



RELEASE NOTES

VallenIQ v1.18

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1. Quote-To-Order API Integration: Convert to Order

1.1 Introduction

The goal of the Quote-to-Order API integration is to allow users to initiate customer order creation from VallenIQ using the new Convert to Order feature in the Quote Actions bar.

When a new customer order is initiated, VallenIQ will push required order and line item details to the Quote-To-Order API, and in return, SXe should either send back errors or confirmation that the customer order was successfully created.

The data returned by the API will be displayed in the application for review by the user who submitted the quote for customer order creation.

1.2 Scope

The following items describe the high level scope of the Quote-to-Order integration that is implemented in VallenIQ:

1. Not all line items must be selected to initiate customer order creation.
2. The system will assign a new status ORD (ordered) to line items that were successfully added to a customer order from VallenIQ. Users will retain the ability to manually assign the ORD status to line items from the Select Status modal. Ordered line items are not locked within the quote.
3. Users are able to create multiple orders from the same quote in VallenIQ. Line items that have already been submitted in an order can be added to a new order.
4. Users must be able to add alternates to orders.
5. If changes must be made to an order that has already been created, users must make those changes outside of VallenIQ, and in SXe.

1.3 User Flow

1.3.1 Select Lines

In order to use the new Convert to Order feature, users must first select line items they'd like to submit for the new order:

Ref #	Req. Part #	Req. MFR/VEN	Quoted Part #	Valen MFR/VEN	Avail. Qty	Req. Qty	Price	Quote Price	Cost	Quote Cost	GP %	Extended Price	Status
1	RPN 56-5 CPN 512335 56-5 PLUG MALE UCM EA	MFR ZSI-Foster Inc. NO VENDOR	MPN 56-5 VALLEN PN 43254456-5 VALLEN CPN 512335 VENDOR PN 56-5 56-5 PLUG MALE UCM EA Multiple Valen Matches Suggested Parts Part Cross References	MFR ZSI-FOSTER INC. CODE 432544 NOTES 4802 MfrVendor Notes	0	805 600 700 800 900	\$5.45000	5.45000 5.45000 5.45000 5.45000 5.45000	Sell Sell Sell Sell Sell	REPLACEMENT COST \$3.84852 REPLACEMENT COST \$3.84852 REPLACEMENT COST \$3.84852 REPLACEMENT COST \$3.84852 REPLACEMENT COST \$3.84852	41.61 % 41.61 % 41.61 % 41.61 % 41.61 %	\$4,387.25000 \$3,270.00000 \$3,815.00000 \$4,360.00000 \$4,905.00000	VAL
2	RPN 45326 CPN 589436 A65 3XL COVERALL B LUEFLAME RESISTANT T UCM EA	MFR Kimberly-Clark NO VENDOR	MPN 45326 VALLEN PN 5890040326 VALLEN CPN 589436 VENDOR PN 45326 A65 3XL COVERALL BLUE FLAME RESISTANT UCM EA Multiple Valen Matches Suggested Parts Part Cross References	MFR KIMBERLY-CLARK CODE 90000 MfrVendor Notes	189	103 50 100 150 200	\$8.85000	8.85000 8.85000 8.85000 8.85000 8.85000	Sell Sell Sell Sell Sell	REPLACEMENT COST \$6.59140 REPLACEMENT COST \$6.59140 REPLACEMENT COST \$6.59140 REPLACEMENT COST \$6.59140	34.27 % 34.27 % 34.27 % 34.27 % 34.27 %	\$911.55000 \$442.50000 \$885.00000 \$1,327.50000 \$1,770.00000	VAL
3	CPN 521402 237393 PRIME GUARD POWERBLAST WINDS HIELD WASHER UCM EA	MFR TRUE VALUE COMPANY NO VENDOR	VALLEN PN 43250237393 VALLEN CPN 521402 VENDOR PN 237393 237393 PRIME GUARD PO WER BLAST WINDSHIELD WASHER UCM EA Part Cross References	MFR TRUE VALUE COMPANY CODE 412326 MfrVendor Notes	0	175 100 150 200 250	\$2.17000	2.17000 2.17000 2.17000 2.17000 2.17000	Sell Sell Sell Sell Sell	REPLACEMENT COST \$1.59000 REPLACEMENT COST \$1.59000 REPLACEMENT COST \$1.59000 REPLACEMENT COST \$1.59000	36.48 % 36.48 % 36.48 % 36.48 % 36.48 %	\$379.75000 \$217.00000 \$325.50000 \$434.00000 \$542.50000	VAL
4	RPN 623340121 CPN CB7080_NO_ SAP VP 6233-40121 CAN LI NERPAT 33340 12 MIC 33GA UCM CA	MFR Encon Safety Products Inc NO VENDOR	MPN 623340121 VALLEN PN CB7080 VALLEN CPN CB7080_NO_SA P VENDOR PN 623340121 VP 6233-40121 CAN LINE R NAT 33340 12 MIC 33G A UCM CA Multiple Valen Matches Part Cross References	MFR ENCON SAFETY PRODUCTS INC CODE 482037 MfrVendor Notes	5	176 150 175 200 225	\$16.82000	16.82000 16.82000 16.82000 16.82000 16.82000	Sell Sell Sell Sell Sell	REPLACEMENT COST \$12.09000 REPLACEMENT COST \$12.09000 REPLACEMENT COST \$12.09000 REPLACEMENT COST \$12.09000	39.12 % 39.12 % 39.12 % 39.12 % 39.12 %	\$2,960.32000 \$2,523.00000 \$2,943.50000 \$3,364.00000 \$3,784.50000	VAL

Select line items to add to your order using the select column

Note that when multiple requested quantities breaks exist for selected line items, the system will currently use the value for Requested Quantity 1 when creating your order.

Ref #	Req. Part #	Req. MFR/VEN	Quoted Part #	Valen MFR/VEN	Avail. Qty	Req. Qty	Price	Quote Price	Cost	Quote Cost	GP %	Extended Price	Status
1	RPN 56-5 CPN 512335 56-5 PLUG MALE UCM EA	MFR ZSI-Foster Inc. NO VENDOR	MPN 56-5 VALLEN PN 43254456-5 VALLEN CPN 512335 VENDOR PN 56-5 56-5 PLUG MALE UCM EA Multiple Valen Matches Suggested Parts Part Cross References	MFR ZSI-FOSTER INC. CODE 432544 NOTES 4802 MfrVendor Notes	0	805 600 700 800 900	\$5.45000	5.45000 5.45000 5.45000 5.45000 5.45000	Sell Sell Sell Sell Sell	REPLACEMENT COST 3.84852 REPLACEMENT COST 3.84852 REPLACEMENT COST 3.84852 REPLACEMENT COST 3.84852	41.61 % 41.61 % 41.61 % 41.61 % 41.61 %	\$4,387.25000 \$3,270.00000 \$3,815.00000 \$4,360.00000 \$4,905.00000	VAL

Requested Quantity 1 will be used to populate the Quantity and Cost fields for orders

In the next release v1.19, users will have the ability to choose which Requested Quantity break they'd like to use in the order.

1.3.2 Select Convert to Order & Enter Order Details

After you've selected your line items, click the new Convert to Order button in the Quote Actions bar at the top of the quote:

Test Quote 08/02/21 (57 Lines) • 2021/08/02 at 8:08 PM EST • Public • Shared
owned by: Eugene Lee

Settings Header Share Edit History Custom Export Expand Lines Hide Alternates **Convert to Order** Actions Filters

220924
Keystone Operating LLC
Project ID: 2958
Status: Open
Due Date: 2021/08/04
Yes
Project Type: RFQ
Lindsey Cross

Filter by Category (12)
Abrasives 12
Chemicals/Lubs/Adhesives 3
Contractor Supplies 1
Hand Tools 2
Ind Rubber Products 2
Maint Equip and Supplies 3
Material Handling Equip 4
Miscellaneous Products 3
Pipe and Fittings 1

Filter by Req. Manufacturer (35)
Ansell Healthcare Products 1/1
BOSTWICK BRAUN 1/1
COMPANY 1/1
Berlin Packaging LLC 4/4
Brady Worldwide Inc. 1/1
Chapin International Inc. 1/1
Credit Card Vendor 2/2
Dixon Valve & Coupling 2/2
ENGODYNE CORPORATION 2/2

Filter by Intelligence
Multiple Value Matches 34
Cross References 0
Part Cross References 57
Suggested Parts 21
Changed RPN 1
Changed CPN 0
Updated Parts 0
Created Parts 0
Last Picks 0

Filter by Cost Source
With Order History 41
With Quote History 25
With Replacement Cost 57
With Rebate Cost 2
With Standard Cost 57

Filter By Assignee
Eugene Lee - EWL 57

Filter by Status
RC Status 20
ORD Status 0
QU Status 0
VAL Status 37
DU Status 0
TI Status 0
NC Status 0
OS Status 0
AL Status 0

Selecting 3 Item(s) Showing 57/57 results

Select All Group Edit Remove Assign Ref # Search line items

Total Cost: 658,721.40010 Refresh All

Ref #	Req. Part #	Req. MFR/VEN	Quoted Part #	Valen MFR/VEN	Avail. Qty	Req. Qty	Price	Quote Price	Cost	Quote Cost	GP %	Extended Price	Status
1	RPN: 56-5 CPN: 512335 56-5 PLUG MALE UOM EA	MFR: ZSI-Foster Inc. NO VENDOR	MPN: 56-5 VALLEN PN: 43204496-5 VALLEN CPN: 512335 VENDOR PN: 56-5 56-5 PLUG MALE UOM EA	MFR: ZSI-FOSTER INC. CODE: 432544 NOTES: 4302 Multiple Value Matches Suggested Parts Part Cross References	0	805 600 700 800 900	\$5.45000	5.45000 5.45000 5.45000 5.45000 5.45000	REPLACEMENT COST 3.84852 REPLACEMENT COST \$3.84852 3.84852 3.84852 3.84852	41.61 41.61 41.61 41.61 41.61	\$4,387.25000 \$3,270.00000 \$3,815.00000 \$4,360.00000 \$4,905.00000	VAL	
2	RPN: 45326 CPN: 589436 A65 3/8 COVERALL B LUEFLAME RESISTAN T UOM EA	MFR: Kimberly-Clark NO VENDOR	MPN: 45326 VALLEN PN: 5900040326 VALLEN CPN: 589436 VENDOR PN: 45326 A65 3/8 COVERALL BLUE FLAME RESISTANT UOM EA	MFR: KIMBERLY-CLARK CODE: 590000 Multiple Value Matches Suggested Parts Part Cross References	189	103 50 100 150 200	\$8.85000	8.85000 8.85000 8.85000 8.85000 8.85000	REPLACEMENT COST 6.59140 REPLACEMENT COST \$6.59140 6.59140 6.59140 6.59140	34.27 34.27 34.27 34.27 34.27	\$911.55000 \$442.50000 \$885.00000 \$1,327.50000 \$1,770.00000	VAL	
3	CPN: 521402 237393 PRIME GUARD POWERSBLAST WINDS HIELD WASHER UOM EA	MFR: TRUE VALUE COMPANY NO VENDOR	VALLEN PN: 412008237393 VALLEN CPN: 521402 VENDOR PN: 237393 237393 PRIME GUARD PO WER BLAST WINDSHIELD WASHER UOM EA	MFR: TRUE VALUE COMPANY CODE: 412008 Multiple Value Matches Suggested Parts Part Cross References	0	175 100 150 200 250	\$2.17000	2.17000 2.17000 2.17000 2.17000 2.17000	REPLACEMENT COST 1.59000 REPLACEMENT COST \$1.59000 1.59000 1.59000 1.59000	36.48 36.48 36.48 36.48 36.48	\$379.75000 \$217.00000 \$325.50000 \$434.00000 \$542.50000	VAL	

New Convert to Order feature

The system should then bring up the order details modal, where users can specify order level information:

Convert To Order

Owner

Eugene Lee

Purchase Order Number

Enter Purchase Order Number

Request Ship Date

Auto-Populated By SxS - Add Date To Override

Promise Date

Auto-Populated By SxS - Add Date To Override

Shipping Instructions

Enter Shipping Instructions

Continue

Cancel

Order Details modal

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1.3.2.1 Owner

The name of the user who selected lines and clicked Convert to Order should populate the Owner field.

1.3.2.2 Purchase Order Number

The Purchase Order Number field is a required field and can be populated by both alphanumeric and special characters.

1.3.2.3 Request Ship Date

This is not a required field. Users can populate the field with the date of their choice, but if left empty, SXe will automatically update the field with either today's date or the next business day.

The date used to populate this field will be available to see in the Project or Line Item Edit History.

1.3.2.4 Promise Date

This is not a required field. Users can populate the field with the date of their choice, but if left empty, SXe will automatically default the field to 10 days after the Request Ship Date.

The date used to populate this field will be available to see in the Project or Line Item Edit History.

1.3.2.5 Shipping Instructions

This is not a required field. The Shipping Instructions field will be automatically populated by VallenIQ based on the Customer Account and Ship To Suffix selected in the header of your quote.

However, users can override the default shipping instructions by typing the new instructions into this field.

The shipping instructions that were used to populate this field will be available to see in the Project or Line Item Edit History.

Once all Order Details are entered and verified, select Continue to move forward in the Convert to Order workflow.

1.3.3 Order Validation

Once the Order Details are defined, VallenIQ will take you to the Order Validation modal, where both order and item details are summarized, and the system will highlight fields that will cause errors once submitted.

Convert To Order

Order Validation

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

Key

● Missing Required ● Invalid

Order Details

Owner	PO #	Cust. #	Warehouse	Ship To Suffix	Req. Ship Date	Promise Date	Proposal #	Ship Instructions
Eugene Lee	151232-199302	220024	DYOR	01	-	-	20210803	Ship to corporate headquarters

Item Details

Ref. #	Cust. Product Code	Product	Description	Vendor Code	Qty	Cost	UOM	Comments	Prod. Line	VIQ Ref.
1	512335	43254456-5	56-5 PLUG MALE	432544	600	3.84852	EA	-	1	2958-1
2	589436	03600045326	A65 3XL COVERALL BLUE FL	36000	50	6.64	EA	-	1	2958-2
3	521402	412326237393	237393 PRIME GUARD POWER	412326	100	1.59	EA	-	1	2958-3

Submit

Back

Order Validation modal

Review the details in this modal and correct all errors that appear in the two tables by exiting from this pop up, correcting issues in the line items themselves or the details of the order, and selecting the Convert to Order button again.

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1.3.3.1 Required Fields

The following are required fields for the line items in your order:

Convert To Order

Order Validation

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

Key

● Missing Required ● Invalid

Order Details

Owner	PO #	Cust. #	Warehouse	Ship To Suffix	Req. Ship Date	Promise Date	Proposal #	Ship Instructions
Eugene Lee	1829147	231752	ZDAT	01	-	-	20210730	-

Item Details

Ref. #	Cust. Product Code	Product	Description	Vendor Code	Qty	Cost	UOM	Comments	Prod. Line	VIQ Ref.
19	-	-	-	-	-	-	-	-	1	2579-19

Submit Back

Required fields for line items in your order

- **Product:** Populated with Vallen Part Number
- **Customer Product Code:** Populated with Customer Part Number. Only required when Product field is not populated. If Product field is populated, Customer Product Code is optional
- **Vendor Code:** Populated by either the vendor code or manufacturer code specified for your line items
 - If only a vendor code is available, the system will use the vendor code to populate this field
 - If only a manufacturer code is available, the system will use the manufacturer code to populate this field
 - If both manufacturer code and vendor code are available for line items, the system will use the vendor code to populate this field
- **Cost:** The system will currently use the Replacement Cost associated with the Vallen Part Number in your selected lines to populate this field. However, if the user updates the Cost field in the Create & Update modal, the system will use this updated value in the Convert to Order workflow
- **UOM:** The system will use the unit of measure associated with the Vallen Part Number in your selected lines to populate this field. However, similar to the Cost field above, if the user updates the Base UM Code field in the Create & Update modal, the system will use this updated value in the Convert to Order workflow

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1.3.3.2 Remaining Fields

The following fields should be automatically populated by VallenIQ:

- **Reference #:** This field will display the reference # of the selected line items
- **Description:** This field will display the description associated with your selected line items. If the line item is a valid Vallen Part Number, the system will pull the description associated with this record and show in this field. If the line item contains an updated or new part, VallenIQ will display updated description in the Create & Update modal
- **Quantity:** VallenIQ will currently always use Requested Quantity 1 to populate this field. In the next release, users will have the ability to select the Requested Quantity break they'd like to use for each line item when submitting orders
- **Comments:** This field will display Internal Comments if they are added to line items
- **Product Line:** VallenIQ will currently always use Product Line Code 1 to populate this field. In the next release, users will have the ability to choose which product line code they'd like to use for their line items in the Create & Update modal
- **VIQ Reference:** This field will be automatically populated by the system. This reference number will be the VallenIQ Project ID and Ref # separated by a dash (eg. 2960-14)
- **Proposal # (Order Details section):** This field will be automatically populated by the system. Proposal # will be today's date in the following format: YYYYMMDD

1.3.4 Order Submission

1.3.4.1 Order Details Errors

If there are errors in the Order Details section, the Submit button will not be selectable, and the system will not let you submit the order:

Convert To Order

Order Validation

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

Key

● Missing Required ● Invalid

Order Details

Owner	PO #	Cust. #	Warehouse	Ship To Suffix	Req. Ship Date	Promise Date	Proposal #	Ship Instructions
Eugene Lee	151352	220024	DYOR	-	-	-	20210803	-

Item Details

Ref. #	Cust. #	Product Code	Product	Description	Vendor Code	Qty	Cost	UOM	Comments	Prod. Line	VIQ Ref.
2	589436		03600045326	TESTING Description 1 An	36000	50	5	CS	Testing 1, 2, 3	1	2960-2
58	-	-	-	-	-	-	-	-	-	1	2960-58

Submit Back

Submit button is not selectable when errors exist in Order Details

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1.3.4.2 Item Details Errors

If the Order Details section *does not* contain errors, but the Item Details section *does* contain errors, the system will let you submit the details of the order.

However, in the next step, VallenIQ will display the Errors Found modal, where the system will highlight only the line items and the specific fields in Item Details that have errors. Line items that were selected for order that do not have errors *will not* display in the Errors Found modal.

Convert To Order

Errors Found
Errors were found and details are listed below. Please note that once your order is submitted, all changes must be completed in SXe.

Key
● Missing Required ● Invalid ● Not Ordered

Item Details

Ref. #	Cust. Product Code	Product	Description	Vendor Code	Qty	Cost	UOM	Comments	Prod. Line	VIQ Ref.
58	-	-	-	-	-	-	-	-	1	2960-58

Close

Errors Found modal displays line items that have errors

All errors called out in the Errors Found modal must be resolved before the order can be successfully submitted.

After the errors are identified, users should close the Errors Found modal, make the appropriate changes to line items that have issues, and restart the Convert to Order workflow.

No Errors

If there are no errors with both the Order Details and Line Item details sections, the system will allow users to submit their order.

1.3.5 Acknowledgement of Customer Purchase Order

Once all errors are resolved, and the user successfully runs through the Convert to Order workflow and submits their order, the system will display the Customer Purchase Order acknowledgement modal.

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Convert To Order

Customer Purchase Order

Order # 151232-199302 has been created. Please note that once your order is submitted, all changes must be completed in SXe.

SXe Acknowledgement

Order: 41948280-00, has been created.

Close

Customer Purchase Order modal displays the customer purchase order number and SXe acknowledgement

In this modal, the system will display the customer purchase order number from SXe under the Customer Purchase Order title.

In the SXe Acknowledgement section, users will see the acknowledgement message that is returned directly from SXe after the order has successfully been created.

Note that once the order is submitted, if any changes are required for the order, these changes must be completed within SXe, instead of VallenIQ.

1.3.6 Apply ORD Status to Successfully Ordered Line Items

Line items that have successfully been added to a customer purchase order will be automatically assigned a new status titled ORD (ordered). Additionally, the new ORD status will appear in Filter by Status:

Test Quote 08/02/21 (57 Lines) • 2021/08/02 at 8:08 PM EST • Public • Shared

owned by: Eugene Lee

Settings

Header

Share

Edit History

Custom Export

Expand Lines

Hide Alternates

Convert to Order

Actions

Filters

220024

Keystone Operating LLC

Customer Order

Project ID

2950

Open

Alt Status

Due Date

2021/08/04

Yes

Team Lead

Lindsey Cross

Project Type

RFQ

Filter by Category (12)

Abrasives

3

Chemicals/Lubes/Adhesives

3

Contractor Supplies

1

Hand Tools

2

Ind Rubber Products

4/4

Maint Equip and Supplies

1/1

Material Handling Equip

4

Miscellaneous Products

3

Pipe and Fittings

1

Filter by Req. Manufacturer (35)

Amell Healthcare Products

1/1

BOSTWICK BRAUN COMPANY

1/1

Berlin Packaging LLC

1/1

Brady Worldwide Inc.

4/4

Chapin International Inc.

1/1

Credit Card Vendor

1/1

Dixon Valve & Coupling

2/2

ERGODYNE

2/2

Filter by Intelligence

Multiple Valen Matches

34

Cross References

0

Part Cross References

57

Suggested Parts

21

Changed RPN

1

Updated Parts

0

Created Parts

0

Last Picks

0

Filter by Cost Source

With Order History

41

With Quote History

25

With Replacement Cost

57

With Pedate Cost

2

With Standard Cost

57

Filter By Assignee

Eugene Lee - EWL

57

Filter by Status

11

APC Status

0

ORD Status

35

CU Status

0

VAL Status

0

T1 Status

0

NQ Status

0

OS Status

0

AL Status

Selecting 3 item(s)

Showing 57/57 results

Select All

Group Edit

Remove

Assign

Ref #

Search line items

Refresh All

Ref #	Req. Part #	Req. MFR/VEN	Quoted Part #	Valen MFR/VEN	Avail. Qty	Req. Qty	Price	Quote Price	Cost	Quote Cost	GP %	Extended Price	Status
1	RPN 56-5 CPN 512335 56-5 PLUG MALE UOM EA	MFR ZSI-Foster Inc. NO VENDOR	MPN 56-5 VALLEN PN 43254456-5 VALLEN CPN 512335 VENDOR PN 56-5 56-5 PLUG MALE UOM EA	MFR ZSI-FOSTER INC. CODE 432544 NOTES 4322 Mfr Vendor Notes	0	805 800 700 800 900	\$5.45000	5.45000 5.45000 5.45000 5.45000 5.45000	REPLACEMENT COST \$3.84852 REPLACEMENT COST \$3.84852 REPLACEMENT COST \$3.84852 REPLACEMENT COST \$3.84852 REPLACEMENT COST \$3.84852	3.84852 3.84852 3.84852 3.84852 3.84852	41.61 41.61 41.61 41.61 41.61	\$4,387.25000 \$3,270.00000 \$3,815.00000 \$4,360.00000 \$4,905.00000	ORD
2	RPN 45326 CPN 589436 A65 SKL COVERALL B LIFUFLAME RESISTANT T UOM EA	MFR Kimberly-Clark NO VENDOR	MPN 45326 VALLEN PN 0900040326 VALLEN CPN 589436 VENDOR PN 45326 A65 SKL COVERALL BLUE FLAME RESISTANT UOM EA	MFR KIMBERLY-CLARK CODE 36000 Mfr Vendor Notes	189	103 50 100 150 200	\$8.85000	8.85000 8.85000 8.85000 8.85000 8.85000	REPLACEMENT COST \$6.59140 REPLACEMENT COST \$6.59140 REPLACEMENT COST \$6.59140 REPLACEMENT COST \$6.59140	6.59140 6.59140 6.59140 6.59140 6.59140	34.27 34.27 34.27 34.27 34.27	\$911.55000 \$442.50000 \$885.00000 \$1,327.50000 \$1,770.00000	ORD
3	CPN 521402 237383 PRIME GUARD POWERBLAST WINDS HIELD WINDSHIELD UOM EA	MFR TRUE VALUE COMPANY NO VENDOR	VALLEN PN 412326237383 VALLEN CPN 521402 VENDOR PN 237383 237383 PRIME GUARD PO WER BLAST WINDSHIELD WINDSHIELD UOM EA	MFR TRUE VALUE COMPANY CODE 412326 Mfr Vendor Notes	0	175 100 175 200 250	\$2.17000	2.17000 2.17000 2.17000 2.17000 2.17000	REPLACEMENT COST \$1.59000 REPLACEMENT COST \$1.59000 REPLACEMENT COST \$1.59000 REPLACEMENT COST \$1.59000	1.59000 1.59000 1.59000 1.59000 1.59000	36.48 36.48 36.48 36.48 36.48	\$379.75000 \$217.00000 \$379.75000 \$434.00000 \$542.50000	ORD

ORD status is applied to successfully ordered line items

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1.3.7 Edit History

When a customer order is successfully submitted, VallenIQ will show both Project and Line Item Level Edit History.

1.3.7.1 Project Level Edit History

Project Edit History can be accessed by selecting the Edit History button in the Quote Actions bar:

The screenshot displays the VallenIQ interface for a quote titled "Test Quote 08/02/21 (57 Lines)". The "Edit History" button is highlighted in the top navigation bar. A modal window titled "Project Edit History (2)" is open, showing a table of line items with columns for Ref #, Req. Part #, Req. MFR/VEN, and a detailed History column. The History column for line item 1 shows a list of events: "Line Items Were Submitted For Order", "Acknowledgement Type: AD", "Buying Party: -", "Cancel Date: -", "Company Number: 1", "Core Charge: -", "Current Date: 08/03/21", "Customer Purchase Order: 151232-199302", "Date Cost: -", "Department: -", "Down Payment: -", "Enter Date: 08/03/21", "Event: -", "GST Tax Amount: -", "Invoice Date: -", "Invoice Number: 41948280", "Invoice Suffix: 00", "Invoice Type: -", "Order Disposition: -", "Package Id: -", and "Partner Id: 220024e". The bottom right of the interface shows a summary table with columns for GP %, Extended Price, and Status.

Project Edit History tab

All data that appears in the History column is data we receive directly from the Quote-to-Order API response.

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1.3.7.2 Line Item Level Edit History

Line Item Edit History can be accessed by selecting the Edit History button in the rightmost column of each line item in your quote.

The screenshot displays the SupplyFrame Test Quote interface for a quote dated 08/02/21. The main table lists four line items. The first item, '56-5 PLUG MALE', is selected, and its 'Edit History' button is clicked, opening a modal window titled 'Line Item Edit History (2)'. This modal shows a table of historical changes for the selected line item, including details like 'Line Item Was Submitted For Order', 'Buyer Product Code', 'Change Code', 'Cross Reference Product Type', 'Description', 'Discount Amount', 'Line Identifier', 'Order Status Code', 'Price', 'Product Service Code', 'Promise Date', 'Quantity Ordered', 'Quantity Ship', 'Quantity Unit Of Measure', 'Requested Ship Date', 'Restock Charge', 'Seller Product Code', 'Special Cost Type', 'Special Cost Unit Of Measure', 'Special Non Stock Type', and 'SX Enterprise Line Number'. The modal also includes a 'Close' button. The background interface shows various filters, a 'Total Cost' of \$658,721.40010, and a 'Refresh All' button.

Ref #	Event	History	User	Date and Time
1	Line Item Was Submitted For Order	<ul style="list-style-type: none">Back Order Type: yBuyer Product Code: 512335Change Code: -Cross Reference Product Type: HDescription: 56-5 PLUG MALEDiscount Amount: -Line Identifier: 1Order Status Code: -Price: 3.84852Product Service Code: -Promise Date: 08/12/21Quantity Ordered: 600.00000Quantity Ship: 0.00000Quantity Unit Of Measure: EARequested Ship Date: 08/03/21Restock Charge: 0.00000Seller Product Code: 43254456-5Special Cost Type: -Special Cost Unit Of Measure: 1.00000Special Non Stock Type: sSX Enterprise Line Number: 0001	Eugene Lee	2021/08/03 at 6:15 PM EST

Line Item Edit History modal

Similar to the Project Edit History described above, all data that appears in the History column is data we receive directly from the Quote-to-Order API response.

2. Cost Preferences

We've updated the Cost Preferences section within the Project Preferences and Project Settings modals.

Users can now specify which costs are selected and the priority in which selected costs are loaded into line items during the auto-matching process.

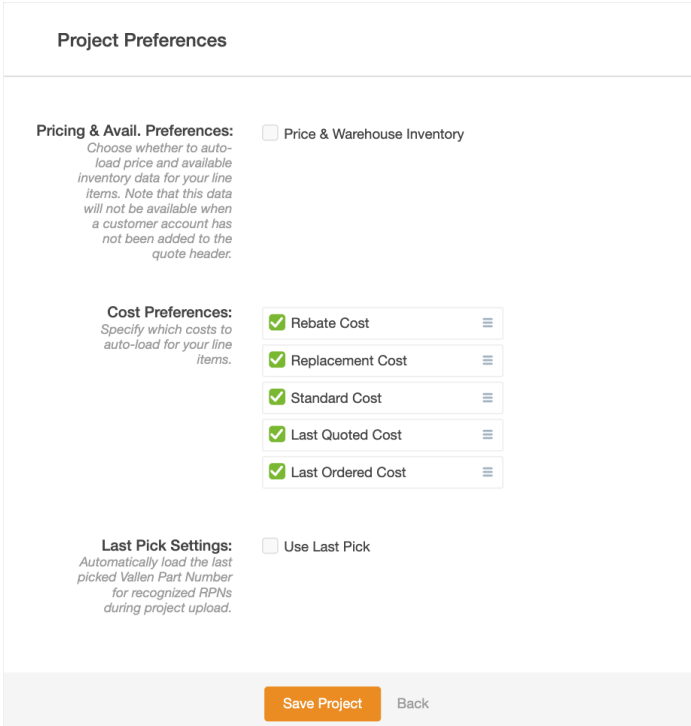
While both CSR and Q&S teams will by default prioritize loading rebate costs into line items if available, the purpose of this enhancement is to allow the CSR team to prioritize loading standard cost into their line items vs. the Q&S team, who require the ability to prioritize replacement cost.

2.1 Locations Impacted

Cost Preferences can be updated in the following locations and scenarios within VallenIQ:

2.1.1 Project Preferences Modal During Quote Upload and Creation

Cost Preferences can be adjusted in the process of uploading or creating a new quote.



The screenshot displays the 'Project Preferences' modal. The 'Cost Preferences' section is highlighted, showing a list of cost types with checkboxes and a three-line menu icon for each. The 'Pricing & Avail. Preferences' section includes a checkbox for 'Price & Warehouse Inventory'. The 'Last Pick Settings' section includes a checkbox for 'Use Last Pick'. At the bottom, there are 'Save Project' and 'Back' buttons.

Section	Option	Status	Menu Icon
Cost Preferences: <i>Specify which costs to auto-load for your line items.</i>	Rebate Cost	Checked	≡
	Replacement Cost	Checked	≡
	Standard Cost	Checked	≡
	Last Quoted Cost	Checked	≡
	Last Ordered Cost	Checked	≡
Pricing & Avail. Preferences: <i>Choose whether to auto-load price and available inventory data for your line items. Note that this data will not be available when a customer account has not been added to the quote header.</i>	Price & Warehouse Inventory	Unchecked	
Last Pick Settings: <i>Automatically load the last picked Vallen Part Number for recognized RPNs during project upload.</i>	Use Last Pick	Unchecked	

Updated Cost Preferences section in Project Preferences modal

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Deselecting certain cost types means that even if the cost type is available, VallenIQ will not load the deselected cost into line items during the auto-matching process.

Reordering the priority of costs can be done by dragging and dropping the cost types using the three lines to the right of each preference.

2.1.2 Project Settings Modal in Existing Quotes

Cost Preferences can also be adjusted for existing quotes where, once updated, the quote will refresh all line items and populate cost according to the user's selected preferences.

The screenshot shows the 'Project Settings' modal with the following sections:

- Project Name:** Test Quote 08/02/21
- Quote Status:** Open
- 58 Code:** Add 58 Code
- Quote Privacy:** Public
- Share Status:** Shared
- Project Description:** 0 of 1000 characters
- Pricing & Avail. Preferences:** Price & Warehouse Inventory
- Cost Preferences:** Rebate Cost, Replacement Cost, Standard Cost, Last Quoted Cost, Last Ordered Cost
- Last Pick Settings:** Use Last Pick

Updated Cost Preferences section in Project Settings modal

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2.2 Default Preferences

2.2.1 Q&S Team

The default Cost Preferences for the users that belong to the Q&S team will be the following:

<input checked="" type="checkbox"/>	Rebate Cost	≡
<input checked="" type="checkbox"/>	Replacement Cost	≡
<input checked="" type="checkbox"/>	Standard Cost	≡
<input checked="" type="checkbox"/>	Last Quoted Cost	≡
<input checked="" type="checkbox"/>	Last Ordered Cost	≡

Rebate Cost, then Replacement Cost will be prioritized by default for the Q&S team

Cost Preferences can still be manually updated for each quote if required.

2.2.2 CSR Team

The default Cost Preferences for the users that belong to the Q&S team will be the following:

<input checked="" type="checkbox"/>	Rebate Cost	≡
<input checked="" type="checkbox"/>	Standard Cost	≡
<input checked="" type="checkbox"/>	Replacement Cost	≡
<input checked="" type="checkbox"/>	Last Quoted Cost	≡
<input checked="" type="checkbox"/>	Last Ordered Cost	≡

Rebate Cost, then Standard Cost will be prioritized by default for the CSR team

Cost Preferences can still be manually updated for each quote if required.

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2.3 Rebate Cost Behavior

In order for VallenIQ to populate Rebate Cost, the Customer Account field in the header must be populated for the quote.

If the Customer Account field is empty, Rebate Cost cannot be loaded into your line items, because the system finds appropriate Rebate Costs by looking up the Vallen part number in conjunction with the Customer Account number.

3. Quote Actions Bar

In Project View, all quote level features have been consolidated into one location at the top of the page to make the process of finding features and changing quote details more efficient for end users:

Test Quote 08/02/21 (57 Lines) • 2021/08/02 at 8:08 PM EST • Public • Shared
owned by: Eugene Lee

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

220024 Keystone Operating LLC
Project ID 2958
Status Open
Date 2021/08/04
Team Lead Lindsey Cross
Project Type RFQ

Filter by Category (12)
Abrasives 12
Chemicals/Lube/Adhesives 3
Contractor Supplies 1
Hand Tools 2
Ind Rubber Products 2
Maint Equip and Supplies 3
Material Handling Equip 4
Miscellaneous Products 3
Pipe and Fittings 1

Filter by Req. Manufacturer (35)
Ansell Healthcare Products 1/1
BOSTONICK BRAUN COMPANY 1/1
Berlin Packaging LLC 1/1
Brady Worldwide Inc. 4/4
Chapin International Inc. 1/1
Credit Card Vendor 1/1
Dixon Valve & Coupling 2/2
ERGO DYNE 1

Filter by Intelligence (34)
Multiple Vallen Matches 34
Cross References 0
Part Cross References 57
Suggested Parts 21
Changed RPN 1
Changed CPN 0
Updated Parts 0
Created Parts 0
Last Picks 0

Filter by Cost Source (41)
With Order History 25
With Quote History 57
With Replacement Cost 57
With Rebate Cost 2
With Standard Cost 57

Filter by Assignee (57)
Eugene Lee - EWL 57

Filter by Status (19)
RC Status 19
QPD Status 3
QU Status 0
VAL Status 35
QU Status 0
TI Status 0
NQ Status 0
CS Status 0
AL Status 0

Selecting 3 item(s) Showing 57/57 results

New Quote Actions bar

The following features have been moved into the Quote Actions bar:

- **Settings:** Previously titled Project Settings
- **Header:** Previously titled Customer Information
- **Share:** Previously titled Share Project
- **Edit History**
- **Custom Export**
- **Expand Lines:** Previously titled Expand View
 - When selected, title will change to say Collapse Lines
- **Hide Alternates**
- **Convert to Order:** New feature, see first section above
- **Actions:** Selecting this button will display a dropdown that contains the Transfer Ownership and Merge Projects features
- **Filters:** Selecting this button will display a dropdown that contains Hide Filters and More Filters features

Note that when Settings, Header, Share, Edit History, Custom Export, Transfer Ownership, Merge Projects, and More Filters are selected, the same modals that previously were opened will open again.

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Only the locations of the buttons have changed, the modals and functionality that each feature enables have not changed.

4. Requested Quantity Updates

Two changes have been applied to Requested Quantities in VallenIQ:

- The order in which Requested Quantities can be added in the Update Quantity modal is now enforced
- The Usage field is now differentiated from Requested Quantities 1-4 in Project View

4.1 Enforce Order When Adding Requested Quantities

When users select into the Req. Qty column in Project View and open up the Update Quantity modal:

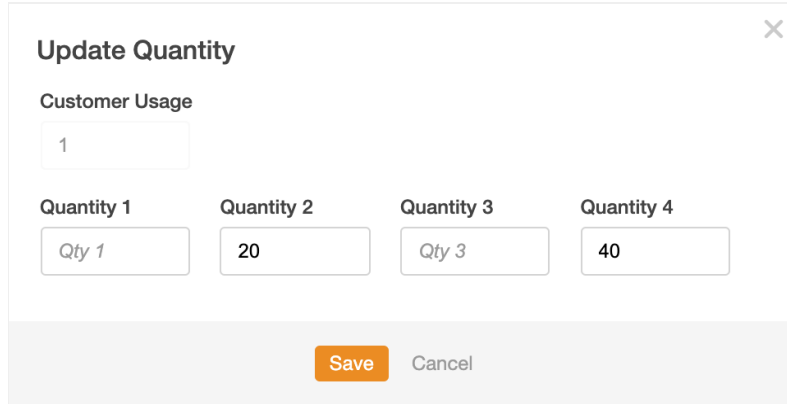
Ref #	Req. Part #	Req. MFR/VEN	Quoted Part #	Vallen MFR/VEN	Avail. Qty	Req. Qty	Price	Quote Price	Cost	Quote Cost	GP %	Extended Price	Status
1	RPN 56-5 CPN 512335 56-5 PLUG MALE UOM EA	MFR ZSI- Foster Inc. NO VENDOR	MPN 56-5 VALLIN PN 43254456-5 VALLIN CPN 512335 VENDOR PN 56-5 56-5 PLUG MALE UOM EA Multiple Vallen Matches Suggested Parts Part Cross References	MFR ZSI-FOSTER INC. CODE 432544 NOTES 4302 Mfr/Vendor Notes	0	805 600 700 800 900	\$5.45000	5.45000 Set 5.45000 Set 5.45000 Set 5.45000 Set 5.45000 Set	REPLACEMENT COST \$3.84852 RPG SC QH QH	3.84852 Set 3.84852 Set 3.84852 Set 3.84852 Set 3.84852 Set	41.61 % 41.61 % 41.61 % 41.61 % 41.61 %	\$4,387.25... \$3,270.00... \$3,815.00... \$4,360.00... \$4,905.00...	ORD
2	RPN 45326 CPN 589436 A65 3XL COVER ALL BLUEFLAME RESISTANT UOM EA	MFR Kimberly- Clark NO VENDOR	MPN 45326 VALLIN PN 036000453 26 VALLIN CPN 589436 VENDOR PN 45326 A65 3XL COVERALL BLUE FLAME RESIS TANT UOM EA Multiple Vallen Matches Suggested Parts Part Cross References	MFR KIMBERLY-CLARK CODE 36000 Mfr/Vendor Notes	189	103 50 100 150 200	\$8.85000	8.85000 Set 8.85000 Set 8.85000 Set 8.85000 Set 8.85000 Set	REPLACEMENT COST \$6.59140 RPG SC QH QH	6.59140 Set 6.59140 Set 6.59140 Set 6.59140 Set 6.59140 Set	34.27 % 34.27 % 34.27 % 34.27 % 34.27 %	\$911.55000 \$442.50000 \$885.00000 \$1,327.50... \$1,770.00...	ORD
3	CPN 521402 237393 PRIME G UARD POWERBL AST WINDSHIEL D WASHER UOM EA	MFR TRUE VALUE COMPANY NO VENDOR	VALLIN PN 412326237 393 VALLIN CPN 521402 VENDOR PN 237393 237393 PRIME GUA RD POWER BLAST WINDSHIELD WASH ER UOM EA Part Cross References	MFR TRUE VALUE COMPANY CODE 412326 Mfr/Vendor Notes	0	175 100 175 200 250	\$2.17000	2.17000 Set 2.17000 Set 2.17000 Set 2.17000 Set 2.17000 Set	REPLACEMENT COST \$1.59000 RPG SC QH QH	1.59000 Set 1.59000 Set 1.59000 Set 1.59000 Set 1.59000 Set	36.4E % 36.4E % 36.4E % 36.4E % 36.4E %	\$379.75000 \$217.00000 \$379.75000 \$434.00000 \$542.50000	ORD

Open the Update Quantity modal by selecting into the Req. Qty column in Project View

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Previously, users could add Requested Quantities in any order. This means they were able to add higher quantities, when lower quantities were not populated, which can be confusing when viewing Requested Quantities from the Project View page.



Update Quantity [X]

Customer Usage

1

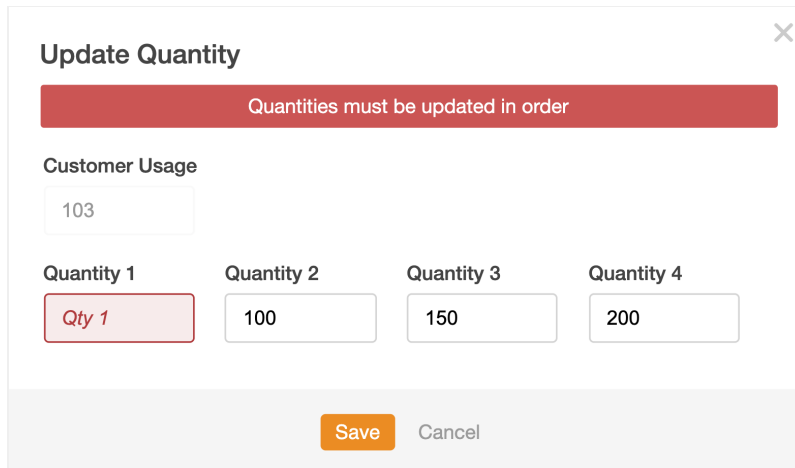
Quantity 1 Quantity 2 Quantity 3 Quantity 4

Qty 1 20 Qty 3 40

Save Cancel

Note that quantities 1 and 3 are not populated

Now, users must add lower Requested Quantities before they can add higher Requested Quantity breaks.



Update Quantity [X]

Quantities must be updated in order

Customer Usage

103

Quantity 1 Quantity 2 Quantity 3 Quantity 4

Qty 1 100 150 200

Save Cancel

Adding higher quantity breaks when lower quantities don't exist will trigger an error

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4.2 Usage Field UI Updates

In Project View, the Usage field will appear in grey and will also be italicized, to differentiate this field from Requested Quantities 1-4.

Previously, the values for both Usage and Requested Quantities 1-4 would appear grey, making it confusing for users to understand whether Usage was or was not populated for their line items.

Ref #	Req. Part Number	Req. MFR/Vendor	Quoted Part Number	Vallen MFR/Vendor	Avail. Qty	Req. Qty	Price	Quote Price	Cost	Quote Cost	GP %	Extended Price	Status
17	RPN 18829	NO MFR NO VENDOR	MPN 18829 Vallen PN 66282018829 VENDOR PN 18829 PTL65483 PORT THER MAL LABEL 250/ROLL UOM RL Multiple Vallen Matches Suggested Parts Part Cross References	MFR BRADY WORLDWIDE INC. CODE 754473 MFR/Vendor Notes	-	50	-	\$ Price Set	REPLACEMENT COST \$29.15000	REPLACEMENT COST 29.15000	GP %	-	VAL DU
18	RPN 18829	NO MFR NO VENDOR	MPN 18829 Vallen PN 66282018829 VENDOR PN 18829 PTL65483 PORT THER MAL LABEL 250/ROLL UOM RL Multiple Vallen Matches Suggested Parts Part Cross References	MFR BRADY WORLDWIDE INC. CODE 754473 MFR/Vendor Notes	-	100 200	-	\$ Price Set \$ Price Set	REPLACEMENT COST \$29.15000 REPLACEMENT COST 29.15000	REPLACEMENT COST 29.15000 REPLACEMENT COST 29.15000	GP % GP %	- -	VAL DU

Prior state of Req. Qty column

With our latest updates, while Usage will always appear italicized and grey, Requested Quantities 1-4 will either display as:

- **Black:** When Requested Quantity breaks are less than Available Quantity, or when the Pricing & Availability Preferences setting (in quote settings modal) is unselected
- **Red:** When Requested Quantity breaks are greater than Available Quantity

Ref #	Req. Part #	Req. MFR/VEN	Quoted Part #	Vallen MFR/VEN	Avail. Qty	Req. Qty	Price	Quote Price	Cost	Quote Cost	GP %	Extended Price	Status
1	RPN 56-5 CPN 512335 56-5 PLUG MALE UOM EA	MFR ZSI- Foster Inc. NO VENDOR	MPN 56-5 Vallen PN 43254456- 5 Vallen CPN 512335 VENDOR PN 56-5 56-5 PLUG MALE UOM EA Multiple Vallen Matches Suggested Parts Part Cross References	MFR ZSI-FOSTER INC. CODE 432544 NOTES 4302 MFR/Vendor Notes	0	805 600 700 800 900	\$5.45000	5.45000 Set 5.45000 Set 5.45000 Set 5.45000 Set 5.45000 Set	REPLACEMENT COST \$3.84852 REPLACEMENT COST \$3.84852	3.84852 Set 3.84852 Set 3.84852 Set 3.84852 Set 3.84852 Set	41.61 % 41.61 % 41.61 % 41.61 % 41.61 %	\$4,387.25... \$3,270.00... \$3,815.00... \$4,360.00... \$4,905.00...	ORD
2	RPN 45326 CPN 589436 A65 3XL COVER ALL BLUEFLAME RESISTANT UOM EA	MFR Kimberly- Clark NO VENDOR	MPN 45326 Vallen PN 09000453 26 Vallen CPN 589436 VENDOR PN 45326 A65 3XL COVERALL BLUE FLAME RESIS TANT UOM EA Multiple Vallen Matches Suggested Parts Part Cross References	MFR KIMBERLY-CLARK CODE 36000 MFR/Vendor Notes	189	103 50 100 150 200	\$8.85000	8.85000 Set 8.85000 Set 8.85000 Set 8.85000 Set 8.85000 Set	REPLACEMENT COST \$6.59140 REPLACEMENT COST \$6.59140	6.59140 Set 6.59140 Set 6.59140 Set 6.59140 Set 6.59140 Set	34.27 % 34.27 % 34.27 % 34.27 % 34.27 %	\$911.55000 \$442.50000 \$885.00000 \$1,327.50... \$1,770.00...	ORD
3	CPN 521402 237393 PRIME G UARD POWERBL AST WINDSHIEL D WASHER UOM EA	MFR TRUE VALUE COMPANY NO VENDOR	Vallen PN 412326237 393 Vallen CPN 521402 VENDOR PN 521402 237393 PRIME GUA RD POWER BLAST WINDSHIELD WASH ER UOM EA Part Cross References	MFR TRUE VALUE COMPANY CODE 412326 MFR/Vendor Notes	0	175 100 175 200 250	\$2.17000	2.17000 Set 2.17000 Set 2.17000 Set 2.17000 Set 2.17000 Set	REPLACEMENT COST \$1.59000 REPLACEMENT COST \$1.59000	1.59000 Set 1.59000 Set 1.59000 Set 1.59000 Set 1.59000 Set	36.4% 36.4% 36.4% 36.4% 36.4%	\$379.75000 \$217.00000 \$379.75000 \$434.00000 \$542.50000	ORD

Updated Req. Qty column

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5. Record Last Picks in Quotes Without Customers

Previously, when Customer Account was left blank in the project header, VallenIQ would not track Last Picks. VallenIQ will now record Last Picks even when no customers are added to a project.

Last Picks that are recorded from projects with no customers will appear in the “Last Picks for Other Customers” section of the Last Picks tab:

225425 (5 Lines) • 2021/07/26 at 7:32 PM EST • Public • Shared
owned by: Eugene Lee

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

Add Customer

Project ID: 2851
Status: Open
Due Date: 2021/07/26
Team Lead: Lou McCormack
Project Type: Market Basket

Filter by Category (5)
Chemicals/Lubricants/Adhesives: 1
Cutting Tools: 1
Fluid Power: 1
Ind Rubber Products: 1
Saw Blades: 1

Filter by Req. Manufacturer (0)

Filter by Intelligence
Multiple Vallen Matches: 5
Cross References: 0
Part Cross References: 5
Suggested Parts: 2
Changed RPN: 3
Changed CPN: 0
Updated Parts: 2
Created Parts: 0
Last Picks: 3

Filter by Cost Source
With Order History: 1
With Quote History: 0
With Replacement Cost: 5
With Rebate Cost: 0
With Standard Cost: 3

Filter By Assignee
Eugene Lee - EWL: 5

Filter by Status
RC Status: 2
CRD Status: 1
CU Status: 0
VAL Status: 2
DU Status: 0
TI Status: 0
HQ Status: 0
CS Status: 0
AL Status: 0

Selecting 0 item(s) Showing 5/5 results

Select All Group Edit Remove Assign Ref # Search line items Refresh All

Ref #	Req. Part #	Req. MFR/VEN	Quoted Part #	Vallen MFR/VEN	Avail. Qty	Req. Qty	Price	Quote Price	Cost	Quote Cost	GP %	Extended Price	Status
1	RPN 15047	NO MFR NO VENDOR	MPN 1504729 VENDOR P/N: 865912 86-5561 ID-35426-001-3 MF G-2519 Multiple Vallen Matches Part Cross References Updated Parts	MFR GLEASON VENDOR GLEASON CUTTING TOOLS CORP CODE: 424088 Multiple Vallen Matches Updated Parts	-	100 200 300	-	17,299.39200 17,200.91880 17,139.01933	Set Set Set	REPLACEMENT COST \$10,816.20000 RPN RPN RPN RPN RPN RPN	59.94 % 59.03 % 58.46 %	\$1,729,939... \$3,440,183... \$5,141,705...	OK OK OK
2	RPN 15047	NO MFR NO VENDOR	MPN 1504729 VALLIN P/N: 87814315547 15047 MIX NOZZLE MIX NO ZZLES VOM EA Multiple Vallen Matches Part Cross References Updated Parts	MFR ITW POLYMERS ADHESIVES N/A CODE: 78143 Multiple Vallen Matches Updated Parts	-	50 200 250 4,000	-	\$ Price \$ Price \$ Price \$ Price	Set Set Set Set	REPLACEMENT COST 2.10740 2.10740 2.10740 2.10740 RPN RPN RPN RPN RPN RPN	GP % GP % GP % GP %	- - - -	OK OK OK OK
3	RPN ABC	NO MFR NO VENDOR	MPN ABC VALLIN P/N: 391307ABC VENDOR P/N: ABC ABC 2-LUG FEMALE END X 3/8 FP NOT FOR STEAM C HIC VOM EA Multiple Vallen Matches Suggested Parts Part Cross References Last Picks	MFR PRESSURE CONNECTIONS CORP CODE: 391307 Multiple Vallen Matches Updated Parts	-	100 200 300	-	\$ Price \$ Price \$ Price	Set Set Set	REPLACEMENT COST \$15,54000 \$15,54000 \$15,54000 RPN RPN RPN RPN RPN RPN	GP % GP % GP %	- - -	OK OK OK
4	RPN BOP	NO MFR NO VENDOR	MPN BDP2500 VALLIN P/N: 802451-40333 VENDOR P/N: BDP2500 46333 2-1/2 DP DRY DIAMO NO HOLE SAW BDP2500 DP VOM EA Multiple Vallen Matches Part Cross References Last Picks	MFR DIAMOND PRODUCTS LIMITED CODE: 427657 Multiple Vallen Matches Updated Parts	-	-	-	-	REPLACEMENT COST \$67.00000 RPN RPN RPN RPN RPN RPN	-	-	-	OK OK
5	RPN ABC LAST PICK	NO MFR NO VENDOR	MPN ABC VALLIN P/N: 42139ABC VENDOR P/N: ABC ABC 3/8 BRASS AIR KING F EMALE NPT VOM EA Multiple Vallen Matches Suggested Parts Part Cross References Last Picks	MFR DIXON VALVE & COUNCO CODE: 421396 Multiple Vallen Matches Updated Parts	-	-	-	-	REPLACEMENT COST \$11.89000 RPN RPN RPN RPN RPN RPN	-	-	-	OK OK

MPN: ABC
Vallen Part Number: 391307ABC
Manufacturer: PRESSURE CONNECTIONS CORP
Code: 15.4
Part Description: ABC 2-LUG FEMALE END
X 3/8 FP NOT FOR S
TEAM CSE
Vendor Code: 391307
Vendor Type: Manufacturer

Usage Add Qty 1 Add Qty 2 Add Qty 3 Add Qty 4 Add Line

Results per page: 125 250 500

RPN for Ref #3 was corrected to 391307ABC - when uploaded again in Ref #5, Last Pick suggestion is provided

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Using the example in the screenshot above, when the Quoted Part # modal is selected for both Ref #3 and 5, the last picked Vallen part number (391307ABC) will appear in the “Last Picks for Other Customers” table:

Requested Part Number:
ABC

Manufacturer Part Number:
ABC
Ind Rubber Products

Vallen Part Number:
421396ABC

Multiple Vallen Matches (4)

Did you mean? (102)

Part Cross References (2)

Advanced Search

Create & Update

Alternates

Last Picks

Last Picks For Other Customers

Vallen Part Number	MPN	VPN	MFR/Vendor	Vendor Code	Vendor Type	Description	S/C	Lead Time	Cost	Last Picked Date	
391307ABC	ABC	ABC	PRESSURE CONNECTIONS CORP	391307	Manufacturer	ABC 2-LUG FEMALE END X 3 / 8 FP NOT FOR STEAM CHIC	C		\$15.54000	2021/08/05	<div></div>

Record appears in Last Picks tab

6. Group Edit GP%

Users can now edit gross profit percentage for multiple line items at once using the new Adjust GP% feature in the Group Edit dropdown.

Prior to using this feature, ensure that Requested Quantity and Quote Cost columns are filled out for at least one quantity break. If Requested Quantity and Quote Cost columns are empty, VallenIQ will not allow you to use this feature.

Access the Adjust GP% feature by first selecting the line items you'd like to edit GP% for, then selecting the Group Edit button above your column headers, and clicking the new Adjust GP% button:

Group Edit ▼ Remove Assign Ref # Search line items										Total Cost 667,762.83585		Refresh All				
Ref #	Select	Part #	Quoted Part #	Vallen MFR/VEN	Avail. Qty	Req. Qty	Price	Quote Price	Cost	Quote Cost	GP %	Extended Price	Status			
1	EWL	Change Status	Foster	MFR 56-5 VALLEN PN 435446-6 VALLEN CPN 62325 VENNOR PN 56-5 56-5 PULG MALE LOM EA	0	805	\$5.45000	5.45000	Set	STANDARD COST \$4.02170 MFR 56-5 CPN 62325 VENNOR PN 56-5	SELECT COST TYPE	\$ Cost	Set	GP %	\$4,387.25000	OK
		5.45000						Set	\$ Cost		Set	GP %	\$3,270.00000			
		5.45000						Set	\$ Cost		Set	GP %	\$3,815.00000			
		5.45000						Set	\$ Cost		Set	GP %	\$4,360.00000			
		5.45000						Set	\$ Cost		Set	GP %	\$4,905.00000			
2	EWL	Set Comment	Kimberly-Clark	MFR 45326 VALLEN PN 080054326 VALLEN CPN 59836 VENNOR PN 45326 A95 BIL COVERALL BIL ULFAME RESISTANT LOM EA	9	103	\$185.85000	185.85000	Set	REPLACEMENT COST \$5.00000 MFR 45326 CPN 59836 VENNOR PN 45326	REPLACEMENT COST	\$ Cost	Set	GP %	\$19,142.55...	OK
		185.85000						Set	\$ Cost		Set	GP %	\$9,292.50000			
		185.85000						Set	\$ Cost		Set	GP %	\$16,585.00...			
		185.85000						Set	\$ Cost		Set	GP %	\$27,877.50...			
		185.85000						Set	\$ Cost		Set	GP %	\$37,170.00...			
3	EWL	Deselect All	TRUE VALUE COMPANY	MFR 521402 VALLEN PN 41262057393 VALLEN CPN 623442 VENNOR PN 527393 237393 PRIME GUARD PO WER BLAST WINDSHIELD WASHER LOM EA	0	175	\$2.17000	2.17000	Set	STANDARD COST \$1.84440 MFR 521402 CPN 623442 VENNOR PN 527393	SELECT COST TYPE	1.84440	Set	17.65 %	\$379.75000	OK
		2.17000						Set	1.84440		Set	17.65 %	\$217.00000			
		2.17000						Set	1.84440		Set	17.65 %	\$325.50000			
		2.17000						Set	1.84440		Set	17.65 %	\$434.00000			
		2.17000						Set	1.84440		Set	17.65 %	\$542.50000			
4	EWL	Create & Update	Encon Safety Products Inc	MFR 623340121 VALLEN PN 1278 VALLEN CPN 623780 VENNOR PN 623340121 VP 6233-40121 CAN LINER ENRINT 33340 12 MIC 33 LOM EA	5	175	\$22.37000	22.37000	Set	STANDARD COST \$12.09000 MFR 623340121 CPN 1278 VENNOR PN 623780	SELECT COST TYPE	12.09000	Set	85.03 %	\$3,937.12000	OK
		22.37000						Set	12.09000		Set	85.03 %	\$3,355.50000			
		22.37000						Set	12.09000		Set	85.03 %	\$3,914.75000			
		22.37000						Set	12.09000		Set	85.03 %	\$4,474.00000			
		22.37000						Set	12.09000		Set	85.03 %	\$5,033.25000			
5	EWL	Import Data	Encon Safety Products Inc	MFR 623340121 VALLEN PN 1278 VALLEN CPN 623780 VENNOR PN 623340121 VP 6233-40121 CAN LINER ENRINT 33340 12 MIC 33 LOM EA	5	225	\$22.37000	22.37000	Set	STANDARD COST \$12.09000 MFR 623340121 CPN 1278 VENNOR PN 623780	SELECT COST TYPE	12.09000	Set	85.03 %	\$3,937.12000	OK
		22.37000						Set	12.09000		Set	85.03 %	\$3,355.50000			
		22.37000						Set	12.09000		Set	85.03 %	\$3,914.75000			
		22.37000						Set	12.09000		Set	85.03 %	\$4,474.00000			
		22.37000						Set	12.09000		Set	85.03 %	\$5,033.25000			

Accessing the Adjust GP% button

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Specify what you'd like the new GP% value to be and select Save:

Adjust Gross Profit %

Adjust GP %

12.7

Save
Cancel

Defining new GP%

The new GP% will be applied to all quantity breaks in your selected line items, in this case Ref #'s 3 and 4:

Ref #	Req. Part #	Req. MFR/VEN	Quoted Part #	Valien MFR/VEN	Avail. Qty	Req. Qty	Price	Quote Price	Cost	Quote Cost	GP %	Extended Price	Status
1	EVL	RPN 56-5 CPN 512335 56-5 PLUG MALE UOM EA	MFR ZSI-Foster Inc. NO VENDOR	MPN 56-5 WALLEN PH 4325456-S WALLEN CPN 812328 VENDOR PH 56-5 56-5 PLUG MALE UOM EA • Multiple Value Matches • Suggested Parts • Part Cross References	MFR ZSI-FORTER INC. CODE 432544 NOTES 4382 • Mfr Vendor Notes	0	\$5.45000	5.45000	Set	\$ Cost	GP %	\$4,387.25000	VAL
								5.45000	Set	\$ Cost	GP %	\$3,270.00000	
								5.45000	Set	\$ Cost	GP %	\$3,815.00000	
								5.45000	Set	\$ Cost	GP %	\$4,360.00000	
								5.45000	Set	\$ Cost	GP %	\$4,905.00000	
2	EVL	RPN 45326 CPN 589436 A66 3XL COVERALL BL UEFLAME RESISTANT UOM EA	MFR Kimberly-Clark NO VENDOR	MPN 45326 WALLEN PH 2806040326 WALLEN CPN 589436 VENDOR PH 45326 TESTING Description 1 And Description 2 UOM CS • Multiple Value Matches • Suggested Parts • Part Cross References • Updated Parts	MFR KIMBERLY-CLARK CODE 36000 • Mfr Vendor Notes	9	\$185.85000	185.85000	Set	\$ Cost	GP %	\$19,142.55...	GRD
								185.85000	Set	\$ Cost	GP %	\$9,292.50000	
								185.85000	Set	\$ Cost	GP %	\$18,585.00...	
								185.85000	Set	\$ Cost	GP %	\$27,877.50...	
								185.85000	Set	\$ Cost	GP %	\$37,170.00...	
3	EVL	CPN 521402 237393 PRIME GUARD POWERBLAST WINDSH IELD WASHER UOM EA	MFR TRUE VALUE COMPANY NO VENDOR	WALLEN PH 41329527393 WALLEN CPN 521402 VENDOR PH 237393 237393 PRIME GUARD PO WER BLAST WINDSHIELD WASHER UOM EA • Part Cross References	MFR TRUE VALUE COMPANY CODE 413295 • Mfr Vendor Notes	0	\$2.17000	2.07864	Set	\$ Cost	12.70 %	\$363.76179	VAL
								2.07864	Set	\$ Cost	12.70 %	\$207.86388	
								2.07864	Set	\$ Cost	12.70 %	\$311.79582	
								2.07864	Set	\$ Cost	12.70 %	\$415.72776	
								2.07864	Set	\$ Cost	12.70 %	\$519.65970	
4	EVL	RPN 623340121 CPN CB7080_NO_ SAP VP 6233-40121 CAN LIN ERNAT 33340 12 MIC 3 3GA UOM CA	MFR Encon Safety Products Inc NO VENDOR	MPN 623340121 WALLEN PH CB7080 WALLEN CPN CB7080_NO_SAP VENDOR PH 623340121 VP 6233-40121 CAN LINER NAT 33340 12 MIC 3GA UOM CA • Multiple Value Matches • Part Cross References	MFR ENCON SAFETY PRODUCTS INC CODE 429257 • Mfr Vendor Notes	5	\$22.37000	13.62543	Set	\$ Cost	12.70 %	\$2,398.07568	GRD
								13.62543	Set	\$ Cost	12.70 %	\$2,043.81450	
								13.62543	Set	\$ Cost	12.70 %	\$2,384.45025	
								13.62543	Set	\$ Cost	12.70 %	\$2,725.08600	
								13.62543	Set	\$ Cost	12.70 %	\$3,065.72175	

GP% has been applied to all quantity breaks for selected lines

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7. Duplicate Quote Header

Users are now able to create new quotes that contain the same header information as an existing quote, directly from the Project Management tab.

This enables users to save time when creating quotes for repeat customers because they won't have to fill out the same header information for the new opportunity.

7.1 What is the Quote Header?

The header is the high level quote details that are filled out when creating or uploading new files from customers:

Customer Account:	Keystone Operating LLC 220024
Warehouse:	Vallen Swedesboro NJ DYOR
Contact Name:	Add Contact Name
Ship To Suffix:	01
Contact Phone:	Add Contact Phone
Contact Email:	Add Customer Email
Address:	Add Address
Project Lead:	Lindsey Cross
Project Due Date:	Thu Aug 05 2021
Project Type:	RFQ
Alternates Allowed:	Yes

Quote Header fields

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7.2 Using the Duplicate Feature

To use this new feature, first navigate to the Project Management tab, then select one quote that you'd like to duplicate. Note that this feature cannot be used when more than one quote is selected.

The screenshot shows the VallenIQ Project Management interface. At the top, there are navigation tabs: Dashboard, Project Management (selected), and Settings. Below these is a search bar for 'Part Number' and buttons for 'Upload Project' and 'Create a New Project'. The main area displays a list of projects under 'My Projects' (220 projects). A toolbar above the list includes 'Select All', 'Remove', 'Change Privacy Status', and 'Duplicate' (highlighted with a red box). The table below has columns: Name, ID, Status, Privacy, Lines, Customer, Warehouse, Type, Lead, Created, and Due. The first row, 'Duplicate Quote Header Test' (ID 2960), is selected with a checkmark in the first column. Other rows include 'Test Quote 08/02/21' (ID 2958) and 'Price-Availability Sample Data - 225959' (ID 2928).

Name	ID	Status	Privacy	Lines	Customer	Warehouse	Type	Lead	Created	Due
<input checked="" type="checkbox"/> Duplicate Quote Header Test	2960	Open	Public	61	EXXON MOBIL CORPORATION 208925	DYOR	Blanket	Kevin Kellums	2021/08/03 at 4:47 PM EST	2021/08/05
<input type="checkbox"/> Test Quote 08/02/21	2958	Open	Public	57	Keystone Operating LLC 220024	DYOR	RFQ	Lindsey Cross	2021/08/02 at 8:08 PM EST	2021/08/04
<input type="checkbox"/> Price-Availability Sample Data - 225959	2928	Open	Public	140	PAMLICO YACHTWORKS 225959	DBEL	RFQ	Shanna Gobel	2021/07/30 at 7:55 PM EST	2021/08/03

Select your desired quote and click the new Duplicate button

VallenIQ will create a copy of the quote that has the same header information as the original quote (except for Due Date), but does not contain any line items.

This new quote will also carry over the same title, but with “copy of” prepended to the beginning of the name.

The screenshot shows the VallenIQ Project Management interface after duplicating a quote. The 'Duplicate' button in the toolbar is still visible. The table now shows a new quote at the top: 'copy of Duplicate Quote Header Test' (ID 2963). This new quote has 0 lines, while the original 'Duplicate Quote Header Test' (ID 2960) has 61 lines. The 'Created' date for the new quote is 2021/08/04 at 9:17 PM EST, and the 'Due' date is empty. The other quotes remain the same.

Name	ID	Status	Privacy	Lines	Customer	Warehouse	Type	Lead	Created	Due
<input type="checkbox"/> copy of Duplicate Quote Header Test	2963	Open	Public	0	EXXON MOBIL CORPORATION 208925	DYOR	Blanket	Kevin Kellums	2021/08/04 at 9:17 PM EST	
<input type="checkbox"/> Duplicate Quote Header Test	2960	Open	Public	61	EXXON MOBIL CORPORATION 208925	DYOR	Blanket	Kevin Kellums	2021/08/03 at 4:47 PM EST	2021/08/05
<input type="checkbox"/> Test Quote 08/02/21	2958	Open	Public	57	Keystone Operating LLC 220024	DYOR	RFQ	Lindsey Cross	2021/08/02 at 8:08 PM EST	2021/08/04
<input type="checkbox"/> Price-Availability Sample Data - 225959	2928	Open	Public	140	PAMLICO YACHTWORKS 225959	DBEL	RFQ	Shanna Gobel	2021/07/30 at 7:55 PM EST	2021/08/03

Duplicate quote contains the same header information as the original

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When this quote is selected, users will be taken to the following page, from which they can manually upload line items or upload a file from their computer:

208925

EXXON MOBIL CORPORATION

Project ID

2963

Due Date

Not Set

Team Lead

Kevin Kellums

Status

Open

Alternates

No

Project Type

Blanket

Filter by Category (0)

Nothing to filter or project is empty

Filter by Req. Manufacturer (0)

Nothing to filter or project is empty

Filter by Intelligence

Multiple Valien Matches

0

Cross References

0

Part Cross References

0

Suggested Parts

0

Changed RPN

0

Changed CPN

0

Updated Parts

0

Created Parts

0

Last Picks

0

Filter by Cost Source

With Order History

0

With Quote History

0

With Replacement Cost

0

With Rebate Cost

0

With Standard Cost

0

Filter By Assignee

Filter by Status

RC Status

0

ORD Status

0

QU Status

0

VAL Status

0

DU Status

0

TI Status

0

NG Status

0

OS Status

0

AL Status

0

Selecting 0 Item(s)

Showing 0/0 results

Select All

Group Edit

Remove

Assign

Ref #

Search line items

Refresh All

Paste a project or add part numbers manually

Enter your Project here

Continue

Upload a file from your device

Upload a Project or list of components from your device. You can also drag and drop your file in this box.

Supported formats: .csv, .tsv, .xls, .xlsx, Eagle .sch, KICad .sch, .SchDoc

Import Project from your Device

Add Part Number

Add CPN

Usage

Add Qty 1

Add Qty 2

Add Qty 3

Add Qty 4

Add Line

Results per page: 125 250 500

Contents of duplicated quote

When Edit History is opened for a duplicated quote, the system will show the following new history event:

208925

EXXON MOBIL CORPORATION

Project ID

2963

Due Date

Not Set

Team Lead

Kevin Kellums

Status

Open

Alternates

No

Project Type

Blanket

Filter by Category (0)

Nothing to filter or project is empty

Filter by Req. Manufacturer (0)

Nothing to filter or project is empty

Filter by Intelligence

Multiple Valien Matches

0

Cross References

0

Part Cross References

0

Suggested Parts

0

Changed RPN

0

Changed CPN

0

Updated Parts

0

Created Parts

0

Last Picks

0

Filter by Cost Source

With Order History

0

With Quote History

0

With Replacement Cost

0

With Rebate Cost

0

With Standard Cost

0

Filter By Assignee

Filter by Status

RC Status

0

ORD Status

0

QU Status

0

VAL Status

0

DU Status

0

TI Status

0

NG Status

0

OS Status

0

AL Status

0

Selecting 0 Item(s)

Showing 0/0 results

Select All

Group Edit

Remove

Assign

Ref #

Search line items

Refresh All

Paste a project or add part numbers manually

Enter your Project here

Continue

Upload a file from your device

Upload a Project or list of components from your device. You can also drag and drop your file in this box.

Supported formats: .csv, .tsv, .xls, .xlsx, Eagle .sch, KICad .sch, .SchDoc

Import Project from your Device

Add Part Number

Add CPN

Usage

Add Qty 1

Add Qty 2

Add Qty 3

Add Qty 4

Add Line

Results per page: 125 250 500

Project ID

2963

Project Name

copy of Duplicate Quote Header Test

Customer ID

208925

Customer Name

EXXON MOBIL CORPORATION

Project Edit History (1)

Line Item Edit History

Event	History	User	Date and Time
Project was duplicated	Project was duplicated from Duplicate Quote Header Test (ID #2960)	Eugene Lee	2021/08/04 at 8:17 PM EST

Close

New Edit History event for duplicated quote

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7.3 User Permissions

Role	Permissions
Super Admin	<ul style="list-style-type: none">• Can duplicate my public projects• Can duplicate other users' public projects• Can duplicate my private projects• Can duplicate other users' private projects
Admin	<ul style="list-style-type: none">• Can duplicate my public projects• Can duplicate other users' public projects• Can only duplicate my private projects• Cannot duplicate other users' private projects
Specialist	<ul style="list-style-type: none">• Cannot duplicate any public projects• Cannot duplicate any private projects

7.4 Duplicating Public Projects

When Super Admins and Admins duplicate public projects that belong to another user, the system will assign the user who duplicated the project as the Quote Owner.

All other quote header information will remain the same as the original quote (except Due Date).

7.5 Duplicating Private Projects

When Super Admins duplicate private projects that belong to another user, the system will assign the Super Admin who duplicated the project as the Quote Owner.

All other quote header information will remain the same as the original quote (except Due Date).

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8. Auto-Match Metrics Report

The Auto-Match Metrics Report has been split up into two separate reports, one for quotes completed by the Q&S team and another containing only quotes completed by the CSR team.

In the Auto-Match Metrics page in Settings, Super Admin and Admin users are able to select which team they would like to download the report for in a new section titled Select Team:

General Settings

Account

Profile

User Settings

User Management

Auto-Assignments

Reports

VIQ Daily Summary & Owners

Auto-Match Metrics

Auto-Match Metrics

This report contains metrics related to the auto-match rate of line items uploaded to ValienIQ. Only data from Closed projects will be available and the report will be downloaded in .xlsx format. The downloaded file will contain the following sheets:

- Summary All Projects
- Summary By Project
- Project Details

Select Team

☒ Q&S ☐ CSR

Download Report

New Select Team option in Auto-Match Metrics report page in Settings

We've also added three new columns to the Project Details sheet within the Auto-Match Metrics report:

- Project Owner
- Customer ID
- Customer Name

Project ID	Project Name	Project Owner	Customer ID	Customer Name	Ref#	Requested Part Number	Requested Mfg Name	Requested Vendor Name
2676	req qty	mramasamy+csradmin@supplyf6407		Milliken & CO. M-235		3 C42146		
2676	req qty	mramasamy+csradmin@supplyf6407		Milliken & CO. M-235		4 C42146		
2676	req qty	mramasamy+csradmin@supplyf6407		Milliken & CO. M-235		5 C42146		
2676	req qty	mramasamy+csradmin@supplyf6407		Milliken & CO. M-235		6 C42146		
2676	req qty	mramasamy+csradmin@supplyf6407		Milliken & CO. M-235		7 28000		
2676	req qty	mramasamy+csradmin@supplyf6407		Milliken & CO. M-235		8 28000		
2676	req qty	mramasamy+csradmin@supplyf6407		Milliken & CO. M-235		9 AUC123		
2568	CSR+Pricing API	mramasamy+csradmin@supplyf100089		Hussmann Int. (Bridgeton)		1 101198566		
2568	CSR+Pricing API	mramasamy+csradmin@supplyf100089		Hussmann Int. (Bridgeton)		2 K400		
2568	CSR+Pricing API	mramasamy+csradmin@supplyf100089		Hussmann Int. (Bridgeton)		3 111		
2568	CSR+Pricing API	mramasamy+csradmin@supplyf100089		Hussmann Int. (Bridgeton)		4 12141		
2568	CSR+Pricing API	mramasamy+csradmin@supplyf100089		Hussmann Int. (Bridgeton)		5 K500		
2383	TEST 062321	el@supplyframe.com	213994	ROBERT BOSCH CORP LLC		1 29-1212	GENERIC MANUFACTURER	Regal
2383	TEST 062321	el@supplyframe.com	213994	ROBERT BOSCH CORP LLC		2 DW5 01-19-1	DELTA PURE	Industrial Components and Tech
2383	TEST 062321	el@supplyframe.com	213994	ROBERT BOSCH CORP LLC		3 0211783C996BT	J&L Industrial Supply	3COM
2383	TEST 062321	el@supplyframe.com	213994	ROBERT BOSCH CORP LLC		4 18370	FULLAM	OMRON
2383	TEST 062321	el@supplyframe.com	213994	ROBERT BOSCH CORP LLC		5 A6065C	HOFFMANN	Chicago Pneumatic Tool Co
2383	TEST 062321	el@supplyframe.com	213994	ROBERT BOSCH CORP LLC		6 302067	ID TECHNOLOGIES	WEILER
2383	TEST 062321	el@supplyframe.com	213994	ROBERT BOSCH CORP LLC		7 051138-72071	MAGID GLOVE	Seco Tools
2383	TEST 062321	el@supplyframe.com	213994	ROBERT BOSCH CORP LLC		8 155022-43	PENITEK	Weiler Corp.
2383	TEST 062321	el@supplyframe.com	213994	ROBERT BOSCH CORP LLC		9 010119857	ACCESS LTD	Valeant
2383	TEST 062321	el@supplyframe.com	213994	ROBERT BOSCH CORP LLC		10 01011985746M	AVAYA	VALEANT Pharma
2383	TEST 062321	el@supplyframe.com	213994	ROBERT BOSCH CORP LLC		11 010119856	Hopkins Manufacturing Co	VALEANT Pharma
2383	TEST 062321	el@supplyframe.com	213994	ROBERT BOSCH CORP LLC		12 0003462610931892	MONOLITH CORPORATION	BOSCH
2383	TEST 062321	el@supplyframe.com	213994	ROBERT BOSCH CORP LLC		13 00029811090100RH	NEXTEL COMMUNICATIONS	Chums Inc.
2383	TEST 062321	el@supplyframe.com	213994	ROBERT BOSCH CORP LLC		14 00029811057D	ARROW ELECTRONICS	Chums Inc.
2383	TEST 062321	el@supplyframe.com	213994	ROBERT BOSCH CORP LLC		15 000207P1596F	STAPLES BUSINESS ADVANTAGE	DETROIT DIESEL CORP
2383	TEST 062321	el@supplyframe.com	213994	ROBERT BOSCH CORP LLC		16 FLUKE-TL223	FLUKE	Seco Tools

New columns added to the Project Details sheet

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