DQIAuto Release Notes

Subject: DQIAuto Release Notes

Date: 07/06/2021

Version: 1.2

DQIAuto v7.1.77

New version available in downloads - DQIAuto v7.1.77 (20211020)

1. Add ability to pass in SMS/Email at order level
    a. OrderContact has been added at the cOrder object level. Email can be passed in the OrderContact.Email field and SMS can be passed in the OrderContact.Phone field. Multiple values can be passed in, comma-separated.

DQIAuto v7.1.76

New version available in downloads - DQIAuto v7.1.76 (20210706)

1. When Order Detail records are imported, the existing detail records for the order are deleted before the new order detail records are inserted. That's so we always have the current details lines and no extra lines. Normally, this would be done using the SOrderNum field, but the problem with using that field is that the PKImport value can change once the order is invoiced. So now, we delete the order detail lines based on the orderId which should not change.

DQIAuto v7.1.75

New version available in downloads - DQIAuto v7.1.75 (20210608)

1. Add CartonCount field to cOrder
2. If a value is sent in the CartonCount field, a carton record will be created in Carton_tbl with the CartonId=CartonCount

DQIAuto v7.1.74

New version available in downloads - DQIAuto v7.1.74 (20210217)

1. New option – 'If address changes, re-geocode address'

DQIAuto v7.1.73

New version available in downloads - DQIAuto v7.1.73 (20210208)

1. Set NoLatLong on for new job accounts.
    a. Found under Import tab

DQIAuto v7.1.69

New version available in downloads - DQIAuto v7.1.69 (20201124)

1. Signature writeback – added ability to create a signature png file in the specified directory.
    a. The order number is used as the file name, for example 12345.png. If the file already exists, it will be written over.
    b. New option, 'Only invoiced orders' – only signatures that are invoiced (have an invoice number) will be queried to be written back.

DQIAuto v7.1.68

New version available in downloads - DQIAuto v7.1.68 (20201008)

** Requires db script update 20201008 or newer **

1. BenchTime – this is a new field that can be passed into the cOrder class. It is an integer value representing minutes. If passed in, it will be added to the OrderDate time and saved to the ExpDepartTime field in the order_tbl.
    a. It will be inserted for new orders and only updated for existing orders if the option to update orderdate is set.

DQIAuto v7.1.67

New version available in downloads – DQIAuto v7.1.67 (20200728)

1. Assigned Salespersons – assigned to either a customer account or job account, are assumed to be unique across the entire company regardless of the 'Employee codes are unique per' setting in the Admin.

DQIAuto v7.1.64

New version available in downloads – DQIAuto v7.1.64 (20200618)

1. Job file import file format modified. Visit added to end of file as new field. This field will get set to the CustomerJobAccount_tbl.RequiresSalesVisit field.
2. The eSales API can now be called to retrieve information.
   a. Enter connection info under 'Import Orders' tab.
   b. Update last visited date – grabs notes from the API of successfully visited customers and updates all job account's LastVisitedDate under that customer number. It will only update the LastVisitedDate if the new LastVisitedDate is more recent than the current LastVisitedDate.
3. 'Update From eSales' schedule added.
   a. Found under Services tab.
   b. Set the schedule for running any 'Update From eSales' options turned on.

DQIAuto v7.1.63

New version available in downloads – DQIAuto v7.1.63 (20200317)

1. Jobs import – the jobs import function has been updated to accept 4 new fields. This is how they will be mapped to the customerJobAccount_tbl:
   a. Sequence – Sequence.
   b. Frequency – Frequency.
   c. AssignedSales – The employee_tbl.Pkey with employeeCode = AssignedSales.
      i. If no match found, it will not be added to employee_tbl.
   d. Area – The location_tbl.PKey with Locationname = Area.
      i. If no matchfound, it will not be added to location_tbl.

DQIAuto v7.1.58

New version available in downloads - DQIAuto v7.1.58 (20190813)

1. eSales:
   a. ShippingAddressNotJobAddress - no longer set for eSales orders. Since customer and job account records are now imported, the job records should exist in the db.
   b. No longer look up job accounts based on customer address. That's because the customer address will not usually match the job address.
   c. When we search for the latest Job Account record for a customer, exclude inactive job accounts.

DQIAuto v7.1.56

New version available in downloads - DQIAuto v7.1.56 (20190809)

1. eSales - when eSales orders are imported, the order number are generated based on the latest order number from the database. If two sets of orders happen to be imported at the same time, then duplicate order numbers can be created for different drivers. To prevent this, a syncLock has been added to the eSales import routine so that only 1 set of orders can be imported at a time. There is a potential for a bottle neck to occur but I don't suspect that will be a problem since the actual import occurs so quickly.
2. Req Date add business days.
    a. Found under Import tab.

DQIAuto v7.1.55

New version available in downloads - DQIAuto v7.1.55 (20190708)

1. eSales importer changes:
    a. TripTimeOut - set to current time that order is imported.
    b. Default Order Duration - found under eSales tab.
    c. Fixes issues with getting the lat/long from the customer job account.

DQIAuto v7.1.53

New version available in downloads - DQIAuto v7.1.53 (20190402)

1. Signature writeback - added new option to writeback Driver name to device field.
    a. This option is turned on by default. That's because the original request was to write it to the device field. However, customer now wants to write Driver name in the DriverName field. So if this option is turned off, it will write to the DriverName field.
    b. Found under Writeback tab -> 'Write DriverName to Device field'.

DQIAuto v7.1.45

New version available in downloads - DQIAuto v7.1.45 (20170510)

1. Updated DQLogfile dll to allow for multi-threaded logging.

DQIAuto v7.1.44

1. For signature writeback, the invoice number is parsed to determine what prefix should be written back. If the invoice number contains 'CN', then 'N' is written back as the prefix, otherwise 'I' is written back as the prefix.

DQIAuto v7.1.43

1. Fixed bug in lineCode parsing from part number.
2. Also, exclude lineCode parsing when the order is a buyout.

DQIAuto v7.1.42

** Requires db script update 20170407 or newer **

1. WebOrderNumber - Added to cOrder class.
    a. Gets written to the order_tbl.WebOrderNumber field. This field is sent to the Myplace web site as the confirmation number.
2. New option, 'Parse line code form part number'. For MAM customers, the lineCode can be parsed from the first 3 characters of the part number.
3. For signature write back:
    a. The value written to the prefix column has been changed from 'I' to 'N'.
    b. If the order has no signature and thus has no signed date, the deliveryTime (coalesce(ArrivalTime, DeliveriedDate, DepartureTime)) will be written to the DeliverDateTime column.

DQIAuto v7.1.41

1. During signature writeback: When the signature file exists, write the text, 'SIG-SIGOK' to the 'Signature' field, otherwise write a blank ('') string to this field.

DQIAuto v7.1.40

1. The signature writeback has been updated to query orders based on order audit status changes.
    a. The Signature Writeback database still needs to be specified under the main Writeback tab.
    b. In addition, under the Group Options form -> Writeback tab, the Order Statuses can be selected that will trigger the writeback.
    c. Generated buyout and user created orders are ignored.
2. DepartedDateTime and Status are now included in the Signatures table writeback.

DQIAuto v7.1.39

** Requires db script update 20170119 or newer **

1. Updated Signature writeback to reflect modified MAM table structure.

DQIAuto v7.1.38

** Requires db script update 20170119 or newer **

1. Signature writeback - the signature image can be written back to the MAM POS database (Signatures table).
    a. Found under Writeback tab.
    b. The query looks for signatures for invoiced orders which have not been written back yet (the uploadtime flag on the order has not been set yet).

DQIAuto v7.1.37

1. Added Rating and Territory to the cVendor class.
2. Vendor job accounts are now updated as orders are imported for them. This is so that fields like rating and territory can be updated on them. Previously, they would be created, but not updated.

DQIAuto v7.1.36

1. A new option to set scope of employee_tbl employee code uniqueness.
    a. Found under Import tab - 'Employee codes are unique per:'
        i. Location - employee codes are unique per location. Employee codes can duplicate across the current company.
        ii. Company - employee codes are unique across the entire company. They can duplicate across different companies.

DQIAuto v7.1.35

1. New options to not import employee records.
    a. Found under Import tab.
    b. 'Do not insert/update salesperson records' (order and customer salesperson).
    c. 'Do not insert/update written by records' (order written by).
    d. If selected, no attempt will be made to update or insert employee_tbl records for the employee. Only if the employee record already exists in the employee_tbl would it be used, otherwise a NULL would be used.

DQIAuto v7.1.34

1. New option to NOT update order date, found under the Import tab.

DQIAuto v7.1.33

1. Bug fix: Orders that are imported as order type Transfer were not getting their order detail records saved to the orderdetail_tbl. They should be getting saved now.

DQIAuto v7.1.32

1. New option - Do not update Order Type. If selected, the order type will only be written for the order record when the order is first imported. If the order is being updated, it will not overwrite the ordertypeid field.

DQIAuto v7.1.31

1. The query that updates the PKImport value to the orderdetail_tbl, called SOrderNum, was sized too small in the importer update query. It was defined as 25 characters which was chopping the end off, thus the drilldown query could not find those orders. The query definition has been increased to 50 characters to match the size of PKImport field.

DQIAuto v7.1.30

1. New option, 'Create builder record when order is invoiced'.
    a. When the order is invoiced (invoice number goes from blank to something), then a builder record is created in the builder table.
2. Invoiced Status can now be set.
    a. The status will be set to the specified status when the order is invoiced.

DQIAuto v7.1.29

1. New option to not generate transfer orders from line details.
    a. Found under 'Import' tab.
    b. If this option is turned on and the line details indicate a transfer order is required, the logic that creates the transfer record will be skipped and the transfer order will not be created.

DQIAuto v7.1.28

1. SOAP Tracing:
   a. There have been some problems reported with the SOAP tracing feature. I've rewritten part of how that works and added additional error handling.
   b. Also, there is now a separate trace logging option under the General tab -> 'Trace Logging'.
   c. So, now if there is an error related to tracing, it should show in the event log. And if the error can't be fixed, then tracing can just be turned off altogether.

DQIAuto v7.1.27

1. New option: 'Only allow LocationTo with prefix:'
   a. If the LocationTo does not match the specified prefix, it will be blanked out.
   b. For example, if the prefix is set to LOC, all LocationTo entries must begin with LOC, for example, LOC01.
   c. If this setting is blank, it is not used at all and LocationTo will remain what it is.

DQIAuto v7.1.26

1. Added "Parent" order fields to cOrder class. The parent order fields hold the unique identifiers for the Transfer's parent order. This will allow us to create transfer records in DQ that relate the transfer to its parent.
   a. ParentOrderNumber.
   b. ParentInvoiceNumber.
   c. ParentOrderDateTime – If not supplied, it will be assumed the same as Transfer's order date time.
2. Added routine to get parent Id based on passed-in parent record info so that transfer records can be created.

DQIAuto v7.1.24

1. Voided orders now handled by the importer.
   a. For example, an order was imported which created a transfer order. On a subsequent import, the order transfer was not created, so the transfer order is no longer needed and it needs to be voided out. This is the part that was missing, so that is what has been added in.

DQIAuto v7.1.23

1. New option to set the job account based on the Address1 field. MAM is sending various shipto accounts with the same name and code as the customer account. They are not differentiating between the various shipTo (job) accounts. The only difference is the address on the various shipTo accounts, so now there is this option to get/set the job account information from the shipTo address info.
   a. New option under Import tab - 'Use Address1 as the job Id'.
   b. If selected, the job code will be set to the Address1 field. A check will be made to see if either an existing job account already exists with that address OR if there is a job code that matches address1. If found it will be used. If not found, a new job account will be created with Address1 as the job code.

DQIAuto v7.1.21

1. Location is now taken into consideration when querying employee information. This will allow duplicate employee codes to be set, one per location.

DQIAuto v7.1.18

1. DQDataService URL can be set now - currently this is used to upload phone data.
   a. Found under Web Services Tab.
2. Upload to phone after each batch import - this is called after a batch is finished importing and after the orders have been optimized.
   a. Found under Web Services Tab.
   b. This can also be called directly through the web service method called 'UploadTripToPhone'. This could be useful for the customer in the event that the upload failed during import. They could identify the erred trip and re-upload it directly.

DQIAuto v7.1.17

1. Added geocoding to ImportJobs routine.

DQIAuto v7.1.16

1. New option 'Throw error on geocode fail'.
   a. Found under 'Web Services' tab.
   b. If the job/order/location doesn't have a valid lat/long, then an attempt is made to geocode the address. Normally, if it fails to successfully geocode the address, no errors are generated and it doesn't prevent the order from being imported. However, if this option is ON, then failure to geocode the address will throw an error and prevent the order from being imported. The fail message, along with the PKImport value will be returned in the response object so that steps can be taken in the calling app to fix the address and then resend to the importer.
2. If an error occurs in the optimize routine, an error will be included in the response object that can be read by the calling app. The error unique id will be the tripId of the optimize.
3. New web interface call - 'RunTripOptimize'.
   a. When orders are batch imported, the optimize runs after the orders are imported to the database. If the optimize fails, the optimize routine can be run again at a later time by calling this routine.
4. New web interface call - 'InsertLocations'.
   a. This is a routine to do bulk inserts for locations.
   b. This could be useful if the calling app wants to make sure that employee locations are successfully geocoded before batches are sent, that either start or end at the employee location.

DQIAuto v7.1.15

** Requires db script update 20141003 or newer **

1. Added new fields to cOrder interface object:
   a. Vehicle o Driver o LoadTimeTimeCode o LocationFrom.
2. If either the vehicle or driver and the load time is specified, then the order can be directly assigned to an existing truck for the same day and loadtime.
3. The DepartLocation_Id and ReturnLocation_Id are now set on the trip record.
4. There is a new option to optimize the trip as a batch after it has been imported.
   a. This only works if all orders in the batch have the same trip id.
   b. VP is used to optimize the trip. It had to be hacked a little bit to get it to return a route where the start and end locations were different. If it turns out that there are problems because of this, I may rewrite the optimize to use WOS instead.

DQIAuto v7.1.13

1. Time zone adjustment. The Auto source database server may be in a different time zone than a particular branch. This causes order dates to be off when viewed in ODT or when delivery estimates are calculated. The solution is to adjust the server date to match the branch time zone.
   a. The server time zone must be set under the General tab.
   b. Each location's time zone must be set under location info.
   c. The affected datetime fields are:
      i. order_tbl.OrderDate
      ii. order_tbl.ExpDelTime
      iii. order_tbl.ChgDate
      iv. order_tbl.CancelDate

DQIAuto v7.1.11

1. New option: If the mapzone is blank, the order will not be imported.
   a. Some customers may send us all orders, including orders they don't want delivered. In this case, mapzone can be used to indicate that the order should be imported into DQ and delivered.
   b. Found under Import tab: 'Don't import order if mapzone if blank'.

DQIAuto v7.1.10

1. Geocoding options added - the DQMap Web Server URL can now be entered and orders/jobs will get geocoded as they are imported or updated New option under Tools -> Options -> Import tab -> 'SetNoLatLong on for new job accounts (saves lat/long to order)'The transfer cust/job account prefix can now be specified. The default is 'Warehouse', but can now be changed to any other string.
   a. Found under Import tab.
2. The transfer job account is now created as 'PrefixX', where prefix is the prefix specified above and X is the location the transfer is going to, for example, 'Warehouse2'.
3. 'LocationTo' has been added to the order header file format for DQAuto. This is used to specify the location that transfers are being transferred to.
4. Transfers can now be specified on the line detail. The source should be set to 'T' for transfer and the location to and transfer number should also be set.