

CHQ RELEASE GUIDE

- Version 6.21
 - Build 6.21.58.0
 - Build 6.21.69.0
 - Build 6.21.83.0
 - Build 6.21.99.0
- Build 6.21.107.0
- Build 6.21.111.0

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Inventory

New setting to determine how ATS and Non-EC ATS values are calculated

TWD-37094 Build 6.21.99.0

We've added a new sales order dialog - calculate ATS for setting in the web and send sales section under chq > settings > order management > custom orders:

		inventory purchasing	sales analytics	services	settings
all search	2	customer orders			
▶ security	^	general			
 company settings 			sales order items always	set as ready to fill	E
 location settings 		web and send sales	m 1997 - 2009 Paulo Banana (1997 - 2007 - 2007 - 2007 - 2007 - 2007 - 2007 - 2007 - 2007 - 2007 - 2007 - 2007 -		
 inventory / catalog 		neo ana sena sales.	auto approvo all pov	sond sale orders	
▶ customer			schedi	uled auto process	·
▶ sales			do not check RTA w	hen auto process	
 order management 			auth and cap	oture - capture on	ship/pick up/drop ship done
sales order types			allow partial fulfillme	ent in SO/SM lines	a 🗸
sales order tabs			send sale	- lock fill location	ı: ok ᠊᠊
customer orders			location for new orde	er creation in CHQ	*
ship to required fields		allo	w to change ship to address f	or existing orders	
sell from locations		send sale	e (ship items) - fill locked locat	tions immediately	
fill locations		order n	management - show archived	orders by default	fill location
shinment reject reasons			sales of definition	- calculate ATS TOP	innocation

This setting allows for configuring how ATS and non-EC ATS values are calculated in the **items** tab under **chq** > **sales** > **order management** > (**selected order**).

In sales order dialog - calculate ATS for, the following options are available for selection:

- "company": if this option is selected, ATS is calculated as a sum of all item quantities in all locations. Non-EC ATS is calculated as the difference between ATS and EC ATS in all locations; selected by default
- "fill location": if this option is selected, ATS is calculated as a sum of all item quantities for that SO fill location. Non-EC ATS is calculated as the difference between ATS and EC ATS in that fill location

Insufficient Quantities Warning for Sales and Transfer Orders

TWD- 33841 Build 6.21.58.0

With this update, users will be notified that there are insufficient item quantities when placing Sales or releasing Transfer Orders.

The situation can occur, for example, if the available to sell quantities are reserved for e-commerce sales (are EC protected), thus making non e-commerce (NON EC) item quantities unavailable to fill the order.

Also, more detailed information on item quantities is now available on the **items** tab under:

- chq > sales > order management > (your sales order)
- chq > inventory > transfer orders > (your transfer order)

Updates to the items tab under Sales Orders

In the **items** tab under **chq** > **sales** > **order management** > (**selected sales order**), the **available** column is renamed to **ATS**.

Also, two new columns have been added:

- 1. **non-EC ATS** shows the number of items that are not reserved for EC
- 2. ATS Short shows if there is enough non-EC ATS to fulfill the order:
 - "0" or any positive value: there is enough ATS to fill the order
 - any negative value (in red): there is not enough ATS to fill the order

IMPORTANT NOTE:

For information on how values are calculated in the ATS and non-EC ATS columns, see the New setting to determine how ATS and Non-EC ATS values are calculated article of this guide.

Both the non-EC ATS and ATS Short columns are not visible by default.

NOTE:

If **Protect EC ATS** for the **EC fill location** is enabled in CHQ under **settings** > **eCommerce** > **EC ATS controls** > (**your EC ATS control**) > **general**, then the **non-EC ATS** column is populated with information from RTA. If disabled, the **non-EC ATS** column equals zero.

sales order -	send sal	e #10000	99999 - held						
order	edit	remove	check qty actions - in	nport					
	all info	search to	Q bad				sea	rch	Q
customer	PLU 🔺	style #	store description	attribute 1	attribute 2	order qty	ATS	non-EC ATS	ATS short
delivery	6128	2231	Fancy Viscose Cami	Green	м	1	12	2	0
	1229	8854	Chic Lin Long-sleeved Tunic	Beige	М	1	26	12	0
items	11523	9874	Tutti Fruitti Pyjama Set	Navy	L	2	8	1	-1
global discount global fees CSR notes payments activity									
user info	□≡ 3 re	cords	age page	1 of 1	• •	10 25	50		
cancel order	print	em	nail			hold	i pla	ace order	cancel

On clicking **place order** (at the bottom of the dialog in the screenshot above), CHQ checks if any item record has a negative **ATS Short**. If such a value is found, the following warning dialog displays:



To place the order anyway, click the place order button in the ATS short dialog.

IMPORTANT NOTE:

The check for insufficient ATS quantities is performed only for "Send Sale" type SOs.

Updates to the Items tab under Transfer Orders

In the **items** tab under **chq** > **inventory** > **transfer orders** > (**your transfer order**), the **available** column is renamed to **ATS**. The column still shows the corresponding item available quantities.

Also, the **check available** button (above the items' grid in the screenshot below) is renamed to **calculate ATS**. Clicking the button allows the user to manually populate **ATS**, **non-EC ATS**, or **ATS short**.

Additionally, two new columns have been added:

- 1. non-EC ATS indicates the number of items that are not reserved for EC
- 2. ATS Short indicates if there is enough non-EC ATS to fulfill the order:
 - "0" or any positive value: there is enough ATS to fill the order
 - any negative value (in red): there is not enough ATS to fill the order

Both the non-EC ATS and ATS Short columns are not visible by default.

NOTE:

If Protect EC ATS for the EC fill location is enabled in CHQ under settings > eCommerce > EC ATS controls > (your EC ATS control) > general, then ATS Short indicates the difference between non-EC ATS and the qty ordered. If disabled, ATS Short indicates the difference between ATS and qty ordered.

all info search to add g ty to add: 1 Image: Search to add Image: Se	eneral	edit	remove	calculate ATS						
Ustom PLU + style # store description attribute 1 attribute 2 qty ordered ATS non-EC ATS ATS short ems 6128 223 Classic Polo Shirt Red SM 50 100 468 .22 ser info 6130 223 Classic Polo Shirt Red MED 500 100 468 .00 6130 223 Classic Polo Shirt Red LG 500 100 444 -66 6132 223 Classic Polo Shirt Red XL 500 1000 444 -66 6132 223 Classic Polo Shirt Red XL 500 1000 613 0 6133 223 Classic Polo Shirt Red XXL 500 1000 489 -1 6134 223 Classic Polo Shirt Red XXL 500 1000 499 -1		all info	search	to add 🔊	qty to ad	d: 1				filter
6128 223 Classic Polo Shirt Red SM .50 100 46 .22 ser info 6129 223 Classic Polo Shirt Red LG .50 100 .65 .00 6130 223 Classic Polo Shirt Red LG .50 100 .44 .66 6132 223 Classic Polo Shirt Red XL .50 100 .71 .00 6133 223 Classic Polo Shirt Red XXL .50 100 .663 .00 6134 223 Classic Polo Shirt Red XXL .50 100 .683 .0 6134 223 Classic Polo Shirt Red XXL .50 100 .49 .1	custom	PLU +	style #	store description	attribute 1	attribute 2	qty ordered	ATS	non-EC ATS	ATS short
6129223Classic Polo ShirtRedMED5010066506130223Classic Polo ShirtRedLG50100144-66132223Classic Polo ShirtRedXL501006806134223Classic Polo ShirtRedXXL5010049-1	tems	6128	223	Classic Polo Shirt	Red	SM	50	100	48	-2
ser info 6130 223 Classic Polo Shirt Red LG 50 100 44 -6 6132 223 Classic Polo Shirt Red XL 50 100 71 0 6133 223 Classic Polo Shirt Red XXL 50 100 668 0 6134 223 Classic Polo Shirt Red XXL 50 100 49 -1		6129	223	Classic Polo Shirt	Red	MED	50	100	65	0
6132223Classic Polo ShirtRedXL501007106133223Classic Polo ShirtRedXXL501006806134223Classic Polo ShirtRedXXL5010049-1	iser info	6130	223	Classic Polo Shirt	Red	LG	50	100	44	-6
6133 223 Classic Polo Shirt Red XXL 50 100 68 0 6134 223 Classic Polo Shirt Red XXL 50 100 49 -1		6132	223	Classic Polo Shirt	Red	XL	50	100	71	0
6134 223 Classic Polo Shirt Red XXXL 50 100 49 -1		6133	223	Classic Polo Shirt	Red	XXL	50	100	68	0
		6134	223	Classic Polo Shirt	Red	XXXL	50	100	49	-1
		6 reco	rds	4 ∢ pag	e 1 of		10 25 1	50		

Upon clicking **release** (at the bottom of the dialog in the screenshot above), CHQ checks if any item record has a negative **ATS Short**. If that is the case, the warning dialog appears.



To release the order, click the **release** button in the **ATS short** dialog.

Updated ATS warning dialogs for Sales Orders and Transfer Orders

TWD-38133 Build 6.21.111.0

We've updated the ATS short warning dialog messages.

• For Sales Orders:



• For Transfer Orders:



Custom logic for EC ATS item quantity decrease

TWD-35345, TWD-35346, TWD-37425 Build 6.21.99.0

We have implemented custom logic to automatically decrease EC ATS item quantities:

- for any item whose status is set to "unsellable" within a certain time span
- for any item on Sales Receipt that is posted between replenishment and EC ATS Order creation

WARNING:

Please be advised that this custom procedure is provided by request only and is not available on default installations.

Sales

Checks before erasing personal identifiable information (PII)

TWD- 34769 Build 6.21.58.0

Now, on clicking **erase PII data** under **chq** > **sales** > **customers** > (**your customer**) and before removing the customer-related personal identifiable information (PII), the system checks if there are any

a) non-archived Sales Orders and Web Orders with an item that is not marked as 'completed' or 'cancelled', or

b) non-zero balance records among the following:

- Store Credits
- Credit Memos
- Gift Cards
- House Accounts

If any of the above is found, the dialog that warns about the potential information loss displays:

cust	omer o	rder or a	ccount	data fou	nd	
The	customer ounts.	has open or	ders or bal	ances for o	ne or mor	e of their
	open cus credit me house ad	stomer order emo balance ccount balan	(s) ce			
Sele	ect 'yes' be	low to contir	nue with th	e erase PII	data proc	ess.
				yes		no

If none of the above is found, the dialog asking to confirm the data deletion displays:



Updated logic for generating memberships based on the spent amount

TWD-35650 Build 6.21.99.0

We've implemented a custom procedure that allows generating customer memberships based on the amount spent by the customer.

Now, when recalculating and/or upgrading customer memberships, Sales Receipts for linked (merged) customers are considered as well.

WARNING:

Please be advised that this custom procedure is provided by request only and is not available on default installations.

Settings

Updated Settings for Sales Receipts

TWD-29694 Build 6.21.58.0

To respect the changes made in Teamwork POS Pro version 6, in particular introducing new Sales Receipt area and the related functionality, we have updated existing and introduced new settings in CHQ.

Security Rights

To work with Sales Receipt area in POS, the user must be granted the following security rights:

Security Right	Area	Description
Void/Reverse Sales Receipts	Sales Receipts	Allows user access to Void/Reverse option for sales receipt
Sales Receipts-Change Cashier	Sales Receipts	Allows user to select cashier option to change cashier during sales receipt
Sales Receipts - Change Assc	Sales Receipts	Allows user to select associate button to select/change associate during sale
Override GC Max and Min	Sales	Allows user to define gift card amount outside the defined min/max range
Sales Receipts - Reprint	Sales Receipts	Allows user to reprint a sales receipt
Sales Receipts - Add	Sales Receipts	Allows user to select NEW sales receipt
Sales Receipts - Hold	Sales Receipts	Allows user to HOLD a sales receipt in progress
System - Access Sales Receipts	Sales Receipts	Allows user to select the sales receipt menu option

Updates to existing settings

The following updates have been introduced to settings in CHQ:

- 1. Under chq > settings > sales > pos settings in the sales history section:
 - the **show "device sales history"** checkbox is now always selected
 - the sales history search and search receipts for the past (days) are removed
- 2. Under chq > settings > sales > sales documents in the sales section:
 - the printing when void/reversing finalized receipts setting allows for selecting one of the following options:
 - \circ do not print
 - prompt to print
 - o automatically print
 - the **hide associate** checkbox, if selected, makes the option to add the associate on Sales Receipt visible in POS
 - the cashier/associate display checkbox is removed

3. Under chq > settings > sales > sales pre-set notes:

Now, if a note is set as default, it is added to the Sales Receipt notes field on a new SR.

No default notes are added if:

- an SR is copied from a finalized receipt
- an SR is unheld

4. Under chq > settings > location settings > locations/location settings > (your location) > edit > general settings:

 device history purge is removed, instead a new setting – days of drawer memo history to save in POS to be used

WARNING:

All Sales Receipts are associated with a Drawer Memo saved on POS. Once a drawer memo is purged (by default that happens in 30 days after finalizing), all the associated SRs are purged with that Drawer Memo as well.

- POS item description is removed
- **enable camera barcode reader**, if selected, makes the barcode icon visible in the Search fields everywhere in POS

5. Under chq > settings > location settings > locations/location settings > (your location) > edit > sales, the pass held receipts to CTS option is no longer used.

New Sales Receipt related settings

Under **chq** > **settings** > **sales**, we have added a new area – **hold reasons**. In the **hold reasons** area, it is possible to create new and edit existing hold reasons for Sales Receipts.



Also, under chq > settings > location settings > locations/location settings > (your location) > edit > sales, we have added a new setting – shopping bag quick add. The field is used to define the PLU of a service item for bags:

dotails	sales		taxes			
uetans	require customer for all sales:		use tax free integration:			
groups	require customer for returns:		use service for tax calculation:			
chedule	pass held receipts to CTS:		service tax area:	-		
ustom	clear all held receipts after (mins):	120	use tax calculation service for:	receipt ship items 👻		
	prompt to print on hold:		sales orders			
eneral settings	require discount override code:		default sell from location:	-		
ales	prevent negative discount:		default fill location:			
orice breaks	do not print store receipt when no		deidar in location			
	credit card:		email notifications - web and se	email notifications - web and send sales		
payments	enable official invoice printing:		sender email:			
ales receipt tabs	require second login for open return		ship memos			
ales order tabs	(V5):	off 🔻	use shipping service:	none 👻		
	require second login for verified		service location name:			
urchasing	return (V5):	off 💌	Service location name.			
ransfers	enable pay in store action:		automatically request return label:			
P. 1	acknowledgement for sales:	not required 💌	return service ship method:	•		
lajustments	acknowledgement for returns:	not required 👻	return label destination locati			
SVS	shopping bag quick add:		select rate shop group code:			
	cash drawer		require scan for item			
	* - required					

NOTE:

Only PLUs of active and available service items with the "normal" type are available for selection.

Configuring customer-related information display on Sales Receipts

TWD-35585 Build 6.21.58.0

We have introduced updates to customer-related settings in CHQ to respect changes made in Teamwork POS Pro version 6 with regard to searching and adding customers on Sales Receipts.

Security Rights

To be able to create and/or edit customer records in POS, the user must be granted the following security rights:

Security Right	Area	Description
Add Customer	Customers	If the user does not have this right, then they cannot create a new customer when on a sales receipt.
Edit Customer	Customers	If the user does not have this right, then they cannot edit an existing customer record from a sales receipt.

Updated phone labels

In CHQ, under **settings** > **company settings** > **phone labels**, **phone 1** is now set to "Mobile" both in the **customer and people** and **vendor and people** sections. The field is no longer configurable.

Hiding sensitive customer data in search results

We have added a new setting, mask sensitive customer data in search results, under chq > settings > customer > customer settings in the general section:

	inventory purchasing sales analytics services settings
titles search C	customer settings
▹ security	general
 company settings 	default customer preset option:
 location settings 	default country: France 💌 \star
inventory / catalog	allow to add contacts to customer account:
∡ customer	do not allow to change ship to state and country:
customer settings	customer history report: 8 select
ship to address types	display quick add tab on customer record:
preset customer options	days to keep customer change log entries: 2 enable images for contacts:
customer required fields	mask sensitive customer data in search results:
contact required fields	customer password
contact type	minimum customer password length: 6

If the checkbox is selected:

- for primary email, the first 4 characters display
- for email 2, the first 4 characters display
- for mobile phone, as well as for phone 2–4, the last 4 digits display
- for member code, the last for characters display

Include customer contact information in search results

You can allow the display of customer contact information in customer search results in POS.

To do so, in CHQ under settings > company settings > stored value services > general SVS settings, select the include contact information in customer search option:

	inventory purchasing sales analytics services settings
titles search .	د general SVS settings
▶ security	SVS services type: internal
✓ company settings	service URL:
company information	access token: value is defined
 stored values services 	enter registration token
general SVS settings	namespace:
member ID	settings configuration mode: chq
SVS location groups	CRM URL:
gift card settings	send sales receipts to CRM: 🗸
store credit settings	offline posting of sales receipt to CRM preferred:
LRP settings	include contact information in customer search:
LRP promotions	publish all customers to shared namespaces:

Configure phone number format

You can configure how a customer's phone number displays in POS.

To do so, under **chq** > **settings** > **company settings** > **general settings**, in the **phone number** section select:

- phone number format: can be "national" (without any country code), "international" (with a country code required), "e.164", or no validation applied
- phone number default country

NOTE: What is E. 164?

E. 164 is the international telephone numbering plan that ensures each device has a globally unique number. According to this standard, the phone number consists of the following: *[+][country code][area code][local phone number]*. Also, under E. 164, a phone number can have a maximum of 15 digits.

	inventory purchasing sales analytics services settings
titles search ,O	general settings
▹ security	web services
✓ company settings	rich content manager URL:
company information stored values services 	cloudhq URL:
general settings	item availability services
countries / regions	get item availability from: Cloud HQ
states / provinces	send data to RTA:
postal codes	RTA service URL:
time zones	access item availability from mobile apps:
currencies	digital asset manager
 taxes phone labels 	digital asset management enabled:
shipping methods	digital asset manager URL:
shipping services	phone number
MAC addresses	phone number format: national 👻
 custom fields 	phone number default country: Austria
shopper display groups	device transaction number
v4 App Designer	alternative device transaction number type: none -

Adding country and state/province for selection in customer address fields

You can configure what countries as well as country provinces/states are available in customer address fields in POS.

To do so, under **chq** > **settings** > **company settings** > **states/provinces**, click **new** if you want to add a new entry to be available for selection.

Also, click to select an existing entry and then click **edit** to change the required country's code and name.

	inventory pur	chasing sales	analytics	services	settings
	<				
titles search O	states / provinces				
▶ security	new edit				
 company settings 	country 🔺	code	na	me	
company information	Afghanistan	а			
 stored values services 	Afghanistan	ai	af		
general settings	Aland Islands	ai	aa		
countries / regions	Aland Islands	ZZ	ZZ		
states / provinces	Albania	a	aa		
postal codes	Albania	AA	aa		

Selecting customer preset options

You can select which customer preset options will be applied when creating a new customer.

To do so, go to settings > location settings > locations / location settings > (your location) > edit > general settings, in the general section select the required option from the preset customer option drop-down menu:

	inventory p	urchasing sales analytics services settings				
titles search O	titles search O locations / location settings					
▶ security	new edit	drawer stations exceptions reset bulk edit				
▶ company settings	code 🔺	name phone email tax area open				
▲ location settings	N TEST T II I					
locations / location settings	TEST - Testing Lo	ocation **				
location price groups	к	general				
availability groups	details K	device history purge limit: 300				
franchise groups	Li groups	enable camera barcode reader:				
model stock groups		POS item description				
width groups	N custom	loyalty program on accounts tab: LRP 1				
location depth groups	N general settings	preset customer option: Standard Customer 💌				
location min ship groups	M	drawer memo				
denomination plan groups	Nsales	days of drawer memo history to save in POS: 30				
external locations	N price breaks	business day start time: 12:00 AM				
location custom fields	N payments	drawer expire:				
 inventory / catalog 	sales receipt tabs	require verification login for start/end of day:				

NOTE:

Creating or editing customer presets is possible in CHQ under **settings** > **customer** > **preset customer options**.

This location level setting overrides the **default customer preset option** setting available in **CHQ** under **settings** > **customer** > **customer settings** in the **general** section.

Configuring ship to address types

You can configure ship to address types in CHQ under **settings** > **customer** > **ship to address types**:

		inventory	purchasir	ng sales	analytics	services	settings
search	<	ship to address t	ypes				
▶ security		new edit	:				
 company settings 		type 🔺					
 location settings 		Commercial					
 inventory / catalog 		Home					
∡ customer		Office					
customer settings		Residential					
ship to address types		Vacation					
preset customer options							
customer required fields							

These types, once configured, become available for selection in POS under **Shipping Address** for a customer.

Configuring required fields for customer and contact forms

Making a field required for filling out on the Customer form in POS is possible under **chq** > **settings** > **customer** > **customer** required fields:

	inventory purch	asing sales	analytics services	settings
<	and the second	_		
titles search O	customer required field	S		
▶ security	edit			
 company settings 	field 🔺	required	convert entry	
 location settings 	address 1			
inventory / catalog	address 2			
∡ customer	address 3			
customer settings	address 4			
ship to address types	address 5			
preset customer options	birthday day			
customer required fields	birthday month			
customer quick add	birthday year			

Similarly, making a field required for a contact is possible under **chq** > **settings** > **customer** > **contact required fields**.

Configuring contact types

Creating and editing contact types is possible in CHQ under **settings** > **customer** > **contact type**:

		inventory	purchasing	sales	analytics	services	settings
titles search	<	contact type					
▶ security		new ed	lit				
 company settings 		name 🔺	list	order	archived		
 location settings 							
inventory / catalog							
✓ customer							
customer settings							
ship to address types							
preset customer options							
customer required fields							
customer quick add							
contact required fields							
contact type							
universal customer search							

The entries, once defined, become available for selection in POS on the Contact record.

Defining customer titles

Defining titles that will be available for selection for customers in POS is possible under **chq** > **settings** > **customer** > **titles**:

	inventory purchasing sales analytics services settings
search O	titles
 security 	new edit
 company settings 	title 🔺
 location settings 	
 inventory / catalog 	Dr
∡ customer	Miss
customer settings	Mr
ship to address types	Mrs
preset customer options	Ms
customer required fields	Prof
customer quick add	
contact required fields	
contact type	
universal customer search	
device customer info	
titles	
▶ custom fields	

Configuring customer custom fields

Configuration of custom fields that display for Customer in POS is available under **chq** > **settings** > **customer** > **custom fields** > **customer**:

	inventory pu	urchasing sales analy	rtics services	settings	
search O	custom fields - custor	omer			
 inventory / catalog 	edit look				
∡ customer		label		, della la	list and as
customer settings	custom field 🔺	label	secure	visible	list order
ship to address types	custom date 1	Anniversary			0
preset customer options	custom date 2	DOB		~	1
customer required fields	custom date 3				0
customer quick add	custom date 4				0
contact required fields	custom date 5				0
contact type	custom date 6				0
universal customer search	custom decimal 1				0
device customer info	custom decimal 2				0
titles	custom decimal 3				0
a custom fields	custom decimal 4				0
customer	custom decimal 5				0
contact	custom decimal 6				0
contact	custom flag 1				0
➤ sales	custom flag 2				0
 order management 	custom flag 3				0
 drawer management 	custom flag 4				0
 purchasing 	custom flag 5				0
 transfers 	custom flag 6				0
▶ printing	custom lookup 1	Favorite Color		\checkmark	0
, 0					

Other customer-related settings at the company level

In CHQ at the company level, under **settings** > **customer** > **customer** settings, it is also possible to configure the following customer-related options:

1. In the **general** section:

- default country
- allow to add contacts to customer account

2. In the customer email verification section:

- check for blank email
- check for valid email format
- verify correct email and marketing opt in

Making customer required for all sales at a location

In CHQ, at the location level, it is possible to make a customer required for all sales.

To do so, go to settings > location settings > locations / location settings > (your location) > edit > sales. In the sales section select the require customer for all sales checkbox.

details	sales			taxes		
uetans	require customer for all sales:			use tax free integration:		
groups	require customer for returns:			use service for tax calculation:		
schedule	pass held receipts to CTS:			service tax area:		w.
custom	clear all held receipts after (mins):	120		use tax calculation service for:	receipt ship items	
1	prompt to print on hold:			sales orders		
general settings	require discount override code:			default sell from location:		-
sales	prevent negative discount:			default fill location:		-
price breaks	do not print store receipt when no					
	credit card:			email notifications - web and se	nd sales	
payments	enable official invoice printing:			sender email:	and an internal sector	
sales receipt tabs	require second login for open return			ship memos		
sales order tabs	(V5):	off 💌		use shipping service:	ShippyPro	•
	require second login for verified			service location name:	The state of the s	*
purchasing	return (V5):	off 👻		autamatically request return		
transfers	enable pay in store action:			label:		
a di ustra anta	acknowledgement for sales:	not required 📼		return service ship method:		Ŧ
aujustments	acknowledgement for returns:	not required 💌		return label destination locati	THE REAL PROPERTY.	-
SVS	shopping bag quick add:		select	rate shop group code:		
	cash drawer			require scan for item		
	* - required					

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

Settings for Editing Item Details

TWD-30485 Build 6.21.69.0

To respect changes in Teamwork POS PRO version 6, in particular introducing the capability to edit Item details on Sales Receipts, we have updated existing as well as added new settings in CHQ.

Security Rights

The following Security Rights are required to be able to edit item details on Sales Receipts in POS:

Area	Security Right	Description
Sales	Discount Authority Level 1	Allows user to use Authority Level 1 discount
Sales	Discount Authority Level 2	Allows user to use Authority Level 2 discount
Sales	Discount Authority Level 3	Allows user to use Authority Level 3 discount
Sales	Allow change discount	Allow changing default discount percent/amount in sales receipt and sales order
Sales	Sales - Change item offer price	Allows user to change item offer price on sales receipt and sales order
Sales Receipts	Change sales receipt price level	Change the price level for a customer on a sales receipt

Configuring discounting limits per user and role

Under **chq** > **settings** > **security** > **users**, for a particular user, in the POS tab, it is possible to configure discount limits.

user info	discounts
locations	override role discount limits:
IOCATIONS	authorization code required:
POS	max line discount %:
roles	max global discount %:
rights	commissions
custom	commissions group:

Also, the equivalent settings are available on the POS tab under chq > settings > security > roles > (selected role) > edit.

WARNING:

If at the **user level the override role discount limits** checkbox is selected, the role-level settings for discount limits are ignored.

- **authorization code required**: if the option is selected, entering an authorization code is required when giving manual discount in POS
- max line discount %: the maximum discount % that can be applied to a line item
- max global discount %: the maximum discount % that can be defined for a global discount

Updated discount reasons settings

We've removed the following two settings under chq > settings > sales > discount reasons > (selected discount reason) > edit:

- ecomm enabled
- external ID

The above two are no longer used in POS PRO version 6.

New settings

1. Under **chq** > **settings** > **sales** > **discount reasons**, when creating a new or editing existing discount reason, we've added the capability to specify the list order for that respective reason:

DISCOUNT50	USD			
general quick discount	prevent changing discount: default discount \$: max discount %: use discount as: coupon discount: permit combining with customer discount: cascade:	S50.00		
	promo exclude: start date: end date: authority level: auth code required:	<pre><mm a="" dd="" hh:mm="" yyyy=""> <mm a="" dd="" hh:mm="" yyyy=""> <mm a="" dd="" hh:mm="" yyyy=""> <none> not required</none></mm></mm></mm></pre>		
	ecomm enabled: external ID: list order: inactive: return discount reason: * - required	0		
			save	cancel

If there are multiple discount reasons with the same number indicated in the **list order** field, those reasons display in the alphabetical order.

2. Under chq > settings > company settings > V6 App Designer, we've added a new section – Item Details Panel – at the Sales Receipt level:

	inventory purchasing sales	analytics services settings		
titles search O	vб App Designer			
▹ security	search layouts Q			
✓ company settings		Item Details Panel		
company information	▲ Point of Sale v6	layout		available fields
 stored values services 	IPad	item description		search O
general settings	Home	description 1	description 2	lattr
countries / regions	 Customer 	Attr 1, Attr 2, Attr 3	Season	Alternate Classification
states / provinces	Customer Form	department	brand	Attr 1 (Alias 2)
postal codes	Search Results	PLU	Primary UPC	Attr 2 (Alias 2)
time zones	Customer Preview	Item Photo		Attr 3 (Alias 2)
currencies	Catalog			Attr 3 (Alias)
taxes	Search Results			attr3
phone labels	 Sales Receipt 			attribute 2
shinning methods	Held List			Charge Type
shinning sandras	History List			CLU
MAC addresses	Receipt Tabs			Color
MAC audiesses	Receipt Options			Date Available
• custom neus	Cart Descriptions			department Code
snopper display groups	Cart Columns			description 3
v4 App Designer	Customer Tab			Digital Asset
v6 App Designer	Customer on Payment Form			Discontinued
transaction acknowledgement	item Details Panel			EID
 location settings 	 Shipments 			Eligible for Discount
inventory / catalog	Incoming List			Final Sale
+ customer	Outgoing List			Height
→ sales	History List			idat1
order management				save cancel

In the section, it is possible to configure how the Item details display in POS PRO version 6:

alla		9:41 AM		
< Back		Classic Polo Shirt		Done
Location Company 8 31 View Availability		Classic Polo Shirt DESCRIPTION 1 Super Soft Supima Cotton	DESCRIPTION 2 Short Sleeve with Pocket	
Discounts		ATTR1, ATTR2, ATTR3 RED, MED	SEASON Spring 19	
Return	le m	DEPARTMENT MENS - SHIRT - CASUAL	Manufacturer ACME Cool Shirts	
Ship		PLU 12345	UPC 1234567890123	More
Fees				
Taxes Clearwater FL	Quantity		- $+$	1

NOTE:

There is no limit to how many fields can be added to the panel, even though the form becomes really long in POS PRO.

Configuring Open Returns

TWD-35710 Build 6.21.69.0

To respect changes in Teamwork POS PRO version 6, in particular, introducing the capability to create an Open Return on an item within a cart on a Sales Receipt, we have added new as well as updated existing settings in CHQ.

Security rights

The following Security Rights are required to make use of the Open Returns functionality in POS PRO V6:

Area	Security Right	Description
Sales	Sales - Chng. Tax Area	Allows the user to change Tax Area for Return
	for Returns	items on the Sales Receipt
Sales	Sales - Chng. Tax Ex.	Allows the user to change Tax Exempt flag for
	for ret.	return items on the sales receipt
Sales Receipts	Allow Returns	Allows the associate to accept merchandise
		returns, optionally limited by amount
Sales Receipts	Allow Return without	Allows the user to ignore the setting to require
	customer	customer for return
Sales Receipts	Sales Receipt -	Allows returns without an original sales receipt -
	Returns without	adds item to returns section directly without
	Receipt	requiring return information from customer
		history
Sales Receipts	Allow gift card return	Allows access to the gift card return option in
		the actions menu

Configuring sales and returns to be made in the same transaction

We have added a new setting – allow sales and returns to be made in the same transaction – under chq > settings > sales > sales documents in the returns section.

	inventory purchasing sales analytics services settings
all search O	sales documents
 security 	returns
company settings location settings	use custom returns service (disable universal returns): use open returns custom panel:
▸ inventory / catalog	auto transfer when returning from another location:
 customer sales 	days to make verified return (V5): no limit return worksheets - refund to: original card/virtual gift card
POS settings sales documents	return worksheets - auto process exchanges: return to sell location:
payment processing sales receipt tabs sales email ship items	enable bulk edit price feature: open return allow toggle tax (V5): 0.00 restrict to one credit card per sale: manual select payment method for change due before finalize: allow to make changes in sales receipt with payments:
sales pre-set notes	allow sales and returns to be made in the same transaction:

If the **allow sales and returns to be made in the same transaction** checkbox is selected, then making return with a sale item in the cart becomes possible.

Enabling fee refunds for Open Returns

It is possible to allow adding fees to the Total Return value for Open Returns in POS.

To do so, in CHQ, under settings > sales > fees > (selected fee) > edit, select the available on returns checkbox and click save:

alteration				
code:	alteration	*	prompt on payment:	\checkmark
description:	remake		require SO deposit:	not required 🔍
method:	price range 🔹 💌		deposit %:	
default \$:	€2.00		charity round factor:	0.00
default %:	0.00		return with item:	\checkmark
default qty:	1		available on returns:	\checkmark
line fee:	\checkmark		ignore tax exempt:	\checkmark
global fee:	\checkmark		ecomm enabled:	\checkmark
prompt:	auto-suggest 🔹		list order:	5
type:	alteration 💌		external ID:	9966
tax category:	Basic Retail Tax Group 💌		inactive:	
* - required				
				save cancel

Configuring required fields for Open Return

It is possible to configure what fields are required for Open Returns in POS.

To do so, under chq > settings > sales > open return required fields select the required field and click edit:

		inventory	purchasing sales	analytics	services	settings
all search	*	open return requ	ired fields			
price / cost code price change reasons	^	edit				
hold reasons		field 🔺	required			
discount reasons		associate				
default line discounts		location				
tax exempt reasons		receipt #				
fees		receipt date				
membership levels						
commission groups						
open return required fields						
 custom fields 						
sales receipt timer						
QR code pay logos						

In the dialog that opens, select the **required** checkbox and click **save**.

Configuring return reasons available for Open Return

It is possible to configure what return reasons are available for Open Return in POS.

To do so, go to **chq** > **settings** > **sales** > **return reasons**:

	<				
titles search	2	return rea	isons		search
location settings		new	edit visil	bility	
inventory / catalog		code 🔺	description	auto transfer to location	list order
customer		broken			0
sales		DAMAGE			0
POS settings		test	test 1		5
sales documents		VH			0
payment processing					
sales receipt tabs					
sales email					
ship items					
sales pre-set notes					
return conditions					
return reasons					
payment methods					

- To add a return reason to the field, click **new**
- To edit an existing return reason, select the required entry and click edit
- To configure return reason availability at a certain location, select the required reason and click **visibility**. Then, in the dialog that opens, select the required location and click **save**.

Settings for DENSO UR-22 RFID Reader

TWD-35580 Build 6.21.83.0

To respect changes in Teamwork POS Pro version 6, in particular, introducing integration with DENSO UR-22 RFID Reader, we have added new settings in CHQ.

The settings are provided in the **DENSO RFID** section that is available in CHQ under **settings** > **company settings** > **general settings**:

	inventory purchasing sales analytics services settings
titles search O	general settings
▶ security	support prioriter
✓ company settings	support email: support@teamworkretail.com
company information	support text: For assistance, call the phone number below or use the support email to submit a ticket for help.
 stored values services 	
general settings	
countries / regions	email validation
states / provinces	enable fresh address validation:
postal codes	device
time zones	
currencies	app font size: large (default)
▶ taxes	DENSO RFID
phone labels	RFID connection timeout (v6): 15
shipping methods	# of reads for successful RFID scan (v6): 3
shipping services	interval time for the next read (v6): 1000 (milliseconds)
MAC addresses	ignore EPC's from previous sale:
▶ custom fields	EAS
shopper display groups	EAS business code (V5):

• **RFID connection timeout** (v6): indicates the period of time in seconds for the RFID reader to provide a response. Once the period expires, if the connection cannot be established, the user receives the warning message. By default, on a new installation, the timeout is set to 15 seconds.

- **# of reads for successful RFID scan** (v6): defines the number of automatic scans needed to make sure the item is scanned correctly before adding that to the cart. By default, on a new installation, set to "3".
- **interval time for the next read** (v6): indicates the time interval between each of the above reads, in milliseconds. By default, on a new installation, set to "1000".
- **ignore EPC's from previous sale**: if the checkbox is selected, the system prevents accidental repeat reads of items from the previous finalized transaction. The checkbox is cleared by default.

NOTE:

Please be advised that you cannot indicate zero, decimal, non-numeric, and negative values in this section.

Configuring Drawer Memo settings

TWD-28184 Build 6.21.83.0

To respect the changes related to embedding the Drawer memo app in POS, we have added new drawer memo settings as well as updated existing in CHQ.

New Security rights

As a part of this update, we have added the following new security rights:

Security Right	Area	Description
Void Take (Paid) Out / In	Drawer Memos	Allows for voiding a take (paid) out / in record
Edit completed start of day	Drawer Memos	Allows a user to edit start of day information after it has been completed

Drawer management settings

We have updated the settings in the **drawer memo** section under **chq** > **settings** > **drawer management** > **drawer memo settings**:

	inventory purchasing sales analytics services settings
all search O	drawer memo settings
▶ security	drawer memo
 company settings 	require re-login when minimize the application:
 location settings 	require notes start and end of day with over/short/discrepancy
inventory / catalog	use denomination plans for cash drawers & safes:
▶ customer	denomination entry on drawer memo: required v
▶ sales	pos
▶ order management	warn if not enough funds in cash drawer to give change:
d desure and agenteric	cash drawer - cash drop warning threshold: €200.00
 Grawer management 	cash drawer - cash drop required threshold: 6300.00
drawer memo settings	safe - cash deposit warning threshold: €400.00
drawer memo pre-set notes	safe - cash deposit required threshold: €500.00

- require notes on start and end of day with over/short/discrepancy: if the option is selected and there is an over/short difference during the End of Day, then End of Day notes are required; alternatively, if the option is selected and there is an opening difference between plan and count, the Start of Day notes are required.
- use denomination plans for cash drawers & safes: if the option is selected, the denomination plans display during Start or End of Day for Drawer Memos
- **denomination entry on drawer memo**: this is a dropdown menu where you can select how to use denominations
 - **not used**: if the option is selected, denomination counting is not possible on Drawer Memo both for cash drawer and safe during Start and End of Day
 - **optional:** if the option is selected, during Start and End of Day of the Drawer Memo, the user can choose if they want to count denominations or not
 - **required**: if the option is selected, the denomination counting is required during Start and End of Day.

NOTE:

Please note that if the **use denomination plans for cash drawers & safes** option is selected, then denomination entry on the drawer memo is set to required automatically and cannot be changed by the user.

Also, as a part of this update, we've added a new **pos** section to the **drawer memo** settings area. The section contains the following two settings that have already been present in CHQ:

- warn if not enough funds in cash drawer to give change
- cash drawer cash drop warning threshold

Drawer memo location level settings

A new drawer memo section has been added to CHQ under settings > location settings > locations / location settings > (selected location) > edit > general settings:

TEST - Testing Lo	ocation					
details	general					^
groups	device histor	y purge limit:	0			
schedule	enable camera bar POS item	description:	store description	-		
custom	loyalty program on a	accounts tab:	LRP 1	*		
general settings	preset cust	omer option:		*		_
sales	drawer memo	cause in POS:	20			
price breaks	business d	ay start time:	12:00 AM	O		
payments	d	rawer expire:	\checkmark			
sales receipt tabs	require verification login for star	t/end of day:				
sales order tabs	end of day excess ca	ash handling:	deposit	*		
purchasing	transaction login					
transfers	sale documents:	prompt for c	ashier	*		
adjustments	purchase documents:	prompt for a	ssociate	•		
SVS	transfer documents: appointment edit:	prompt for a	issociate	*		
	sales auto logout					
					-	×
					save	cancel

In the section, the following can be configured:

• days of drawer memo history to save in POS: indicate the required number of days during which Drawer Memos are kept once finalized and synchronized with CHQ; by default, is set to "30".

NOTE:

Any <u>finalized</u> Drawer Memo that is older than the indicated number of days will be purged from the POS database. <u>Non-finalized</u> Drawer Memos are kept indefinitely. <u>Finalized but non-</u> <u>synchronized</u> Drawer Memos are kept indefinitely but once synchronized to CHQ, they can be purged based on the above setting.

• **business day start time**: indicate the time when the business day starts; by default this is set to 12:00 AM

• **drawer expire:** select the option to set the drawer automatically to the "inactive" status at the end of the business day

WARNING:

Once in the "inactive" status, the drawer memo cannot be re-activated.

• require verification login for start/end of day: select the option to require a second user to login in order to verify the counts/totals when performing Start or End of Day

NOTE:

For information on the **require confirmation of deposit to bank** and **end of day excess cash handling** settings, see the **Bank deposit confirmation and end-of-day cash handling** article of this guide.

Enabling safe management for POS

We've added a new setting safe management under chq > services > device controller > (selected device name) > general:

reperal	location:	TEST - Te	sting Location		application:	Teamwork POS - 6.0	
Serierai	device name:	iOS	Lpad		installed version:	6.21	
direct printers	alias:				drawer station:	TEST 1	
pin pads	device type:	iPad			update scheduled on:	<mm dd="" yyyy=""></mm>	
estricted	device hub IP:				collect network stats:		
payments	printer port:			*	change SVS au	uthorization token 🕨 generate	
nfo	scales port:			*	safe management:		
	deactivated:	no		Ŧ			

Selecting the checkbox enables safe management capabilities for the respective device.

Cash drop and safe cash deposit management

TWD-33203 Build 6.21.83.0

We have added new settings to respect the new features in POS PRO related to how clients can manage cash from drawers to safe as well as record bank deposits.

The above may be helpful, for example, during the holiday season, when increased sales are expected. With the increased sales, one needs to know when a drawer needs a cash-pick and also record the money being taken out of the drawer and put into the safe.

New security rights

The following new security rights have been added:

Security Right	Area	Description
Add/Edit a deposit	Drawer Memos	User may create or edit a deposit record. Does not apply to EOD deposit creation.
Void a deposit record	Drawer Memos	User may void a deposit record
Add/edit a cash movement	Drawer Memos	User may create or edit a cash movement. Does not apply to EOD cash movement
Void a cash movement	Drawer Memos	User may void a cash movement record
Verify a cash deposit record	Drawer Memos	User may verify a cash deposit record
Bypass required cash drop	Sales Receipts	User may proceed to make a sale without making a required cash drop from cash drawer or safe

Cash drop and safe cash deposit thresholds

The following new settings have been added under **chq** > **settings** > **drawer management** > **drawer memo settings** in the **pos** section:

	inventory purchasing sales analytics services settings
all search O	drawer memo settings
 security 	drawer memo
 company settings 	require re-login when minimize the application:
 location settings 	require notes start and end of day with over/short/discrepancy
inventory / catalog	use denomination plans for cash drawers & safes:
▶ customer	denomination entry on drawer memo: required
▶ sales	pos
 order management 	warn if not enough funds in cash drawer to give change:
 drawer management 	cash drawer - cash drop warning threshold: €200.00
drawer memo settings	cash arawer - cash denosit warning threshold:
drawer memo pre-set notes	safe - cash deposit required threshold: €500.00
cash management reasons	

- cash drawer cash drop required threshold: before the new sale begins, if the cash drawer amount is above the defined amount, the system prompts that a cash drop is required
- **safe cash deposit warning threshold**: before the new sale begins, if the safe is above the defined amount, the system warns to make a deposit
- **safe cash deposit required threshold**: before the new sale begins, if the safe is above the required amount, the system prompts that a deposit is required

WARNING:

If any of the values of any of the above settings equals "0", that setting is ignored.

The equivalent settings have been added at the location level under settings > location settings > location settings > (selected location) > edit > sales:

TEST - Testing Lo	ocation				
details	require second login for verified return (V5):	off 💌	service location name:	Testing Location	*
groups schedule	enable pay in store action: acknowledgement for sales:	not required 🔻	automatically request return label: return service ship method:		•
custom general settings	shopping bag quick add:	select	return label destination locati rate shop group code:	TEST - Testing Locat 🤜	
sales	cash drawer always open cash drawer:		require scan for item verification:		
price breaks payments	require cash drawer close: use location based cash drop:				
sales receipt tabs	cash drawer - cash drop warning t cash drawer - cash drop required t	€0.00 €0.00			
sales order tabs purchasing	safe - cash deposit warning thresh safe - cash deposit required thresh	€0.00 €0.00			
transfers	membership prompt to sell membership:				
adjustments SVS	prompt to membership renewal: days till renewal prompt:				
	allow membership discount: * - required	\checkmark			~
				save car	ncel

The settings are applied if the **use location based cash drop** checkbox is selected.

WARNING:

Please note that location-level settings override company-level settings.

Bank deposit confirmation and end-of-day cash handling

As a part of safe management capability, two new settings have been added to the **drawer memo** section under **settings** > **location settings** > **locations / location settings** > (**selected location**) > **edit** > **general settings**:

TEST - Testing Lo	ocation					
details	general					^
occans	device histor	y purge limit:	0			
groups	enable camera bar	code reader:	\checkmark			
schedule	POS item	description:	store description			
custom	loyalty program on a	accounts tab:	LRP 1	*		
general settings	preset cust	omer option:		*		
88-	drawer memo					
sales	days of drawer memo history to	save in POS:	30			
price breaks	business d	ay start time:	12:00 AM			
payments	d	rawer expire:	\checkmark	and the		
sales receipt tabs	require verification login for star	t/end of day:				
sales order tabs	require confirmation of dep	osit to bank:				
Sales of del tabs	end of day excess ca	ash handling:	deposit	*		
purchasing	transaction login					
transfers	sale documents:	prompt for c	ashier	*		
adjustments	purchase documents:	prompt for a	issociate	•		
svs	transfer documents:	prompt for a	issociate	*		
	appointment edit:	prompt for a	ssociate	▼		
	sales auto logout					~
					-	1023
					save	cancel

• require confirmation of deposit to bank: if the option is selected, the user is required to confirm that a deposit was taken and deposited in the bank.

In this case, the deposit may be taken out of the safe, but is still shown as money in the safe until the deposit is confirmed. Once confirmed, money is not included as a part of a safe total.

If the checkbox is cleared, then a deposit made is immediately removed and never shown as a part of a safe total.

- end of day excess cash handling: allows the user to specify how to handle the excess cash at the End of Day (EOD). The user can choose one of the following:
 - **deposit:** excess cash will be a deposit
 - move to safe: excess cash will be handled as a "move to safe" cash movement record
 - **prompt**: allows the user to choose manually from the two options listed above during EOD

New types for cash management reasons

We have renamed the **take (paid) out / in** section to **cash management reasons**. This area is available in CHQ under **settings** > **drawer management**:

	invento	ory purchasin	g sales	analytics	services	settings
all search O	cash manag	gement reasons				
* security		-				
 company settings 	defaults					
 location settings 		float balance take (p	aid) in (v5): tak	ein test		
 inventory / catalog 		float balance take (pai	d) out (v5): Dŋ eposit (v5): tes	y cleaning tReason		
▶ customer	cach managam					
▶ sales	Cash managen	ient reasons				
 order management 	new	edit				
 drawer management 	code 🔺	description	type			
drawer memo settings	1		no sale			
drawer memo pre-set notes	11		no sale			
cash management reasons	111		no sale			
denomination plans	DryClean	Dry cleaning	take (paid)	out		

We have also added new types that are available for selection when configuring a cash management reason:

- **Deposit**: indicates that cash is put on deposit
- Move to Safe: indicates that cash is removed from the drawer and put in the safe
- Move to Drawer: indicates that cash is removed from the safe and put in the drawer.

WARNING:

Please be advised that it is not possible to create a new reason with one of the above types and "SOD" or "EOD" specified as a code.

Also, you cannot specify "Start of Day" and "End of Day" as descriptions for reasons of any of the above types.

Configuring Offline Credit Card payment

TWD-33309 Build 6.21.83.0

To respect the changes in Teamwork POS PRO V6, in particular, implementation of the Offline Credit Card payment method, we have updated existing and added new settings in CHQ.

These settings are available at the company and location levels in CHQ.

NOTE:

Please be advised that the Offline Credit Card payment method is not available in POS V4.

Configuring company-level settings

At the company level, you can configure the Offline Credit Card payment settings under chq > settings > sales > payment methods. In the area, click to select Offline Credit Card and click edit:

general		
payment type:	credit card	
code:	Offline Credit Card	*
description:		
require customer:		
open cash drawer on finalize:		
refund on cancel in Teamwork:		
list order:	0	
external ID:		
inactive:		
maximum		
maximum amount allowed:	€0.00	
over-tender		
allow for positive amount:	\checkmark	
max positive over-tender \$:	€0.00	
max positive over-tender %:	50.00	
returns manager		
refund to:		¥
- required		

- payment type: the name of the payment method
- **code**: the payment method in POS
- description: an optional description of the payment method

- **require customer**: if the checkbox is selected, then the customer must be added to the sale
- **open cash drawer on finalize**: if the checkbox is selected, the cash drawer opens automatically on finalizing the transaction
- list order: the position of the payment method in the payment method list in POS
- inactive: if the checkbox is selected, then this payment method becomes inactive in POS
- **maximum amount allowed**: the maximum amount allowed for this payment method. If the amount of the sale is greater than the indicated value, then the warning displays in POS
- allow for positive amount: if the checkbox is selected, then the customer can pay more than the amount of the purchase based on the values indicated in the max positive over-tender \$ or max positive over-tender % fields

WARNING:

Please be advised that for offline payments the **disable integrated processing** checkbox must be selected at the location level for the respective payment method. To do so, go to **chq** > **settings** > **sales** > **payment methods** > (**selected payment method**) > **location settings** > (**selected location**) > **edit**.

Configuring location-level settings

You can configure the Offline Credit Card payment method for a specific location under chq > settings > sales > payment methods. In the area, click to select Offline Credit Card > location settings. Then click to select your location and click edit:

visible:	\checkmark
suggested amt. when positive:	
disable integrated processing:	
require type for offline:	
require last 4 for offline:	
require authorization code for offline:	
signature capture:	\checkmark
require signature capture:	
display payment line custom fields:	
list order:	0
* - required	

You can configure the following fields in the dialog:

• visible: if the checkbox is selected, then the payment method is available at this location

- **suggested amt. when positive**: if the checkbox is selected, then the amount of the sale is auto-suggested and displays as **Payment Due** in POS. Alternatively, if the checkbox is cleared, then the amount of the sale equals zero and the user will have to enter the amount manually
- **disable integrated processing**: if the checkbox is selected, then the payment is considered to take place offline
- **require type for offline**: if the checkbox is selected, specifying the card type is required once this payment method is selected in POS
- require last 4 for offline: if the checkbox is selected, then the last for digits of the customer's credit card number must be indicated once this payment method is selected in POS
- **require authorization code for offline**: if the checkbox is selected, then specifying the authorization code is required once this payment method is selected in POS
- **signature capture**: if the checkbox is selected, then capturing the customer's signature becomes possible
- require signature capture: if the checkbox is selected, then the customer's signature is required for this payment method; the option is hidden if the signature capture checkbox is cleared
- **display payment line custom fields**: if the checkbox is selected, then custom fields display on selecting the payment method in POS
- list order: the position of the payment method in the payment method list in POS. This
 list order applies for this location if use location based payment options is selected for
 this respective location in CHQ under settings > location settings > locations/location
 settings > (your location) > edit > payments

WARNING:

Note that location-level settings override company-level settings.

Please be advised that if **disable integrated processing** is cleared, then the following fields are hidden:

- require type for offline
- require last 4 for offline
- require authorization code for offline
- require signature capture

cura	visible:		
disa	ble integrated processing:		
	payment processing:	<none></none>	
	list order:	0	
* - required			

Configuring Offline Credit Card Credit payment

TWD-33310 Build 6.21.83.0

To respect the changes in Teamwork POS PRO V6, in particular, implementation of the Offline Credit Card Credit payment method, we've updated existing and added new settings in CHQ. These settings are available at the company and location levels.

NOTE:

Please be advised that the Offline Credit Card Credit payment method is not available in POS V4.

Configuring company-level settings

You can configure the Offline Credit Card Credit settings in CHQ under **settings** > **sales** > **payment methods.** Then, click to select **Offline Credit Card Credit** and click **edit**:

general	
payment type:	credit card credit
code:	Offline Credit Card Credit
description:	
require customer:	
open cash drawer on finalize:	
list order:	0
external ID:	
inactive:	
over-tender	
allow for negative amount:	
max negative over-tender \$:	€0.00
max negative over-tender %:	0.00
eturns manager	
refund to:	
required	

- payment type: the name of the payment method
- code: the payment method in POS
- description: an optional description of the payment method
- **require customer**: if the checkbox is selected, then the customer must be added to the sale
- **open cash drawer on finalize**: if the checkbox is selected, the cash drawer opens automatically on finalizing the transaction
- list order: the position of the payment method in the payment method list in POS
- inactive: if the checkbox is selected, then this payment method becomes inactive in POS
- allow for negative amount: if the checkbox is selected, then the customer can pay more than the amount of the purchase based on the values indicated in the max negative over-tender \$ or max negative over-tender % fields

WARNING:

Please be advised that for offline payments the **disable integrated processing** checkbox must be selected at the location level for the respective payment method. To do so, go to **chq** > **settings** > **sales** > **payment methods** > (**selected payment method**) > **location settings** > (**selected location**) > **edit**.

Configuring location-level settings

To configure the Offline Credit Card Credit payment method settings for a specific location, go to chq > settings > sales > payment methods. In the payment methods area, select Offline Credit Card Credit and then click location settings above the grid. After that, select the required location and click edit:

Offline Credit Card Credit - TE	ST - Testing Location
visible: suggested amt. when negative: disable integrated processing: <u>require type for offline:</u> <u>require last 4 for offline:</u> require authorization code for offline: signature capture: require signature capture:	
list order: * - required	0
	save cancel

- visible: if the checkbox is selected, then the payment type is available at this location
- **suggested amt. when negative**: if the checkbox is selected, then the amount of sale is auto-suggested and displays as **Change Due** in POS
- **disable integrated processing**: if the checkbox is selected, then the payment is considered to take place offline
- **require type for offline**: if the checkbox is selected, specifying the card type is required once this payment method is selected in POS
- **require last 4 for offline**: if the checkbox is selected, then the last for digits of the customer's credit card number must be indicated once this payment method is selected in POS
- **require authorization code for offline**: if the checkbox is selected, then specifying the authorization code is required once this payment method is selected in POS
- list order: the position of the payment method in the payment method list in POS. This
 list order applies for this location if use location based payment options is selected for
 this respective location in CHQ under settings > location settings > locations/location
 settings > (your location) > edit > payments

WARNING:

Note that location-level settings override company-level settings.

Updated logic for inventory labels display

TWD-35166 Build 6.21.99.0

With this update, if the default label is specified for the inventory label in CHQ under **settings** > **inventory/catalog** > **inventory labels** or the respective field remains empty, on clicking **save**, the empty value is saved. In that case, in CHQ, the corresponding fields will take their default names for that specific locale.

Configuring settings for payments on Sales Receipt

TWD-32268 Build 6.21.83.0

To respect changes in Teamwork POS PRO version 6, in particular, introducing payments on Sales Receipts, we have added new as well as updated existing settings in CHQ.

New setting: configuring how customer displays on the Payment screen

In CHQ, we have added the capability to configure how customer-related information displays on the Payment screen in POS PRO version 6.

Customer on Payments in POS PRO version 6:

** 941M ale Discard Payment Print Options AME Accounts Accounts Image: Credit Card Image: Credit Card ale Total: 3 Item(s) \$289.45 Image: Credit Card Image: Credit Card<			
< Sale Discard	Payment		Print Options
Ron ATTRIBUTE 1 CREDIT LIMIT Brand A \$1,000,000.01	Accounts	Cash	On file Credit Card
Sale Total: 3 Item(s)	\$289.45	on file	
Payments Taken	le Discard Payment ME n Accounts TREUTE 1 CREDIT LIMIT and A \$1,000,000.01 le Total: 3 Item(s) \$289.45 yments Taken \$0.00 Payment Due \$289.45	Gift Card	Offline Credit Card
Payment Due \$289.45	Accounts Service Credit Card Service Credit Card Service Credit Memo Service Credit Service Credit		
·		EMAIL rsparks@teamworkcom Print Printer 1	Gift Receipt
		ounts Image: Cash Image: Credit Card 89.45 Image: Cash Image: Credit Card 60.00 Image: Credit Card Image: Credit Card Image: Credit Memo Image: Credit Card Image: Credit Card Image: Credit Memo Image: Credit Card Image: Credit Card Image: Credit Memo Image: Credit Card Image: Credit Card Image: Credit Memo Image: Credit Card Image: Credit Card Image: Credit Memo Image: Credit Card Image: Credit Card Image: Credit Memo Image: Credit Card Image: Credit Card Image: Credit Memo Image: Credit Card Image: Credit Card Image: Credit Memo Image: Credit Card Image: Credit Card Image: Credit Memo Image: Credit Card Image: Credit Card Image: Credit Memo Image: Credit Card Image: Credit Card Image: Credit Memo Image: Credit Card Image: Credit Card Image: Credit Memo Image: Credit Card Image: Credit Card Image: Credit Memo Image: Credit Card Image: Credit Card Image: Credit Memo Image: Credit Card Image: Credit Card Image: Cred	

The configuration is available under chq > settings > company settings > v6 App Designer > Point of Sale v6 > iPad > Sales Receipt > Customer on Payment Form:

	4				
all search	🔎 v6 App Designer				
i	^				
 company settings 	search layouts O	Customer on Payment Form		rest	ore defau
company information	▲ Point of Sale v6	lavout	add group	available fields	
 stored values services 	▲ iPad	networkers 12		1	
general settings	Home			search	
countries / regions	▶ Customer			Anniversary	í í
states / provinces				Birthday	
postal codes	P Catalog			Company	
time zones	 Sales Receipt 			Custom Date 1	
currencies	Held List			Custom Date 2	
- keine	History List			Custom Date 3	
 LdXes 	Receipt Tabs			Custom Date 4	
phone labels	Receipt Options			Custom Date 5	
shipping methods	Item Options			Custom Date 6	
shipping services	Cart Descriptions			Custom Decimal 1	
MAC addresses	Cart Columns			Custom Decimal 2	
 custom fields 	Customer Tab			Custom Decimal 3	
shopper display groups	Customer on Payment Form			Custom Decimal 4	
ud Ann Decimer	Item Details Panel				

Please be advised that if no fields are added to the Payment Form in CHQ designer, no customer-related information will display on Payment in POS.

Configuring transaction acknowledgement for Sales Receipt

In CHQ, it is possible to configure how transactions are acknowledged in POS PRO version 6.

These settings are available under chq > settings > location settings > locations / location settings > (selected location) > edit on the sales tab:

	sales			taxes		
details	require customer for all sales:	\checkmark		use tax free integration:		
groups	require customer for returns:			use service for tax calculation:		
schedule	pass held receipts to CTS:			service tax area:		
custom	clear all held receipts after (mins):	120		use tax calculation service for:	receipt ship items 👻	
	prompt to print on hold:			sales orders		
general settings	require discount override code:			default sell from location:		7
sales	prevent negative discount:			default fill location:		ā.
price breaks	do not print store receipt when no			email notifications - web and se	nd sales	
payments	credit card: enable official invoice printing:			sender email:		
sales receipt tabs	require second login for open			ship memos		
sales order tabs	return (V5):	off 👻		use shipping service:	ShippyPro -	
sales of der tabs	require second login for verified			service location name:	Testing Location	*
purchasing	return (V5):	off 💌		automatically request return		
transfers	enable pay in store action:			label:		
adjustments	acknowledgement for sales:	not required 💌		return service ship method:	-	Ē
aujustments	acknowledgement for returns:	not required 👻		return label destination locati	TEST - Testing Locat 🔻	
SVS	shopping bag quick add:		select	rate shop group code:		
	cash drawer			require scan for item		
	* - required					

- **acknowledgement for sales**: defines if the customer's signature and/or manager's confirmation are required to perform sales
- **acknowledgement for returns**: defines if the customer's signature and/or manager's confirmation are required to perform returns

For both the fields, you can choose one of the following:

- "not required": no acknowledgement is required
- "required with signature": makes the customer's signature required to finalize the transaction
- "required with manager override": makes the manager override required to finalize the transaction
- "required with signature and manager override": both the customer's signature and manager override are required to finalize the transaction

NOTE:

If a receipt contains both sale and return items, then the acknowledgement may be required twice.

WARNING:

To be able to perform overrides, the manager must be granted the "Allowed to acknowledge transaction" security right in CHQ.

Configuring the cash drawer settings

In CHQ, it is possible to configure how the cash drawer behaves during sales transactions. In particular, you can specify if the cash drawer:

- will open for all transactions (A in the screenshot below)
- must be closed before starting a new sale (B)

WARNING:

If a user is granted the "Continue without drawer close" security right, they can move on to the next sale despite **require cash drawer close** is selected.

Also, you can allow using location based cash drops (**C**) as well as set thresholds for cash drops and cash deposits (**D** and **E** in the screenshot below). In the latter case, if the sum available in the cash drawer (safe) exceeds the limit, you will be prompted to make a cash drop (cash deposit) before a new sale begins.

The respective settings are available under chq > settings > location settings > locations / location settings > (selected location) > edit on the sales tab:

	11			8.8 . W	11.0	
details	require second login for verified			service location name:	Testing Location	
	return (VS):	off +		automatically request return		
groups	enable pay in store action:			label:		
chedule	acknowledgement for sales:	not required 📼		return service shin method	-	*
	acknowledgement for returns:	not required 👻		ratura label destination locati	TEST Testing Locat	
custom	shopping bag quick add:		select	return laber destination locati	TEST - Testing Locat	-
general settings	cash drawer			rate shop group code:		
ales	A always open cash drawer:			verification:		
orice breaks	require cash drawer close:					
	use location based cash drop:					
ayments	cash drawer - cash drop warning t	\$0.00				
ales receipt tabs	cash drawer - cash drop required t	\$0.00	1	D		
sales order tabs	safe - cash deposit warning thresh	\$0.00				
purchasing	safe - cash deposit required thresh	\$0.00				

Configuring payments

In CHQ under settings > location settings > locations/location settings > (selected location) > edit > payments, it is possible to configure the following:

- **use location based payment options**: if the checkbox is selected, the payments displayed in POS come from location-level settings
- warn when cash payment amount exceeds: if the amount of cash payment is above the amount defined in this field, the system shows the warning message
- warning message: the text of the message that displays to warn about the exceeding cash payment amount

TEST - Testing Lo	ocation				
details	payments		credit card - voice authorization		^
groups	prompt to use available store credit: payment processing in test mode		phone: message:	_	
schedule	(not used for cayan): use location based payment options:	\checkmark			
general settings	restrict to one credit card per sale:		payment processing - p	payworks	
sales	exceeds:	\$0.00	merchant ID: merchant key:		
price breaks	warning message:		payment processing - r	moneris	
payments			type:	eSelect	
sales receipt tabs	delay in SCO before proceed after RFID read (milliseconds):	1000	store ID: API token:		

Other enhancements

New JSON-based Traffic Counter Export API

TWD-36120 Build 6.21.58.0

We've added a new JSON-based Traffic Counter Export API. The API allows for exporting the information on the number of visitors per location to a third-party system.

Updated JSON-based Inventory Price Import API

TWD-30837 Build 6.21.69.0

We have updated the JSON-based Inventory Price Import API by adding the following parameters to the request settings as well as line item level:

- EffectiveDate: defines when the new price comes into effect
- Reverse: defines if the new price is to be reversed or not
- ReverseDate: defines when the new price is to be reversed

Updated JSON-based Sales Receipt Import API

TWD-36172 Build 6.21.99.0

We've updated the existing JSON-based Sales Receipt Import API to conform with changes in Sales Engine.

In particular, this Sales Receipt Import API has been enhanced to properly import the MembershipCode, TaxExempt, WholesaleCustomer, SellToTradingPartner, and ReceiptNum values.

Updated validation for JSON-based Traffic Counter Import API

DS-1167 Build 6.21.99.0

We've added a new validation to the JSON-based Traffic Counter Import API.

Now, in the case of asynchronous requests, if there are location-date pair duplicates, the import doesn't take place and the following warning message displays: "There are duplicates in import document for DateTime <M/D/YYYY HH:MM:SS tt> and Location <location code>".

Issue Resolution: Sales Receipt cannot be posted to database

DS-1235 Build 6.21.99.0

Prior to version 6.21.99.0, as a result of completion of the following steps, Sales Receipts failed to be posted to the database:

- 1. Registering a new device for Teamwork POS 6.0 at a certain location in CHQ.
- 2. Installing on that device and then initializing the POS Pro version 6 app.
- 3. Finalizing a couple of Sales Receipts.
- 4. Deleting the POS Pro app from that device and updating the device record in CHQ.
- 5. Reinstalling POS Pro version 6 afresh and initializing it again.
- 6. Creating and finalizing another Sales Receipt in POS.

In that case, Sales Receipt from step **6** would not be posted to the database. Instead, an error message would display saying that posting cannot be performed due to Device Transaction Number duplication.

For Sales Receipt to be posted, it is required to use CHQ version 6.21.99.0 in conjunction with Cloud Service HQ 6.21.47.0 and POS Pro 6.21.210 or newer.

Enhanced JSON-based Inventory Price Import API

DS-1255 Build 6.21.107.0

We've enhanced JSON-based Inventory Price Import API to allow for importing multiple prices without the end date via a single request.

Issue Resolution: Calculate ATS won't work for Transfer Orders

DS-705 Build 6.21.111.0

Upon clicking the **calculate ATS** button on the **items** tab of a newly created **transfer order**, it would take up to several minutes to update the ATS quantities.

The issue has been fixed. Now, on clicking **calculate ATS**, it generally takes less than twenty seconds to update values in the **ATS** and **ATS short** columns.

WARNING:

Please note that the time required to update the values may vary depending on the number of items added.

JSON-based Sales Receipt Full Export API won't work due to incorrect column name

DS-1257 Build 6.21.111.0

We've fixed the issues that resulted from the Sales Receipt structure optimization at the database level and prevented JSON-based Sales Receipt Full Export API from functioning properly.

Epilogue

This guide was published on November 3, 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: support@teamworkcommerce.com.

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.