RELEASE NOTES

VallenIQ v1.27

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1. Support For Verticals

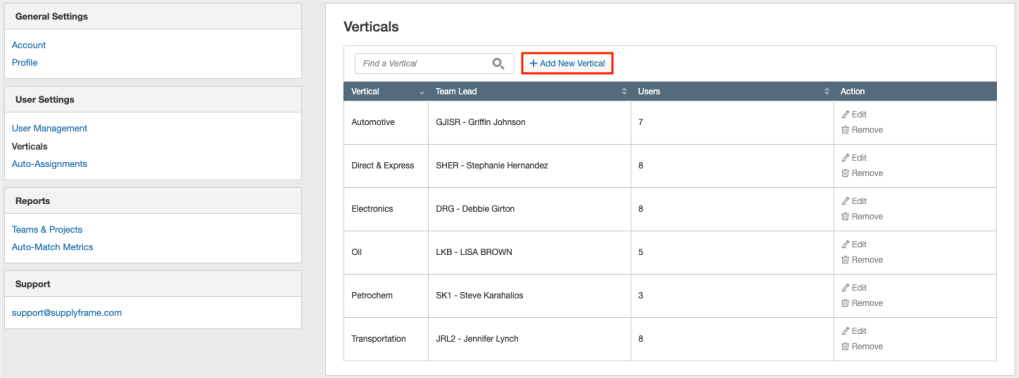
VallenIQ now supports verticals in a new page in “Settings.” In this new page, Super Admins can create and manage verticals for the ISR organization.

1.1 New Verticals Page In User Settings

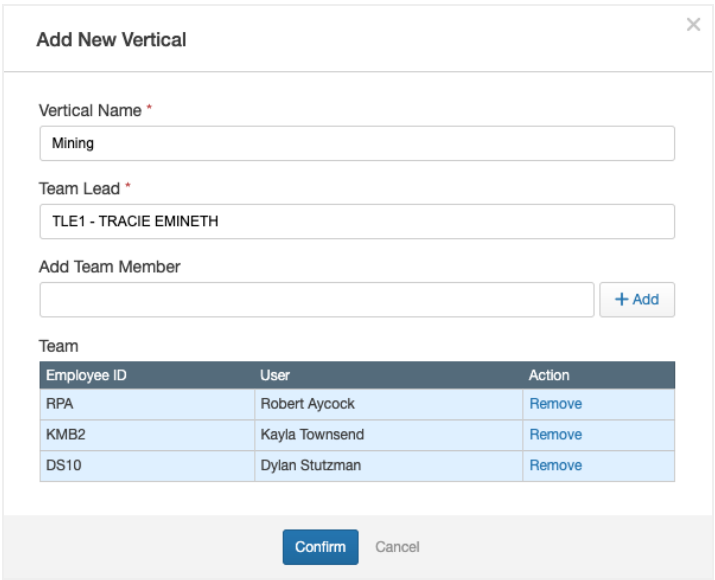
Access the new “Verticals” page under the “User Settings” section of the “Settings” tab.

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:



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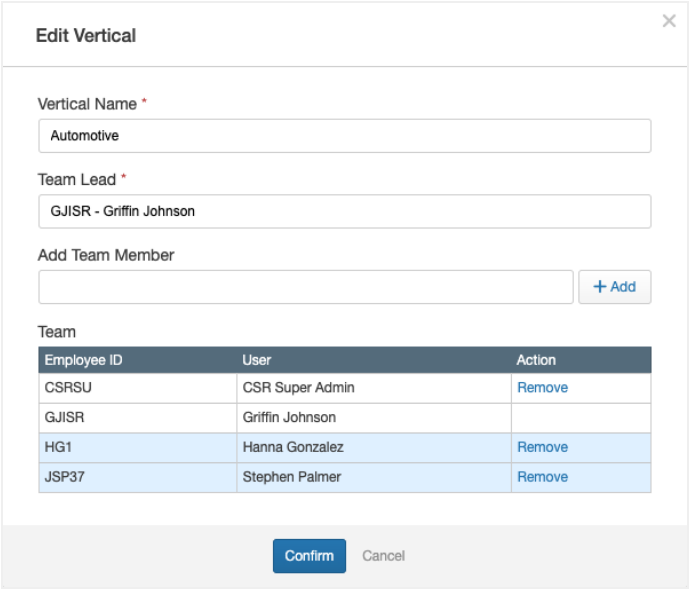
Add users to your new vertical by typing names into the “Add Team Member” field and selecting “Add.” As you add users to your team, you’ll see them appear in blue in the “Team” table. Once you’re done, select “Confirm” to save your changes.

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:

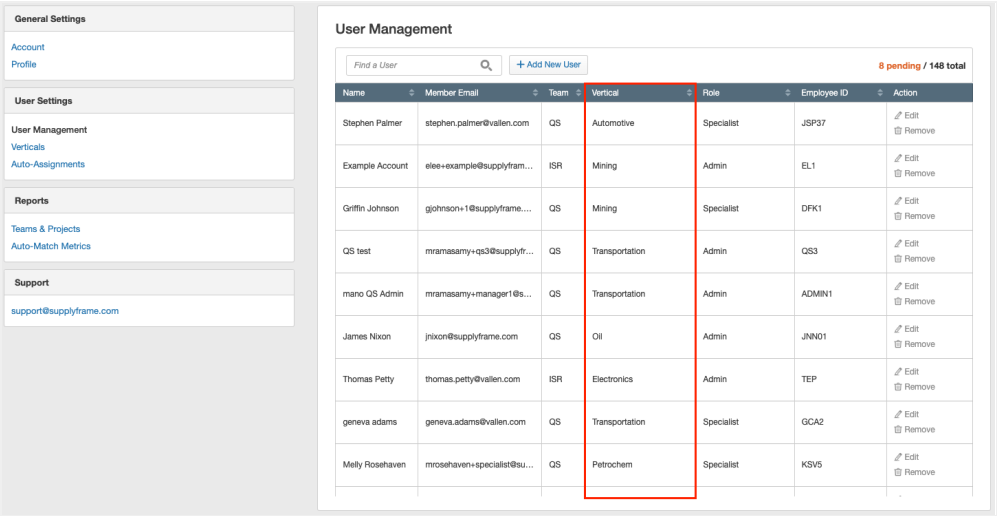


1.1.3 Removing

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

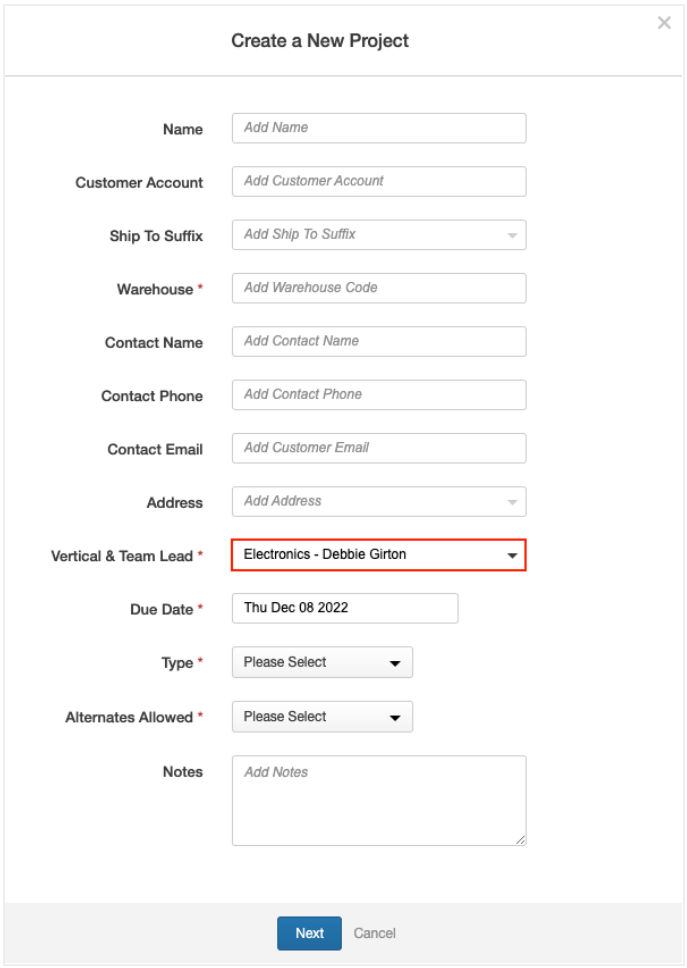
1.1.4 New Vertical Column in User Management Page

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

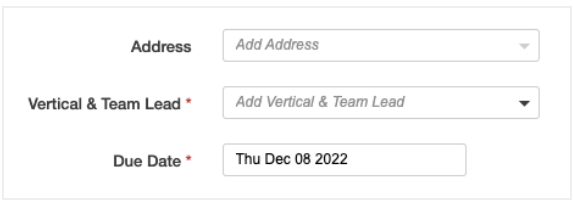


1.2 Defaulting Vertical & Team Lead In Project Headers

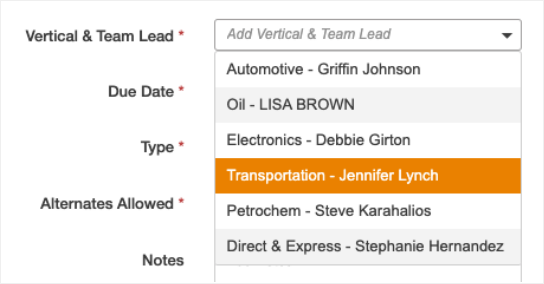
When users that belong to a vertical use the “Upload Project” and “Create New Project” features, VallenIQ will automatically add the vertical that the user belongs to, as well as the Team Lead for this vertical to the following field:



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:



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:

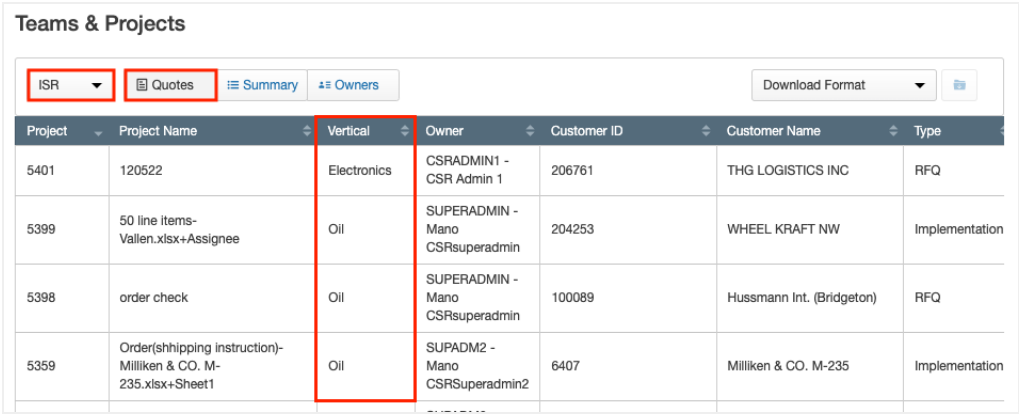


1.3 Reporting

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

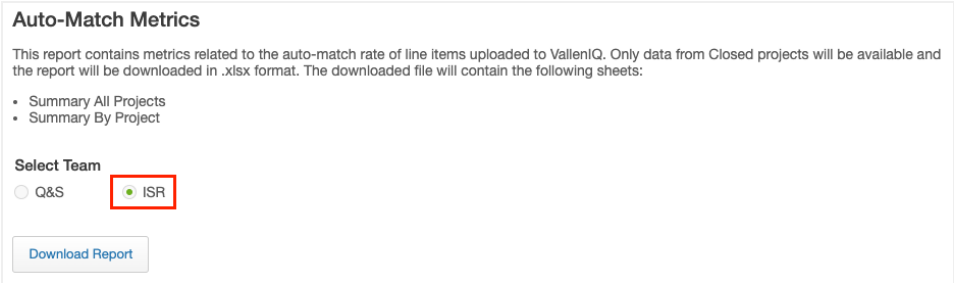
The “Vertical” column appears in the ISR “Quotes” report, in both the in-app report page as well as in downloaded copies of this report:



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(shhipping instruction)-Milliken & CO. M-235.xlsx+Sheet1	Oil	SUPADM2 - Mano CSRSuperadmin2	6407	Milliken & CO. M-235	Implementation

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.



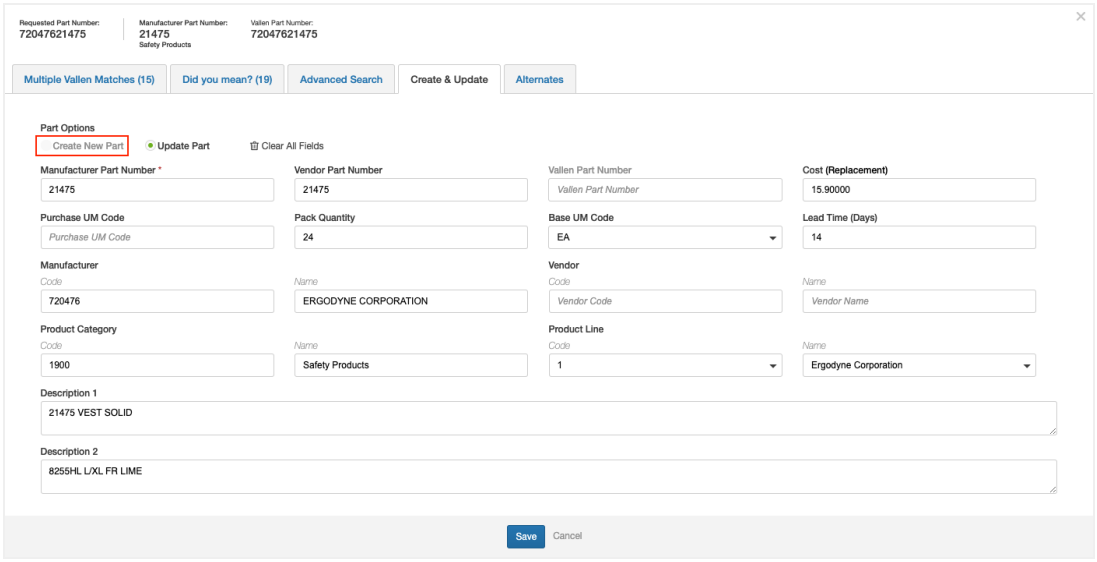
1.4 Permissions

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

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):



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