

# DQIAGILITY RELEASE NOTES

Subject: DQIAgility Release Notes

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Version: 1.2



## DQIAgility v7.1.66

New version available in downloads - DQIAgility v7.1.66 (20210426)

1. New option to set req date source and add business days.
  - a. Req Date Sources:
    - i. Req Date/Time – uses Req Date/Time field from Agility.
    - ii. Imported Date – uses the current date that the order is imported.

## DQIAgility v7.1.65

New version available in downloads - DQIAgility v7.1.65 (20210420)

1. When calling the map server web service to geocode an address, the georadius can also be returned if the address was geocoded by address matching. However, if the address was not geocoded by address matching, it should not update the georadius. So now, only if the georadius has a value set, which would only be set by address matching, will the GeoRadius be updated on the job account record.

## DQIAgility v7.1.64

New version available in downloads - DQIAgility v7.1.64 (20210416)

1. New option 'Do not import volume'.
  - a. Found under Import 1 tab.
2. Agility wants to make sure that all its users are using https and tls version 1.2, so they will make a requirement soon. It seems we already support connecting to an https site, but some additional changes have been made to how we will connect to Agility's web site:
  - a. Security certificates are not all blindly accepted anymore so that means their site will need to have a valid SSL certificate, otherwise the connection will fail.
  - b. TLS1.2 is now enforced. If the client's server is not currently set up for tls 1.2, then we will need to update their server.

## DQIAgility v7.1.61

New version available in downloads - DQIAgility v7.1.61 (20210312)

1. An error is no longer generated when a company is not found in the database. It will just write a message now.



## DQIAgility v7.1.60

New version available in downloads – DQIAgility v7.1.60 (20200728)

1. Set dispatchId length – the dispatch id length may change over time, so instead of assuming a length of 8, a different length can be set.
  - a. Found under Import tab.

## DQIAgility v7.1.59

New version available in downloads – DQIAgility v7.1.59 (20200616)

1. The ReqDate set for generated orders is now applied the same logic that gets applied to TripDate for generated orders - the ReqDate will be adjusted based on the specified wait time.

## DQIAgility v7.1.58

New version available in downloads - DQIAgility v7.1.58 (20200528)

1. New option – Do not update load type.
  - a. Found under Import 1 tab.
  - b. For record updates, if this option is checked ON, then the load type will not be updated.

## DQIAgility v7.1.56

New version available in downloads – DQIAgility v7.1.56 (20200303)

1. OriginalLocationId is now set for each new order record.
  - a. The originalLocationId is also now used as the originating location when looking for matching generate order records. Previously, the locationId was used, but this location could be different than the original location if it was mapped.

## DQIAgility v7.1.55

New version available in downloads – DQIAgility v7.1.55 (20200302)

1. Bug fix: When an order has reached the fixed status, the order detail records should not be updated (or deleted). Previously, it would be deleted, but not re-inserted, but now it's not deleted or re-inserted.



## DQIAgility v7.1.54

New version available in downloads - DQIAgility v7.1.54 (20200302)

1. Since Agility doesn't send us an order date time (they send date only), we now append the current server time to the order date to give it a time value.

## DQIAgility v7.1.53

New version available in downloads – DQIAgility v7.1.53 (20200218)

1. Fixed Status – if the order has reached the fixed status, the order will not be updated or routed unless:
  - a. It is a void order.
  - b. The dispatch Id has not changed and the shipment has changed.

## DQIAgility v7.1.52

New version available in downloads – DQIAgility v7.1.52 (20200130)

1. Bug fix: When reimporting an order because the geocoded zip doesn't match the order zip, the reimport counter was not being reset at the correct place which was causing the reimport to not fire and not actually reimport the order. This has been fixed.

## DQIAgility v7.1.51

New version available in downloads - DQIAgility v7.1.51 (20200124)

1. Bug fix: When geocoding an address, the found address may return some fields as NULL. The code was not considering that, so now there is a check to make sure the field is not NULL before using the field.



## DQIAgility v7.1.49

New version available in downloads – DQIAgility v7.1.49 (20200115)

1. Address changed – if the order address (nolatlong) or job address (not nolatlong) has changed in relation to the imported order address, then:
  - a. The order or job lat/long will be reset to NULL.
  - b. The order or job lat/long will be re-geocoded.
  - c. Found under Import 1 tab -> 'If address changes, re-geocode address'.
2. Geofence zip – when needing to geocode an order, if the geocoded zip does not match the zip passed in on the order, then:
  - a. The geocoded zip will be set as the order zip.
  - b. The order will be re-imported with the updated order zip.
  - c. An order audit record will be written with ColumnName = 'GeocodedZip'.
  - d. Found under Import 1 tab -> 'If geocoded zip does not match...'

## DQIAgility v7.1.48

New version available in downloads – DQIAgility v7.1.48 (20191219)

**\*\* Requires db script update 20191219 or newer \*\***

1. Sales Type mapzone mapping – the mapzone can now be mapped to the 'Sale Type' field from Agility order.
  - a. Found under Map Zone tab.
2. Line Details – a new line detail field called Size is now available. We don't have a field to store it in the orderdetail\_tbl, but we can just append it to the end of the Description field.
  - a. Found under Import 1 tab -> 'Append size to description'.
3. Uncombine if location changes – if the location changes on an order update, then the order will be uncombined from existing trip and moved to a new trip in the update location. The order location will also be updated to the new location.
4. Load type re-mapping – for the Customer Re-Mapping, a specific job account can now be specified in the list. Just separate the cust and job numbers with a pipe (|)
  - a. The cust account can still be specified by itself or it can be a combination of cust and job. If only the cust account is specified, then only the cust needs to match. But if both the cust and job are specified, then both need to match.
  - b. Examples:
    - i. Cust only: CUSTA.
    - ii. Cust and job: CUSTA|1.
    - iii. Multiple cust/job accounts: CUSTA|1,CUSTB,CUSTC|17
  - c. Found under Load Type Re-Mapping tab.
5. Bug fix: The uncombine routine was not updating the order to the new Trip\_Id when the status was already equal to or greater than the void status. The code was changed to specifically set the new Trip\_Id if it was determined that the order needed to be uncombined.



## DQIAgility v7.1.46

New version available in downloads – DQIAgility v7.1.46 (20191113)

**\*\* Requires db script update (20191030-20191113) or newer \*\***

1. In the generate orders setup, generated orders can now be skipped (not created) for specific conditions. For example:
  - a. If the main POS order is a customer return.
  - b. If the main POS order is a vendor pickup.
  - c. One or more conditions can be set per generated order line under the 'Do not create if:' column.

## DQIAgility v7.1.45

New version available in downloads – DQIAgility v7.1.45 (20191112)

1. The misc fields don't exist for all orders. Code has been added to make sure that those fields exist for each order, though they will just contain blank values.

## DQIAgility v7.1.41

New version available in downloads - DQIAgility v7.1.41 (20191003)

1. Bug fix - parsing pkimport for relay orders was not working correctly. That has been fixed.

## DQIAgility v7.1.40

New version available in downloads - DQIAgility v7.1.40 (20190927)

1. Some fields don't always exist in the feed from Agility. This can cause errors since the field is expected. So now, when we get data from Agility, if the field doesn't exist, we add it to the datatable and its value will be blank.
  - a. Right now, the only field identified as such is 'Sale Type'. If any more are identified, they can easily be added to the importer.



## DQIAgility v7.1.39

New version available in downloads - DQIAgility v7.1.39 (20190909)

1. The MISC field can now be set to get email/phone info for an order.
  - a. Found under Import 2 tab.
  - b. The MISC field should contain either an email address or a phone number, but not both.
  - c. If the string in this field contains and @ sign, then it will be imported as an order email address and added to the contacts\_tbl. This will be set for new orders or updates to orders.
  - d. Otherwise, it will be imported as an order phone number and saved to the phone\_tbl. This will only be set for new orders, not updates to orders.

## DQIAgility v7.1.37

New version available in downloads - DQIAgility v7.1.37 (20190904)

1. Req Date option added to Generate Order Setup form.
  - a. The generated order's ReqDate can be set to either Current Time or Order Reg Date (based off order's requested date).

## DQIAgility v7.1.36

New version available in downloads - DQIAgility v7.1.36 (20190823)

1. Removed OriginalLocationId - no longer gets filled or set during import. This ends up creating locations that don't need to be in DQ, so it has been removed.
2. GenerateOrders - uses the order location instead of OriginalLocation for the FROM location to find matching GenerateOrder records. Locations can be transformed or mapped to different locations, so in this case it's better to reference the changed location instead of the order's original location in Agility.

## DQIAgility v7.1.35

New version available in downloads - DQIAgility v7.1.35 (20190821)

1. Relay status - the default status can now be set for Relay orders.
  - a. Found under Status tab.



## DQIAgility v7.1.34

New version available in downloads - DQIAgility v7.1.34 (20190710)

1. Import order email from MISC field.
  - a. Found under Import 2 tab.
  - b. If there is a value in the specified misc field, then a new order contact record will be created in contact\_tbl with email set to the value and the contact name set to the order shipTo.

## DQIAgility v7.1.32

New version available in downloads - DQIAgility v7.1.32 (20190304)

**\*\* Requires db script update 20190304 or newer \*\***

1. New option to writeback stop sequence instead of load sequence for Main writeback.
  - a. Found under Writeback tab -> 'Stop Seq'.
2. New option to use Misc fields as notes field.
  - a. Found under Import 1 tab -> 'Get notes from Misc field'.

## DQIAgility v7.1.30

New version available in downloads - DQIAgility v7.1.30 (20180418)

1. Major writeback - new option to use the trip\_tbl.RouteName instead of the routeheader\_tbl.RouteName in the LOAD\_ID tag.
  - a. Also, the routeld is parsed from the trip\_tbl.RouteName field before it is written to the LOAD\_ID tab. For example, the routeld, 1700 is extracted from the routename 'WL\_1700\_20180418'.

## DQIAgility v7.1.29

1. Route API - route Ids in Agility are NOT unique per location, so now we need to append the location (branch) to the route name that we store in the trip\_tbl to make it unique per location.

## DQIAgility v7.1.28

1. RouteOrderAPI - The date that is used to format the routename is now used to update the tripDate on the trip record. This would only occur once, when the trip routeName is initially set.

## DQIAgility v7.1.27

1. Routing with API:
  - a. The route Id may either be found in the shipments display API call or the pick files display API call. Previously, it was only looking in the shipments display but now it looks in the pick files display first, then if not found, looks in the shipments display.
  - b. Some order that have route Id may not actually need to be route. i.e., Will Call orders. So now, there is an option to exclude orders from routing based on their ship via.
    - i. Found under Priority tab -> API Routing tab.

## DQIAgility v7.1.26

1. API sessions appear to be expiring. After logging into the API, a sessionId is returned and stored in memory so that it can be used for subsequent calls. However, that sessionId only lasts X number of minutes before expiring. After that time, any additional calls to the API will fail with a message like 'Login is required to access this application' or 'Session has expired'. To try and prevent this from happening a couple of changes have been made:
  - a. Reset the sessionId every time the importer runs a new task (ImportOrder, SyncTables, etc.). This will force a new login to get a new sessionId.
  - b. Set the sessionId expire timeout to 2 hours. After that time has elapsed, then log in again to get a new sessionId.
  - c. After each API call, check for login failed messages and if encountered, log in again to get a new sessionId and then retry the API call again up to 5 times. After 5 times, give up.

## DQIAgility v7.1.25

1. For routing based on the API, some changes have been made:
  - a. The RouteName that is saved to the trip\_tbl is now formatted as RouteId\_ImportDate+1. ImportDate+1 means it's the dTimeStamp date of the order record plus 1 business day.
  - b. Resequencing orders based off StopNum. The change is that previously we were calling one query to get all of the orders on the route. However, there isn't way to query all the orders on the route, so now we query each order individually. It's probably more inefficient but seems to be the only way to do it.

## DQIAgility v7.1.23

1. Bug fix: The BranchId was not being found when a transformed branch was not set up for a branch. It should be able to find it regardless, so that has been fixed and should return the BranchId now.



## DQIAgility v7.1.22

1. If the RouteId from the soap api returns a blank RouteId, then it should ignore it just return a blank. Previously, it would append the date to a blank RouteId which in the end won't be unique.
2. The BranchId (setup in POS connection) is now used when calling the SOAP API just like it is when calling the REST API.

## DQIAgility v7.1.21

1. Under the POS Connection form, a new column for Branch Id was added. The Branch Id, which is different than the Branch, is required for API writeback.

## DQIAgility v7.1.20

1. Use the 'Ship To' field to always set the order address name which should get set to the order\_tbl.ShipTo and trip\_tbl.ShipTo fields.

## DQIAgility v7.1.19

1. Changed timestamp delay to go back an extra two minutes for the Main and DeliveryCost writeback routines. Order writebacks could get skipped because the query only writes back order's whose tripTimeIn is greater than 2 minutes, so there could be a 2-minute gap where orders were recently returned but not eligible to write back. But now, the query will go back an extra 2 minutes to cover that gap.

## DQIAgility v7.1.18

1. Lat/Long Bug fix revised: The previous bug fix for inserting/updating the job lat/long has been revised:
  - a. The job lat/long will only be **inserted** if the job is a NoLatLong job.
  - b. The job lat/long will only be **updated** if the job is not a NoLatLong job and the customer is not a NoJobLatLong customer.
    - i. If the option, 'Always update Lat/Long on job account' flag is turned on then the lat/long from Agility will overwrite the lat/long in DQ.
    - ii. If this option is not turned on, then it will only write the lat/long from Agility if the current job lat/long is currently set.



## DQIAgility v7.1.17

1. Bug fix: If they send us a lat/long on the order, and the order is a NoLatLong order, then the lat/long was being saved to the customerJobAccount\_tbl in addition to the order\_tbl. This was causing issues because the job account is a NoLatLong job account. Now, only if the option to 'Always update Lat/Long on job account' is turned on in the imported, will it update the job account lat/long.

## DQIAgility v7.1.16

\*\* Requires db script update 20171208 or newer \*\*

1. Soap API - the URL, username and password can be set on the POS Connection -> Soap API tab.
2. Soap API Routing - use the route from the soap API to combine orders together.
  - a. Found under Options -> Priority tab -> API Routing tab -> Use routing.
  - b. After the order has been imported, a call will be made to the soap API to get the routeld for the order. The routeld itself does not represent a trip, but together with the exp delivery date, it does, so a combination of routeld and ExpDeliveryDate is used as the routeName that will represent a unique trip. The routeName is stored in a new field in the trip\_tbl called RouteName. If there is an existing trip with the same route name, the order will be combined to that trip. If there is not, then the order's current trip will be set to the routeName and the order will be the first order on the route. If the order is locked, already on a trip with a tripTimeIn or already on a trip that has a routeName already, then it will not be routed again.
  - c. Load Sequence: Each time, after an order has been routed, all the orders on the route will be queried from the API and sorted by StopNum. The load sequence for the orders on the trip will be re-set based on the StopNum sequence. If there is an order on the trip that is not routed from Agility, it will not be returned in the query and thus will not have a stop number. These orders will be given load sequences that moves them to the end of the trip.
  - d. Currently there is no way to un-route or change the route for an order. Further work and/or further information will need to be provided from Agility to do this.

## DQIAgility v7.1.15

1. The Agility API cannot accept an image of type png, so now it is converted to a jpg image before sending it.

## DQIAgility v7.1.11

1. Main, Delivery Cost and Majure writebacks now triggered by audit table status changes.



## DQIAgility v7.1.10

**\*\* Requires db script update 20170630 or newer \*\***

1. Majure writeback option 'Write files to sub folders based on Branch'.
  - a. If selected, a sub folder with the branch name will be created under the Majure writeback folder and the files will be placed here.
  - b. The batch file that writes the majure files to the majure servers will need to be modified to look in each sub folder for the files and move them to the correct server.
2. Agility REST API Writeback:
  - a. Connection info for the REST API can be set under the POS Connections individual connections form.
  - b. Signature writeback - write back signature file based on order audit status change.
    - i. Only tran type of SO or CR are written back.
  - c. Messages writeback - write back the order\_tbl.reference field based on order audit status change.
    - i. Only tran type os CM, SR, DP, PO, Quot, RM, RM-input, RM-output, RM-operation, SO, SPO and WO are written back.

## DQIAgility v7.1.1

1. Multiple branches per POS Connection can be entered.
  - a. The name of each branch should be entered.
  - b. If a branch name needs to be transformed to a different name, then enter that under the 'Transformed Branch' column.



## DQIAgility v7.1.0

This is the Agility importer converted from vb6 to .NET

1. Written with .NET Framework 4.5.2
2. It can import from multiple Agility web services into 1 DQ database.
  - a. The Agility web services are uniquely identified using the Branch field set under POS Connection Info.
  - b. If the Branch is not unique per POS, then it can be converted to a different branch name using the Transformed Branch field.
    - i. As soon as the data is retrieved from the web service, the branch name will be changed to the Transformed Branch name in the Primary Key and Location fields.
    - ii. When a transformed branch is written back to the web service, it will be converted back to the original Branch name.
  - c. Right now, only 1 DQ database connection is allowed per POS. However, if the need arises, it's possible that the POS connections could be broken out based on the unique Branch Name. However, one could just set up a separate POS to handle this.
  - d. The calls to the multiple web services to get new orders is done asynchronously, to minimize waiting time. However, the importer still waits for all the calls to return before they are actually imported.
  - e. For order writeback, each order needs to be written back to the web service from which it originated. The PKImport contains the Branch/Transformed Branch name which can be used to find the originating web service.
  - f. For table sync writeback, the tables will be written back to ALL POS connections since it's assumed that they all need to stay in sync with the DQ tables.
3. All other settings/features should have been moved over from the old importer, in addition to some new features, like Generate Order and mapzone mapping.
4. To do: DMSI has a new API to write back signatures and messages. I'm not sure if there's an immediate need for this but it can be added to the importer at a future time.
5. And mapzone mapping.
6. To do: DMSI has a new API to write back signatures and messages. I'm not sure if there's an immediate need for this but it can be added to the importer at a future time.