



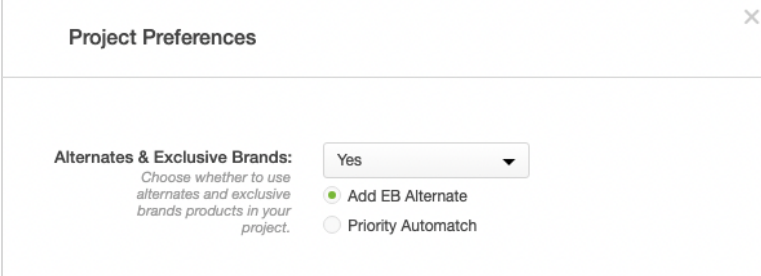
VallenIQ v1.35

December 12th, 2024

1. Alternates & Exclusive Brands Setting	2
1.1 Yes - Add EB Alternate	4
1.2 Yes - Priority Automatch	6
1.3 No	7
2. Exclusive Brands Suggestions	9
3. Duplicate Projects From Project View	11
3.1 How To Use	11
3.2 Duplicated Project	14
4. Remove Comments From Modal	15
5. Quoted Part # Modal Closing Behavior	17
6. Quoted Part # Modal Field Updates	18
6.1 Hidden	18
6.2 Abbreviated	19
6.3 Removed	19

1. Alternates & Exclusive Brands Setting

We've added a new setting to Project Preferences that expands on the Exclusive Brands (EB) feature we added in our last release.

The image shows a 'Project Preferences' dialog box. Inside, there is a section titled 'Alternates & Exclusive Brands:' with a subtitle: 'Choose whether to use alternates and exclusive brands products in your project.' To the right of this text is a dropdown menu currently set to 'Yes'. Below the dropdown are two radio button options: 'Add EB Alternate' (which is selected) and 'Priority Automatch'.

This setting has been combined with the existing Alternates Allowed setting where the dropdown allows you to choose whether it's possible to add Alternates to your line items.

When the new Alternates & Exclusive Brands setting is set to **Yes**, you can choose from the following options:

1. Yes - Add EB Alternate:

- When this setting is on, for each part in your project, VIQ will first automatch to a Vallen Part Number
- Then use the Vallen Part Number in the Quoted Part # column to try to find any exact matches to EB parts
- If exact matches to EB parts are found, VIQ will automatically add the first EB match as an alternate

2. Yes - Priority Automatch:

- When this setting is on, for each part in your project, VIQ will first automatch to a Vallen Part Number
- Then use the Vallen Part Number in the Quoted Part # column to try to find any exact matches to EB parts
- If exact matches to EB parts are found, VIQ will automatically replace the parent line item with the first EB exact match
- Alternates will not be automatically added to your line item, but you will have the ability to manually add alternates to the line items in your project

When the new Alternates & Exclusive Brands setting is set to **No**:

- VIQ *will not* automatically add the first available EB match as an alternate
- VIQ *will not* automatch the line item to the first available EB item unless it is the best possible match
- Users *will not* have the option of adding alternates to line items in the project

Each of the settings are described in further detail in the three sections below.

Lastly, in Project View, we now show the Alternates & Exclusive Brands setting you've chosen in a new field in the Quote Information section of the page:

Sample RFQ 051520 - SX-119252.xlsx+Sheet2 (34 Lines) • 2024/09/11 at 2

owned by: Eugene Lee

Settings

Header

Notes

Share

Edit History

Custom Export

Expand Lines

119252

VIKING PUMP INC

Customer Notes

Project ID

8028

Status

Open

Due Date

2024/09/13

Team Lead

Bridget Fosback

Project type

RFQ

Alternates/EB

Add EB Alternate

Filter by Category (12)

Abrasives

2

Chemicals/Lubs/Adhesives

5

Cutting Tools

2

Electrical Products

1

Extended Warranty

1

Hand Tools

3

Misc Items

1

Quality Control Products

1

Filter by Req. Manufacturer (26)

3M

1/2

Apex Tool Group LLC

0/1

CASTROL

3/3

CHEVRON

1/1

Cooper Crouse-Hinds

0/1

Harvey Tool

0/1

HONEYWELL

1/1

ISCAR

0/1

Selecting 0 item(s)

Showing 25/34 results

Company Confidential

61 S Fair Oaks Ave, Suite 200, Pasadena, CA 91105
p: 626.793.7732 | f: 626.793.7914 | w: www.supplyframe.com

3

1.1 Yes - Add EB Alternate

Alternates & Exclusive Brands:
Choose whether to use alternates and exclusive brands products in your project.

Yes

☒ Add EB Alternate

☐ Priority Automatch

When this setting is selected, VIQ will automatically match a line item to a Vallen Part Number. This is the highlighted Vallen Part Number in the Quoted Part # column below:

Ref #	Req. Part #	Req. MFR/VEN	Quoted Part #	Vallen MFR/VEN
<input type="checkbox"/> 6 EWL	RPN 330400200 70-03	NO MFR NO VENDOR	MPN 20070/03 VALLN PN 33040020070-03 VENDOR PN 20070/03 20070/03 WIPER MED D UTY WHT 4X9 DRC POP UP 10/CA UOM BX EB PXREF	MFR GEORGIA PACIFIC CODE 330400 Product Notes

If the line item matched to a **non-EB part**, VIQ will take the Vallen Part Number above and try to find an **exact match** in Vallen's repository of EB cross references.

If results are found, VIQ will automatically add the first matching EB part as an **alternate** to the line item. If Exclusive Brands suggestions are *not* available, alternates *will not* be added.

Ref #	Req. Part #	Req. MFR/VEN	Quoted Part #	Vallen MFR/VEN
<input type="checkbox"/> 6 EWL	RPN 330400200 70-03	NO MFR NO VENDOR	MPN 20070/03 VALLN PN 33040020070-03 VENDOR PN 20070/03 20070/03 WIPER MED D UTY WHT 4X9 DRC POP UP 10/CA UOM BX EB PXREF	MFR GEORGIA PACIFIC CODE 330400 Product Notes
<input type="checkbox"/> 6 EWL			Exclusive Brands MPN E40-P VALLN PN 11938646 VENDOR PN E40-P E40-P WIPER HEAVY D UTY DRC WHT 9X16.25I N 100/BX UOM BX	MFR ENCON SAFETY PRODUCTS INC CODE 429257 Mfr Notes

If the line item automatically matched to an **EB part**, VIQ will not look up EB matches and will also not add an EB alternate to the line item.

This process will take place for each line item in your project.

Once the upload process has completed, users will have access to Exclusive Brands suggestions:

Requested Part Number:
33040020070-03

Manufacturer Part Number:
20070/03
Miscellaneous Products

Vallen Part Number:
33040020070-03

EB Suggestions (1)

Part Cross References (1)

Advanced Search

Create & Update

Alternates

Based On Quoted Vallen Part Number

Vallen Part Number	MPN	VPN	MFR/Vendor	Description	S/C	D/C	L/T	Cost	P/L	Item Type	
11938646	E40-P		Encon Safety Products Inc	E40-P WIPER HEAVY DUTY DRC WHT 9X16.25IN 100/BX	S	No	21	5.9544	8005	EB	<div><div></div><div>Replace</div><div>Add</div></div>

Close

They will also see Exclusive Brands parts appear in Advanced Search:

Requested Part Number:
33040020070-03

Manufacturer Part Number:
20070/03
Miscellaneous Products

Vallen Part Number:
33040020070-03

EB Suggestions (1)

Part Cross References (1)

Advanced Search (500)

Create & Update

Alternates

Search Options

Part Master

Modified Parts

Part Number

Description

MFR/Vendor

50467411

Description

MFR/Vendor

Include Price

500 Part Master table result(s) for "50467411"

Vallen PN	MPN	VPN	MFR/VEN	Desc.	S/C	QOH	D/C	Base UM	Cost	P/L	Item Type	
504674110779	1232216	1232216	GREENFIELD INDUSTRIES	110779 DRILL BIT 475 1/4 JL TITANIUM COAT	S	0	Yes	EA	\$3.44000	999	EB	<div><div></div><div>Replace</div><div>Add</div></div>
504674111967	1242208	1242208	GREENFIELD INDUSTRIES	111967 DRILL BIT 500 1/8 JL COB	S	0	Yes	EA	\$1.31000	999	EB	<div><div></div><div>Replace</div><div>Add</div></div>
504674112011	1242212	1242212	GREENFIELD INDUSTRIES	112011 DRILL BIT 500 3/16 JL COB	S	0	Yes	EA	\$1.73000	999	EB	<div><div></div><div>Replace</div><div>Add</div></div>
504674112022	1242213	1242213	GREENFIELD INDUSTRIES	112022 DRILL BIT 500 13/64 JL COB	S	0	Yes	EA	\$2.08000	999	EB	<div><div></div><div>Replace</div><div>Add</div></div>
504674112033	1242214	1242214	GREENFIELD INDUSTRIES	112033 DRILL BIT 500 7/32 JL COB	S	0	Yes	EA	\$2.27000	999	EB	<div><div></div><div>Replace</div><div>Add</div></div>
504674112055	1242216	1242216	GREENFIELD INDUSTRIES	112055 DRILL BIT 500 1/4 JL COB	S	0	Yes	EA	\$2.58000	999	EB	<div><div></div><div>Replace</div><div>Add</div></div>

Search

Cancel

Users also have the ability to manually add both other Exclusive Brands parts as well as non-Exclusive Brands parts as alternates to their line items:

Requested Part Number:
33040020070-03

Manufacturer Part Number:
20070/03
Microtensore Products

Vallen Part Number:
33040020070-03

EB Suggestions (1)

Part Cross References (1)

Advanced Search (500)

Create & Update

Alternates

Search Options

☒ Part Master

☐ Modified Parts

Part Number

50467411

Description

MFR/Vendor

☐ Include Price

500 Part Master table result(s) for "50467411"

Vallen PN	MPN	VPN	MFR/VEN	Desc.	S/C	QOH	D/C	Base UM	Cost	P/L	Item Type		
504674110779	1232216	1232216	GREENFIELD INDUSTRIES	110779 DRILL BIT 475 1/4 JL TITANIUM COAT	S	0	Yes	EA	\$3.44000	999	EB	<input type="radio"/>	<div>Replace Add</div>
504674111967	1242208	1242208	GREENFIELD INDUSTRIES	111967 DRILL BIT 500 1/8 JL COB	S	0	Yes	EA	\$1.31000	999	EB	<input type="radio"/>	<div>Replace Add</div>
504674112011	1242212	1242212	GREENFIELD INDUSTRIES	112011 DRILL BIT 500 3/16 JL COB	S	0	Yes	EA	\$1.73000	999	EB	<input type="radio"/>	<div>Replace Add</div>
504674112022	1242213	1242213	GREENFIELD INDUSTRIES	112022 DRILL BIT 500 13/64 JL COB	S	0	Yes	EA	\$2.08000	999	EB	<input type="radio"/>	<div>Replace Add</div>
504674112033	1242214	1242214	GREENFIELD INDUSTRIES	112033 DRILL BIT 500 7/32 JL COB	S	0	Yes	EA	\$2.27000	999	EB	<input type="radio"/>	<div>Replace Add</div>
504674112055	1242216	1242216	GREENFIELD INDUSTRIES	112055 DRILL BIT 500 1/4 JL COB	S	0	Yes	EA	\$2.58000	999	EB	<input type="radio"/>	<div>Replace Add</div>

Search

Cancel

1.2 Yes - Priority Automatch

Alternates & Exclusive Brands:

Choose whether to use alternates and exclusive brands products in your project.

Yes



Add EB Alternate



Priority Automatch

When this setting is selected, VIQ will automatically match a line item to a Vallen Part Number.

This Vallen Part Number will then be used by VIQ to try and find an **exact match** to an EB part in Vallen's repository of EB cross references.

If exact matches to EB cross references are found, VIQ will take the first exact match and automatically load the EB part into the **parent line item**. It will not be added as an alternate as is described in the Yes - Add EB Alternate section above.

Note that it is also possible to automatch to non-Exclusive Brands items when the system determines a non-EB part is the best match, or if Exclusive Brands matches are not available.

Once line items are uploaded to your project, users will have access to Exclusive Brands suggestions and will see Exclusive Brands items appear in Advanced Search.

Requested Part Number:
410603250-305400

Manufacturer Part Number:
4123510
Cutting Tools

Valien Part Number:
11737259

EB Suggestions (2)

Multiple Valien Matches (3)

Part Cross References (2)

Advanced Search

Create & Update

Alternates

Based On RPN

Valien Part Number	MPN	VPN	MFR/Vendor	Description	S/C	D/C	L/T	Cost	P/L	Item Type		
11737305	4133510		Greenfield Industries/	EXACTEK 4133510 .035X1/8 X.105X 1-1/2 2FL MINI CA	S	No	30	10.33	8001	EB		<div>Replace</div> <div>Add</div>
11737259	4123510		Greenfield Industries/	EXACTEK 4123510 .035X1/8 X.105X 1-1/2 2FL MINI CA	S	No	30	8.61	8001	EB		

Close

Alternates are still supported so users will retain the ability to manually add both Exclusive Brands and non-Exclusive Brands parts as alternates to their lines.

Requested Part Number:
5015192085-M

Manufacturer Part Number:
HPPUA4M
Safety Products

Valien Part Number:
10825546

Did you mean? (1)

Part Cross References (1)

Advanced Search (115)

Create & Update

Alternates

Search Options

Part Master

Modified Parts

Part Number

Description

MFR/Vendor

117372

Description

MFR/Vendor

☐ Include Price

115 Part Master table result(s) for "117372"

Valien PN	MPN	VPN	MFR/VEN	Desc.	S/C	QOH	D/C	Base UM	Cost	P/L	Item Type		
16192263	4117372	4117372	Capp USA	4117372 DPMA-500 VOLT CO NT NO BKUTE	C	0	No	EA	\$149.05000	1	NC		<div>Replace</div> <div>Add</div>
16117372	HGP-885-1CYL	HGP-885-1CYL	Carbide Probes Inc	HGP-885-1CYL 1.0MM CYL NDRICAL CARBIDE PIN X 10	C	0	No	EA	\$158.80000	1	NC		<div>Replace</div> <div>Add</div>
10117372		2700000624	Credit Card Vendor	2700000624	S	0	No	EA	\$66.34000	888	NC		<div>Replace</div> <div>Add</div>
11737200	4627523	4627523	Greenfield Industries/	EXACTEK 4627523 3/4X3/4X 1-5/8X4 .125 CR 3FL ALUM	S	0	No	EA	\$84.12000	8001	EB		<div>Replace</div> <div>Add</div>
11737201	4627530	4627530	Greenfield Industries/	EXACTEK 4627530 3/4X3/4X 2-1/2X5 3FL ALUM CARB EM	S	0	No	EA	\$104.40000	8001	EB		<div>Replace</div> <div>Add</div>
11737202	4627531	4627531	Greenfield Industries/	EXACTEK 4627531 3/4X3/4X 2-1/2X5 .03 CR 3FL ALUM	S	0	No	EA	\$104.40000	8001	EB		<div>Replace</div> <div>Add</div>

Search

Cancel

1.3 No

In Project Preferences, when the Alternates & Exclusive Brands setting is set to "No," the additional Exclusive Brands options below the dropdown should disappear.

Alternates & Exclusive Brands:

*Choose whether to use
alternates and exclusive
brands products in your
project.*

No ▼

When you upload line items into your project, VIQ will not automatch to Exclusive Brands items unless it's the best possible match, and it will not automatically add Exclusive Brands items as alternates to your line items.

Users will have access to Exclusive Brands suggestions and they will also see Exclusive Brands parts appear in Advanced Search, but users will not have the ability to add alternates to their line items.

Requested Part Number:
07467

Manufacturer Part Number:
07467
Cutting Tools

Valien Part Number:
11511616

EB Suggestions (1)

Did you mean? (12)

Advanced Search

Create & Update

Part Master

Valien 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	
40313407467	07467-	07467-	National Wiper Alliance	403134	Manufacturer	07467 WIPER HYDROENTANGLE MW 6X13	S	No	14	\$32.76000	2022/05/10	2022/03/16	1	EB	Replace

Close

Requested Part Number:
07467

Manufacturer Part Number:
07467
Cutting Tools

Valien Part Number:
11511616

EB Suggestions (1)

Did you mean? (12)

Advanced Search

Create & Update

Part Master

Valien 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	
15224529	074677	074677	Carlisle Fluid Tech. Inc. DBA/	440074	Manufacturer	074677 SH/AVE 3 GROOVE 7 .4PD H BUSH.	C	No		\$268.00000	2023/04/04	2023/04/04	1	NC	Replace
13294761	074676	074676	Carlisle Fluid Tech. Inc. DBA/	440074	Manufacturer	074676 TRANSFORMERS00VA 600V-120V	C	No		\$304.00000	2023/04/04	2023/04/04	1	NC	Replace
40313407467	07467-	07467-	National Wiper Alliance	403134	Manufacturer	07467 WIPER HYDROENTANGLE MW 6X13	S	No	14	\$32.76000	2022/05/10	2022/03/16	1	EB	Replace
51533207467-	07467-	07467-	National Wiper Alliance	403134	Manufacturer	07467-WHT MEDIUM WEIGHT INFINITY PERFORATED CENT	C	No		\$32.76000	2022/03/16	2022/03/16	1	NC	Replace
697172074672MS	074672MS	074672MS	Regal Cutting Tool/ New York	697172	Manufacturer	074672MS TAP 5/16-18 NC H5 3FL PLUG SUPERTUF T1	C	No		\$18.71000	2023/01/01	2023/01/01	1	NC	Replace
697172074674MS	074674MS	074674MS	Regal Cutting Tool/ New York	697172	Manufacturer	074674MS TAP 7/16-14 NC H5 3FL PLUG SUPERTUF T1	C	No		\$26.57000	2023/01/01	2023/01/01	1	NC	Replace

Close

Company Confidential

61 S Fair Oaks Ave, Suite 200, Pasadena, CA 91105
p: 626.793.7732 | f: 626.793.7914 | w: www.supplyframe.com

Requested Part Number:

07467

Manufacturer Part Number:

07467

Cutting Tools

Vallen Part Number:

11511616

EB Suggestions (1)

Did you mean? (12)

Advanced Search (3)

Create & Update

Search Options

Part Master

Modified Parts

Part Number

5046741151

Description

MFR/Vendor

Include Price

3 Part Master table result(s) for "5046741151"

Vallen PN	MPN	VPN	MFR/VEN	VEN Code	Desc.	S/C	QOH	D/C	Base UM	Cost	RPC Change Date	SL Date	Product Line	Item Type	
504674115146	1932500	1932500	GREENFIELD INDUSTRIES	451984	EXACTEK 1 - 5 SCREW EXTRACTOR SET	S	0	No	EA	\$17.52000	2022/09/08	2022/09/06	8001	EB	Replace
504674115102	115102	115102	TITAN LLC	408817	115102 SCREW EXTRACTOR 531 N9	S	0	Yes	EA	\$32.84000	2019/04/01	2019/04/01	999	EB	Replace
504674115113	115113	CD53110	TITAN LLC	408817	115113 SCREW EXTRACTOR 531 N10	S	0	Yes	EA	\$85.23000	2019/04/01	2019/04/01	999	EB	Replace

Search

Cancel

2. Exclusive Brands Suggestions

When Exclusive Brands Suggestions are found, VallenIQ will display the *EB* badge below and users can access these suggestions by clicking into the Quoted Part # modal:

Ref #	Req. Part #	Req. MFR/VEN	Quoted Part #	Vallen MFR/VEN
15 JHH	RPN 436971HTS 170034	MFR Alfa VENDOR BERNARD WELDING	<div> <div>MPN HTS170034</div> <div>VALLEN PN 436971HTS170034</div> <div>VENDOR PN HTS170034</div> <div>HTS170034 3/8-16 NC H AND TAP ALFA USA HS S GRND T UOM EA</div> <div>EB PXREF</div> </div>	<div>MFR ALFA TOOLS</div> <div>CODE 436971</div> <div>Mfr Notes</div>

When searching for Exclusive Brands Suggestions, VallenIQ will:

- Look up suggestions based on the quoted Vallen part #, quoted manufacturer part number (MPN), requested part number (RPN), and customer part number (CPN)

Ref #	Req. Part #	Req. MFR/VEN	Quoted Part #	Vallen MFR/VEN
16 JHH	<div> <div>RPN 436971HTS 170034</div> <div>CPN 198382743</div> </div>	MFR Alfa VENDOR BERNARD WELDING	<div> <div>MPN HTS170034</div> <div>VALLEN PN 436971HTS170034</div> <div>VENDOR PN HTS170034</div> <div>HTS170034 3/8-16 NC H AND TAP ALFA USA HS S GRND T UOM EA</div> <div>EB PXREF</div> </div>	<div>MFR ALFA TOOLS</div> <div>CODE 436971</div> <div>Mfr Notes</div>

Company Confidential

61 S Fair Oaks Ave, Suite 200, Pasadena, CA 91105
p: 626.793.7732 | f: 626.793.7914 | w: www.supplyframe.com

- Look for both *exact* and *partial* matches
- Check across all Xref Types
- And will separate EB Suggestions into different sections based on the part that was used to find the suggestions - there are a possible four sections that can appear in this tab:
 - Based On Quoted Vallen Part Number
 - Based On Quoted MPN
 - Based On RPN
 - Based On CPN

Requested Part Number:
436971BBML74203

Requested Customer Part Number:
01011

Manufacturer Part Number:
BBML74203
Cutting Tools

Vallen Part Number:
436971BBML74203

EB Suggestions (2)
Part Cross References (4)
Advanced Search
Create & Update
Alternates

Based On Quoted Vallen Part Number

Vallen Part Number	MPN	VPN	MFR/Vendor	Description	S/C	D/C	L/T	Cost	P/L	Item Type		
504674110350	1362206		Greenfield Industries/	EXACTEK 3/32 HSS ML 135 SP BLK + GOLD	S	No	30	0.9	8001	EB	①	Replace Add

Based On CPN

Vallen Part Number	MPN	VPN	MFR/Vendor	Description	S/C	D/C	L/T	Cost	P/L	Item Type		
CB6255	V16LSP		Encon Safety Products Inc	V16LSP LENS CLEANING FLUID BTL W/ PUMP A STC	S	No	21	1.42083	8017	EB	①	Replace Add

Close

Requested Part Number:
410603250-305400

Manufacturer Part Number:
4123510
Cutting Tools

Vallen Part Number:
11737259

EB Suggestions (2)
Multiple Vallen Matches (3)
Part Cross References (2)
Advanced Search
Create & Update
Alternates

Based On RPN

Vallen Part Number	MPN	VPN	MFR/Vendor	Description	S/C	D/C	L/T	Cost	P/L	Item Type		
11737305	4133510		Greenfield Industries/	EXACTEK 4133510 .035X1/8 X.105X 1-1/2 2FL MINI CA	S	No	30	10.33	8001	EB	①	Replace Add
11737259	4123510		Greenfield Industries/	EXACTEK 4123510 .035X1/8 X.105X 1-1/2 2FL MINI CA	S	No	30	8.61	8001	EB	①	

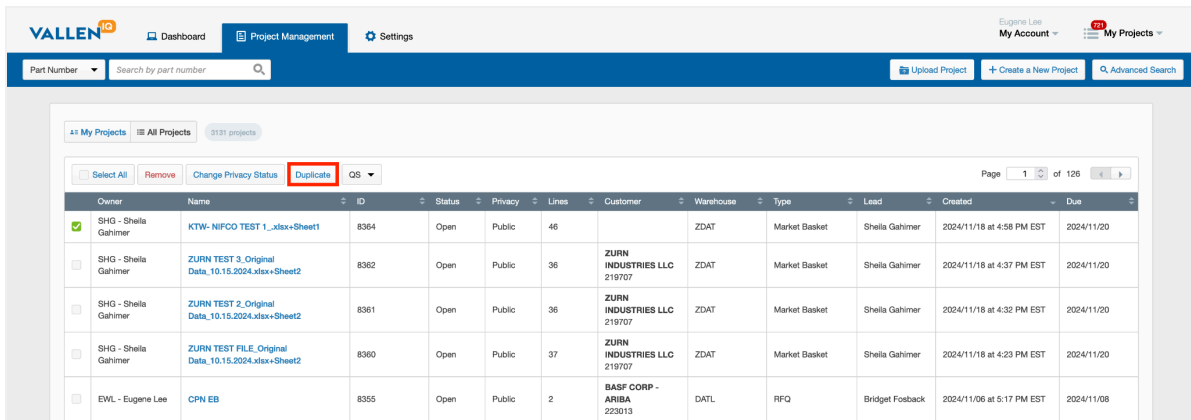
Close

Company Confidential

3. Duplicate Projects From Project View

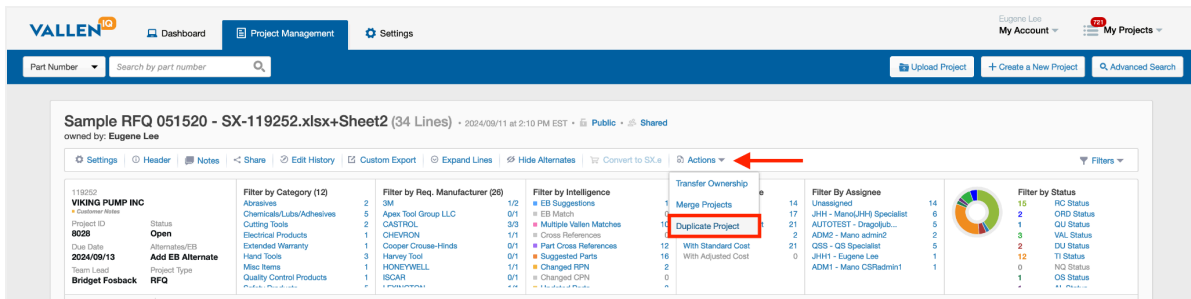
Users can now create duplicates of their projects from the Project View page. Additionally, users can now also choose whether to copy all line items, or only copy the line items they've selected into the new list.

Previously projects could only be duplicated from the Project Management page:



3.1 How To Use

Users can access this feature by first opening a project, clicking on the *Actions* dropdown at the top of your list, then selecting *Duplicate Project*:



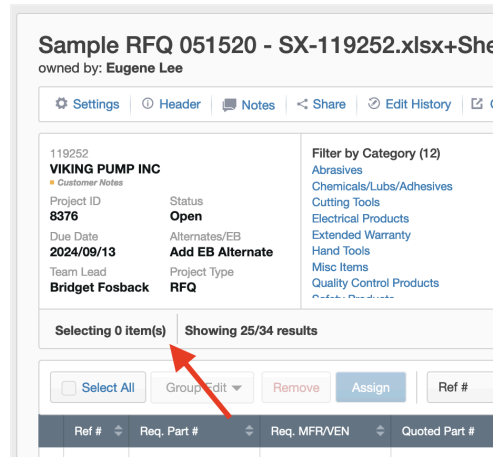
Company Confidential

61 S Fair Oaks Ave, Suite 200, Pasadena, CA 91105
p: 626.793.7732 | f: 626.793.7914 | w: www.supplyframe.com

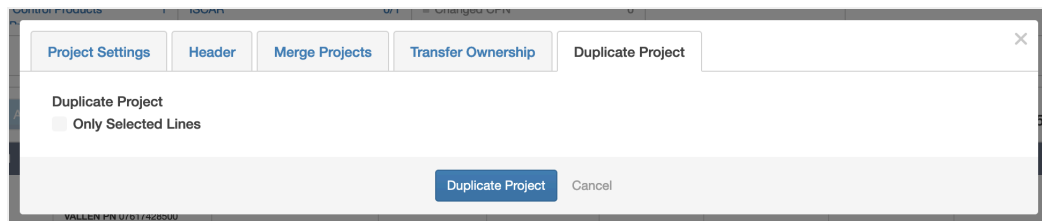
Users have two options when it comes to duplicating their lists:

1. ***Copy All Line Items***

- To copy all line items in your list into your duplicated project ensure that none of the line items in your list are selected:

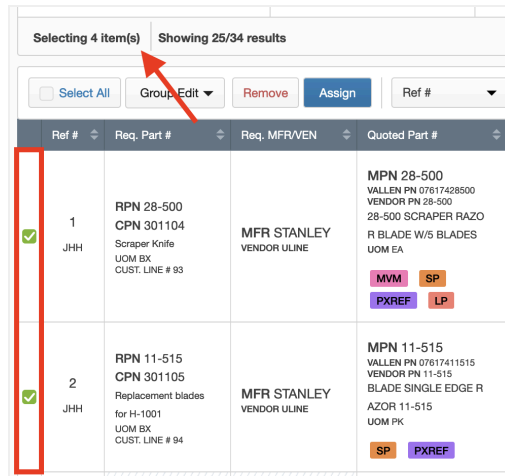


- Then open the modal below and click *Duplicate Project*:



2. Copy Only Selected Line Items

- To copy only specific selected line items into your duplicated project, select the line items you want to include in your new list:

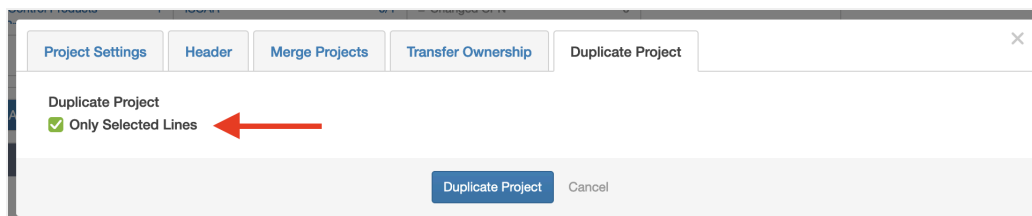


Selecting 4 item(s) Showing 25/34 results

☐ Select All

Ref #	Req. Part #	Req. MFR/VEN	Quoted Part #
<input checked="" type="checkbox"/>	1 JHH RPN 28-500 CPN 301104 Scraper Knife UOM BX CUST. LINE # 93	MFR STANLEY VENDOR ULINE	MPN 28-500 VALLEN PN 07617428500 VENDOR PN 28-500 28-500 SCRAPER RAZO R BLADE W/5 BLADES UOM EA MVM SP PXREF LP
<input checked="" type="checkbox"/>	2 JHH RPN 11-515 CPN 301105 Replacement blades for H-1001 UOM BX CUST. LINE # 94	MFR STANLEY VENDOR ULINE	MPN 11-515 VALLEN PN 07617411515 VENDOR PN 11-515 BLADE SINGLE EDGE R AZOR 11-515 UOM PK SP PXREF

- Then open the modal below, select *Only Selected Lines*, and click *Duplicate Project*:



Project Settings Header Merge Projects Transfer Ownership Duplicate Project

Duplicate Project

☒ Only Selected Lines

3.2 Duplicated Project

After completing the step above, VallenIQ will take you to the duplicated project. Here are some important things to note about your new project:

- The new project will have the same header details and settings as the original
- The naming convention will use the same name as the original project, but with a **(1)** appended to the end of the name. If you duplicate the original project again, the number for the new project will increment to **(2)**:

Sample RFQ 051520 - SX-119252.xlsx+Sheet2 (1) (4 Lines) • 2024/12/06 at 6:10 PM EST • Public • Shared
owned by: Eugene Lee

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

119252
Viking Pump Inc
Project ID: 8377
Status: Open
Date: 2024/09/13
Team Lead: Bridget Fosback
Project Type: RFQ

Filter by Category (3)
Hand Tools
Safety Products
Tapes

Filter by Req. Manufacturer (3)
3M
MAAGD
STANLEY

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

Filter by Cost Source
With Order History
With Quote History
With Replacement Cost
With Rebate Cost
With Standard Cost
With Adjusted Cost

Filter by Assignee
AUTOTEST - DragonB...
ADM1 - Memo C2Bachm...
JHH - Memo/JHH Specialst

Filter by Status
RC Status
CRD Status
CU Status
VAL Status
TI Status
HQ Status
CS Status

Selecting 0 item(s) Showing 4/4 results

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
1	RPN 28-500 CPN 301104 Scrapers Knife UOM EA CUST. LINE # 93	MFR STANLEY VENDOR ULINE	MPN 28-500 VALLIN PN 0701140900 28-500 SCRAPER RAZO R BLADE W/5 BLADES UOM EA	MFR STANLEY BLACK & DECOR CODE 602679	3	169	\$3.63580	3.63580	3.63580	1.62740	55.24 %	\$614.45020	Yes
						10		3.63580	3.63580	1.62740	55.24 %	\$36.35800	Yes
	RPN 11-515		MPN 11-515 VALLIN PN 07011411515										

- If you selected parent line items that have children lines associated with them (eg. alternates) or if you selected any children lines, both the parent and children lines will be copied into the new duplicate project:

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
1	RPN 28-500 CPN 301104 Scrapers Knife UOM EA CUST. LINE # 93	MFR STANLEY VENDOR ULINE	MPN 28-500 VALLIN PN 0701140900 28-500 SCRAPER RAZO R BLADE W/5 BLADES UOM EA	MFR STANLEY BLACK & DECOR CODE 602679	3	169	\$3.63580	3.63580	3.63580	1.62740	55.24 %	\$614.45020	Yes
						10		3.63580	3.63580	1.62740	55.24 %	\$36.35800	Yes
2	RPN 11-515 CPN 301105 Replacement blades for H-1001 UOM EA CUST. LINE # 94	MFR STANLEY VENDOR ULINE	MPN 11-515 VALLIN PN 07011411515 BLADE SINGLE EDGE R AZOR 11-515 UOM EA	MFR STANLEY BLACK & DECOR CODE 602679	15	269	\$10.81200	10.81200	10.81200	4.81010	55.81 %	\$2,908.42800	Yes
						25		10.81200	10.81200	4.81010	55.81 %	\$270.30000	Yes
2			MPN STARFIRE W HITE OIL VALLIN PN 41168570VPR EMITE VENDOR PN STARFIRE WH TE OIL STARFIRE WHITE OIL UOM GA	MFR DIAMOND OIL CO CODE 411658	0	269	\$31.89000	31.89000	31.89000	18.28250	42.87 %	\$8,578.41000	Yes
						1		31.89000	31.89000	18.28250	42.87 %	\$31.89000	Yes
3	RPN 021200-431 85 CPN 500283 764 TAPE VINYL 2X3 870 84 UOM EA CUST. LINE # 95	MFR 3M VENDOR AM	MPN 70000298956 VALLIN PN 02120043185 VENDOR PN 70000298956 764 TAPE VINYL 2X3BY D 3M IL WHT UOM EA	MFR 3M CODE 021144 NOTES 83	0	210	\$10.19000	10.19000	10.19000	5.55000	45.53 %	\$2,139.90000	Yes
						1		10.19000	10.19000	5.55000	45.53 %	\$10.19000	Yes

Company Confidential

Ref #	Req. Part #	Req. MFR/VEN	Quoted Part #	Valien MFR/VEN	Avail. Qty	Req. Qty	Unit Price	Quote Price	Cost	Quote Cost	GP %	Extended Price	Status
1	RPN 28-500 CPN 301104 Scrapers knife UOM BX CUST. LINE # 93	MFR STANLEY VENDOR UJNE	MPN 28-500 VALLEN PN 0717428950 28-500 SCRAPER RAZOR R BLADE W/5 BLADES UOM EA MOM SP PXREF LP	MFR STANLEY BLACK & DECKER CODE 862679 MFR Notes	3	169 10	\$3.63580	3.63580 Set 3.63580 Set	STANDARD COST 1.62740 1.62740	STANDARD COST 1.62740 1.62740	55.24 % 55.24 %	\$614.45020 \$36.35800	OK OK
2	RPN 11-515 CPN 301105 Replacement blades Set 11-1001 UOM BX CUST. LINE # 94	MFR STANLEY VENDOR UJNE	MPN 11-515 VALLEN PN 0717411515 BLADE SINGLE EDGE R AZOR 11-515 UOM PK SP PXREF LP	MFR STANLEY BLACK & DECKER CODE 862679 MFR Notes	15	269 25	\$10.81200	10.81200 Set 10.81200 Set	STANDARD COST 4.81010 4.81010	STANDARD COST 4.81010 4.81010	55.51 % 55.51 %	\$2,908.42800 \$270.30000	OK OK
2			MPN STARFIRE W HITE OIL VALLEN PN 411668704RFR WHITE VENDOR PN STARFIRE WH TE OIL STARFIRE WHITE OIL UOM GA MOM	MFR DIAMOND OIL CO CODE 411668 MFR Notes	0	269 1	\$31.89000	31.89000 Set 31.89000 Set	STANDARD COST 18.28250 18.28250	STANDARD COST 18.28250 18.28250	42.67 % 42.67 %	\$8,578.41000 \$31.89000	OK OK
3	RPN 021200-431 CPN 500283 764 TAP VINYL 2X3 BYD SM UOM EA CUST. LINE # 95	MFR 3M VENDOR AEM	MPN 7000028856 VALLEN PN 0212004185 VENDOR PN 7000038856 764 TAP VINYL 2X3BY D 3/4 IN WHITE UOM EA PXREF LP	MFR 3M CODE 01144 NOTES 003 MFR Notes	0	210 1	\$10.19000	10.19000 Set 10.19000 Set	STANDARD COST 5.55000 5.55000	STANDARD COST 5.55000 5.55000	45.53 % 45.53 %	\$2,139.90000 \$10.19000	OK OK

4. Remove Comments From Modal

Prior to this release, when users added Internal and External Comments:

Ref #	Req. Part #	Req. MFR/VEN	Quoted Part #	Valien MFR/VEN	Avail. Qty	Req. Qty	Unit Price	Quote Price	Cost	Quote Cost	GP%	Extended Price	Status
1	RPN 28-500 CPN 301104 Scrapers knife UOM BX CUST. LINE # 93	MFR STANLEY VENDOR UJNE	MPN 28-500 VALLEN PN 0717428950 28-500 SCRAPER RAZOR R BLADE W/5 BLADES UOM EA MOM SP PXREF LP	MFR STANLEY BLACK & DECKER CODE 862679 MFR Notes	3	169 10	\$3.63580	3.63580 Set 3.63580 Set	STANDARD COST 1.62740 1.62740	STANDARD COST 1.62740 1.62740	55.24 % 55.24 %	\$614.45020 \$36.35800	OK OK

Write a comment 28-500

Comment Type

External Comment

Test comment

Save Cancel

Description:

28-500 SCRAPER RAZOR

Hazmat G

Part Notes:

BLADE W/5 BLADES

Lead Time

Product Category:

Hand Tools

List Price

Product Category Code:

800

Customer

Product Line:

STANLEY-PROTO IND TOOLS

Stand. Price

Product Line Code:

1

Purchase

Company Wide Inv. (QOH):

838

Base UOM

Stocking Status:

S

Taxable:

MSDS Code:

N

Non-Tax T

Item Type:

CP

Image Link

Vendor Packaging:

Vendor Notes:

External Comment - Remove

Test comment

+ Add Note

Misc. 1:

-

Misc. 2:

-

Misc. 3:

-

Misc. 4:

-

1989/12/31 at 7:00 PM EST

Refresh

Company Confidential

61 S Fair Oaks Ave, Suite 200, Pasadena, CA 91105
p: 626.793.7732 | f: 626.793.7914 | w: www.supplyframe.com

The only way to remove them was to remove them from Expand View:

Ref #	Req. Part #	Req. MFR/VEN	Quoted Part #	Vallen MFR/VEN
1 JHH	RPN 28-500 CPN 301104 Scraper Knife UOM BX CUST. LINE # 93	MFR STANLEY VENDOR ULINE	MPN 28-500 VALLER PN 07617428500 VENDOR PN 28-500 28-500 SCRAPER RAZO R BLADE W/5 BLADES UOM EA MVM SP PXREF LP	MFR STANLEY BLACK DECKER CODE 662679 Mfr Notes

Description: 28-500 SCRAPER RAZOR
BLADE W/5 BLADES

Part Notes: *

Product Category: Hand Tools

Product Category Code: 800

Product Line: STANLEY-PROTO IND TOOLS

Product Line Code: 1

Company Wide Inv. (QOH): 838

Stocking Status: S

MSDS Code: N

Item Type: CP

Hazmat Code:

Lead Time:

List Price:

Customer Resale Price:

Stand. Package Size:

Purchase UM:

Base UM Code:

Taxable:

Non-Tax Type:

Image Link:

External Comment • Remove
Test comment
[+ Add Note](#)

Based on user feedback, we've now made it possible to remove both Internal and External Comments from the Comments modal. Simply delete your comment and click Save to delete your comments:

Write a comment 28-500

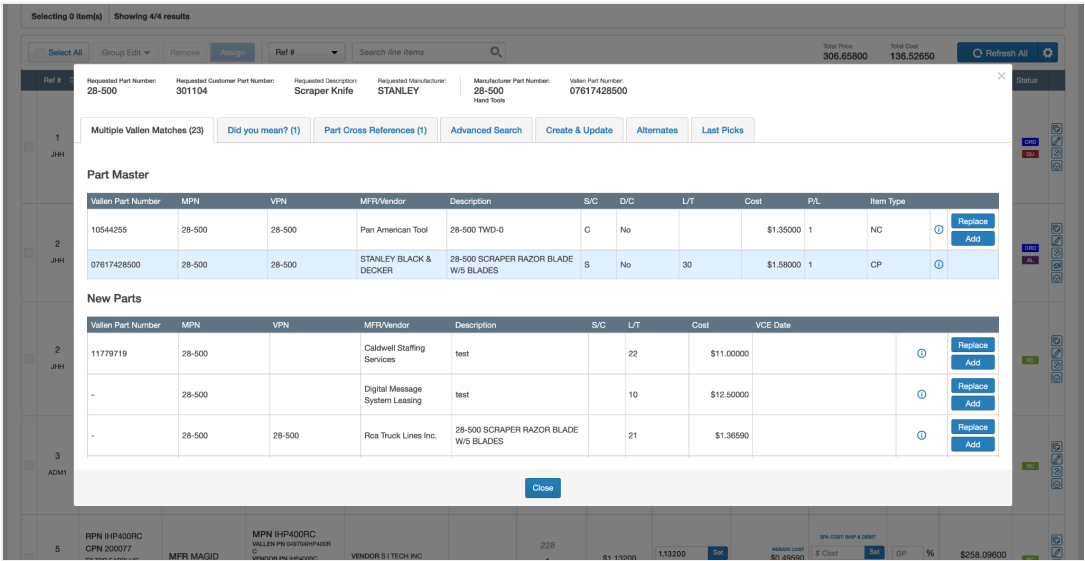
Comment Type External Comment

Test comment

Save Cancel

5. Quoted Part # Modal Closing Behavior

When the Quoted Part # modal is open, the pop up will no longer close if you click outside of the modal.



To close the modal, click the *Close* button or select the X button on the top right corner of the pop up.

6. Quoted Part # Modal Field Updates

Many of the tables VallenIQ supports in the Quoted Part # modal were getting too long, making it difficult for users to read and find information.

We've hidden, abbreviated, and removed fields in some of the tables we show in this modal to improve the experience when viewing suggestions and finding parts.

6.1 Hidden

The following fields used to be standard columns in many of the suggestions tabs, but we've added a new information column and have moved them into the tooltip that appears when you hover your cursor over the new icon (this change was made across all tabs that contain these fields):

- Vendor Code
- Vendor Type
- Project ID
- Project Due Date

Requested Part Number:
436971HTS170034

Requested Customer Part Number:
198382743

Requested Manufacturer:
Alfa

Manufacturer Part Number:
HTS170034
Cutting Tools

Vallen Part Number:
436971HTS170034

EB Suggestions (1)

Part Cross References (1)

Advanced Search

Create & Update

Alternates

Based On Quoted Vallen Part Number

Vallen Part Number	MPN	VPN	MFR/Vendor	Description	S/C	D/C	L/T	Cost			
11733483	3905600		Greenfield Industries/	EXACTEK 3905600 3/8-16 H 3 4FL HAND TAP SET	S	No	30	12.84	8001	EB	<div><div></div><div>Vendor Code: 423837 Vendor Type: Manufacturer RPC Change Date: 2024/01/16 S Date: 2024/01/01 Xref Type: S Xref Part ID: 436971HTS170034 From: master.xgite</div></div> <div>Replace</div> <div>Add</div>

Close

6.2 Abbreviated

We also abbreviated some of the column names so they take up less space within their respective tables:

- *Discontinued* → *D/C*
- *Leat Time* → *L/T*
- *Product Line* → *P/L*

Requested Part Number:
436971HTS170034

Requested Customer Part Number:
198382743

Requested Manufacturer:
Alfa

Manufacturer Part Number:
HTS170034
Cutting Tools

Vallen Part Number:
436971HTS170034

EB Suggestions (1)

Part Cross References (1)

Advanced Search

Create & Update

Alternates

Based On Quoted Vallen Part Number

Vallen Part Number	MPN	VPN	MFR/Vendor	Description	S/C	D/C	L/T	Cost	P/L	Item Type	
11733483	3905600		Greenfield Industries/	EXACTEK 3905600 3/8-16 H 3 4FL HAND TAP SET	S	No	30	12.84	8001	EB	<div>Replace</div> <div>Add</div>

Close

6.3 Removed

The only field that was removed was the *Resale Price* column that we used to show in the Part Cross Reference tab. This was based on feedback from a number of VallenIQ users who said this is a field that is never referenced in the quoting process:

Requested Part Number:
7000028956

Requested Customer Part Number:
SX-51144

Requested Description:
3M

Manufacturer Part Number:
7000028956
Tapes

Vallen Part Number:
02120043185

Part Cross References (1)

Advanced Search

Create & Update

Alternates

Part Master

Xref Part ID	Vallen Part Number	MPN	VPN	MFR/Vendor	Vendor Code	Vendor Type	Xref Type	Description	S/C	Discontinued	Lead Time	Resale Price	Cost	RPC Change Date	SL Date	Product
7000028956	02120043185	7000028956	7000028956	3M	51144	Manufacturer	Comp Xref	764 TAPE VINYL 2X36YD 5M IL WHT	S	No	20		5.55	2023/04/01	2023/04/01	1

Close