RELEASE NOTES

VallenIQ v1.32

Release Date: September 21, 2023

Company Confidential

1. Item Type & Exclusive Brands Support

VallenIQ will now display a new Item Type field that will help determine if items are core to Vallen or not. This will help guide users the opportunity to select an item from a strategic exclusive brand or core vendor.

Previously in VallenIQ, there was no clear indicator for SX.e part numbers to display their importance for quoting and sourcing. This new indicator will display whether the item is an exclusive brand, core plus, core, etc.

This new field will display in each line item's Expanded View, Suggestions, and Advanced Search results screens to allow users to select these parts over similar parts that are from non-core vendors.

In addition to the new Item Type field, we've now included specific support for Exclusive Brands items in VallenIQ.

Users will now be able to see Exclusive Brands suggestions in a new dedicated suggestions tab, load them into their line items, and use them as alternates.

1.1 Item Type

1.1.1 Item Type Values

One of four Item Types will appear in VallenIQ:

- EB: Exclusive Brands
- CP: Core Plus
- C: Core
- NC: Non-Core

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These Item Types shown in VallenIQ will correspond to the following codes in SX.e:

Item Type	SX.e Code
EB	Blackbook Indicator 8***
CP	Vendor Types 33, 34, 35, 36
C	Vendor Types 30, 31, 32, 37
NC	All Other Vendor Types

1.1.2 Expand View

At the line item level, Item Types are available to reference in Expand View:

1.1.3 Suggestions

Item Types are also available for each of the following suggestions:

- EB Suggestions
- Multiple Vallen Matches
- Did You Mean
- Part Cross References
- Cross References
- Last Picks
- Advanced Search

To access the suggestions mentioned above, select the Quoted Part # column:

Ref #	Req. Part #	Req. MFR/VEN	Quoted Part #	Vallen MFR/VEN
11 JHH	RPN 6150	NO MFR NO VENDOR	MPN 6150 VALLEN PN 03710348041 VENDOR PN 6150 6150 CUT TIP W/O STU DS /48041 /48041 UOM EA ■ *Multiple Vallen Matches* ■ *Suggested Parts* ■ *EB Suggestions* ■ *Part Cross References*	MFR APEX TOOL GROUP LLC CODE 781412 NOTES AR CONTACT/VICKIE ■ *Mfr Notes*

Item Types will be listed in the rightmost column in each of the listed tabs:

Requested Part Number: 6150 | Manufacturer Part Number: 6150 Hand Tools | Vallen Part Number: 03710348041

Tabs: EB Suggestions (15) | Multiple Vallen Matches (12) | **Did you mean? (64)** | Part Cross References (500) | Advanced Search | Create & Update | Alternates

Part Master

Vallen Part Number	MPN	VPN	MFR/Vendor	Vendor Code	Vendor Type	Description	S/C	Discontinued	Lead Time	Cost	RPC Change Date	SL Date	Product Line	Item Type	
6150010861000280	B1012254	B1012254	3M	51144	Manufacturer	B1012254 WHEEL EDGE 150-9542 DEBUR	S	No	7	$73.97000	2015/09/10	2015/09/10	999	CP	R
04801109484	61500046042	04801109484	3M	51144	Manufacturer	ST-UW SST UNITIZED WHEEL 3A FIN 1X1X3/16 /09484/	S	No	14	$2.17200	2018/01/31	2018/01/31	999	CP	R
04801101822	61500006889	04801101822	3M	51144	Manufacturer	ST-UW SST UNITIZED WHEEL 5A FIN 12X1/2X1-1/4	S	No	14	$96.45600	2018/01/31	2018/01/31	999	CP	R
15382881	61500067873	61500067873	3M	51144	Manufacturer	61500067873 BELT 1X42 A CRS SURFACE CONDITION	S	No	21	$7.58400	2023/04/29	2023/04/29	888	CP	R
04801108997	61500040250	04801108997	3M	51144	Manufacturer	08997 FNSH FLAP BRUSH 5SFIN GRAY 8X2X3IN	S	No	14	$58.25400	2018/01/31	2018/01/31	999	CP	R
04801101275	61500008372	04801101275	3M	51144	Manufacturer	01275 CLEAN AND FINISH SHEET T WHT 5INX11IN	S	No	14	$2.41200	2018/01/31	2018/01/31	999	CP	R

Close

1.1.4 Custom Export

Custom Export Item Types by selecting the field below:

1.2 Exclusive Brands Items

1.2.1 Flag

When line items have Exclusive Brands suggestions available to review, VallenIQ will now show a new flag in the Quoted Part # column titled EB Suggestions:

1.2.2 Suggestions

Click into the Quoted Part # column and go to the EB Suggestions tab to view recommended Exclusive Brands items based on your Requested Part Number:

Click Replace to load a particular Exclusive Brand suggestion into your line item, or select Add to add the item as an alternate.

Note that the Add button will only be available when Alternates Allowed setting is set to Yes in the Project Header.

1.2.3 Match Indicator

When Exclusive Brands items are loaded into your line items, VallenIQ will add a new label to the top of the Quoted Part # column:

	Ref # ⇕	Req. Part # ⇕	Req. MFR/VEN ⇕	Quoted Part # ⇕	Vallen MFR/VEN ⇕
☐	1 JMK2	RPN 504674103 233	NO MFR NO VENDOR	**Exclusive Brands** **MPN** 1152415 **VALLEN PN** 504674103233 **VENDOR PN** 1152415 EXACTEK O HSS SML 1 35 SP BLK OX **UOM** EA ▪ *Suggested Parts*	**MFR** GREENFIELD INDUSTRIES **CODE** 451984 ▪ *Mfr Notes*

Exclusive Brands items can be loaded into your line items in one of two ways:

- VallenIQ auto-matches to the Exclusive Brands item
- Users open the EB Suggestions pop up and use the Replace feature to load the EB item into their line

1.2.4 Filters

Two new filters have been added to the Filter By Intelligence section of the Filter Toolbar:

Filter by Intelligence		Filter by Cost Source	
EB Suggestions	3	With Order History	9
EB Match	10	With Quote History	5
Multiple Vallen Matches	6	With Replacement Cost	12
Cross References	0	With Rebate Cost	0
Part Cross References	2	With Standard Cost	12
Suggested Parts	6	With Adjusted Cost	0
Changed RPN	0		
Changed CPN	0		
Updated Parts	0		

The EB Suggestions option will filter your list by line items that have Exclusive Brands suggestions available to review.

The EB Match option will filter your list by line items that have matched to Exclusive Brands items.

2. Group Edit - Set Usage & Requested Quantity

VallenIQ now has a new feature in Group Edit titled Set Usage & Req. Qty. This feature can be used to update usage values, as well as requested quantities, for multiple line items at a time.

2.1 New Modal

To use this feature, first select one or more line items using the selection box located in the leftmost column of the main project page, then select the new Set Usage & Req. Qty option:
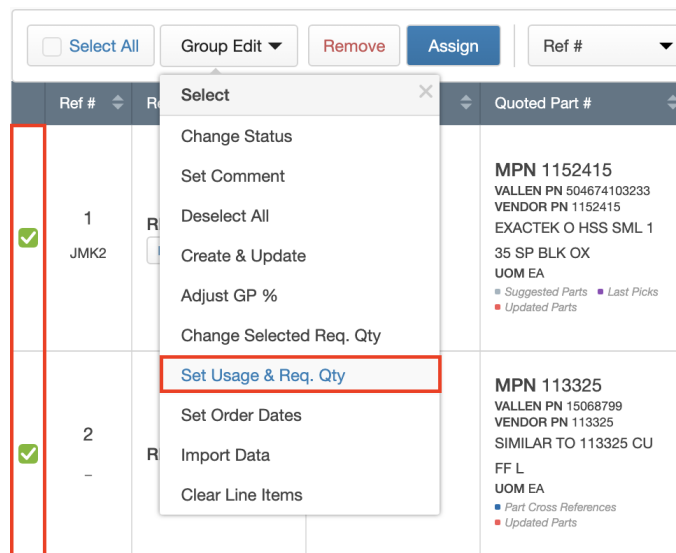
VallenIQ will display a new modal where users can update Customer Usage values and Requested Quantity values:
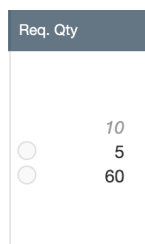
2.2 Error Handling

When updating Quantity values in this pop up, quantities must be updated in order.

This means that VallenIQ will not allow users to update Requested Quantity 2 before updating Requested Quantity 1 and so on and so forth.

For example, if you have a scenario where two line items are selected, and selected line item 1 has two Requested Quantities (note that the italicized 10 is the usage value, which does not count towards the Requested Quantities):

Req. Qty
10
◯ 5
◯ 60

And selected line item 2 has three Requested Quantities:

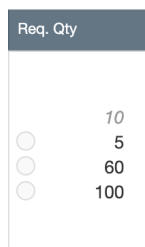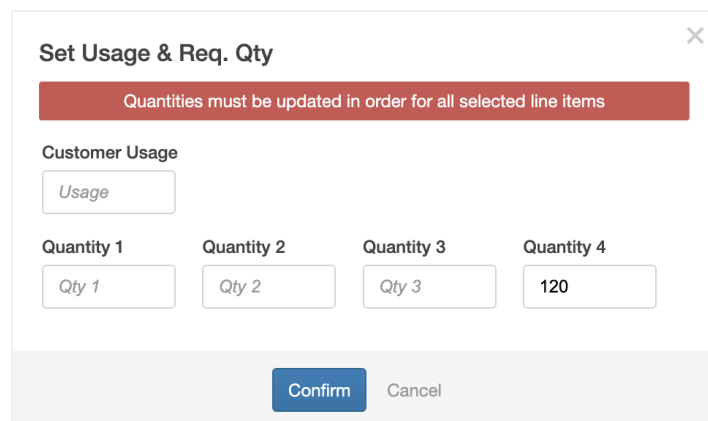| Req. Qty |
|---|
| *10* |
| ◯ 5 |
| ◯ 60 |
| ◯ 100 |

VallenIQ will not allow you to update Requested Quantity 4, because selected line item 1 does not have Requested Quantity 3 populated:

Set Usage & Req. Qty

Quantities must be updated in order for all selected line items

Customer Usage

Usage

Quantity 1	Quantity 2	Quantity 3	Quantity 4
Qty 1	*Qty 2*	*Qty 3*	120

Confirm   Cancel

2.3 Permissions

The following are the permissions for the new Group Edit - Set Usage & Requested Quantities feature:

- **Super Admins & Admins**: Can edit both Customer Usage and Requested Quantity breaks

- **Specialists:** Cannot edit Customer Usage field, but can edit Requested Quantity breaks for line items they are assigned

3. Edit Usage At Line Item Level

Super Admin and Admin users are now able to edit the Usage field in the Requested Quantity modal at the line item level.

To edit Customer Usage at the line item level, select the Requested Quantity cell:

Then update the value in the Customer Usage field and select Save:

However, VallenIQ will not let Specialist users edit the Customer Usage field. They will only be able to edit the Quantity 1-4 fields for line items they are assigned.
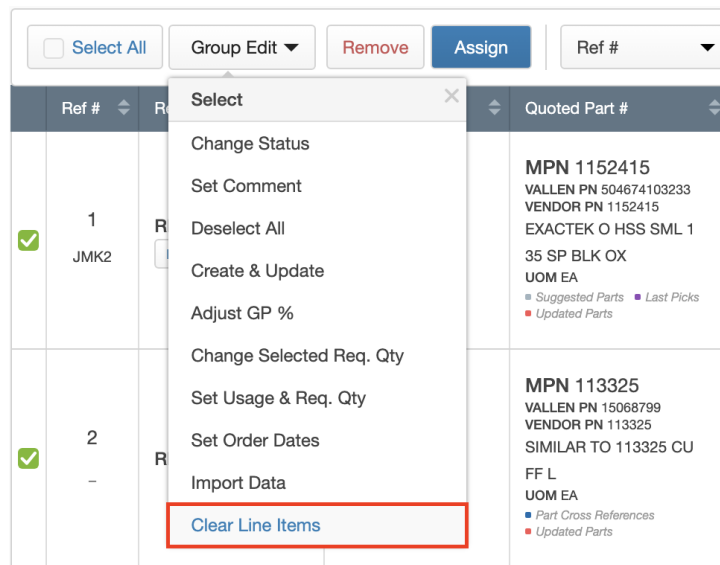
4. Group Edit - Clear Line Items Updates

In this release, we've made adjustments to Group Edit - Clear Line Items that improves usability of the feature.

4.1 Location In Group Edit Dropdown

Clear Line Items has been moved to the last option in the Group Edit dropdown to prevent users from accidentally selecting this feature.

4.2 Confirmation

When Clear Line Items is selected, VallenIQ will now display a confirmation pop up that requires you to select Confirm in order to clear the contents of your selected line items.

This prevents users from accidentally clearing their selected line items when this action is not intended.

4.3 Update Status To TI

Lastly, when line items are cleared, the status of the selected line items will be changed to TI (To Be Identified):
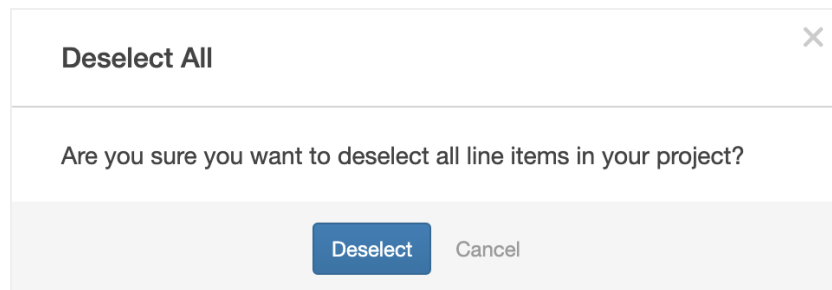
5. Group Edit - Deselect All Confirmation

Similar to the Group Edit - Clear Line Items confirmation step discussed above, we've also implemented a confirmation step for the Group Edit - Deselect All feature as well.

When using this feature, VallenIQ will not deselect the line items you've selected:

Until you click the Deselect button in the pop up below: