



# CHQ RELEASE GUIDE

Version 6.30

Build 6.30.39.0

Build 6.30.41.0

Build 6.30.43.0

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# Sales

## Restricting promotions to certain membership levels

Build 6.30.39.0: PRO-2848

CHQ now provides the capability to restrict promotions to customers with certain membership levels.

### Purpose

This feature allows retailers to manage their promotions with more precision as well as additionally reward the most loyal customers.

### How to limit a promotion to certain membership levels

To configure a promotion to be applied only for customers with a certain membership, in CHQ:

1. Go to **sales > promotion engine**.
2. In the area that opens, double click the required promotion to open the **edit promotion engine** dialog. Alternatively, to create a new promotion, click **new** at the top-left.

#### NOTE

To access the **new (edit) promotion engine** dialog, the user must be granted the “Add/Edit promotions” security right.

3. In the **advanced options** section of the **new (edit) promotion engine** dialog, select the **restricted memberships** checkbox:

The screenshot shows the 'new promotion engine' dialog box. The 'advanced options' section is expanded, showing the following settings:

- restricted memberships** (underlined in red)
- eligible membership levels: any
- promo returns**
- allow to combine with line discount
- allow to combine with global discount
- allow to combine with coupon discount
- allow to combine with membership discount

Other visible fields include:

- buy: qty
- get: qty
- items from promo groups: any
- with discount: percent %
- 0.00
- for 'buy' items always use: most expensive
- for 'get' items always use: least expensive
- locations: any
- start date: <dd/mm/yyyy hh:mm>
- end date: <dd/mm/yyyy hh:mm>
- rank: 29

Buttons at the bottom: save, cancel

Selecting this checkbox makes visible the **eligible membership levels** field below.

4. Click **edit** next to the **eligible membership levels** field.

5. In the **select membership levels** dialog, select one of the following:

select membership levels

Select membership levels eligible for promotion:

any membership level

selected membership levels

select all    unselect all    search

membership level	selected
Basic	<input checked="" type="checkbox"/>
Test Membership Level 1	<input checked="" type="checkbox"/>
Not a member	<input checked="" type="checkbox"/>
Silver	<input checked="" type="checkbox"/>
Gold	<input checked="" type="checkbox"/>
Platinum	<input checked="" type="checkbox"/>
White	<input checked="" type="checkbox"/>
Green	<input checked="" type="checkbox"/>
Violet	<input checked="" type="checkbox"/>
Yellow	<input checked="" type="checkbox"/>

18 records    page 1 of 2    10 25 50

select    cancel

- **any membership level:** promotion will be available to all membership levels. This option is selected by default
- **selected membership levels:** promotion will be restricted to selected membership levels. Choosing this option enables the grid with existing promotions below

If the **selected membership levels** option is selected, in the grid below, click the **selected** checkbox next to those membership levels for which the promotion should be available (see **A** in the screenshot below):

select membership levels

Select membership levels eligible for promotion:

any membership level

selected membership levels

select all    unselect all    search

membership level	selected
Basic	<input checked="" type="checkbox"/> <b>A</b>
Test Membership Level 1	<input type="checkbox"/>
Not a member	<input type="checkbox"/>
Silver	<input type="checkbox"/>
Gold	<input type="checkbox"/>
Platinum	<input type="checkbox"/>
White	<input type="checkbox"/>
Green	<input type="checkbox"/>
Violet	<input type="checkbox"/>
Yellow	<input type="checkbox"/>

Searching for specific membership levels is available via the **search** field above the grid.

Once finished, click **select** at the bottom to close the dialog.

6. Back in the **new promotion engine** dialog, to allow combining the selected promotion with membership discounts in POS Pro, select the **allow to combine with membership discount** checkbox:

The screenshot shows the 'new promotion engine' dialog box. The 'advanced options' section is expanded, revealing several settings:

- restricted memberships**
  - eligible membership levels: any
- promo returns**
- allow to combine with line discount
- allow to combine with global discount
- allow to combine with coupon discount
- allow to combine with membership discount**
  - applies to membership levels: any
- restricted payments

At the bottom of the dialog are 'save' and 'cancel' buttons.

Selecting the checkbox makes visible the **applies to membership levels** field below.

6. Click **edit** next to the **applies to membership levels** field to configure to which membership levels the **allow to combine with membership discount** setting applies.

7. Repeat step 5.

6. Back in the **new promotion engine** dialog, click **save** for the changes to take place.

**See also**

[Cloud HQ User Manual Sales & eCommerce](#)  
[V6.30 Mobile Release Guide](#)

# Settings

## Configuring tax refund service in CHQ

Build 6.30.39.0: PRO-1183

Teamwork Commerce Pro now provides the capability to issue and manage tax refund vouchers for tax-exempt customers.

For this purpose, we've integrated with WestID, a middleware service that provides communication between Teamwork and Planet, a tax refunding service. Planet, in its turn, receives customer information from Teamwork and handles the tax refunding procedure.

### NOTE

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Planet prioritizes retailer and customer data protection as well as compliance with all applicable rules and regulations.

To find out more about Planet's GDPR compliance, visit their [GDPR Compliance](#) webpage. Additionally, to review Planet's policy on collecting and handling personal information, see the [Privacy](#) section.

## Purpose

Within the European Union, tax-free shopping is typically available to non-resident customers who are privately exporting the purchased goods. Accordingly, such customers are eligible to receive tax refund vouchers for their purchases.

In CHQ, we've added the settings to enable the tax refunding feature in POS Pro as well as configure the integration with WestID. Proper configuration is required for tax refunding to be available in the POS Pro app.

### NOTE

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For information on how to manage tax refund vouchers in POS Pro, see the [V6.30 Mobile Release Guide](#)

## How to configure the tax refund service at the company level

We've added a new **tax refund service** section that allows for configuring integration with WestID.

To configure tax refund settings, in CHQ:

1. Go to **settings > sales > sales documents**.
2. In the area that opens, find the new **tax refund service** section.

3. In the **tax refund service** field, select “WestID tax refund” (see the screenshot below).

#### NOTE

“WestID tax refund” is the only available option at the moment.

The screenshot shows the 'settings' page in TEAMWORK COMMERCE. The 'sales documents' section is active, and the 'tax refund service' is configured with the following values:

- tax refund service: WestID tax refund
- URL: [Redacted]
- API key: value is defined
- webview retry attempts: 5
- webview timeout: 1 (seconds)
- WestID API timeout: 5000 (milliseconds)
- WestID API retry attempts: 2

Below the 'tax refund service' section, the 'promotions' section is visible with the following settings:

- promotion application rule: use rank
- promotion rank priority: lower rank

Buttons for 'save' and 'cancel' are located at the bottom right of the settings area.

4. Selecting the West ID service makes visible the following settings:

Setting	Description	Value
<b>URL</b>	the URL of the service	Valid service URL. Length from “1” to “4000” char
<b>API key</b>	West ID API key	From “1” to “4000” char
<b>webview retry attempts</b>	number of attempts to connect to the WestID webform	Values can range from “0” to “9”. “0” is set by default
<b>webview timeout</b>	seconds to wait for the WestID webview to display	Values can range from “1” to “99”. “8” is set by default
<b>WestID API timeout</b>	milliseconds to wait for connection to WestID API	Values can range from “1” to “999999”. “5000” is set by default
<b>WestID API retry attempts</b>	number of retry attempts to connect to WestID API	Values can range from “0” to “9”. “2” set by default

**WARNING**

Please be advised that all the fields of the **tax refund service** section must be populated. If any of the fields is empty or contains invalid values, POS V6 app considers the tax refund service inactive for the location.

## How to configure the tax refund service at the location level

We've added a new **enable tax refund option** checkbox at the location level.

If the checkbox is selected for a store location, issuing and managing tax refund vouchers becomes available in POS Pro.

To configure the new setting, in CHQ:

1. Go to **settings > location settings > locations / location settings**.
2. In the area that opens, click to select your location and then click **edit**.
3. In the [**selected location**] dialog, go to the **sales** tab.
4. In the **taxes** section, select the **enable tax refund option** checkbox.

The screenshot shows a settings screen with a 'taxes' section. The 'enable tax refund option' checkbox is highlighted with a red underline. Below it are 'use tax free integration', 'use service for tax calculation', 'service tax area' (dropdown), and 'use tax calculation service for' (dropdown). Below the 'taxes' section is the 'sales orders' section with a 'location for new order creation in CHQ' checkbox.

5. Click **save** for the changes to take place.

### See also

[Cloud HQ User Manual: Settings](#)

[V6.30 Mobile Release Guide](#)

## Extended list of multi-language fields and values for POS Pro V6

Build 6.30.39.0: PRO-1702

For user convenience, we've extended the list of POS fields and values that can be translated in multiple languages.


In POS Pro version 6, the translation of a field or value applies automatically based on the language of the app's user interface.



## How to add a translation for a POS field or value?

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For a translation to be available in POS, first, it must be set up in CHQ. To do so:

1. Click the  icon next to the default label of the required field or value.
2. On tapping the icon, the **description: [default field name]** dialog opens.
3. Enter the required translation.
4. Click **save** twice.

Please be advised that if no translation is defined in CHQ for the language that is used for the user interface in POS Pro, default field labels and values display in POS.

## New POS Pro multi-language fields and values definable in CHQ

In CHQ, it's possible to add multiple translations for the following POS labels:

- transfer reasons under **settings > transfers > transfer reasons > [selected transfer reason]**
- transfer reject reasons under **settings > transfers > transfer reject reasons > [selected transfer reject reason]**
- transfer hold reasons under **settings > transfers > hold reasons > [selected hold reason]**
- tax exempt reasons under **settings > sales > tax exempt reasons > [selected tax exempt reason]**
- reprint reasons under **settings > sales > reprint reasons > [selected reprint reason]**
- purchasing hold reasons under **settings > purchasing > hold reasons > [selected hold reason]**
- shipment reject reasons under **settings > order management > shipment reject reasons > [selected shipment reject reason]**
- reserve reasons under **settings > inventory/catalog > reserve reasons > [selected reserve reason]**

### See also

[Cloud HQ Settings Manual](#)

[V6.27 and V6.30 Mobile Release Guide](#)

[V6.27 CHQ Release Guide](#)

## v6 App Designer: Configuring the Purchase History area for POS Pro

Build 6.30.39.0: PRO-2635

We've introduced the capability to customize the **Purchase History** area of POS Pro V6 via v6 App Designer.

### NOTE

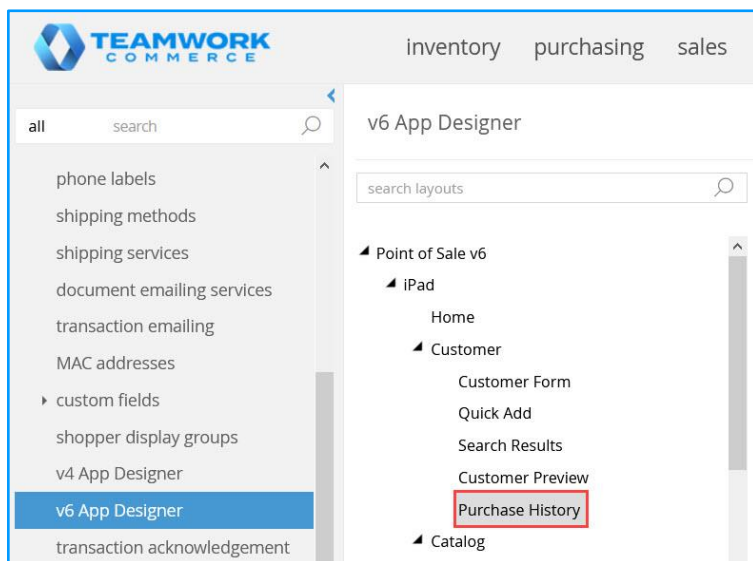
The **Purchase History** area allows for viewing details of the customer's past transactions. To learn more about this area in POS Pro, refer to the [V6.30 Mobile Release Guide](#).

In particular, it's now possible to configure what columns display in the grid with the customer's transactions.

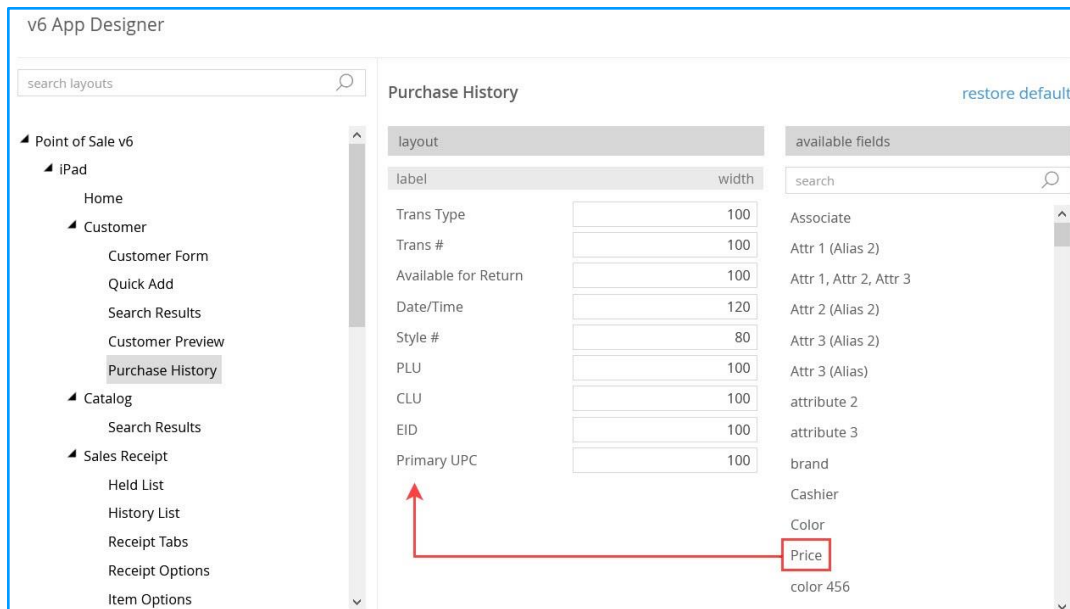
### How to configure

In CHQ, to configure what columns display in the **Purchase History** area of POS Pro V6:

1. Go to **settings > company settings > v6 App Designer**.
2. In the area that opens, choose **Point of Sale V6 > iPad > Customer > Purchase History**:



3. To add a column to the **Purchase History** area, under **available fields**, press the required label and then drag it to the **layout** section. Please note that by changing the order of columns under the **layout** section you can define the order in which the columns display in POS Pro.



4. To remove a column from the area, press the required label and then drag it out of the **layout** area.

5. Click **save**.

[See also](#)

[V6.30 Mobile Release Guide](#)

## Location-based return policies

Build 6.30.39.0: PRO-2840

As of version 6.30.39.0, CHQ allows users to create multiple return policy texts that can be assigned to specific locations.

### Purpose

The new feature may be useful for storing a return policy in different languages as well as assigning different policies depending on the store type, for example for regular and outlet stores.

### Configuring return policies in CHQ

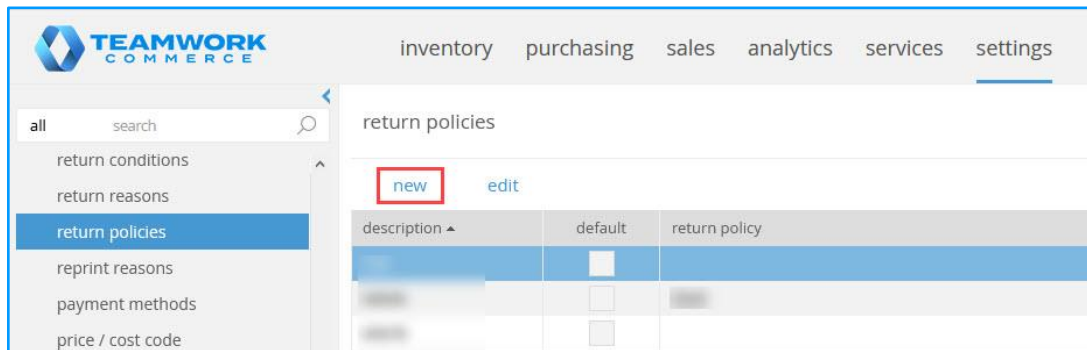
For a return policy to be assigned to a specific store location, the following must be done:

- 1) The return policy must be created under **settings > sales > return policies**.
- 2) Then, the created return policy must be selected at the location level under **settings > locations / location settings > [selected store location] > sales**.

## How to create a return policy

To create a return policy, in CHQ:

1. Under **settings > sales > return policies**, click **new** at the top-left:



2. In the **new return policy** dialog, fill out the following fields:

The 'new return policy' dialog form contains the following fields:

- description:** A text input field with a red asterisk (\*) indicating it is required.
- default:** A checkbox.
- return policy:** A large text area for entering the policy text.
- inactive:** A checkbox.

At the bottom left, there is a red asterisk (\*) with the text '\* - required'. At the bottom right, there are two buttons: 'save' and 'cancel'.

- **description:** the description of the return policy; required field
- **default:** the checkbox to make the record default, clear by default

### NOTE

A default return policy is used for locations that don't have a return policy assigned. The default return policy will be automatically printed on Sales Receipts.

Please note that if no return policy is manually marked as default, the first policy in the list under **settings > sales > return policies** will be automatically made default.

- **return policy:** the return policy text
- **inactive:** the checkbox to mark the record inactive, clear by default

3. Once finished, click **save**.

## How to assign a return policy to a store location

To assign one of the existing return policies to the location:

1. Go to **chq > settings > location settings > locations / location settings**.
2. Click to select the required location and then click **edit**.
3. In the **[your selected location]** dialog, go to the **sales** tab.
4. In the **sales** section, select your return policy from the **return policy** dropdown menu:

The screenshot shows a settings dialog for a location. The 'sales' tab is selected in the left sidebar. In the main content area, the 'return policy' dropdown menu is highlighted with a red box. Other settings visible include 'enable official invoice printing', 'require second login for open return', 'enable pay in store action', 'acknowledgement for sales', 'acknowledgement for returns', 'shopping bag quick add', 'cash drawer' settings, and 'ship memos' settings.

### NOTE

The selected return policy will be printed on Sales Receipts in POS Pro. Alternatively, if the **return policy** field is empty, the default return policy is printed on Sales Receipt.

5. Click **save** for the changes to take place.

## See also

[V6.30 Mobile Release Guide](#)

## Removed setting: require confirmation of deposit to bank

Build 6.30.39.0: PRO-2845

We've removed the **require confirmation of deposit to bank** 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 6.30.

## See also

[V6.30 Mobile Release Guide](#)

[Cloud HQ User Manual: Settings](#)

## Configuring the number of discounts during the sale

Build 6.30.39.0: PRO-2885

As of version 6.30.39.0, CHQ allows users to define how many discounts can be applied to a single item or the whole Sales Receipt in POS Pro V6.

### Purpose

This feature allows for better management of sale discounts at the company level. For example, it's now possible to prohibit combining item-level and document-level discounts.

This update also substitutes the previously existing logic when multiple coupon discounts could be applied simultaneously. For this purpose, we've removed the **allow multiple coupon discounts** setting from CHQ.

### Specifying the number of discounts

To configure the number of discounts that can be applied on a sale in POS Pro V6, in CHQ:

1. Go to **settings > sales > sales documents**.
2. In the area that opens, in the **sales** section, populate the following fields:

The screenshot shows the 'sales documents' configuration page in the Teamwork Commerce settings. The 'sales' section is expanded, and the following settings are visible:

- restrict discount class to one type on sale (item or discount):
- number of discounts allowed on a single item:  \*
- number of discounts allowed on a document:  \*
- enable customer associated coupons:
- if unused coupon available, on pay, prompt to select:
- use customer override membership for discounting:
- prompt for contact on add customer:
- require customer information for tax exempt:

- **number of discounts allowed on a single item:** the amount of discounts that can be applied to a single item. The value can range from “0” to “10”, “1” is set by default
- **number of discounts allowed on a document:** the amount of discounts that can be applied to a document (to the Sales Receipt total). The value can range from “0” to “10”, “1” is set by default

#### WARNING

The “0” value in either of the fields means that no discounts can be applied to an item or a document respectively.

3. Additionally, to prohibit applying both item-level and receipt-level discounts to one Sales Receipt in POS Pro, select the **restrict discount class to one type on sale (item or discount)** checkbox:

The screenshot shows the Teamwork Commerce settings interface. The navigation menu includes 'inventory', 'purchasing', 'sales', 'analytics', 'services', and 'settings'. The 'sales documents' section is active, showing a search bar and a list of settings. The 'restrict discount class to one type on sale (item or discount)' checkbox is checked. Below it, the 'number of discounts allowed on a single item' is set to 1, and the 'number of discounts allowed on a document' is also set to 1. The 'enable customer associated coupons' checkbox is unchecked.

4. Click **save** for the changes to take place.

## See also

[V6.30 Mobile Release Guide](#)

## Loyalty engine: Updated Membership re-calculation

Build 6.30.39.0: PRO-2875, PRO-2876

### WARNING

Please be advised that this feature relates to the custom Upgrade and Recalculate Membership process that is installed on request only.

We've updated how the "amount spent" is calculated during the custom Upgrade and Recalculate Membership processes. In particular, we've added the capabilities to:

- include gift card purchases into calculation
- exclude sales with item and global discounts from calculation
- exclude items with promos

### NOTE

To be able to perform these configurations, the user must be granted the "Add/Edit customer settings CHQ" security right.

## Purpose

In Teamwork Commerce Pro, the customer's membership level is calculated based on the amount spent within the retailer's company. This update helps the retailer more granularly adjust which transactions are included in the calculation of the amount spent.

For example, the retailer may not want to consider items bought with a particular promotion, but instead can allow adding all the gift card purchases to the amounts needed for achieving a certain membership level.

## How to configure amount spent calculation

1. In CHQ, go to **settings > customer > membership calculation**.
2. Under **amount spent calculation** (a new section):

The screenshot displays the 'membership calculation' settings in the TEAMWORK COMMERCE interface. The left sidebar shows the navigation menu with 'membership calculation' selected. The main content area is divided into two sections:

- membership calculation:** This section contains several input fields and dropdown menus for configuring membership levels:
  - membership recalculation month: January
  - membership recalculation day: [input field]
  - membership conversion delay (days): [input field]
  - upgrade threshold - level 1/EUR: [input field]
  - upgrade threshold - level 2/EUR: [input field]
  - upgrade threshold - level 3/EUR: [input field]
  - upgrade threshold - level 1/GBP: [input field]
  - upgrade threshold - level 2/GBP: [input field]
  - upgrade threshold - level 3/GBP: [input field]
  - upgrade threshold - level 1/CHF: [input field]
  - upgrade threshold - level 2/CHF: [input field]
  - upgrade threshold - level 3/CHF: [input field]
- amount spent calculation:** This section, highlighted with a red box, contains three checkboxes and a dropdown menu:
  - include gift card purchases:
  - exclude items with line/global discounts:
  - exclude items with promos: do not exclude items with promos (dropdown menu) [edit]

- selecting the **include gift card purchases** checkbox allows for adding gift card purchases to the amount spent for the customer level calculation
- selecting the **exclude items with line/ global discounts** checkbox allows for excluding all the items with line/ global discounts from customer membership level calculation

Clicking **edit** next to **exclude items with promos** opens the **select promos** dialog. In the dialog, it is possible to:

- specify whether to exclude items with any promos,
- select specific promos for exclusion, or
- configure not to exclude such items at all



select promos

Excluded promos:

do not exclude items with promos

any promo

selected promos

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select all   unselect all   search  filter ▾

promo name ▲	selected
20% off	<input type="checkbox"/>
20% on iphone	<input type="checkbox"/>
20.5% off	<input type="checkbox"/>
asya	<input type="checkbox"/>
asyap	<input type="checkbox"/>
Asyaprom	<input type="checkbox"/>

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Once done, click **select**.

4. Back in the **membership calculation** area, click **save** on the bottom right.

[See also](#)

[V6.30 Mobile Release Guide](#)

## Other enhancements

### Replenishment optimization

Build 6.30.39.0: PRO-3095

We've performed backend optimization to how EC ATS control orders are created. This allows for smoother execution of the replenishment process.

## Issue resolution

### Customer search by phone number: ignoring a leading “0”

Build 6.30.39.0: DS-1826

As of version 6.30.39.0, when searching for a customer by phone number in CHQ, “0” at the beginning of the phone number is ignored.

### StreamingDate not updated for Count Memos

Build 6.30.39.0: DS-1700

We have fixed the issue where when the Count Memo-related information was updated at the database level, the respective StreamingDate value would not change. The correct StreamingDate value is critical for proper backing up and preparing analytics in BigQuery.

### Error when filtering Purchase Orders by order date

Build 6.30.39.0: DS-1813

#### Issue

Prior to 6.30.39.0, for users marked as trading partners in CHQ, an error message would appear incorrectly as a result of the following:

1. In CHQ, go to **purchasing > purchase orders**.
2. In the **filter** section, find the **order date** filter and specify the date range.
3. Click **search**.

#### Resolution

The issue has been fixed. Now the **order date** filter works as expected.

### Incomplete transfer of payment method settings between locations

Build 6.30.39.0: DS-1831

We’ve fixed the issue where, for payment methods of the credit card type, not all the configured settings would be copied from one location to another.

#### NOTE

Payment method settings can be copied from one location to another by clicking the **copy to locations** button in CHQ under **settings > sales > payment methods > [selected payment method] > location settings**.

## Customer attributes not synchronized from BigQuery

Build 6.30.39.0: DS-1832

We've fixed the issue where the Sync CustomerAttributes job would occasionally fail to upload attributes from BigQuery to CHQ.

## JSON-based Sales Order Export API: The "Invalid object name" error

Build 6.30.41.0: DS-1824

We've fixed the issue where the JSON-based Sales Order Export API call could occasionally fail with the "Invalid object name 'dbo.SvsGiftCard'" error.

## XML-based Transfer Memo In Import API: Transfer Memos In not imported to CHQ

Build 6.30.43.0: DS-1870

We've fixed the issue where importing Transfer Memos In (TMIs) via XML-based Transfer Memo In Import API could occasionally fail with the "There was an error generating the XML document" error message.

## Epilogue

This guide was published on **April 23, 2021** 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](mailto: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: [support@teamworkcommerce.com](mailto:support@teamworkcommerce.com).

For emergency support call the Teamwork Commerce Main Line [\(727\) 210-1700](tel:7272101700) and [select 1](#) to leave a message that will immediately be dispatched to an on-call tech.