

# CHQ RELEASE GUIDE

# Version 6.25

Build 6.25.1.0

Build 6.25.26.0

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# Inventory

## New totals for Count Memo

Build 6.25.1.0: PRO-206

We've added two new total quantity values for display in the count memo dialog in CHQ.

#### **Purpose**

The **# of items with ledger quantity** field displays the number of unique PLUs on the Count Memo that have a quantity other than zero. This value helps the user to tell approximately how much merchandise is in stock and needs to be counted.

The **total ledger quantity** field displays the total quantity of all the PLUs included in the **# of items** with ledger quantity value.

#### How to access total quantity values in CHQ

- 1. Open CHQ and go to **inventory** > **count memos**.
- 2. Double click your count memo to open the [selected count memo] dialog.
- 3. In the **general** tab of the dialog that opens, the values display on the right (see the screenshot below):

	inventory purchasing sales analytics services settings						
styles & items			search	Q			
damage memos	new list						
stock count	recent		filter				
count memos	count memo	- 4XB08KJ					
transfer orders					_		
	general	count memo ID:	4XB08KJ	# of items in memo:	5		
transfer memos	0	universal #:	10721000035	# of items with ledger qty:	3		
	items	location:		total ledger quantity:	1541		
visual allocation	scans	description:		# of items counted:	0		
adjustment memos	zones	count date/time:	09/12/2020 2:41 PM	total qty scanned:	0		
price memor	unrecognized	etatue	open	items with differences:	4		
price memos		status.	open	unrecognized scans:	0		
kits	imports	archived:		5			
KIC5	user info	adjustment doc #:		quantity over:	50		
kit orders				quantity short:	-1541		
				net difference:	-1491		
promo groups		filter					

### See also

Cloud HQ User Manual: Inventory

# Optimal Stock: Quantity patterns for individual size segments

Build 6.25.26.0: PRO-782

In Optimal Stock, it's now possible to apply item quantity patterns to individual size segments.

#### **Purpose**

#### NOTE

A quantity pattern is a predefined set of item quantities which allows for a quick definition of optimal stock for an item.

Quantity patterns are available for configuration under **chq** > **settings** > **inventory** / **catalog** > **qty patterns**.

Prior to version 6.25.26.0, quantity patterns were automatically applied to all available size segments. This update allows for more precise configuration of optimal stock, as it's now possible to apply a different quantity pattern to each size segment.

#### How to apply a qty pattern to the selected segment in CHQ

To apply a quantity pattern only to the selected size segment, do the following:

- 1. Go to chq > inventory > replenishment > optimal stock.
- 2. In the **item search** dialog that opens, find and double-click the required item. On clicking, the **optimal stock** dialog opens.
- 3. In **optimal stock**, click the required size segment at the top-left:

optimal stock										
store description production seaso	n: Atlas n: S18				style #: 330 color: Red				standard prom	0
A E	3	С	D	)						
depth group	# of	last	curr	32A	34A	36A	38A	40A		
and a straight of the	stores	wk	wk	GMP	GMP	GMP	GMP	G		
Depth Group 1	2	24	8	1	1	1	1	N/A		
Depth Group 2	36	35	9	1	1	1	1	1		
Depth Group 3	45	19	8	1	1	1	1	1		
Depth Group 4	58	20	5	1	1	1	1	N/A		
Depth Group 5	48	13	7	1	1	1	1	1		
Depth Group 6	49	37	9	1	1	1	1	1		
apply qty patter	n ch	nange v	vidth g	roup					save canc	el

4. Then, with the size segment selected, click **apply qty pattern** in the bottom left corner. On clicking, the **apply qty pattern** dialog opens. 5. In apply qty pattern, define the qty pattern and trend fields and then select the apply to the selected segment radio-button:

apply qty patte	rn	
qty pattern:	qty pattern for city attribute	*
trend:	1	*
[	apply to selected segment	
	o apply to all segments	
	apply cancel	

- 6. Click apply.
- 7. To save the changes, click **save** in the **optimal stock** dialog.

#### See also

**Optimal Stock Engine Guide** 

Cloud HQ User Manual: Settings

# **Optimal Stock: Rearranged location summary fields**

Build 6.25.26.0: PRO-778

For user convenience, we've changed the order of fields under the following locations:

- 1. chq > inventory > replenishment > optimal stock > item search dialog > optimal stock dialog (at the location summary panel)
- chq > inventory > replenishment > optimal stock > item search dialog > optimal stock dialog > [selected depth group] (at the location summary panel)

#### NOTE

To open or hide the **location summary** panel, click the **location** above the **apply qty pattern** button.

Now, the location summary data is displayed in the following order:

- incoming
- need
- expected available

- expected weeks coverage
- WH available
- WH POs due
- total qty
- optimum
- on hand
- available

#### See also

#### **Optimal Stock Engine Guide**

## **Optimal Stock: Faster transition between dialogs**

#### Build 6.25.26.0: PRO-777

Now, when the user clicks **save** or **cancel** in the **optimal stock** dialog, they are returned to the **item search** dialog instead of the **replenishment** area.

#### NOTE:

To access the **optimal stock** dialog, under **chq** > **inventory** > **replenishment** > **optimal stock** > **item search**, double click the required item.

Additionally, the configured search parameters and results remain the same when returning to the **item search** dialog.

#### See also

**Optimal Stock Engine Guide** 

# Sales and OMS

## Faster access to the Sales Order list view

#### Build 6.25.1.0: PRO-791

We've introduced updates in CHQ to ensure faster access to the Sales Order list view from **chq** > **sales** > **order management**.

# New status messages for run auto process

#### Build 6.25.1.0: PRO-791

We've updated the status messages that display on clicking **run auto process** under **chq** > **sales** > **order management** > **list** > **actions**.

Now, on clicking **run auto process**, the following messages can appear:

- "Auto process is starting to work" if the process is starting
- "Cannot run auto process because it's already going" if the process is already running
- "No orders to process" if there are no orders available for processing

#### See also

Cloud HQ User Manual: Sales & eCommerce

# Settings

## Removed setting: end of day excess cash handling

Build 6.25.1.0: PRO-679

We've removed the end of day excess cash handling setting previously located under chq > settings > location settings > locations / location settings > [selected location] > general settings (drawer memo section) as it's no longer used in Teamwork POS Pro version 6.25.

See also

<u>6.25 Mobile Release Guide</u> <u>Cloud HQ User Manual: Settings</u>

## Defining a default return reason for Open Returns

Build 6.25.1.0: PRO-276

We have updated the return reasons dialog with a new make default reason checkbox.

#### Purpose

Selecting the checkbox allows for defining the default reason for a return that will be processed as an open return in POS Pro version 6.

#### NOTE

An open return can occur when a customer returns merchandise without the original Sales Receipt.

For more information, see <u>6.25 Mobile Release Guide</u> of the software.

#### How to configure a default return reason

In CHQ, to configure a default return reason:

- 1. Go to settings > sales > return reasons.
- 2. Under return reasons, double click the required reason to open the [selected return reason] dialog.

3. In the dialog that opens, to make that reason default, select the **make default** reason checkbox:

	inver	ntory purchas	ing sales	analytics	services	sett	ings
-	return re	aconc				-	
titles search 20	recomme	30113					
In security		adit via	hallin a				
Image: Image	new	edit visi	onity				
✤ location settings	code +	description	auto trans	sfer to location		list of	rder
inventory / catalog	" dama	ged					3
<ul> <li>customer</li> </ul>	at						5
	da	code:	damaged			*	10
* sales	da	description:	damaged				2
POS settings	er aut	o transfer to location:			Ŧ		6
sales documents	ev	qty status:	TEST		Ŧ		7
payment processing	ev	external ID:					8
sales receipt tabs	Ira	list order:	2				9
sales email	ĪVē	make default reason:					4
ship items	Le *-requ	aired					1
sales pre-set notes				5010	Capical		
return conditions	_			Save	Cance		
return reasons							
payment methods							

#### 4. Click save.

#### WARNING

Only one return reason can be selected as default. Selecting the **make default reason** checkbox for a new return reason automatically clears the respective checkbox for the old one.

#### See also

#### 6.25 Mobile Release Guide Cloud HQ User Manual: Sales & eCommerce

## Warning POS user when no customer on the Sales Receipt

Build 6.25.1.0: PRO-305

In 6.25.1.0, we've added the following new settings under chq > settings > location settings > location settings > [selected location] > sales:

- customer on sales receipt
- customer on receipt for returns

#### Purpose

The **customer on sales receipt** and **customer on receipt for returns** settings allow for configuring the display of warnings in POS Pro version 6 if there's no customer on the Sales Receipt.

#### NOTE

For more information, see <u>6.25 Mobile Release Guide</u> of the software.

#### How to configure the no customer warning in CHQ

In CHQ, to configure the new settings:

- 1. Go to settings > location settings > locations / location settings.
- 2. Click to select the required location in the list and then click edit.
- In the [selected location] dialog that opens, go to the sales tab.
   In the sales section, configure the customer on sales receipt and customer on receipt for returns settings:

	inventory	purchasing sales a	analytics services	settings			
titles search ,O	locations / location settings						
▶ security	new edit	drawer stations		bulk edit			
<ul> <li>company settings</li> </ul>	code 🔺	name	phone e	mail tax area	open		
✓ location settings		D. AND DE					
locations / location settings	TEST - Testing Lo	ocation					
location price groups	details	sales		taxes			
franchise groups	groups	customer on receipt for sales	s (v6): warn if none 🔻	use tax free integration:			
model stock groups	schedule	require customer for all	sales:	service tax calculation.	· · · · · · · · · · · · · · · · · · ·		
width groups	custom	require customer for ret	urns:	use tax calculation service for:	receipt ship items 👻		
location depth groups	general settings	pass held receipts to	CTS:	sales orders			
denomination plan groups	sales	clear all held receipts after (n	nins): 120 hold:	default sell from location:	· · · · ·		
external locations	price breaks	require discount override	code:	default fill location:	· · · ·		
location custom fields	payments	email notifications - web and send sales					
inventory / catalog	sales receipt tabs	do not print store receipt whe credit	en no card:	sender email:	emaii@git.ee		

For both the settings, the following options are available:

- "not required": if selected, no warning dialog displays in POS; default value
- "warn if none": if selected, a warning dialog displays in POS when the user taps the **Payment** button with no customer on the Sales Receipt; the user can proceed without a customer assigned
- "required": if selected, a warning dialog displays in POS when the user taps the **Payment** button with no customer on the Sales Receipt; it's required to add a customer to proceed

#### See also

6.25 Mobile Release Guide iPad POS version 6 Cloud HQ Settings Manual

# Preventing or warning about item quantities greater than a particular value

Build 6.25.1.0: PRO-888

In CHQ, we've added the following new settings:

- warn if item quantity is greater than
- prevent item quantities greater than

#### Purpose

These new settings allow for configuring POS Pro version 6 behavior in case the user enters an item quantity exceeding the limit.

In case of the **warn if item quantity is greater than** setting, if the POS user enters a qty greater than the value defined in this setting, the user is warned, but the qty is allowed.

In case of the **prevent item quantities greater than** setting, if the POS user enters a qty greater than the value defined in this setting, the qty is not allowed.

#### Security right to override the prevention

To be able to enter in POS quantities greater than the defined limit, the user must be granted a new **Allow qtys greater than limit** security right:

Application	Area	Right	Description
V6-POS	General	Allow qtys greater than limit	Allows user to enter quantities greater than settings limit for purchasing, transfer, and adjustment documents

### How to configure warning and prevention in CHQ

Configuring the **warn if item quantity is greater than** and **prevent item quantities greater than** settings is available in CHQ under:

- settings > purchasing > purchase documents (applied to Purchase Orders, Purchase Receipts, and Purchase Returns)
- settings > transfers > transfer documents (applied to Transfers In, Transfers Out, Transfer Orders, and ASNs)
- **settings** > **inventory** / **catalog** > **adjustment documents** (applied to Adjustment Memos)

#### NOTE

Both settings default to "0" on a new installation meaning that the POS user won't be warned or prevented from entering any item quantities.

Values from "0" to "999999" are allowed.

#### See also

Cloud HQ Settings Manual

# Other enhancements

# Missing fields added to Drawer Memo tables

Build 6.25.26.0: PRO-1037

To ensure correct data processing, we've extended Drawer Memo related tables with the fields that display in the POS Pro app UI but were missing at the database level.

# **Issue Resolution**

### Replenishment process status issue

Build 6.25.1.0: DS-1449

Prior to version 6.25.1.0, the inventory replenishment would sometimes remain in the "in process" status when creating transfer orders even if creation was successfully completed.

The issue has been fixed. Now, the status of the replenishment updates as expected.

## Error on opening a device record

Build 6.25.1.0: DS-1496

Prior to version 6.25.0.1, some old device records couldn't be opened under **chq** > **services** > **device controller**.

The issue occurred because the structure of the old device records was incompatible with the new version of CHQ.

With version 6.25.1.0, old device records can be opened without any issues.

## Order Management: Incorrect PLU display

Build 6.25.26.0: DS-843

#### Issue

Under sales > order management > [selected order] > items, on clicking multiple in the receipt # column, the header of the [sales order number] - [plu number] - sales receipts dialog that opened would display an incorrect PLU.

That happened when another item line was highlighted under sales > order management > [selected order] > items.

#### Resolution

Now, the header of the dialog displays the PLU of the item for which associated Sales Receipts are viewed.

## JSON-based Qty Status Update API remains 'in process'

#### Build 6.25.26.0: DS-1499

We've fixed the issue where JSON-based Qty Status Update API would occasionally remain in the "in process" status for a long time instead of successfully completing the import or failing.

# Sell price visible for inactive items in CHQ

Build 6.25.26.0: DS-1558

#### Issue

Prior to 6.25.26.0, under chq > inventory > styles and items > new (style/model) > pricing tab, the sell price field for a new item remained populated after the item was marked inactive.

#### Resolution

The issue has been fixed. Now, the sell price field is empty for an inactive item record.

# XML-based Sales Order Import API: Sales Orders remain 'in process' Build 6.25.26.0: DS-1502

We've fixed the issue where resulting from Sales Order import via XML-based Sales Order Import API, Sales Orders could occasionally remain in the "in process" status for a long time. In CHQ, that could be seen under **sales** > **order management** > **list view**.

## XML-based Transfer Memo Out Import API: 'Two cartons' error

Build 6.25.26.0: DS-1536

#### Issue

Prior to version 6.25.26.0, the XML-based Transfer Memo Out Import API call could occasionally fail. This happened when the imported Transfer Memo Out contained two shipping cartons. As a result, only one Transfer Memo Out for one of the cartons would be created in CHQ.

#### Resolution

The issue has been fixed. Now, XML-based Transfer Memo Out Import API works as expected.

## Sales Receipt: Price-related fields not populated at the DB level

#### Build 6.25.26.0: DS-1522

We've fixed the issue where the following price-related fields wouldn't be populated at the database level when a Sales Receipt was created:

- PriceAfterPromoDiscountExt
- PriceAfterItemDiscount
- NetOfferPrice

# JSON-based Ship Memo Control Flow API: Partially completed request

Build 6.25.26.0: DS-1547

#### Issue

Prior to version 6.25.26.0, some calls to the JSON-based Ship Memo Control Flow API (ship-sales-order-cf) went through only partially.

That happened when the items in the imported Ship Memos were split into two cartons. After the import, in CHQ, only one of those Ship Memos was shipped, while the other remained in the "in process" status since two cartons were not created.

#### Resolution

The issue has been fixed. Now, JSON-based Ship Memo Control Flow API either completes the import or fails.

# Epilogue

This guide was published on December 30, 2020 by Teamwork Commerce.

CHQ is accessed online through a browser and a client-specific web site. This guide provides documentation on new features and product updates to the existing CHQ software.

If you have any questions or wish to receive training from Teamwork Commerce, email us at: training@teamworkcommerce.com.

If you need technical support, have a question about whether or not you have the current version of the guide, or you have some comments or feedback about our guide, please contact us at: <a href="mailto:support@teamworkcommerce.com">support@teamworkcommerce.com</a>.

For emergency support call the Teamwork Commerce Main Line (727) 210-1700 and select 1 to leave a message that will immediately be dispatched to an on-call tech.