VallenIQ v1.37

May 22nd, 2025

1. New SUB Status

A new **SUB** (Substitute) status has been added to VallenIQ. The purpose of this status is to indicate that the part in the **Quoted Part #** column has been replaced with a substitute part.

1.1 Applying

The new SUB status must be manually applied to line items, either by selecting directly into the status column:

Or by selecting one or more lines, then using the **Group Edit** - **Change Status** feature:

When applied, the new SUB status will look like the following:

1.2 Clearing

Similar to other line item statuses, when line items with SUB status are cleared:

VallenIQ will automatically change the line status to *TI*:

1.3 Filter By Status

We've added the new SUB status to *Filter By Status*:

1.4 Custom Export

The SUB status will be exported when you select the **Status** option in **Custom Export Preferences**:

The status will appear as follows in your downloaded file:

1.5 Reporting

Lastly, the SUB status will appear in the following reports in VallenIQ:

- quote_history_details
- Teams & Projects Summary report (for both QS & ISR) - both within VallenIQ & in airflow/email reports
- Teams & Projects Owners report (for both QS & ISR) - both within VallenIQ & in airflow/email reports

Teams & Projects

| QS ▼ | ☰ Summary | ⩲ Owners | | Download Format ▼ | 🗀 |

Project ⌄	Project Name ⇅	Customer ⇅	Type ⇅	Lead ⇅	Due Date ⇅	Status ⇅	Count ⇅	P1 ⇅	P2 ⇅	P3 ⇅	P4
8700	3M Pittsboro TEST	3M Pittsboro IS	FI	Sheila Gahimer	05/22/25	SUB	2	2	0	0	0
8699	Test Advanced search	SABINE UNIVERSAL PRODUCTS INC	FI	Mano Ram	05/22/25	SUB	1	0	0	0	0
8697	group edit 571343660561	VIKING PIPE & SUPPLY	FM	Dragoljub Zdravkovic	05/22/25	RC	4	0	0	0	0
8694	Final upload + Eb check	SABINE UNIVERSAL PRODUCTS INC	FM	Mano Ram	05/21/25	RC	14	0	0	0	0
8694	Final upload + Eb check	SABINE UNIVERSAL PRODUCTS INC	FM	Mano Ram	05/21/25	AL	19	0	0	0	0
8694	Final upload + Eb check	SABINE UNIVERSAL PRODUCTS INC	FM	Mano Ram	05/21/25	TI	6	0	0	0	0
8694	Final upload + Eb check	SABINE UNIVERSAL PRODUCTS INC	FM	Mano Ram	05/21/25	VAL	11	0	0	0	0
8687	group edit 942024401219	VIKING PIPE & SUPPLY	FM	Dragoljub Zdravkovic	05/21/25	RC	4	0	0	0	0
8678	Status check	WHEEL KRAFT NW	FI	Mano Ram	05/21/25	AL	1	0	0	0	0
8678	Status check	WHEEL KRAFT NW	FI	Mano Ram	05/21/25	RC	5	0	0	0	0
8674	List with priority	WHEEL KRAFT NW	FM	Mano Ram	05/20/25	TI	1	0	0	0	0
8674	List with priority	WHEEL KRAFT NW	FM	Mano Ram	05/20/25	RC	2	0	0	0	1
8674	List with priority	WHEEL KRAFT NW	FM	Mano Ram	05/20/25	VAL	6	1	1	1	1
8674	List with priority	WHEEL KRAFT NW	FM	Mano Ram	05/20/25	AL	1	1	0	0	0
8667	VallenIQ v1.37	VIKING PUMP INC	FM	Bridget Fosback	05/20/25	TI	11	2	3	2	4

Results per page: 125 250 500   ▶

2. New Priority Feature

Super Admin and Admin users can now upload four **_Priority_** designations into VallenIQ, reference them during the quoting process, export them from the system, and see them in reporting.

Note that the only accepted Priority values are listed below:

- P1
- P2
- P3
- P4

Other variations on priority cannot be accepted by the system. This means that the following values, or any other variation, will not upload properly:

- Priority 1
- Priority2
- Priority #3
- P5

2.1 Upload

Super Admins and Admins can upload priorities into VallenIQ in two different ways:

Upload Project

The first is by manually adding Priority designations into customer RFQ files, then uploading the file into VallenIQ:

Sort id	Customer Part	Mfg Part	Customer Description	Mfg Name	Vendor Name	AnnualUsage Qty	UOM	Priority
93	301104	28-500	Scraper Knife	STANLEY	Uline	169	BX	P1
94	301105	11-515	Replacement blades for H-1001	STANLEY	Uline	269	BX	P2
95	500283	021200-43185	764 TAPE VINYL 2X36YD 5M	3M	AIM	210	EA	P3
2156	600153	7078.H4B	WELDING ROD	LINCOLN		145	BX	P4
126	200077	IHP400RC	E2 TPR EARPLUG W/CORD 100PR/DP	MAGID	Magid	228	BX	P1
129	200084	LA111EBFL-9	BLUE FLOC LINED NITRILE SZ 9	NORTH-HONEYWELL	Magid	58	PR	P2
80	301077	300-M-00005	36 X 200YD, 35LB, SATURATED PAPER ROLL	ZERUST EXCOR	Mid Iowa Tools	192	RL	P3
99	1503	OSG1312101	1-5/16 Inch Shank Diameter, 1-3/4 Inch Thread Length, 0.98 Inch Square Size, 2-1/2 Chamfer	OSG	MSC	241	EA	P4
465	006606	368024	0.3750GLASSSERIES	LEXINGTON	LEXINGTON	104	EA	P1

In the **Preview & Confirm Project Data** step of the upload process, users can map the Priority column into the solution:

Add New Line

Priority can also be added via the **Add New Line** feature within **Project View**:

2.2 Display Location - Expand View

Once uploaded, Priority designations will appear in **Expand View**:

2.3 Filter By Priority

Filter your project by Priority designation by using the four new filters we've added to **Filter By Intelligence**:

2.4 Export

Export Priority designations by selecting the new *Priority* option in *Custom Export Preferences*:

Export Preferences ✕

Export Options

◉ User Export   ○ Customer Export

Select Columns for Export *

Select all   Deselect all   Default only

☐ Adjusted Cost	☐ GP Percentage Usage	☐ Promise Date	☐ Selected Requested Quantity
☑ All Extended Prices	☐ Image Link	☐ Purchase UM Code	☐ Standard Cost
☐ All GP Percentages	☐ Internal Comment	☐ Quote Cost Type	☐ Standard Package Size
☑ All Quote Costs	☐ Item Type	☐ Quote Cost Usage	☑ Status
☑ All Quote Prices	☐ Last Ordered Cost	☐ Quote Price Usage	☐ Stocking Status
☑ All Requested Quantities	☐ Last Quoted Cost	☐ RPC Change Date	☐ Taxable
☐ Assignee	☐ Lead Time	☐ Rebate Cost	☐ Unit Price
☐ Available Quantity	☐ MSDS Code	☑ Ref #	☐ Usage
☐ Base UM Code	☑ Manufacturer Part Number	☐ Replacement Cost	☐ Vallen Customer Part Number
☐ Company Wide Inventory	☐ Minimum Quantity	☑ Requested Manufacturer	☑ Vallen Description
☐ Cost	☐ Miscellaneous 1	☑ Requested Part Number	☐ Vallen Manufacturer Code
☐ Cost Type	☐ Miscellaneous 2	☐ Requested Ship Date	☑ Vallen Manufacturer Name
☑ Customer Description	☐ Miscellaneous 3	☐ Requested Vendor Name	☐ Vallen Part Number
☐ Customer Last Price	☐ Miscellaneous 4	☐ SL Date	☐ Vallen Vendor Code
☐ Customer Line #	☐ Non-Tax Type	☐ SPA Cost	☐ Vallen Vendor Name
☐ Customer Part Number	☐ Part Notes	☐ Selected Extended Price	☐ Vend Pack
☐ Customer UOM	☑ Priority ←	☐ Selected GP Percentage	☐ Vendor Cost Expiration
☐ Extended Price Usage	☐ Product Category Code	☐ Selected Quote Cost	☐ Vendor Notes
☐ External Comment	☐ Product Category Name	☐ Selected Quote Price	☐ Vendor Part Number

---

VALLEN IQ   Quote ID: 8667   Quote Name: VallenIQ v1.37

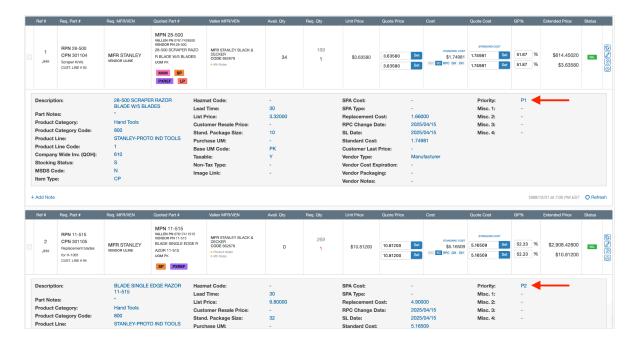| Ref #	Requested Part Number	Requested Manufacturer	Customer Description	Manufacturer Part Number	Vallen Manufacturer Name	Vallen Description	Quantity 1	Quote Price 1	Quote Cost 1	Extended Price 1	Status	Priority
1	28-500	STANLEY	Scraper Knife	28-5005	Harrington Ind Plastics/E & S	S 28-5005 WRIST STRAP	1	46.76815	23.21	46.76815	Substitute	P1
2	11-515	STANLEY	Replacement blades for H-1001	11-5150	Stone Truck Parts	11-5150 SET AIR ASSY 15FT	1	10.812	86.32	10.812	Substitute	P2
3	021200-43185	3M	764 TAPE VINYL 2X36YD 5M				1				To Be Identified	P3
4	7078.H4B	LINCOLN	WELDING ROD	7010511265	3M	7010511265 CUBITRON II C LOTI	1	31.99	18.078	31.99	Need Validation	P4
5	IHP400RC	MAGID	E2 TPR EARPLUG W/CORD 100PR	3141202	Greenfield Industries/	EXACTEK 3-56 3 FL H2 PLUG HSS	1	14.02	4.82458	14.02	Need Validation	P1
6	LA111EBFL-9	NORTH-HONEYWELL	BLUE FLOC LINED NITRILE SZ 9	TEST12345	3M	TEST	1		15		Requires Cost	P2
7	300-M-00005	ZERUST EXCOR	36 X 200YD, 35LB, SATURATED P	300-M-00005	Northern Technologies Intl	PAPER ROLL 36 X 200YD 35LB SA	1	92.43	54.27975	92.43	Requires Cost	P3
8	OSG1312101	OSG	1-5/16 Inch Shank Diameter, 1-3				1				To Be Identified	P4
9	568024	LEXINGTON	0.3750GLASSSERIES	568024	Lexington Cutter Inc	368024 DRILL GLASS 3/8	1	66.25	32.7275	66.25	Requires Cost	P1
10	SR-14-544/SM4-0.7T-15	ISCAR	SR-14-544/SM4-0.7T-15INSERT				1				To Be Identified	P2
11	411658STARFIREWHITE	STAR FIRE	Starfire White oil	STARFIRE WHITE OIL	Diamond Oil Co	STARFIRE WHITE OIL	1	31.89	18.72625	31.89	Requires Cost	P3
12	5MK15	Apex Tool Group LLC	59326 HEX KEY LA BALLPLS 7/16			test test	1		1.3992		Requires Cost	P4
13	77375	SECO	INSERT SPGX12T3-C1 T400D	77375	STREAMLIGHT INC.	77375 BATTERY STICK - S L-20XP-	1	43.92	25.76573	43.92	Need Validation	P1
14	79557311117-AEDR	CASTROL	Techniclean MP 2	157E0E	BP Lubricants USA Inc	11117-BEDR TECHNICLEAN MP 2	1	46.04	24.14588	46.04	Need Validation	P2
15	08834180232	MERIT-SAINT GOBAIN	3/8X1 1/2X 1/8 80 GRIT CARTRID	08834180232	SAINT-GOBAIN ABRASIVES INC	CART ROLL STRAIGHT 80 3/8X1/1	1	0.7	0.40845	0.7	Need Validation	P3
16	4506549	Cooper Crouse-Hinds	1/2" Trade Rigid/Intermediate (IN				1				To Be Identified	P4
17	S8550	HONEYWELL	VISOR, FACE SHIELD CLEAR	S8550	Honeywell Safety Products USA	VISOR REPLACEMENT S8550 UVE	1	8.83	5.19244	8.83	Need Validation	P1
18	232512	CHEVRON	Vistac 220	232512	Ottsen Oil Company	232512 VISTAC 220	1	1748.68	1021.10709	1748.68	Requires Cost	P2
19	79557303117-BEU5	CASTROL	Hysol MB 50 320 GAL TOTE	152CF3	BP Lubricants USA Inc	03117-BEU5 HYSOL MB 50 1 BIN	1	17657.6	8524.8	17657.6	Need Validation	P3
20	79557305323-ATDR	CASTROL	Performance Bio NC Plus	157DE3	BP Lubricants USA Inc	05323-DEDR PERFORMANCE BIO	1	37.4	19.6163	37.4	Need Validation	P4
21	66261139380	SAINT-GOBAIN	39380 SHEET 9X11 T402 1200-A	66261139380	SAINT-GOBAIN ABRASIVES INC	39380 SHEET 9X11 T402 1200-A	1	1.92	1.1688	1.92	Need Validation	P1
22	57431335	SAIT	4-1/2" Wheel Diam, Type 27 Dep				1				To Be Identified	P2
23	28-500	STANLEY	Scraper Knife	28-500	STANLEY BLACK & DECKER	28-500 SCRAPER RAZOR BLADE W	1	3.6358	1.74981	3.6358	Need Validation	P3
24	HVT953616	Harvey Tool	1/4" Stub-Flute Long Reach Corn				1				To Be Identified	P4
25	0.4688TSHSS	PTD	0.4688TSHSS 15/32 HS				1				To Be Identified	P1
26	MDW04844HGS3	SUMITOMO	0.4844CBDTHRU-COOL				1				To Be Identified	P2
27	15H	NUPLA	HAMMER TIP1.5"15158	15H	Encoder Products Company Inc	15H HOLLOW BORE MODEL BA SE	1	367.91	211.2	367.91	Need Validation	P3
28	T3327	VOISARD	T-3327CBDSPSS				1				To Be Identified	P4
29	82702-00000	3M	SHIELD, FACE WP 96C DARK GRE				1				To Be Identified	P1
30	650L	TILLMAN	GLOVE, LEATHER WELDING SIZE L	650L	John Tillman & Company	650L GRAIN COWHD WELDERS G	1	27.14	16.52738	27.14	Need Validation	P2
31	272204	NORTH-HONEYWELL	CREAM, BARRIER WITH SILICONE	272204	Honeywell Safety Products USA	272204 222 4 OZ TUBE BAR RIER	1	5.91	3.79196	5.91	Need Validation	P3
32	404-20	TREGASKISS	GAS DEFUSER	404-20		404-20 DIFFUSER 100/PK	1	20.23	10.61588	20.23	Requires Cost	P4
33	9599968823	Manufacturer	Description				1111				To Be Identified	P3

2.5 Reporting

Priority designations will appear in the following reports in VallenIQ:

- quote_history_details
- Teams & Projects Summary report (for both QS & ISR) - both within VallenIQ & in airflow/email reports
- Teams & Projects Owners report (for both QS & ISR) - both within VallenIQ & in airflow/email reports

Teams & Projects

Project	Project Name	Customer	Type	Lead	Due Date	Status	Count	P1	P2	P3	P4
8702	3M Nevada Test.xlsx+Sheet1		FI	Sheila Gahimer	05/22/25	VAL	11	1	1	2	1
8702	3M Nevada Test.xlsx+Sheet1		FI	Sheila Gahimer	05/22/25	SUB	2	2	0	0	0
8702	3M Nevada Test.xlsx+Sheet1		FI	Sheila Gahimer	05/22/25	RC	1	0	0	0	0
8702	3M Nevada Test.xlsx+Sheet1		FI	Sheila Gahimer	05/22/25	TI	5	3	0	0	1
8701	09 - VIQ Input 3MN3.xls+test		FI	Sheila Gahimer	05/22/25	TI	10	2	5	3	0
8701	09 - VIQ Input 3MN3.xls+test		FI	Sheila Gahimer	05/22/25	RC	4	0	4	0	0
8701	09 - VIQ Input 3MN3.xls+test		FI	Sheila Gahimer	05/22/25	SUB	2	2	0	0	0
8701	09 - VIQ Input 3MN3.xls+test		FI	Sheila Gahimer	05/22/25	VAL	6	4	1	1	0
8700	3M Pittsboro TEST	3M Pittsboro IS	FI	Sheila Gahimer	05/22/25	VAL	9	2	6	1	0
8700	3M Pittsboro TEST	3M Pittsboro IS	FI	Sheila Gahimer	05/22/25	RC	5	1	2	1	1
8700	3M Pittsboro TEST	3M Pittsboro IS	FI	Sheila Gahimer	05/22/25	TI	5	1	3	1	0
8700	3M Pittsboro TEST	3M Pittsboro IS	FI	Sheila Gahimer	05/22/25	SUB	2	2	0	0	0
8699	Test Advanced search	SABINE UNIVERSAL PRODUCTS INC	FI	Mano Ram	05/22/25	SUB	1	0	0	0	0
8697	group edit 571343660561	VIKING PIPE & SUPPLY	FM	Dragoljub Zdravkovic	05/22/25	RC	4	0	0	0	0
8694	Final upload + Eb check	SABINE UNIVERSAL PRODUCTS INC	FM	Mano Ram	05/21/25	RC	14	0	0	0	0
8694	Final upload + Eb check	SABINE UNIVERSAL PRODUCTS INC	FM	Mano Ram	05/21/25	AL	19	0	0	0	0
8694	Final upload + Eb check	SABINE UNIVERSAL PRODUCTS INC	FM	Mano Ram	05/21/25	TI	6	0	0	0	0

Results per page: 125 250 500