# VallenIQ v1.35

December 12th, 2024

# 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.



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:

# 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 |
|---|---|---|---|---|---|
| ☐ | 6 EWL | RPN 330400200 70-03 | NO MFR NO VENDOR | MPN 20070/03 VALLEN 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 |
|---|---|---|---|---|---|
| ☐ | 6 EWL | RPN 330400200 70-03 | NO MFR NO VENDOR | MPN 20070/03 VALLEN 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 |
| ☐ | 6 EWL | | | **Exclusive Brands** MPN E40-P VALLEN 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:



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

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:



## 1.2 Yes - 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.



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.



## 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.

# 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:



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)

- 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 | ⓘ | 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 | ⓘ | 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 | ⓘ | 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 | ⓘ | |

Close

# 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:
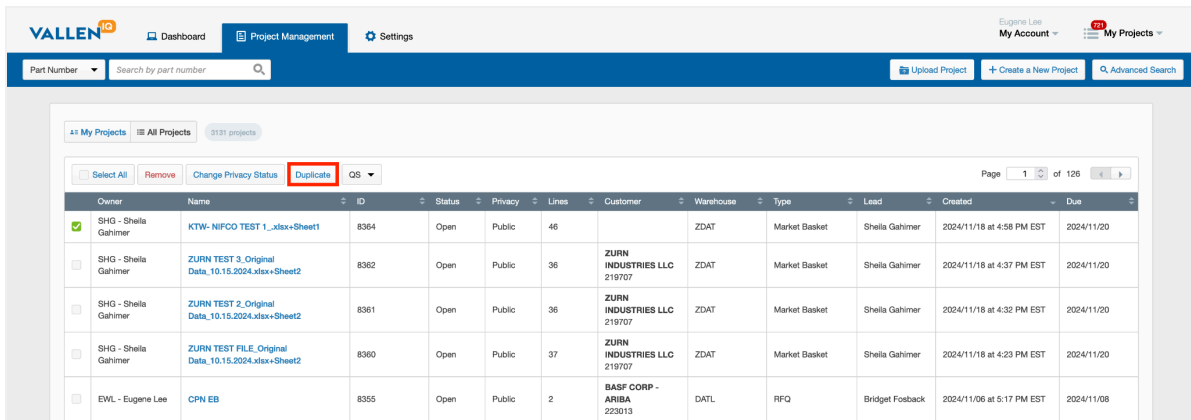


## 3.1 How To Use

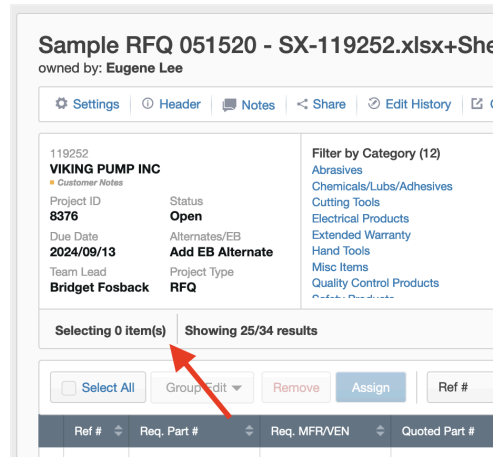Users can access this feature by first opening a project, clicking on the *Actions* dropdown at the top of your list, then selecting *Duplicate Project:*
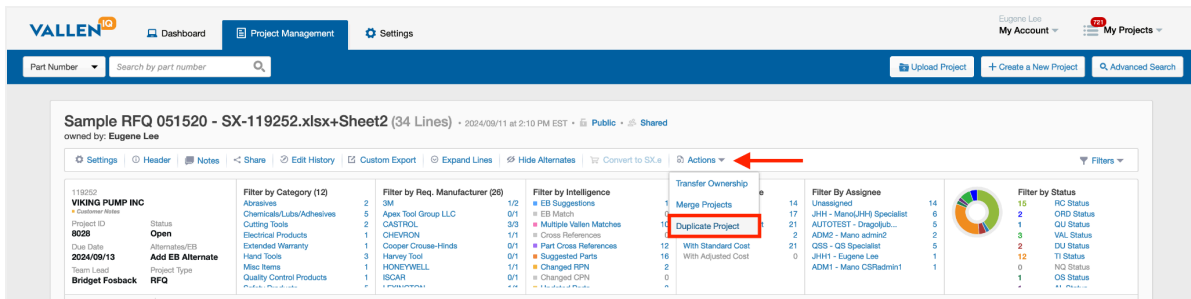
Users have two options when it comes to duplicating their lists:

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:
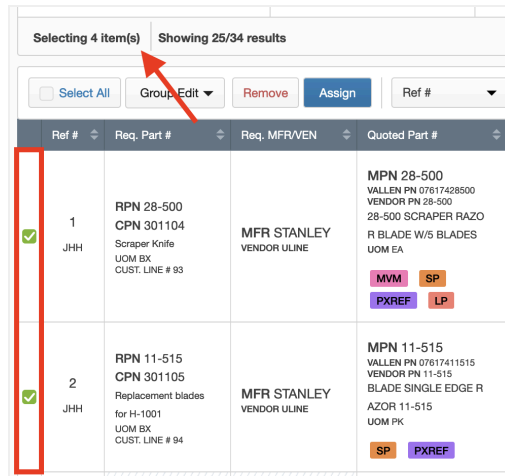


   ● Then open the modal below and click *Duplicate Project:*
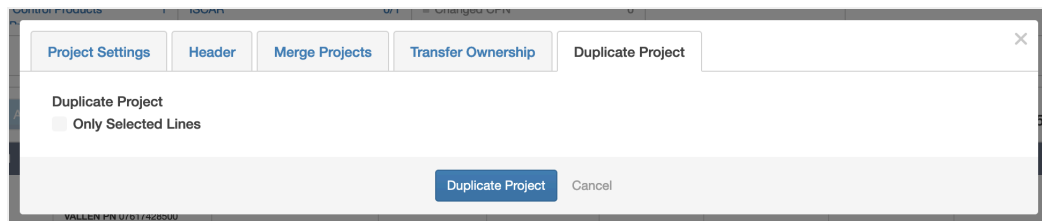
2. *Copy Only Selected Line Items*

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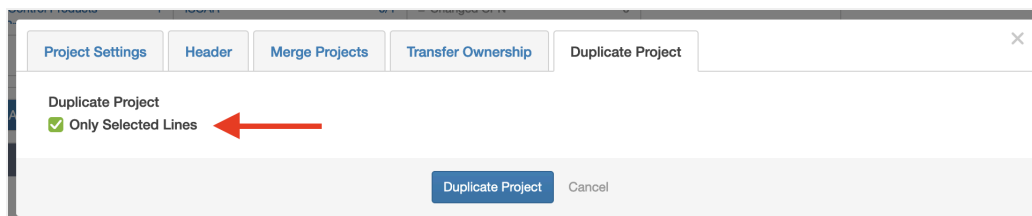


- Then open the modal below, select *Only Selected Lines*, and click *Duplicate Project*:

## 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):*



- 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:

# 4. Remove Comments From Modal

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

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



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:

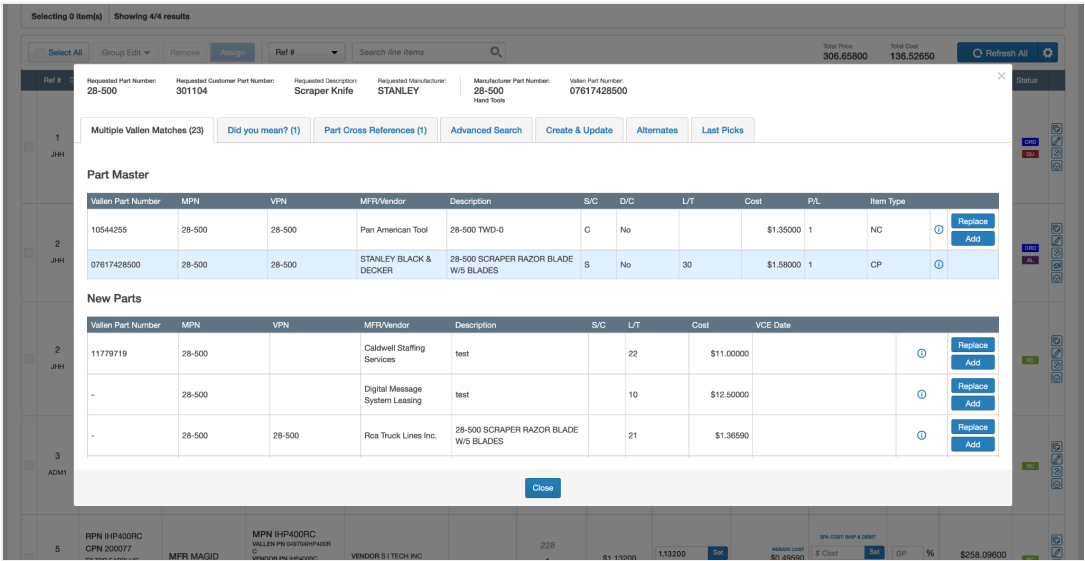# 5. Quoted Part # Modal Closing Behavior

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

# 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*



# 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: