



RELEASE NOTES

VallenIQ v1.27

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1. Support For Verticals

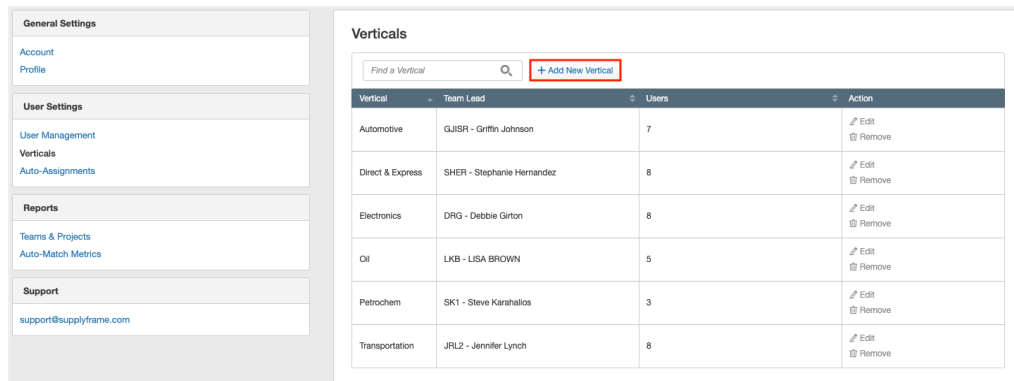
VallenIQ now supports verticals in a new page in “Settings.” In this new page, Super Admins can create and manage verticals for the ISR organization.

1.1 New Verticals Page In User Settings

Access the new “Verticals” page under the “User Settings” section of the “Settings” tab.

1.1.1 Adding

Add a new vertical by selecting the “Add New Vertical” button at the top of the page:



In the “Add New Vertical” modal, the required fields are marked with a red asterisk:

Add New Vertical

Vertical Name *

Mining

Team Lead *

TLE1 - TRACIE EMINETH

Add Team Member

+ Add

Team

Employee ID	User	Action
RPA	Robert Aycock	Remove
KMB2	Kayla Townsend	Remove
DS10	Dylan Stutzman	Remove

Confirm

Cancel

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Add users to your new vertical by typing names into the “Add Team Member” field and selecting “Add.” As you add users to your team, you’ll see them appear in blue in the “Team” table. Once you’re done, select “Confirm” to save your changes.

Note that each vertical can only have one Team Lead, and each user can only belong to one vertical at a time.

1.1.2 Editing

Select the “Edit” button in the “Actions” column to edit your existing verticals:

Edit Vertical

Vertical Name *
Automotive

Team Lead *
GJISR - Griffin Johnson

Add Team Member
 [+ Add](#)

Team

Employee ID	User	Action
CSRSU	CSR Super Admin	Remove
GJISR	Griffin Johnson	
HG1	Hanna Gonzalez	Remove
JSP37	Stephen Palmer	Remove

[Confirm](#) [Cancel](#)

1.1.3 Removing

Select the “Remove” button in the “Actions” column to remove verticals. You’ll be prompted to confirm your decision before your change is applied.

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1.1.4 New Vertical Column in User Management Page

Super Admins and Admins are able to see which users belong to which vertical in the User Management page:

General Settings

Account

Profile

User Settings

User Management

Verticals

Auto-Assignments

Reports

Teams & Projects

Auto-Match Metrics

Support

support@supplyframe.com

User Management

Find a User

+ Add New User

8 pending / 148 total

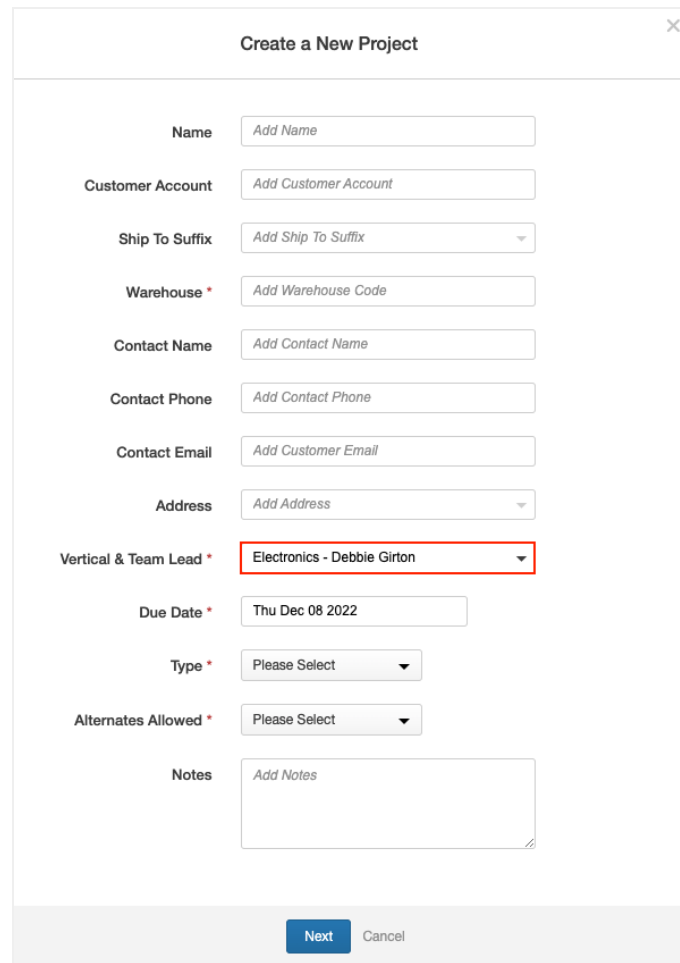
Name	Member Email	Team	Vertical	Role	Employee ID	Action
Stephen Palmer	stephen.palmer@vallen.com	QS	Automotive	Specialist	JSP37	<div>Edit</div> <div>Remove</div>
Example Account	elée+example@supplyfram...	ISR	Mining	Admin	EL1	<div>Edit</div> <div>Remove</div>
Griffin Johnson	gjohnson+1@supplyframe...	QS	Mining	Specialist	DFK1	<div>Edit</div> <div>Remove</div>
QS test	mramasamy+qs3@supplyfr...	QS	Transportation	Admin	QS3	<div>Edit</div> <div>Remove</div>
mano QS Admin	mramasamy+manager1@su...	QS	Transportation	Admin	ADMIN1	<div>Edit</div> <div>Remove</div>
James Nixon	jnixn@supplyframe.com	QS	Oil	Admin	JNN01	<div>Edit</div> <div>Remove</div>
Thomas Petty	thomas.petty@vallen.com	ISR	Electronics	Admin	TEP	<div>Edit</div> <div>Remove</div>
geneva adams	geneva.adams@vallen.com	QS	Transportation	Specialist	GCA2	<div>Edit</div> <div>Remove</div>
Melly Rosehaven	mrosehaven+specialist@su...	QS	Petrochem	Specialist	KSV5	<div>Edit</div> <div>Remove</div>

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1.2 Defaulting Vertical & Team Lead In Project Headers

When users that belong to a vertical use the “Upload Project” and “Create New Project” features, VallenIQ will automatically add the vertical that the user belongs to, as well as the Team Lead for this vertical to the following field:

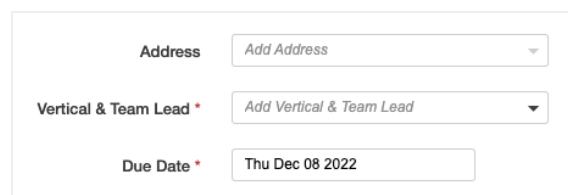


The screenshot shows a web form titled "Create a New Project" with a close button (X) in the top right corner. The form contains several input fields and dropdown menus. The "Vertical & Team Lead" field is highlighted with a red rectangle and shows the selected value "Electronics - Debbie Gorton".

Field Label	Value / Placeholder
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
Vertical & Team Lead *	Electronics - Debbie Gorton
Due Date *	Thu Dec 08 2022
Type *	Please Select
Alternates Allowed *	Please Select
Notes	Add Notes

At the bottom of the form, there are two buttons: "Next" (blue) and "Cancel" (grey).

When users that don't belong to a vertical use the “Upload Project” and “Create New Project” features, VallenIQ will not auto-populate the “Vertical & Team Lead” field:



This screenshot shows a portion of the "Create a New Project" form, specifically the "Address", "Vertical & Team Lead", and "Due Date" fields. The "Vertical & Team Lead" field is empty, showing the placeholder text "Add Vertical & Team Lead".

Field Label	Value / Placeholder
Address	Add Address
Vertical & Team Lead *	Add Vertical & Team Lead
Due Date *	Thu Dec 08 2022

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Values of the “Vertical & Team Lead” field can be changed by users - when the dropdown is selected, all existing Verticals and their corresponding Team Leads will appear:

Vertical & Team Lead *
 Add Vertical & Team Lead
 Automotive - Griffin Johnson
 Oil - LISA BROWN
 Electronics - Debbie Gorton
 Transportation - Jennifer Lynch
 Petrochem - Steve Karahalios
 Direct & Express - Stephanie Hernandez

1.3 Reporting

Verticals are only used by the ISR organization so this information will only appear in reports built for the ISR team.

1.3.1 Teams & Projects

The “Vertical” column appears in the ISR “Quotes” report, in both the in-app report page as well as in downloaded copies of this report:

Teams & Projects

ISR Quotes Summary Owners Download Format

Project	Project Name	Vertical	Owner	Customer ID	Customer Name	Type
5401	120522	Electronics	CSRADMIN1 - CSR Admin 1	206761	THG LOGISTICS INC	RFQ
5399	50 line items-Vallen.xlsx+Assignee	Oil	SUPERADMIN - Mano CSRsuperadmin	204253	WHEEL KRAFT NW	Implementation
5398	order check	Oil	SUPERADMIN - Mano CSRsuperadmin	100089	Hussmann Int. (Bridgeton)	RFQ
5359	Order(shipping instruction)-Milliken & CO. M-235.xlsx+Sheet1	Oil	SUPADM2 - Mano CSRsuperadmin2	6407	Milliken & CO. M-235	Implementation

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1.3.2 Auto-Match Metrics

The “Vertical” column also appears in the Auto-Match Metrics report, but only when “ISR” is selected. This column will not appear in the report for the Q&S team.

Auto-Match Metrics

This report contains metrics related to the auto-match rate of line items uploaded to VallenIQ. Only data from Closed projects will be available and the report will be downloaded in .xlsx format. The downloaded file will contain the following sheets:

- Summary All Projects
- Summary By Project

Select Team

☐ Q&S ☒ ISR

[Download Report](#)

1.4 Permissions

The permissions for the new Verticals feature are as follows:

Action	Super Admin	Admin	Specialist
View Verticals Page	Yes	Yes	No
Edit Verticals Page	Yes	No	No
View Teams & Projects Reports	Yes	Yes	Yes (only for Q&S specialists / only for lines assigned to your account)
Download Teams & Projects Reports	Yes	Yes	Yes (only for Q&S specialists / only for lines assigned to your account)
Download Auto-Match Reports	Yes	Yes	No
Change Vertical & Team Lead in Project Headers	Yes	Yes	No

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2. Create New Part Permissions Update For ISR Users

The “Create New Part” feature in “Create & Update” has been grayed out and will be unselectable for all ISR users in VallenIQ (Super Admin, Admin, and Specialist user roles):

The screenshot displays the 'Create & Update' form in VallenIQ. At the top, there are three tabs: 'Multiple Vallen Matches (15)', 'Did you mean? (19)', and 'Advanced Search'. Below these is a 'Create & Update' button, which is currently disabled (grayed out). To the right of this button is an 'Alternates' button. The main form area is titled 'Part Options' and contains several sections for data entry. The 'Create New Part' option is highlighted with a red box, indicating it is the focus of the update. The 'Update Part' option is also visible. The form includes fields for 'Manufacturer Part Number', 'Vendor Part Number', 'Vallen Part Number', 'Cost (Replacement)', 'Purchase UM Code', 'Pack Quantity', 'Base UM Code', 'Lead Time (Days)', 'Manufacturer', 'Vendor', 'Product Category', 'Product Line', 'Description 1', and 'Description 2'. The 'Create New Part' option is currently disabled, as indicated by the red box and the context provided in the text.

Requested Part Number:	Manufacturer Part Number:	Vallen Part Number:
72047621475	21475 Safety Products	72047621475

Multiple Vallen Matches (15) | Did you mean? (19) | Advanced Search | Create & Update | Alternates

Part Options

Create New Part | Update Part | Clear All Fields

Manufacturer Part Number *
21475

Vendor Part Number
21475

Vallen Part Number
Vallen Part Number

Cost (Replacement)
15.90000

Purchase UM Code
Purchase UM Code

Pack Quantity
24

Base UM Code
EA

Lead Time (Days)
14

Manufacturer
Code
720476

Name
ERGODYNE CORPORATION

Vendor
Code
Vendor Code

Name
Vendor Name

Product Category
Code
1900

Name
Safety Products

Product Line
Code
1

Name
Ergodyne Corporation

Description 1
21475 VEST SOLID

Description 2
8255HL LXL FR LIME

Save Cancel

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