EM	NO MFR NO VENDOR	VALLIN PN 10461569 VENDOR PN 1 SPREC/SCHU CA7-23-1 0-120 SPA XCOLD LOW V LM RS 1/28 UOM EA Multiple Vallen Matches	MFR UPSTATE CONTROL INC CODE 403530 M Notes	-	1	\$398.05000	398.05000 Set	STANDARD COST \$334.56000 \$334.56000 Set	15.95 %	\$398.05000	VAL DU	
134	RPN 1* CPN 401376787 2DA, FASE - SPOT IT EM	MFR COMERCIAL NO VENDOR	VALLIN PN 10461569 VENDOR PN 1 SPREC/SCHU CA7-23-1 0-120 SPA XCOLD LOW V LM RS 1/28 UOM EA Multiple Vallen Matches	MFR UPSTATE CONTROL INC CODE 403530 M Notes	-	1	\$398.05000	398.05000 Set	STANDARD COST \$334.56000 \$334.56000 Set	15.95 %	\$398.05000	VAL DU	
135	RPN 1/2* CPN 401370056 2DA, FASE - SPOT IT EM	MFR COMERCIAL NO VENDOR	MPN 12 VALLIN PN 69704112 VENDOR PN 12 12 CHSEL 9IN UOM EA Multiple Vallen Matches	MFR AJAX TOOL WORKS INC CODE 697041 M Notes	-	1	\$8.06000	8.06000 Set	STANDARD COST \$8.30180 8.30180 Set	-3.00 %	\$8.06000	VAL DU	

Users can edit line items so they no longer belong in the filter they've selected. VallenIQ will then highlight the lines and display text that says "Does not qualify for filters."

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This notifies users that the lines now do not meet filter criteria, but VallenIQ will continue to keep the lines on the page so they can be edited further if needed:

Sample Project (2001 Lines) • 2022/07/26 at 5:41 PM EST • Public • Shared  
owned by: Eugene Lee

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

230118  
NISSAN NORTH AMERICA

Project ID: 4925  
Status: Open  
Due Date: 2022/07/28  
Yes  
Team Lead: Lindsey Cross  
Project Type: Implementation

Filter by Category (7)  
Electrical Products  
Ind Rubber Products  
Maint Equip and Supplies  
Miscellaneous Products  
Pipe and Fittings  
Power Tools  
Power Transmission Equip

Filter by Req. Manufacturer (8)  
4 ALLOS HORNS  
2 COMERCIAL  
2 GATES  
7 IVOSTUD  
2 MOMENTO  
4 NELSON STUD WELDING  
4 SMC  
1/1 TREGASKISS

Filter by Intelligence  
Multiple Vallen Matches  
Cross References  
Part Cross References  
Suggested Parts  
Changed RPN  
Changed CPN  
Updated Parts  
Created Parts  
Last Picks

Filter by Cost Source  
19 With Order History  
0 With Quote History  
3 With Replacement Cost  
7 With Rebate Cost  
21 With Standard Cost  
0 With Adjusted Cost

Filter By Assignee  
9 EWL - Eugene Lee  
25

Filter by Status  
322 RC Status  
0 CRD Status  
1 QU Status  
218 VAL Status  
25 DU Status  
1460 TI Status  
0 NQ Status  
0 OS Status  
0 AL Status

Selecting 0 Item(s) Showing 25/25 results With Status: DU x

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
82	RPN 1* CPN 401011606 1RA, FASE - BAJA R OTACION	MFR ANCLCO NO VENDOR	MPN 83336-4 VALLIN PN 10461800 VENDOR PN 1 83336-4 INJECTOR MA NIFOLD UOM EA Multiple Vallen Matches Last Picks	MFR AUTO LUBE SERVICES INC CODE 41941 NOTES CREDIT CARD Multiple Vallen Matches Last Picks	-	1	\$156.00000	398.05000	STANDARD COST \$127.92000	STANDARD COST 127.92000	67.86 %	\$398.05000	RC
116	RPN 1* CPN 401371210 2DA, FASE - SPOT IT EM	NO MFR NO VENDOR	MPN 22-1347 VALLIN PN 10461499 VENDOR PN 1 FILTER VACUUM ELEME NT SOLBERG 22-1347 UOM EA Multiple Vallen Matches Last Picks	VENDOR BEARINGS AND DRIVES CODE 431449 Multiple Vallen Matches Last Picks	-	1	\$80.65000	398.05000	STANDARD COST \$68.11390	STANDARD COST 68.11390	82.89 %	\$398.05000	VAL
134	RPN 1* CPN 401376787 2DA, FASE - SPOT IT EM LAST PICK	MFR COMERCIAL NO VENDOR	VALLIN PN 10461569 VENDOR PN 1 SPRINC/SCHAU CA7-23-1 0-120 SFA, NCOLD LOW V LM RS 128 UOM EA Multiple Vallen Matches Last Picks	MFR UPSTATE CONTROL INC CODE 403530 Multiple Vallen Matches Last Picks	-	1	\$398.05000	398.05000	STANDARD COST \$334.56000	STANDARD COST 334.56000	15.95 %	\$398.05000	VAL
135	RPN 1/2* CPN 401370056 2DA, FASE - SPOT IT EM	MFR COMERCIAL NO VENDOR	MPN 12 VALLIN PN 69704112 VENDOR PN 12 12 CHISEL 9IN UOM EA Multiple Vallen Matches Last Picks	MFR AJAX TOOL WORKS INC CODE 697041 Multiple Vallen Matches Last Picks	-	1	\$8.06000	8.06000	STANDARD COST \$8.30180	STANDARD COST 8.30180	-3.00 %	\$8.06000	VAL

The line items will remain visible until the page is refreshed or until the filters are changed again (filters are added, removed, or all filters are cleared).

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### 3. Alphabetize Matched Manufacturers In More Filters

We've alphabetized results in the "Matched Manufacturers" tab in the "More Filters" modal.

The screenshot displays the SupplyFrame application interface for a 'Sample Project (2001 Lines)'. The main window shows a list of project lines with columns for Ref #, Req. Part #, Req. MFR/VEN, Quoted Part #, and various status indicators. A modal window titled 'Filter by Matched Manufacturers' is open, showing a list of manufacturers under the 'Matched Manufacturers' tab. The list includes manufacturers like 3M Fall Protection, ABRASIC 90 INC, Alvord-Polk Tool Co., Arlington Industries Inc, Brady Worldwide Inc, Carlisle Food Service Products, Crouse Hinds, Dixon Valve & Coupling, Eaton Corporation, ERGODYNE CORPORATION, ABB INSTALLATION PRODUCTS INC, Ajax Tool Works Inc, Apex Tool Group LLC, Black & Decker (U.S.) Inc, Brooks Equipment Co., Cooper Wiring Devices Inc, Custom Leather Craft, Dynabrade Inc, Ekland Tool Company, and Florida Pneumatic Mfg Co. The modal also has 'Save' and 'Cancel' buttons. The background shows the project details for 'NISSAN NORTH AMERICA' and a table of costs and prices.

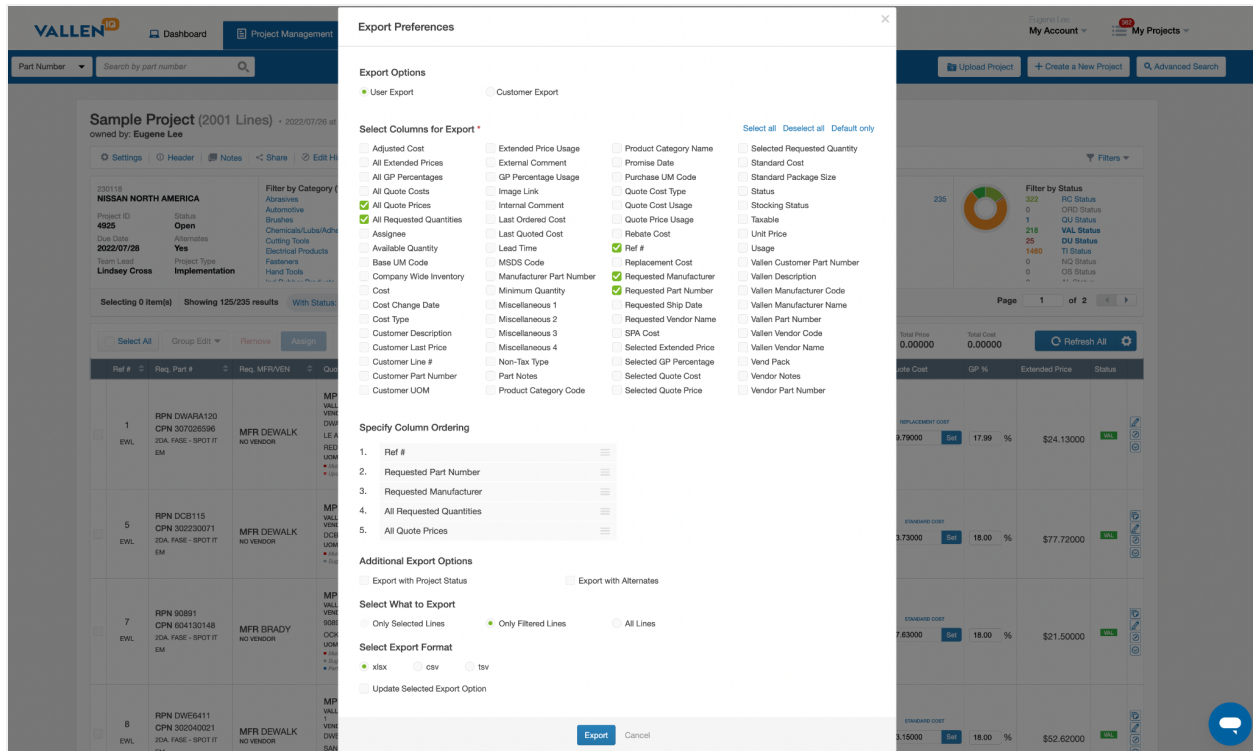
Ref #	Req. Part #	Req. MFR/VEN	Quoted Part #	Cost	Quote Cost	GP %	Extended Price	Status
1	RPN DWARA120 CPN 307026596 2DA, FASE - SPOT IT EM	MFR DEWALK NO VENDOR	MPN DWARA120 VALLIN PN 889115423 VENDOR PN DWARA120 DWARA120 RIGHT ANG LE ATT ACHMT IMPACT REDY UOM EA Multiple Matched Updated Parts	19.79000	19.79000	17.99 %	\$24.13000	VAL
5	RPN DCB115 CPN 302230071 2DA, FASE - SPOT IT EM	MFR DEWALK NO VENDOR	MPN DCB115 VALLIN PN 02867028115 VENDOR PN DCB115 DCB115 CHARGER 20V UOM EA Multiple Matched Suggested Parts	63.73000	63.73000	18.00 %	\$77.72000	VAL
7	RPN 90891 CPN 604130148 2DA, FASE - SPOT IT EM	MFR BRADY NO VENDOR	MPN 90891 VALLIN PN 9089102023 VENDOR PN 90891 90891 KIT BREAKER BL OCK EZ 480 600 VOLT UOM EA Multiple Matched Suggested Parts Part Cross Reference	17.63000	17.63000	18.00 %	\$21.50000	VAL
8	RPN DWE5411 CPN 302040021 2DA, FASE - SPOT IT EM	MFR DEWALK NO VENDOR	MPN DWE5411 VALLIN PN 02867028541 VENDOR PN DWE5411 DWE5411 ORB FINISH SANDE R 1/4 SHEET UOM EA Multiple Matched Suggested Parts Part Cross Reference	43.15000	43.15000	18.00 %	\$52.62000	VAL

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## 4. Expand Custom Export Modal Horizontally

We've expanded the Custom Export modal horizontally so users can see more of the modal in one page, and to make it easier to view and use this feature.



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