



RELEASE NOTES

# VallenIQ v1.34

Release Date: July 18, 2024

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# 1. Show Pop Up To Confirm Line Item Removals

We've made an update to the Remove feature in Project View to make it more clear to users that they will be permanently removing line items from their project.

When you select line items and click on the Remove feature:

**Valen IQ** Dashboard Project Management Settings

Part Number Search by part number

**Trane Technologies 100777 - Ship To 01 - Warehouse... (15 Lines)** • 2024/06/21 at 4:50 PM EST •

owned by: Eugene Lee

Settings Header Notes Share Edit History Custom Export Expand Lines Hide Alternates Convert to S

100777  
**Trane Technologies- TRENTON NJ**  
Customer Notes  
Project ID: 7806 Status: Open  
Due Date: 2024/06/25 Alternates: Yes  
Team Lead: Bridget Fosback Project Type: RFQ

**Filter by Category (9)**  
Abrasives 1  
Chemicals/Lubs/Adhesives 1  
Fasteners 1  
Hand Tools 3  
Maint Equip and Supplies 1  
Miscellaneous Products 1  
Power Tools 1  
Safety Products 3

**Filter by Req. Manufacturer (15)**  
3M 0/1  
BATORAY 0/1  
ESSENDANT 1/1  
RECEIVABLES 1/1  
GENERAL TOOLS & INDUSTRIALS 1/1  
HONEYWELL 1/1  
INGERSOLL-RAND INDUSTRIAL 1/1

**Filter by Intelligence**  
EB Suggestions  
EB Match  
Multiple Valen Matches  
Cross References  
Part Cross References  
Suggested Parts  
Changed RPN  
Changed CPN  
Updated Parts

Selecting 2 item(s) Showing 15/15 results

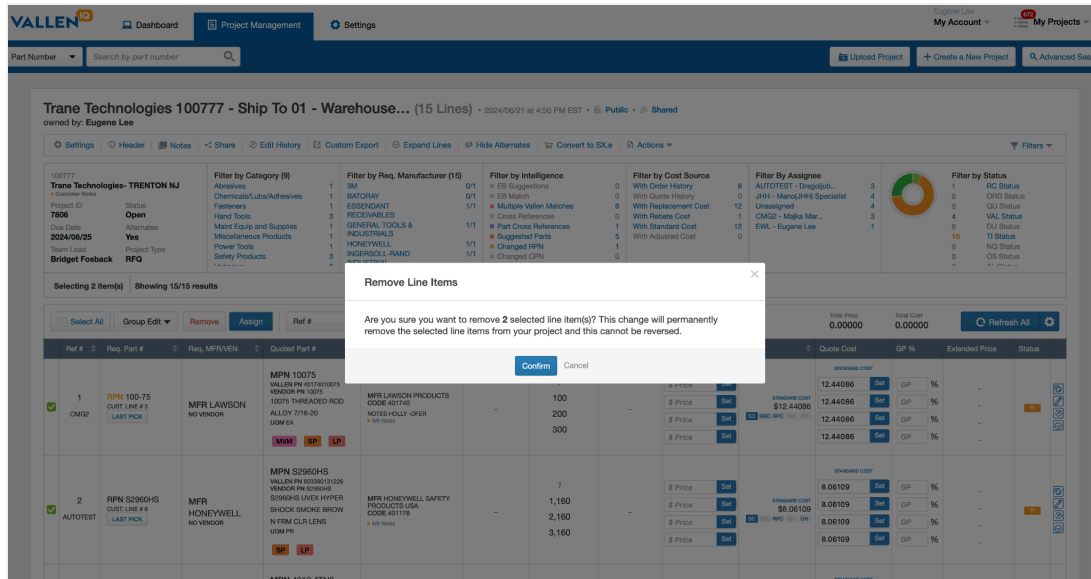
Select All Group Edit Remove Assign Ref # Search line items

Ref #	Req. Part #	Req. MFR/VEN	Quoted Part #	Valen MFR/VEN	Avail. Qty	Req. Qty
1	RPN 100-75 CUST. LINE # 3 LAST PICK	MFR LAWSON NO VENDOR	MPN 10075 VALLEN PN 40174010075 VENDOR PN 10075 10075 THREADED ROD ALLOY 7/16-20 UOM EA MVM SP LP	MFR LAWSON PRODUCTS CODE 401740 NOTES HOLLY -DFER Mfr Notes	-	1 100 200 300
2	RPN S2960HS CUST. LINE # 6 LAST PICK	MFR HONEYWELL NO VENDOR	MPN S2960HS VALLEN PN 603390131226 VENDOR PN S2960HS S2960HS UVEX HYPER SHOCK SMOKE BROW N FRM CLR LENS UOM PR SP LP	MFR HONEYWELL SAFETY PRODUCTS USA CODE 401178 Mfr Notes	-	1 1,160 2,160 3,160

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A new popup will appear that shows you how many line items you currently have selected, as well as a note that says that the selected lines will be permanently removed and that this change cannot be reversed:



If you want to move forward with removing your selected line items, click on the confirm button to make this change.

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## 2. Make Suggestions Flags Easier To See

We received feedback that it was difficult to see which Suggestions exist for line items in the Quoted Part # column. In this release, we've made a design change that makes it easier to see the Suggestions that are available for review.

We're now using badges to indicate Suggestions:

Req. Part #	Req. MFR/VEN	Quoted Part #	Vallen MFR/VEN
RPN 41012	NO MFR NO VENDOR	<b>MPN 41012</b> VALLEN PN 01238241012 VENDOR PN 41012 41012 BRUSH 1/4 LACQ UER CAMEL HAIR 1-1/8 TRIM UOM EA <div> <div>MVM</div> <div>SP</div> <div>EB</div> <div>PXREF</div> <div>UP</div> </div>	<b>MFR WEILER CORPORATION</b> <b>CODE 12382</b> <small>Mfr Notes</small>
<b>RPN 150</b>	NO MFR NO VENDOR	<b>MPN 1504729</b> VALLEN PN 07814315047 VENDOR PN 15047 15047 MIX NOZZLE MIX NOZZLES UOM EA <div> <div>MVM</div> <div>PXREF</div> <div>MM</div> </div>	<b>MFR ITW POLYMERS ADHESIVES N.A.</b> <b>CODE 78143</b> <small>Mfr Notes</small>
RPN S2960HS	NO MFR NO VENDOR	<b>MPN S2960HS</b> VALLEN PN 603390131226 VENDOR PN S2960HS S2960HS UVEX HYPER SHOCK SMOKE BROW N FRM CLR LENS UOM PR <div> <div>SP</div> <div>LP</div> </div>	<b>MFR HONEYWELL SAFETY PRODUCTS USA</b> <b>CODE 401178</b> <small>Mfr Notes</small>

Hover over the badges to see a full description of each:

Req. Part #	Req. MFR/VEN	Quoted Part #	Vallen MFR/VEN
RPN 41012	NO MFR NO VENDOR	<b>MPN 41012</b> VALLEN PN 01238241012 VENDOR PN 41012 41012 BRUSH 1/4 LACQ UER CAMEL HAIR 1-1/8 TRIM UOM EA <div> <div>EB Suggestions</div> <div>MVM</div> <div>SP</div> <div>EB</div> <div>PXREF</div> <div>UP</div> </div>	<b>MFR WEILER CORPORATION</b> <b>CODE 12382</b> <small>Mfr Notes</small>

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The following is the full list of badges and their abbreviations (in parentheses) that you may now see in VallenIQ:

- Multiple Vallen Matches (MVM)
- Suggested Parts / Did You Mean? (SP)
- EB Suggestions (EB)
- Part Cross References (PXREF)
- Cross References (XREF)
- Last Picks (LP)

Additionally, the following indicators will now appear as badges as well:

- Updated Parts (UP)
- Created Parts (CP)
- Modified Match (MM)
- Discontinued (DISC)

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### 3. Expand Clickable Area Of Quantity Breaks In Requested Quantity Column

Feedback was provided that it was difficult to select the intended quantity break in the Requested Quantity column in Project View.

The previous design made it difficult to select the correct value because the clickable area of the radio button was small.

In this release, we've changed the design of the Requested Quantity column, where users can now click on a much larger portion of each break in order to select the break they need.

Users can now select the entire highlighted portion of each break as shown below:

Quoted Part #	Vallen MFR/VEN	Avail. Qty	Req. Qty	Unit Price	Quote Price	Cost
<b>MPN 10075</b> VALLEN PN 40174010075 VENDOR PN 10075 10075 THREADED ROD ALLOY 7/16-20 UOM EA MVM SP LP	<b>MFR LAWSON PRODUCTS</b> CODE 401740 NOTES HOLLY -DFER Mfr Notes	-	1 100 200 300	-	\$ Price Set \$ Price Set \$ Price Set \$ Price Set	STANDARD COST \$12.44086 SC RBC RPC QH OH

When users click on a Requested Quantity break, it will highlight blue to clearly indicate the value is selected. Additionally, the corresponding Quote Price, Quote Cost, GP%, and Extended Price for the chosen break will be selected.

Quoted Part #	Vallen MFR/VEN	Avail. Qty	Req. Qty	Unit Price	Quote Price	Cost	Quote Cost	GP %	Extended Price
<b>MPN 10075</b> VALLEN PN 40174010075 VENDOR PN 10075 10075 THREADED ROD ALLOY 7/16-20 UOM EA MVM SP LP	<b>MFR LAWSON PRODUCTS</b> CODE 401740 NOTES HOLLY -DFER Mfr Notes	-	1 100 200 <b>300</b>	-	32.38190 Set 22.73920 Set 20.18430 Set <b>17.00988 Set</b>	STANDARD COST \$12.44086 SC RBC RPC QH OH	12.44086 Set 12.44086 Set 12.44086 Set <b>12.44086 Set</b>	61.58 % 45.29 % 38.36 % <b>26.86 %</b>	\$32.38190 \$2,273.92000 \$4,036.86000 <b>\$5,102.96400</b>

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For example, when the third Requested Quantity break is selected like in the screenshot above, the corresponding highlighted fields to the right are selected and their values will be used in the Convert To SX.e feature:

Convert To SX.e

Transaction Validation

Review the details of your transaction below. Please note that once your transaction is submitted, all changes must be completed in SX.e.

Key

Missing Required

Invalid

Transaction Details

Owner	Transaction Type	PO #	Cust. #	Warehouse	Ship To Suffix	Req. Ship Date	Promise Date	Proposal #	Ship Instructions
Eugene Lee	SO	11252333	100777	Y880	01	-	-	20240716	Collect 008600589

Item Details

Ref. #	Cust.	Product Code	Product	Description	Vendor Code	Qty	Price	Cost	UOM	Comments	Prod. Line	Stocked	VIQ Ref.	Req. Ship Date	Promise Date
1	-	40174010075	10075 THREADED ROD ALLOY 7/16-20	401740	300	17.00988	12.44086	EA	-	1	-	7806-1	-	-	-

Submit

Back

Also, if the following Custom Export fields are selected, the highlighted values above will be exported:

Export Preferences

Export Options

User Export

Customer Export

Select Columns for Export \*

Select all

Deselect all

Default only

Adjusted Cost

All Extended Prices

All GP Percentages

All Quote Costs

All Quote Prices

All Requested Quantities

Assignee

Available Quantity

Base UM Code

Company Wide Inventory

Cost

Cost Type

Customer Description

Customer Last Price

Customer Line #

Customer Part Number

Customer UOM

Extended Price Usage

External Comment

GP Percentage Usage

Image Link

Internal Comment

Item Type

Last Ordered Cost

Last Quoted Cost

Lead Time

MSDS Code

Manufacturer Part Number

Minimum Quantity

Miscellaneous 1

Miscellaneous 2

Miscellaneous 3

Miscellaneous 4

Non-Tax Type

Part Notes

Product Category Code

Product Category Name

Promise Date

Purchase UM Code

Quote Cost Type

Quote Cost Usage

Quote Price Usage

RPC Change Date

Rebate Cost

Ref #

Replacement Cost

Requested Manufacturer

Requested Part Number

Requested Ship Date

Requested Vendor Name

SL Date

SPA Cost

Selected Extended Price

Selected GP Percentage

Selected Quote Cost

Selected Quote Price

Selected Requested Quantity

Standard Cost

Standard Package Size

Status

Stocking Status

Taxable

Unit Price

Usage

Vallen Customer Part Number

Vallen Description

Vallen Manufacturer Code

Vallen Manufacturer Name

Vallen Part Number

Vallen Vendor Code

Vallen Vendor Name

Vend Pack

Vendor Cost Expiration

Vendor Notes

Vendor Part Number

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## 4. Carry Over Item Type Of Original Part When Update Part Feature Is Used

When the Update Part feature is used, the Item Type of the original line item will now be retained. This enhancement does not apply to the Create New Part feature.

Previously, the Item Type values of Updated Parts were reset. This would cause confusion because the Item Type of the original item is important for users to reference during the rest of the quoting process.

After making this change, if you have an item like the following, where Item Type is C:

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
10	RPN 490026 CUST LINE # 62 LAST PICK	MFR WD-40 COMPANY NO VENDOR	MPN 490026 VALLIN PN 07956749002 VENDOR PN 490026 49002 WD-40 8OZ AER OSOL SMART STRAW L OW VOC 25 UOM EA MM SP LP	MFR WD-40 COMPANY CODE 79567 Product Notes MFR Notes	15	35 350 3,500	\$5.13000	5.13000 5.13000 5.13000 5.13000	4.67000 \$4.67000 4.67000 4.67000	8.97 % 8.97 % 8.97 % 8.97 %	\$5.13000 \$179.55000 \$1,795.50000 \$17,955.00...	View Add Edit Delete	
<div><div>Description: 49002 WD-40 8OZ AEROSOL SMART STRAW LOW VOC 25</div><div>Part Notes: !</div><div>Product Category: Chemicals/Lubs/Adhesives</div><div>Product Category Code: 300</div><div>Product Line: Bdrsz</div><div>Product Line Code: 1</div><div>Company Wide Inv. (OOH): 1403</div><div>Stocking Status: S</div><div>MSDS Code: N</div><div>Item Type: C</div></div> <div><div>Hazmat Code: -</div><div>Lead Time: 14</div><div>List Price: 9.34000</div><div>Customer Resale Price: -</div><div>Stand. Package Size: 1</div><div>Purchase UOM: -</div><div>Base UOM Code: EA</div><div>Taxable: Y</div><div>Non-Tax Type: -</div><div>Image Link: -</div></div> <div><div>SPA Cost: -</div><div>SPA Type: -</div><div>Replacement Cost: 4.67000</div><div>RPC Change Date: 2024/06/17</div><div>SL Date: 2022/04/18</div><div>Standard Cost: 4.67000</div><div>Customer Last Price: -</div><div>Vendor Type: Manufacturer</div><div>Vendor Cost Expiration: -</div><div>Vendor Packaging: -</div><div>Vendor Notes: -</div></div> <div><div>Misc. 1: -</div><div>Misc. 2: -</div><div>Misc. 3: -</div><div>Misc. 4: -</div></div>													

+ Add Note

2024/06/21 at 4:51 PM EST Refresh

If you change item details using the Update Part feature:

Requested Part Number: 490026

Requested Manufacturer: WD-40 COMPANY

Manufacturer Part Number: 490026

Vallen Part Number: 07956749002

Multiple Vallen Matches (2)

Did you mean? (1)

Advanced Search

Create & Update

Alternates

Last Picks

Part Options

Create New Part

Update Part

Clear All Fields

Manufacturer Part Number \*

490026

Vendor Part Number

490026

Vallen Part Number

Vallen Part Number

Cost (Replacement)

4.67000

Purchase UOM Code

PK

Pack Quantity

12

Base UOM Code

EA

Lead Time (Days)

14

Vendor Cost Expiration

Vendor Cost Expiration

Manufacturer

Code

79567

Name

WD-40 Company

Vendor

Code

79567

Name

WD-40 Company

Product Category

Code

300

Name

Chemicals/Lubs/Adhesives

Product Line

Code

1

Name

bdrsz

Description 1

49002 WD-40 8OZ AEROSOL

Description 2

SMART STRAW LOW VOC 25

Save

Cancel

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You can tell that the line item has been updated (because of the UP badge in Quoted Part # column) and the original Item Type of the Vallen part number has been retained:

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
10	RPN 490026 CUST. LINE # 62 LAST PICK	MFR WD-40 COMPANY NO VENDOR	MPN 490026 Vallen PN 02055-49002 VENDOR PN 490026 49002 WD-40 R02 AER OSOL SMART STRAW L OW VOC 25 UOM EA UP	MFR WD-40 COMPANY CODE 78M7 * Product Name * Alt Notes	15	1 35 350 3,500	\$5.13000	5.13000 5.13000 5.13000 5.13000	- REPLACEMENT COST \$4.67000 - - -	4.67000 4.67000 4.67000 4.67000	8.97 8.97 8.97 8.97	\$5.13000 \$179.55000 \$1,795.50000 \$17,955.00...	
<div> <div> Description: 49002 WD-40 R02 AEROSOL SMART STRAW LOW VOC 25  Part Notes: !  Product Category: Chemicals/Lube/Adhesives  Product Category Code: 300  Product Line: Bdrsz  Product Line Code: 1  Company Wide Inv. (QOH): 1403  Stocking Status: S  MSDS Code: N  Item Type: C </div> <div> Hazard Code: -  Lead Time: 14  List Price: 9.34000  Customer Resale Price: -  Stand. Package Size: 12  Purchase UOM: PK  Base UOM Code: EA  Taxable: Y  Non-Tax Type: -  Image Link: - </div> <div> SPA Cost: -  SPA Type: -  Replacement Cost: 4.67000  RPC Change Date: 2024/05/17  SL Date: 2022/04/18  Standard Cost: 4.67000  Customer Last Price: -  Vendor Type: Manufacturer  Vendor Cost Expiration: -  Vendor Packaging: -  Vendor Notes: - </div> <div> Misc. 1: -  Misc. 2: -  Misc. 3: -  Misc. 4: - </div> </div>													

Additionally, we've added a new Item Type column to the following tabs in Quoted Part # modal so users can reference these details when evaluating suggestions:

- Did You Mean?
- Multiple Vallen Matches
- Cross References
- Last Picks
- Advanced Search

Requested Part Number: 100-75

Requested Manufacturer: LAWSON

Manufacturer Part Number: 10075  
Fasteners

Vallen Part Number: 40174010075

Multiple Vallen Matches (45)

Did you mean? (102)

Advanced Search

Create & Update

Alternates

Last Picks

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	
69178110075	10075	10075	ATA Tools Inc	502307	Manufacturer	10075 BUR SA-3 C SA03P	S	No	14	\$9.59000	2022/09/04	2022/08/02	1	C	<div>Replace</div> <div>Add</div>
66278310075	10075	10075	Alvord-Polk Tool Co.	662783	Manufacturer	10075 REAMER CHK 1270 .0655 SF GD ALV PK	C	No		\$10.39500	2022/10/01	2022/10/01	1	NC	<div>Replace</div> <div>Add</div>
69800610075	10075	10075	Berkshire eSupply	698006	Manufacturer	10075 1302 1-11/64IN 4MT S DRL HSS BLK 118 PT MAD	C	No		\$80.04000	2023/06/01	2023/06/01	1	NC	<div>Replace</div> <div>Add</div>
08183410075	10075	10075	C H Hanson Co	81834	Manufacturer	10075 5 BRASS LTRS NBR SET 45PC	C	No		\$102.86000	2023/05/11	2023/05/11	1	C	<div>Replace</div> <div>Add</div>
10914365	10075	10075	Capp USA	401859	Manufacturer	10075 ALL SLOT SENSORS	C	No		\$96.37500	2023/02/01	2023/02/01	1	NC	<div>Replace</div> <div>Add</div>
14044362	10075	10075	Deburring Technologies LLC d	799716	Manufacturer	10075 XEBEC CH-PM-6B-XB-106T-WW02 200 MIN.	C	No		\$85.68000	2023/01/01	2023/01/01	1	NC	<div>Replace</div> <div>Add</div>

Close

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## 5. Don't Remove Discontinued Flag When Update Part Feature Is Used

This enhancement is similar to the section above, where when the Update Part feature is used on discontinued parts, the new Updated Part will retain the Discontinued flag of the original Vallen part number.

For example, if you have the following discontinued part:

Req. Part #	Req. MFR/VEN	Quoted Part #	Vallen MFR/VEN	Avail. Qty	Req. Qty	Unit Price
RPN 662459262 83	NO MFR NO VENDOR	MPN 50T-I VALLEN PN 66245926283 VENDOR PN 50T-I 50T-I TORQUE WRENC H PRESET 5-75FT-LB IN CHG UOM EA MVM Discontinued PXREF DISC	MFR SNAP-ON INCORPORATED/ CODE 662459 NOTES AR/ROSE Product Notes Mfr Notes	—	100 150 200	\$95.69000

If the part is then updated using the Update Part feature:

Requested Part Number:  
66245926283

Manufacturer Part Number:  
50T-I  
Hand Tools

Vallen Part Number:  
66245926283

Multiple Vallen Matches (7)

Did you mean? (3)

Part Cross References (2)

Advanced Search

Create & Update

Alternates

Part Options

Create New Part

Update Part

Clear All Fields

Manufacturer Part Number \*

50T-I

Vendor Part Number

50T-I

Vallen Part Number

Vallen Part Number

Cost (Replacement)

87.11000

Purchase UOM Code

PK

Pack Quantity

14

Base UOM Code

EA

Lead Time (Days)

14

Vendor Cost Expiration

Vendor Cost Expiration

Manufacturer

Code

662459

Name

Snap-on Incorporated/

Vendor

Code

Snap-on Incorporated/

Name

Vendor Name

Product Category

Code

800

Name

Hand Tools

Product Line

Code

1

Name

Snap-On Industrial

Description 1

50T-I TORQUE WRENCH

Description 2

PRESET 5-75FT-LB INCHG

Save

Cancel

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The Discontinued flag of the original Vallen part number is retained:

Req. Part #	Req. MFR/VEN	Quoted Part #	Vallen MFR/VEN	Avail. Qty	Req. Qty	Unit Price
RPN 662459262 83	NO MFR NO VENDOR	<b>MPN 50T-I</b> VALLN PN 66245926283 VENDOR PN 50T-I 50T-I TORQUE WRENC H PRESET 5-75FT-LB IN CHG UOM EA <div> MVM SP </div> <div> PXREF UP </div> <div> DISC </div>	MFR SNAP-ON INCORPORATED/ CODE 662459 NOTES AR/ROSE Product Notes Mfr Notes	—	100 150 200	\$95.69000

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