CHQ Release Guide

Version 6.25

Build 6.25.1.0

Build 6.25.26.0

Table of Contents

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.

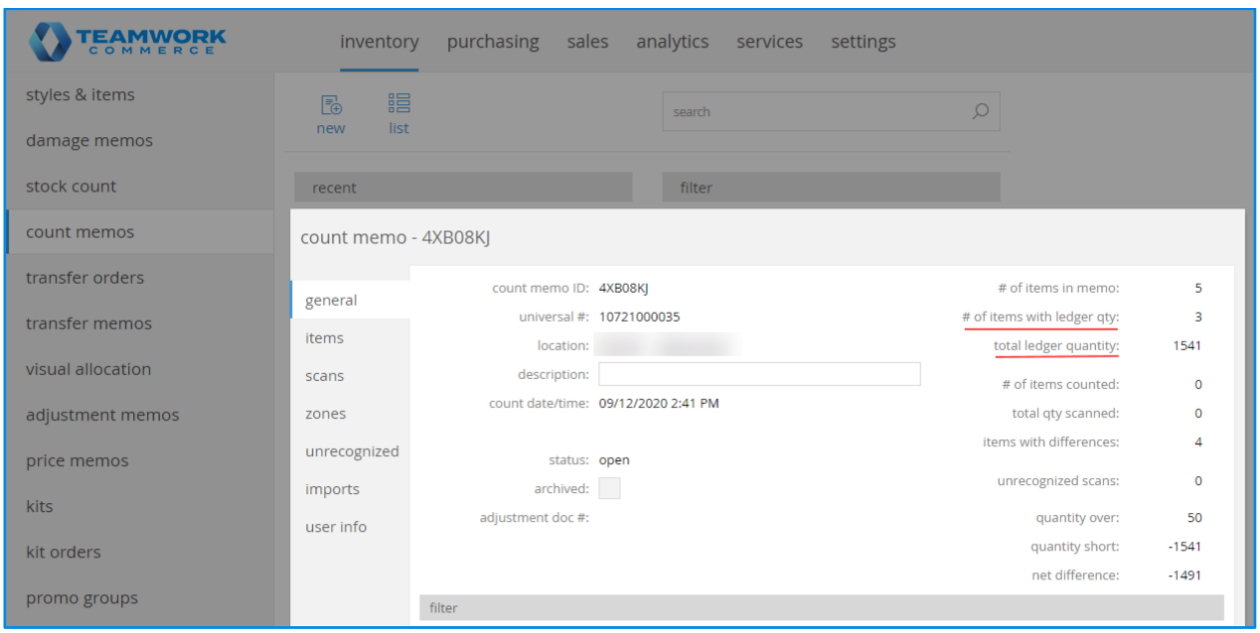
Purpose

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):



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

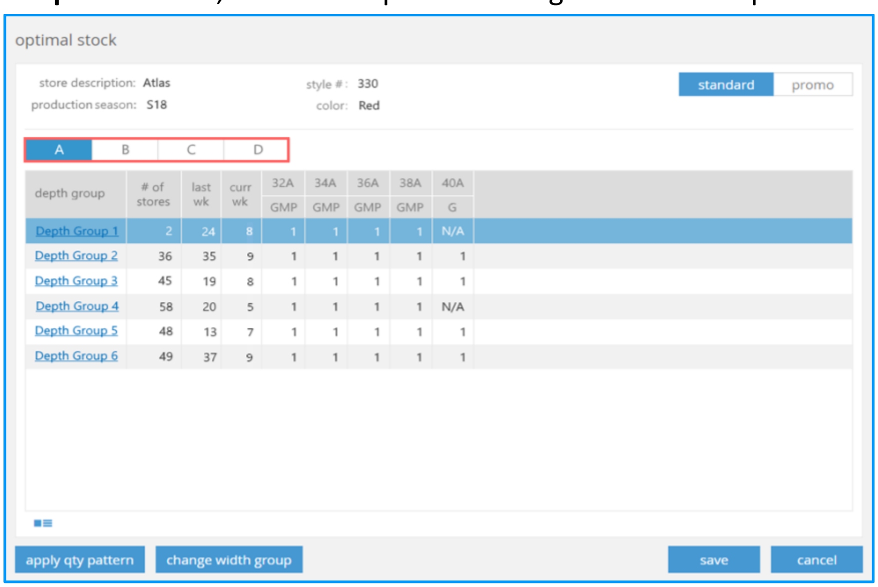
> NOTE
>
> A quantity pattern is a predefined set of item quantities which allows for a quick definition of optimal stock for an item.
>
> Quantity patterns are available for configuration under **chq** > **settings** > **inventory** / **catalog** > **qty patterns**.

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

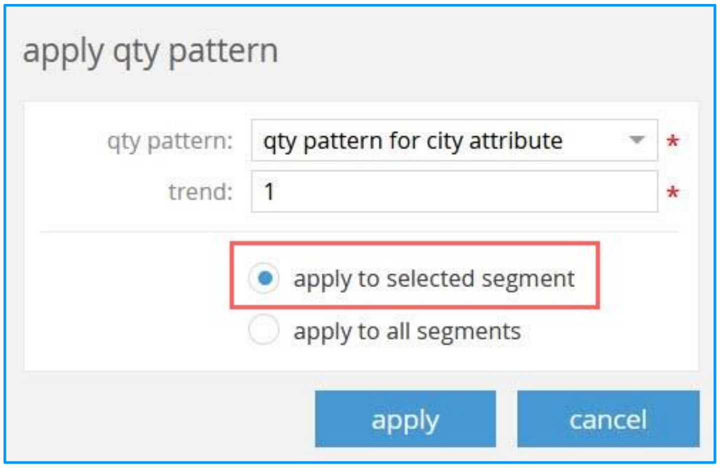
To apply a quantity pattern only to the selected size segment, do the following:

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:



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:



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)
2. **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 icon 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

6.25 Mobile Release Guide
Cloud HQ User Manual: Settings

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.

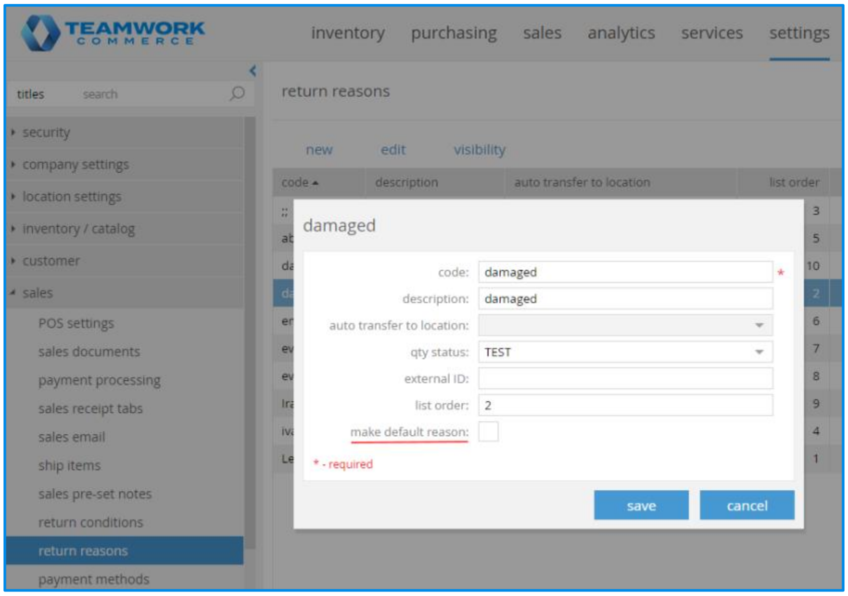
> NOTE
>
> An open return can occur when a customer returns merchandise without the original Sales Receipt.
>
> For more information, see 6.25 Mobile Release Guide of the software.

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:



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** > **locations / 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.

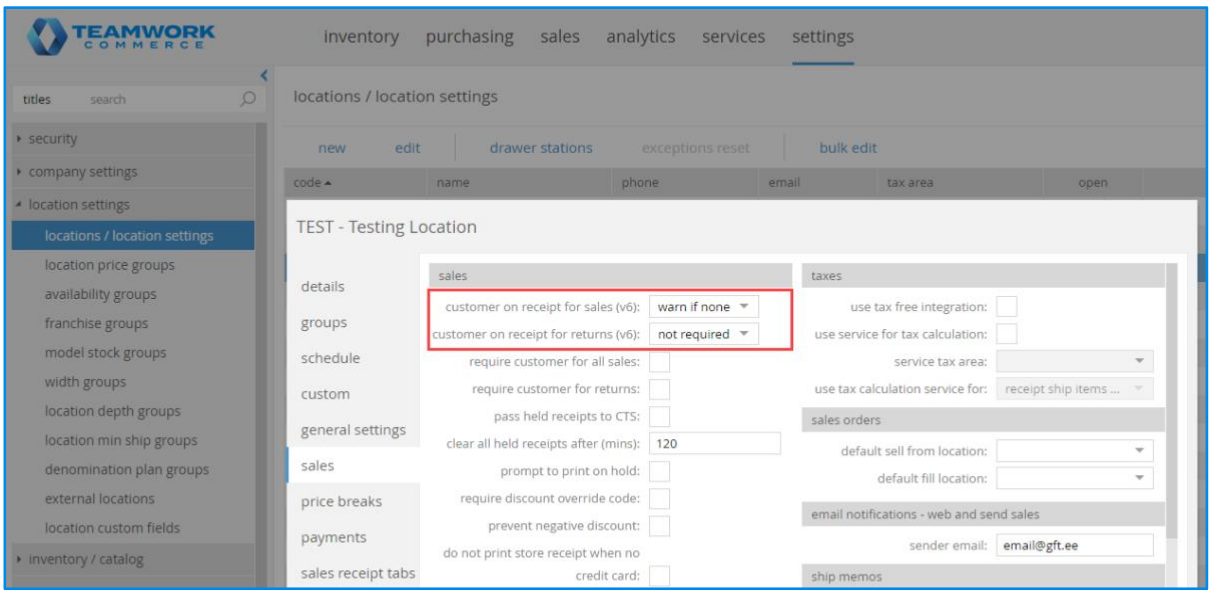
NOTE

For more information, see 6.25 Mobile Release Guide 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.**
3. 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:



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.

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