CHQ RELEASE GUIDE

Version 6.16

Build 6.16.78.0

Build 6.16.206.0

Build 6.16.210.0

Table of Contents

Inventory

Calculation corrected for the available for backorder and next date available values

TWD-35139
Build 6.16.206.0

We've corrected the calculation and display of the **available for backorder** and **next date available** values under **chq** > **settings** > **inventory** > **styles & items** > **(your item)** > **check qty**.

Sales

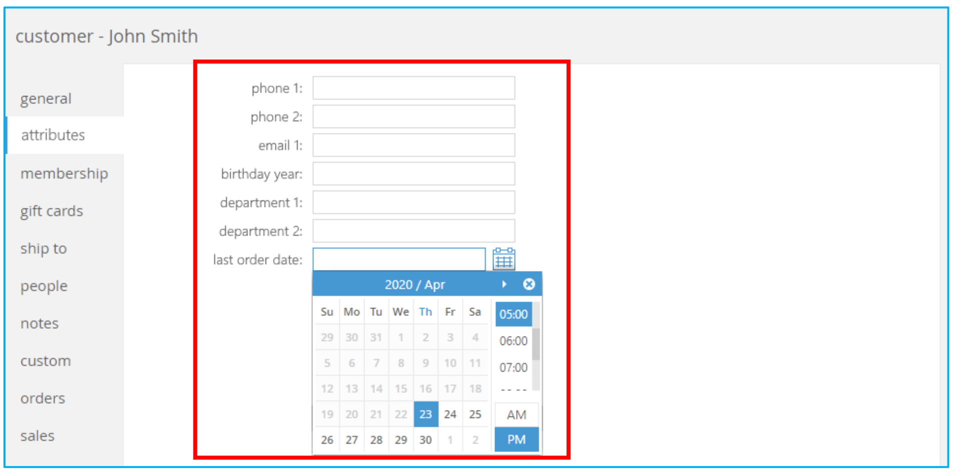
Customer attributes

TWD-30033
Build 6.16.78.0

We've introduced the capability to add attributes to customer records in CHQ.

Firstly, an attribute must be created under **chq** > **settings** > **customer** > **custom fields** > **customer attributes** > **new.**

Once created, that attribute becomes available in a new **attributes** tab under **chq** > **sales** > **customers** > (**select your customer**) or **new**. For example:

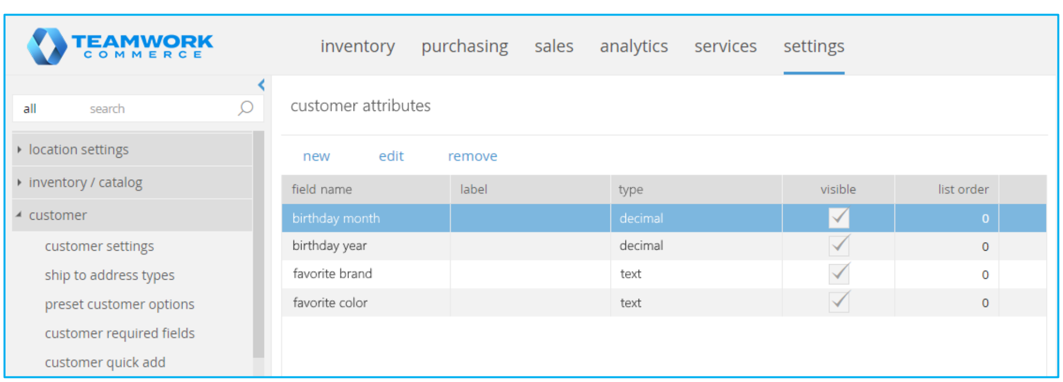


NOTE: Required Security Rights

To manage customer attributes, you must be granted the **Edit Customer Attributes** security right.

Configuring customer attributes

Customer attribute configuration is available under **chq** > **settings** > **customer** > **custom fields** > **customer attributes**:



In the **customer attributes** area, it is possible to:

- create new
- edit
- remove existing customer attributes

NOTE:

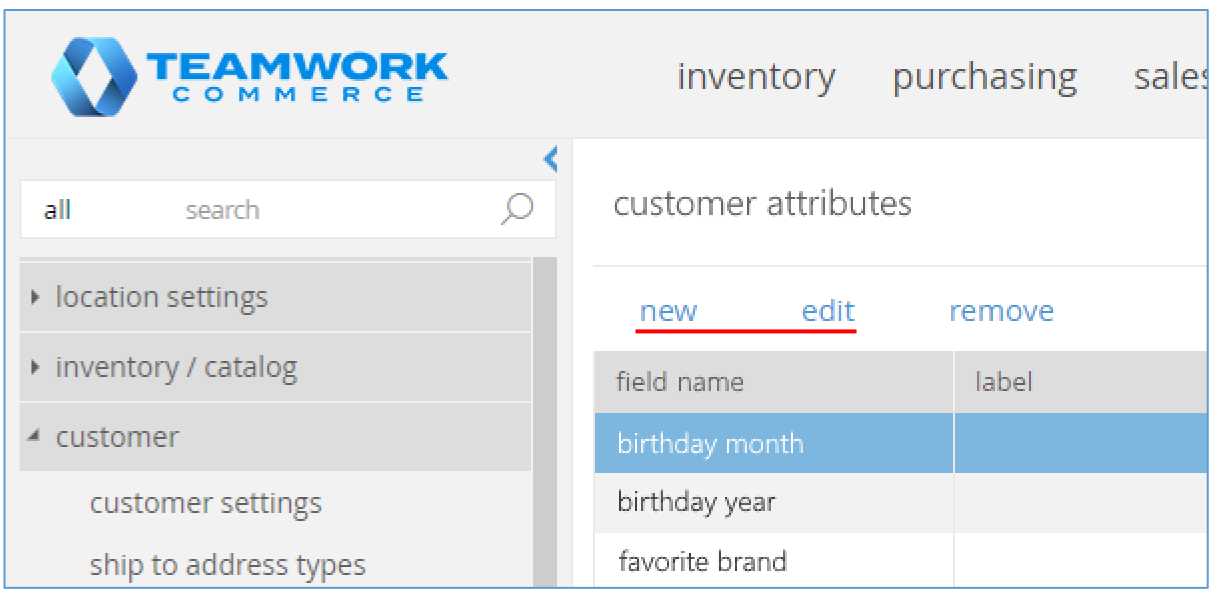
If an attribute was marked as "visible" and populated at least for one customer, it cannot be deleted. On attempting to remove such an attribute, the "It's not possible to delete selected customer attribute" message displays.

For existing customer attributes, the following information is available in the grid:

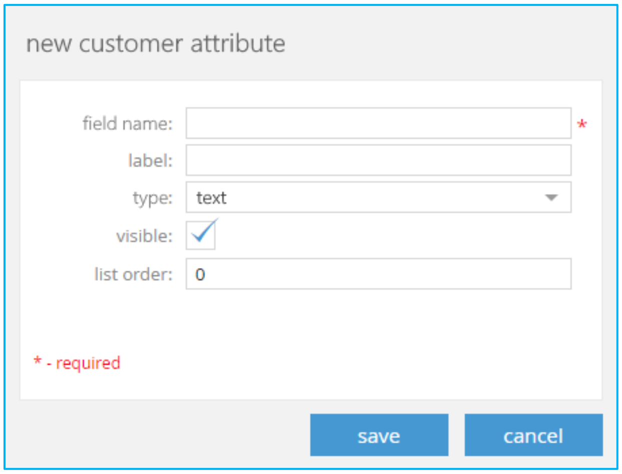
- **field name:** attribute name used for settings configuration
- **label:** attribute name that displays when creating or editing a customer (if not specified, then the field name value displays there)
- **type:** attribute type, for example "text", "decimal", "date", or "date-time"
- **visible:** shows if the attribute displays in the **customer** dialog
- **list order:** shows the position of an attribute in the **attributes** tab of the **customer** dialog

Adding and editing customer attributes

To add a new or edit existing customer attribute, in the **customer attributes** area, click the **new** or **edit** button correspondingly.



Clicking **new** (or **edit**) opens the **new customer attribute** (or **edit customer attribute**) dialog:



In both dialogs, the following fields are available:

- **field name**: attribute name used for settings configuration
- **label**: attribute name that displays when creating or editing a customer (if not specified, then the field name value displays there)
- **type:** attribute type, for example "text", "decimal", "date", or "date-time"
- **visible:** shows if the attribute displays in the **customer** dialog
- **list order:** shows the position of an attribute in the **attributes** tab of the **customer** dialog

To save changes in the dialog, click **save**.

Updated JSON-based Customer Export and Import API

To respect the updates in CHQ, the Customer Import and Export JSON-based APIs have been expanded by the Attributes section. This section contains the information added via new customer attributes.

Retrieving customer attributes from BigQuery

TWD-32322
Build 6.16.78.0

We've added the capability to automatically populate customer attributes in CHQ from BigQuery.

NOTE:

BigQuery is a fully-managed, serverless data warehouse that enables scalable, cost-effective and fast analysis over petabytes of data. It is a serverless Software as a Service (SaaS) that supports querying using ANSI SQL.

CHQ can now retrieve data from a BigQuery table by schedule and then update or add attributes to specific customer records.

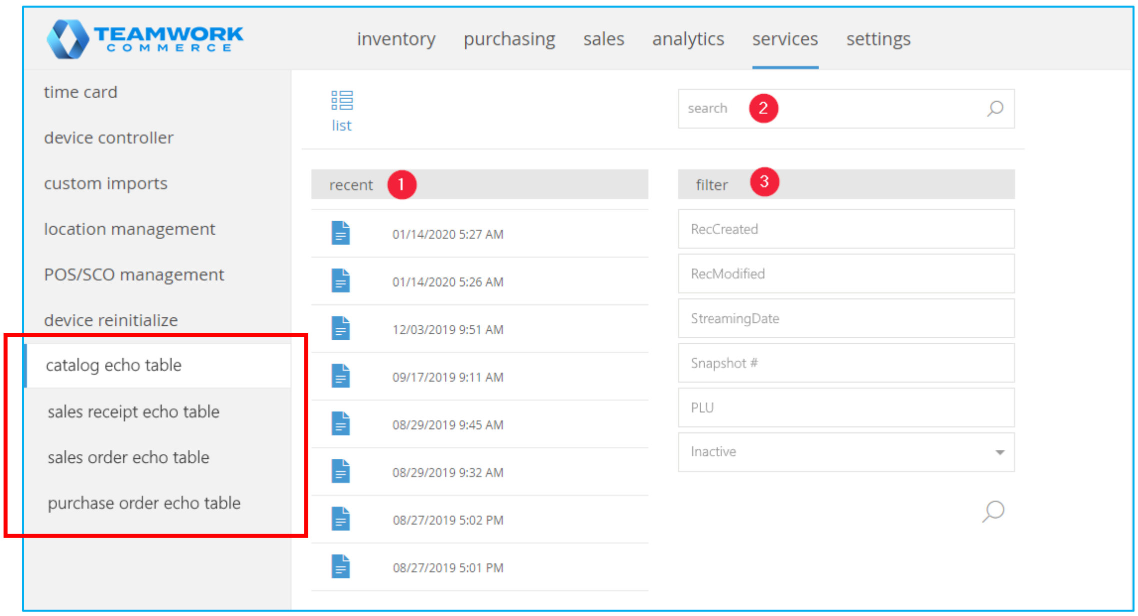
Services

Custom tables

TWD-27512
Build 6.16.78.0

This update allows for displaying information from custom tables under **chq** > **services**.

Each custom table is a separate sub-section in the list of sub-sections on the left:



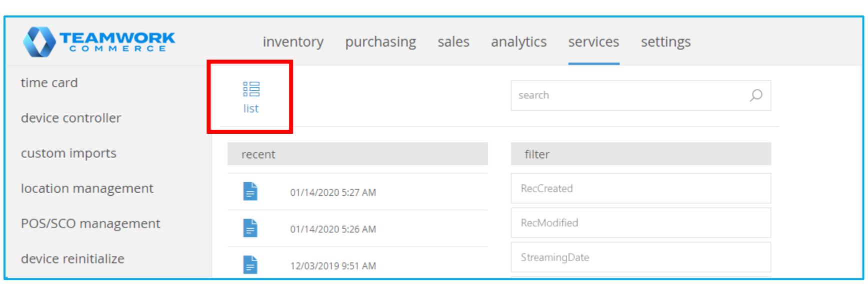
For each table (for example, **catalog echo table** in the screenshot above), the table records, sorted by their modification date, display in the **recent** section (**1**).

To search for table records by all string and text fields, use the **search** field (**2**).

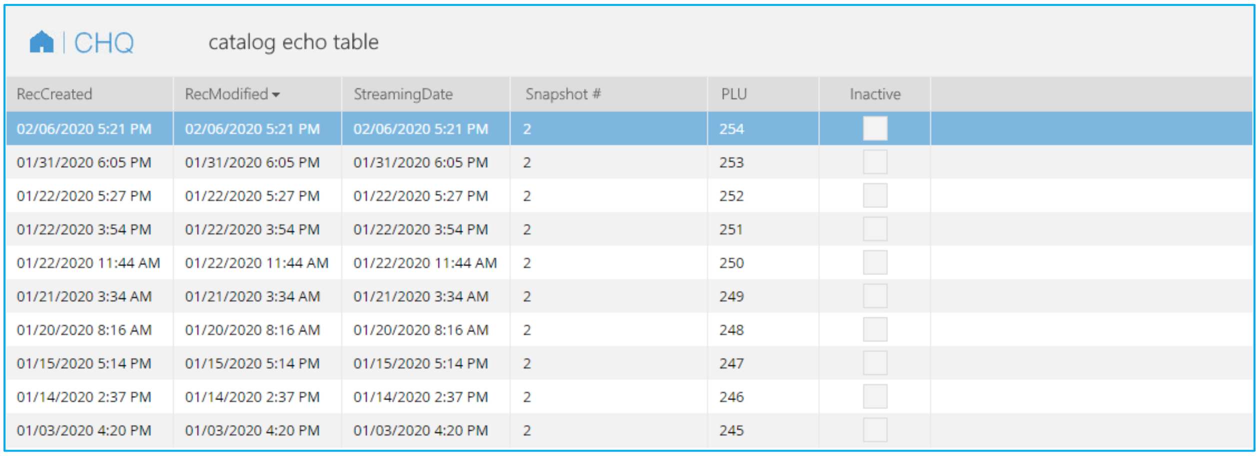
To filter table records, fill out the required field in the **filter** section (**3**).

Custom table – List view

To view all the records from the selected custom table, click **list** under **chq** > **services** > **(select your table)**:



In the **list** view, by default, the records are sorted by the **RecModified** column:



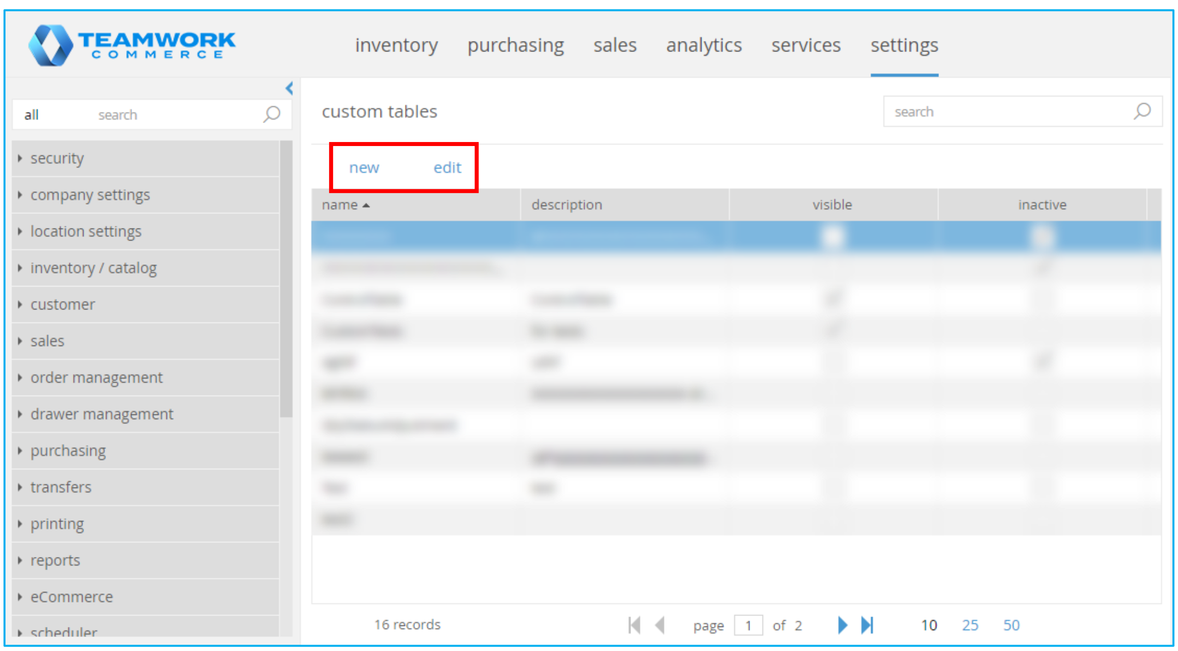
RecCreated	RecModified	StreamingDate	Snapshot #	PLU	Inactive
02/06/2020 5:21 PM	02/06/2020 5:21 PM	02/06/2020 5:21 PM	2	254	
01/31/2020 6:05 PM	01/31/2020 6:05 PM	01/31/2020 6:05 PM	2	253	
01/22/2020 5:27 PM	01/22/2020 5:27 PM	01/22/2020 5:27 PM	2	252	
01/22/2020 3:54 PM	01/22/2020 3:54 PM	01/22/2020 3:54 PM	2	251	
01/22/2020 11:44 AM	01/22/2020 11:44 AM	01/22/2020 11:44 AM	2	250	
01/21/2020 3:34 AM	01/21/2020 3:34 AM	01/21/2020 3:34 AM	2	249	
01/20/2020 8:16 AM	01/20/2020 8:16 AM	01/20/2020 8:16 AM	2	248	
01/15/2020 5:14 PM	01/15/2020 5:14 PM	01/15/2020 5:14 PM	2	247	
01/14/2020 2:37 PM	01/14/2020 2:37 PM	01/14/2020 2:37 PM	2	246	
01/03/2020 4:20 PM	01/03/2020 4:20 PM	01/03/2020 4:20 PM	2	245	

NOTE:

To define what columns display in the custom table list view, go to **chq** > **settings** > **integrations** > **custom tables** > **new** or **edit** > **columns**.

Creating and editing custom tables

Creating and editing custom tables is available under **chq** > **settings** > **integrations** > **custom tables**:



To create a new table, in **custom tables**, click **new**.

To edit a table, click to select the required table in the list and then click **edit**.

NOTE: Required Security Rights

To manage custom tables, you must be granted the **Custom Tables – Access** security right.

Marking a custom table as “visible”

A new **visible** field has been added for custom tables under **chq** > **settings** > **integrations** > **custom tables**.

The “visible” option allows to configure the display of tables under **chq** > **services.**

To hide the required custom table from **chq** > **services**:

1. Under **chq** > **settings** > **integrations** > **custom tables**, click to select your table and then click **edit** above the grid.

2. In the **general** area of the dialog that opens, clear the **visible** checkbox.

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

Backorder Qty Import: Simple removal of items from preorders

TWD-33599
Build 6.16.206.0

For one of our clients, we’ve simplified the process of moving an item from a preorder to backorder.

Prior to 6.16.206.0, to mark an item as backorder using the Backorder Qty Import template, the import had to be performed twice. The first import removed the item from preorders and the second one assigned the required backorder item quantities.

Now, to remove an item from preorders, in the Backorder Qty Import template, simply enter one of the following values in the **Preorder YES** column: FALSE / NO / 0.

NOTE:

Importing with one of the values described above for the **Preorder YES** column clears the **Preorder** checkbox located under **chq** > **inventory** > **styles & items** > **(your item)** > **general**.

Then, in the same import, configure the backorder-related columns.

Updated calculation of Purchase Order external receiving qty

TWD-33599
Build 6.16.206.0

For one of our clients, we’ve updated how **external receiving qty** for a Purchase Order item is populated.

Now, the **external receiving qty** is populated with the sum of **received qty** values for that item from the associated Purchase Receipts. Quantities from Purchase Receipt Returns are not included.

Settings

Custom tables purging

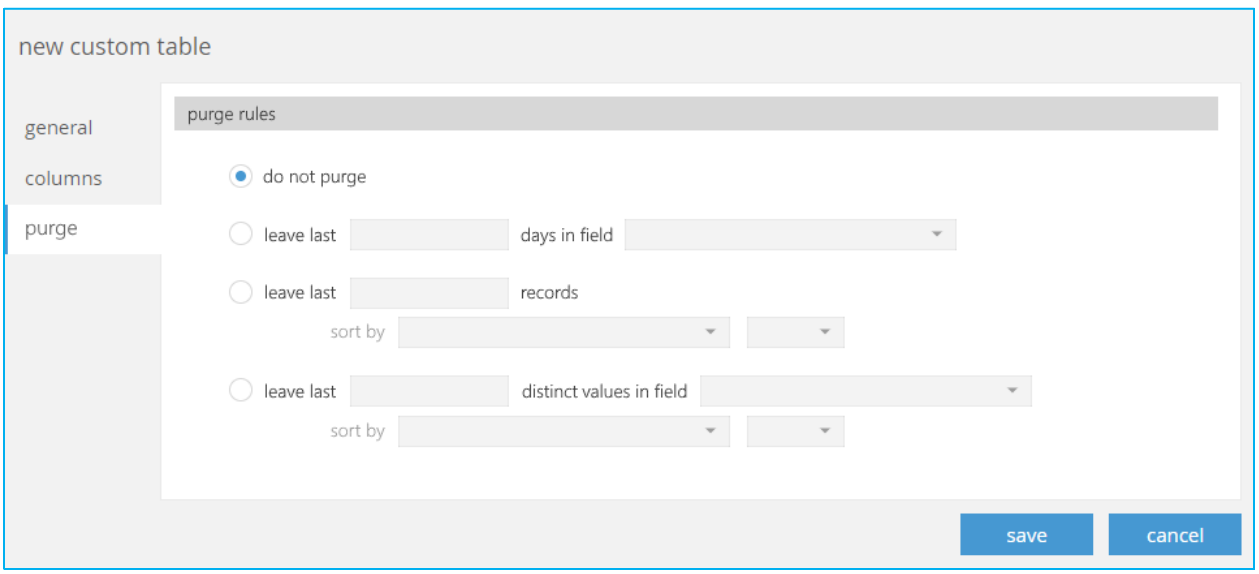
TWD-27513
Build 6.16.78.0

We've added the capability to automatically purge custom tables according to pre-defined settings.

By default, purging is scheduled to run once a day at 3 AM.

Defining settings for purging

Configuring settings for custom table purging is available under **chq** > **settings** > **integrations** > **custom tables** > **new** or **edit** > **purge**:



In the **purge** section, the following options are available:

- **do not purge**: select not to purge that table.
- **leave last … days in field …** : define a date range within which the table records should not be deleted (for example, "30" days). Then, select a table field to which the date range applies (for example, **RecModified**).
- **leave last** … **records**: define a number of latest records that should not be deleted. In the **sort by** sub-field, define by what field the latest records should be sorted before purging (for example, **RecCreated**) and in what order (ascending or descending).
- **leave last … distinct values in field … :** define a number of latest records with distinct values that should not be deleted. Then, define to which field the distinct values apply (for example, **RecModified**).

In the **sort by** sub-field, define by what field the records should be sorted before purging and in what order (ascending or descending).

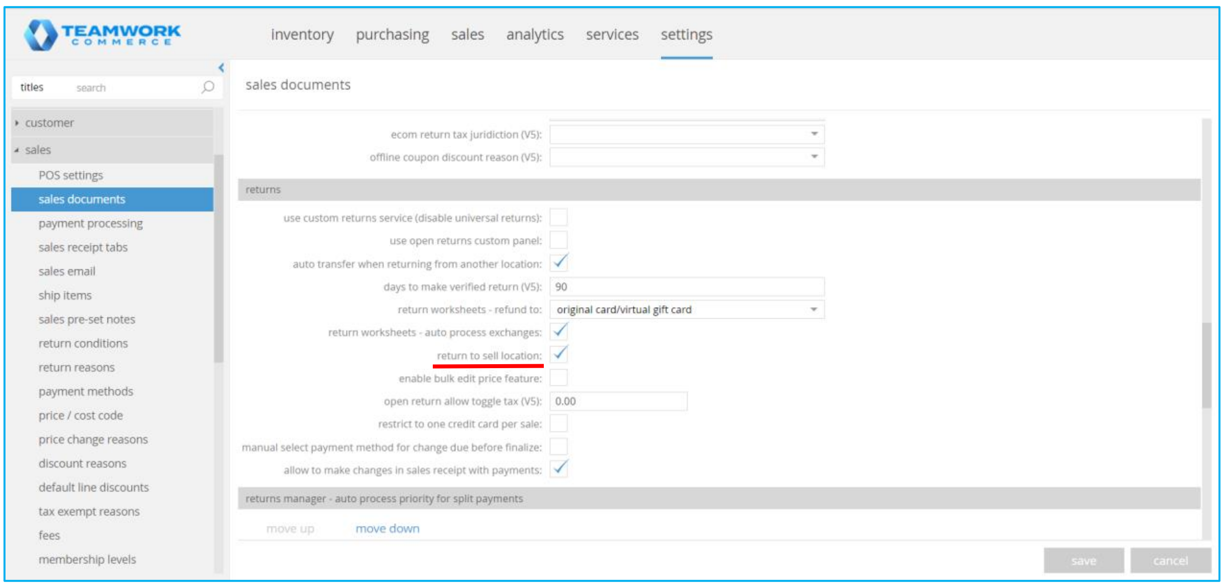
Once done configuring, click **save** in the bottom right corner.

New setting in sales documents: return to sell location

TWD-32226

Build 6.16.78.0

We've added a new **return to sell location** setting under **chq** > **settings** > **sales** > **sales documents**. It is located in the **returns** section:



If merchandise is returned via the auto-return process, manual return process in CHQ, or by Return Worksheet Import API, and the **return to sell location** setting is set to "true", then:

1. A Return Receipt is created with the location where the original Sales Receipt was finalized.

2. If the return location is different from the Sales Receipt location, a Transfer Memo from the Sales Receipt location to the return location is automatically created.

The Transfer Memo has the following characteristics:

- **created date**: current date and time
- **source location**: original Sales Receipt location
- **target location**: return location
- **qty out**: qty from the Return Receipt
- **notes**: "Auto transferred when finalizing return (return receipt # XXX), where XXX is the DTN of the Return Receipt

3. A Transfer Memo Out is posted with the following characteristic:

- **memo (post out) date**: the date and time from the Return Receipt

4. A Transfer Memo In is posted with the following characteristics:

- **qty in**: matches qty out
- **post in date**: the date and time from the Return Receipt
- **status**: "Posted"

If the **return to sell location** setting is "false", the Return Receipt is created for the return location.

> NOTE:
>
> The **return to sell location** setting applies only to returns made via CHQ.

New setting to swap from and to addresses for return

TWD-38092
Build 6.16.210.0

We have added a new option, **swap from and to address for returns**, to the <**selected shipping method**> dialog. To access the dialog, in CHQ under **settings** > **company settings** > **shipping services**, click to select your shipping service and then click **configure methods**. After that, click to select the required method and click **edit**.

If the **swap from and to address for returns** option is selected, when a request is submitted to a shipping service, the "from" and "to" addresses that are sent to that service are swapped automatically.

This may be helpful if the shipping service expects the "from" and "to" addresses to be the opposite of what is normally sent by Teamwork.

Creating and scheduling custom procedures

TWD-27858
Build 6.16.78.0

In CHQ, we've added the capability to create custom procedures and then:

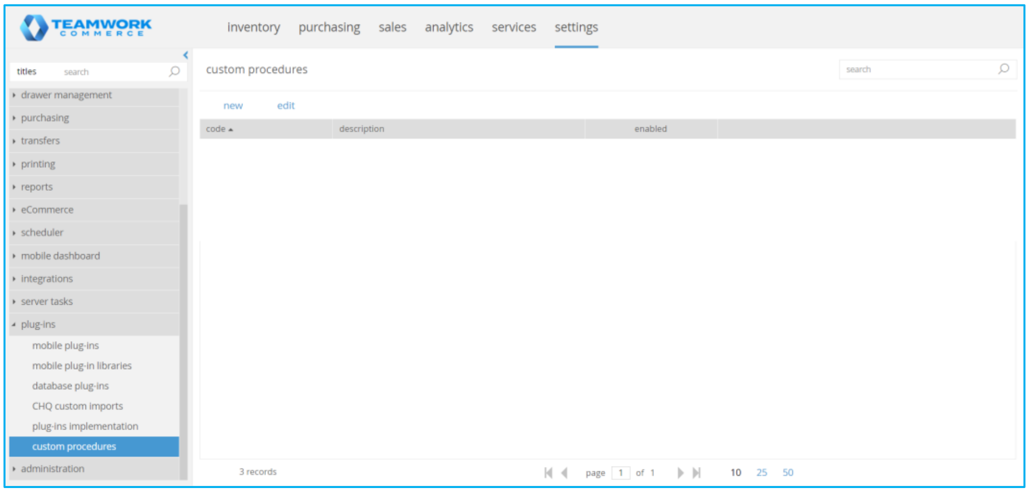
- schedule the procedures for execution
- use the data prepared by the procedures for export via API requests

> NOTE: What is a custom procedure?
>
> A custom procedure is the block of the SQL code that can be reused. The custom procedure is required to perform custom data retrieval from the database. Then, the data can be demonstrated to users in forms, lookups, or reports as well as used in other workflows.

To create and/or edit custom procedures, the **Add/Edit Plug-In Settings CHQ** security right is required.

Custom procedures area

In CHQ, managing custom procedures becomes possible under **chq > settings > plug-ins > custom procedures**:



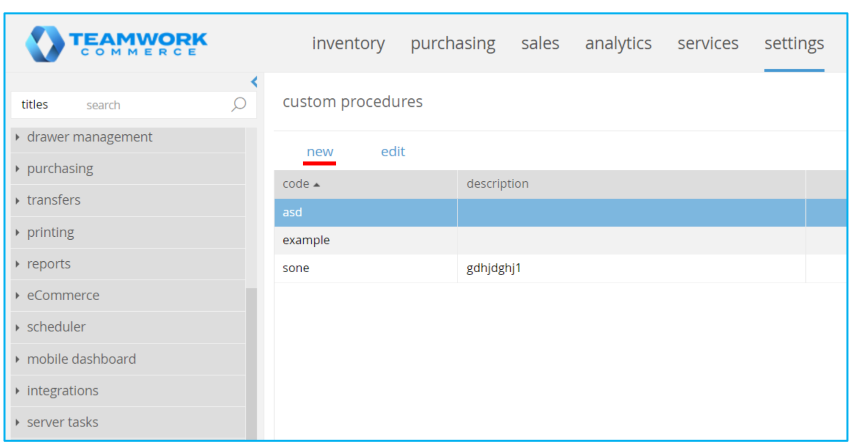
In the **custom procedures** grid, the following information is available:

- **code**: unique code of the procedure
- **description**: procedure description provided by the user
- **enabled**: a flag that shows if the procedure is enabled for scheduling; the state of the **enabled** flag corresponds to the state of the **enabled for scheduling** flag in the custom procedure dialog (opens for a specific custom procedure on clicking **edit**)

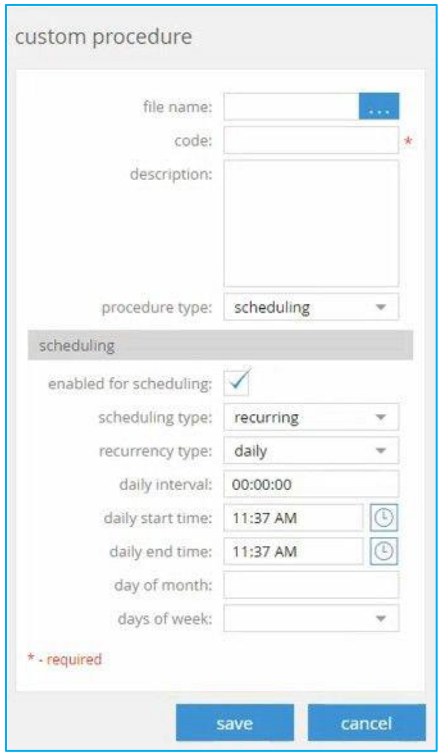
To search for a custom procedure, use the search field in the upper right corner of the area.

Creating and editing custom procedures

To create a new custom procedure, under **chq > settings > plug-ins > custom procedures**, click **new**:



On clicking, the **custom procedure** dialog opens:



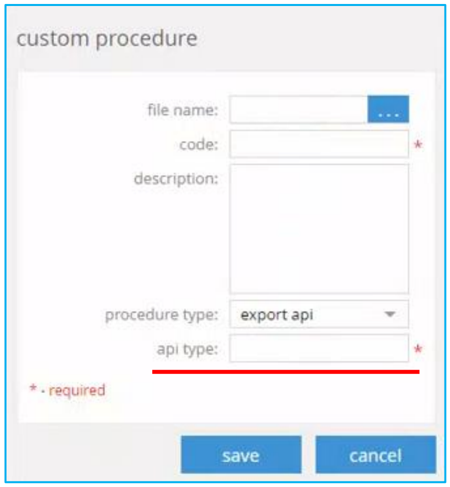
In the dialog, the following fields are available:

- **file name**: the name of the file with the custom procedure code during custom procedure creation; to select a file, click the **choose file** button next to the field
- **code**: code of the custom procedure; required
- **description**: description of the custom procedure defined by the user
- **procedure type**: the type of the created procedure; two options are available: scheduling (default) and export api

"Export API" procedure type

If the "export api" option is selected in the **procedure type** field:

- the **api type** field displays under the **procedure type** field and is required
- the **scheduling** section doesn't display



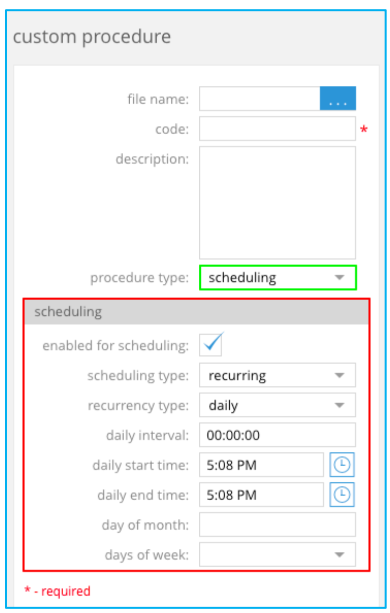
NOTE:

Once a custom procedure of the “export api” type is created, it can be used for data export via API requests by the created API type.

As a result of such request, the data prepared by the custom procedure is exported to the target system.

“Scheduling” procedure type

If the “scheduling” option is selected in the **procedure type** field, the **scheduling** section displays below it:



In the **scheduling** section, the following fields are available:

- **enabled for scheduling**: determines if the custom procedure is enabled for scheduling or not; if “false”, the fields below become disabled; “true” by default

- **scheduling type**: defines the type of scheduling applied: recurring (default), run once, scheduler start, or scheduler init
- **recurrency type**: defines how often the procedure is run: daily (default), weekly, or monthly
- **daily interval**: defines the interval with which the procedure is run in the 24-hour format
- **daily start time**: defines the start time for the procedure execution in the 12-hour format; to configure, edit the field directly or click the clock button
- **daily end time**: defines the end time for the procedure execution in the 12-hour format; to configure, edit the field directly or click the clock button
- **day of month**: defines the day of month when the procedure will be run
- **days of week**: defines on which day(s) of the week the procedure runs

Blocking rejected items for shipping

TWD-32910

Build 6.16.78.0

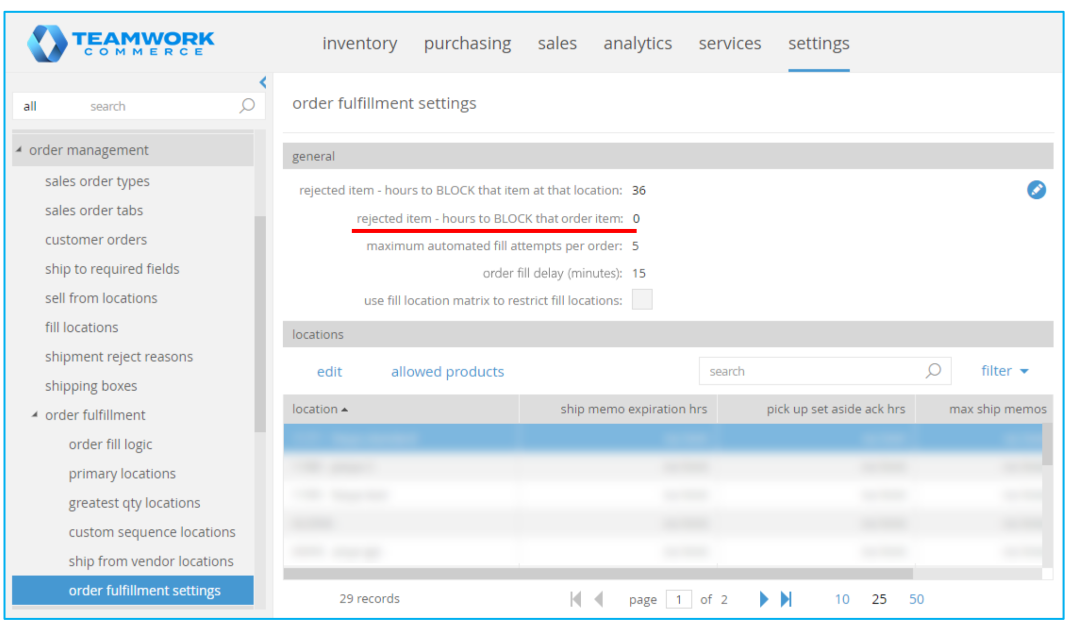
We've updated the Order Fulfillment Logic (OFL) functionality with a new **rejected item – hours to BLOCK that order item** setting.

This setting allows users to block an item on a Sales Order for all company locations if that item has been marked as "rejected" in a Ship Memo. A blocked item cannot be shipped by a Ship Memo within a specified time frame since it has been rejected.

NOTE:

This setting doesn't affect manual creation of Ship Memos.

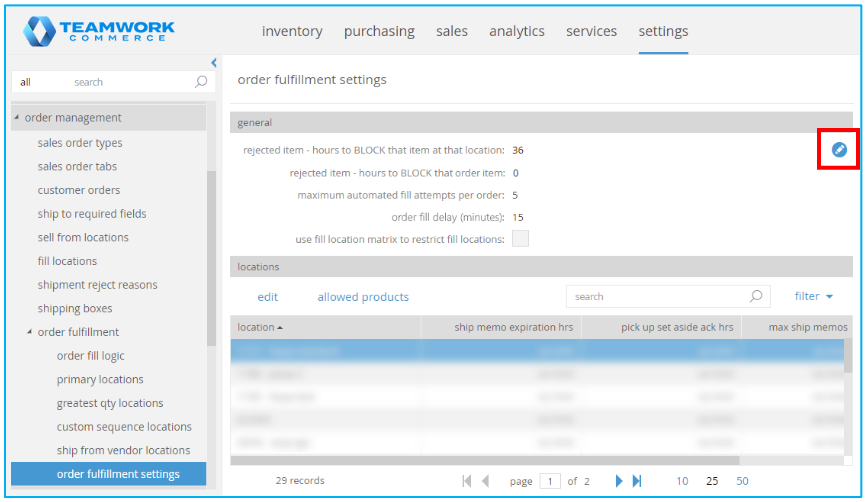
The new setting displays under **chq** > **settings** > **order management** > **order fulfillment** > **order fulfillment settings**:



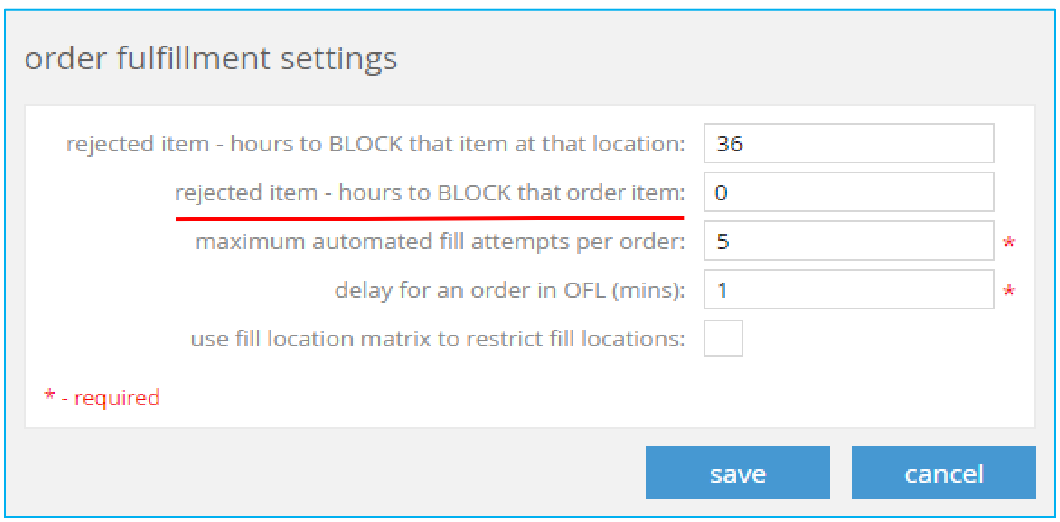
Configuring the time frame

To define the number of hours for which a rejected item should be blocked, under **chq** > **settings** > **order management** > **order fulfillment** > **order fulfillment settings,** do the following**:**

1. Click the **edit** button in the **general** section:



2. In the **order fulfillment settings** dialog that opens, define the **rejected item – hours to BLOCK that order item** field:



NOTE:

By default, the **rejected item – hours to BLOCK that order item** field is “0”.

Other enhancements

Automatic EC ATS Control Change process

TWD-31981
Build 6.16.78.0

The **Auto EC ATS Control Change** process is now run automatically.

> NOTE:
>
> The EC ATS (eCommerce Available-to-Sell) functionality is aimed at stabilizing the quantity integration from CHQ to any e-commerce platform.

This process allows recalculating the **EC ATS Delta** values as well as updating the **change EC ATS**, **last modified date**, and the **last modified by** fields in the required EC ATS control order.

Additionally, the **enabled for scheduling** field under **chq** > **settings** > **eCommerce** > **EC ATS controls** > **new** or **edit** is now “false” by default.

Faster performance of Optimal Stock Replenishment

TWD-32562
Build 6.16.76.0

We’ve introduced improvements to the Optimal Stock Replenishment functionality to ensure faster replenishment calculation.

Faster Sales Receipts posting

TWD-32720, TWD-32860
Build 6.16.76.0

When posting Sales Receipts to CHQ database, we’ve ensured faster data handling by:

- allowing non-sequential processing of documents
- reducing frequency of cases when data cannot be retrieved from a table

Filtering by OrderNo in JSON-based Sales Receipt Export API

TWD-32858
Build 6.16.76.0

In the JSON-based Sales Receipt Export API, we’ve added filtering by the OrderNo field.

> NOTE:
>
> The OrderNo field contains the number of Sales Order associated with a Sales Receipt.

Faster data retrieval for Sales Orders

TWD-32861
Build 6.16.78.0

We've introduced changes at the CHQ database level to enhance data retrieval.
Now, the data for the **recent** list of Sales Orders under **chq** > **sales** > **order management** can be retrieved from the CHQ database at all times.

Enhanced JSON-based Catalog Export API

TWD-33079
Build 6.16.78.0

The JSON-based Catalog Export API has been updated to provide better performance.

Updated order promise date calculation and notification of customers

TWD-34981
Build 6.16.206.0

For one of our clients, we've updated how the promise date on a Sales Order is calculated.
Also, we've added the capability to notify customers:

- if the promise date for any item on a Sales Order has changed
- if a Sales Order has been open for over 30 days and doesn't have available-to-fill quantities

Updated calculation of the Sales Order promise date

If the arrival date on a Purchase Order changes to a later one, the promise date on the associated Sales Order is now automatically updated.
By default, the update takes place daily at 8 PM.
The following orders will not be updated:

- orders that have item stock available for fulfillment
- Buy-Online-Pickup-In-Store orders
- Ship-From-Vendor orders

Notification of customers on Sales Order promise date change

If the promise date for any item on a Sales Order has changed, the customer is notified.

> NOTE: Configuration in CHQ
>
> For the notification to work properly, the **email notification for "backorder"** checkbox under **chq** > **settings** > **order management** > **customer orders** > **email notifications – web and send sales** must be selected.
>
> Also, the **block email notifications** checkbox on the required order under **chq** > **sales** > **order management** > **(your Sales Order)** > **order** must be cleared.

Once the promise date of a Sales Order changes, the **custom flag 4** checkbox is automatically selected on the required Sales Order. The selected checkbox indicates that the order had its promise date changed.

Once the **custom flag 4** checkbox is selected, the customer will be sent an email.

By default, the procedure checks for promise date changes daily at 10 PM.

The following orders are not included:

- Buy-Online-Pickup-In-Store orders
- Ship-From-Vendor orders

30-day reminder about an open Sales Order

This procedure allows for notifying the customer with an email about a Sales Order that:

- has the “accepted”, “in review”, or “suspended” status and
- doesn’t have available-to-fill quantities, and
- has been open for over 30 days

The **custom flag 4** checkbox on all Sales Orders that have been open for over 30 days is automatically cleared.

Once the **custom flag 4** checkbox is cleared, the customer will be sent an email.

By default, the procedure runs on the 1st and 15th of each month at 1 AM.

JSON-based Sales Receipt Export API: New ActualReturnLocationId

TWD-35203
Build 6.16.206.0

We’ve added a new ActualReturnLocationId field to the JSON-based Sales Receipt Export API.

If an item on the Sales Receipt has been returned to the sell location and then automatically transferred to the return location, the new field indicates the target location of the transfer.

Issue resolutions

Items not processed in Return Worksheets

DS-353
Build 6.16.78.0

Issue:

In CHQ, when performing a return through the Return Worksheet functionality, some items would not be processed and remained in the “pending” status.

Resolution:

Now, the return functionality works as expected.

Refund amount calculated incorrectly

DS-745
Build 6.16.78.0

Issue:

When trying to make a refund by applying a 100% discount after processing an imported Web Order, the refund amount would be calculated incorrectly.

Resolution:

The issue has been fixed. Now, the refund amount is calculated as expected.

Sales Receipts data filter working incorrectly

DS-829
Build 6.16.78.0

We’ve fixed the issue where the date filter under **chq** > **sales** > **sales receipts** would work incorrectly. For example, when the date range would be set to 5/21/2020–5/22/2020, the records shown would be for 5/22/2020–5/23/2020.

Now, the date filter works without any issues.

Error on Count Memo scan import

DS-878
Build 6.16.78.0

Prior to 6.16, when trying to import a Count Memo scan via the JSON-based Import API, the scan would not be posted and an error would occur.

Now, Count Memo scans can be imported without any issues.

EC ATS Control Order performance enhancement

DS-893
Build 6.16.78.0

We've introduced updates to the EC ATS Control Order functionality to ensure faster performance.

Ship Memo: Payment not captured

DS-868
Build 6.16.206.0

Issue

When two Ship Memos were created against a Sales Order via the Order Fulfillment Logic functionality, the payment on the second Ship Memo could not be captured. The credit card payment transaction would remain in the "authorized" status.

Resolution

Now, the payment on the second Ship Memo can be successfully captured.

Order Fulfillment Logic: Ignoring the setting for rejected items

DS-890
Build 6.16.206.0

Issue

Prior to 6.16.206.0, the Order Fulfillment Logic (OFL) functionality would sometimes ignore the **rejected item – hours to BLOCK that order item** setting that can be configured under **chq** > **settings** > **order management** > **order fulfillment** > **order fulfillment settings**.

> NOTE:
>
> The **rejected item – hours to BLOCK that order item** setting allows for blocking an item on a Sales Order for all company locations if that item has been marked as "rejected" in a Ship Memo. A blocked item cannot be shipped by a Ship Memo within a specified time frame since it has been rejected.

Resolution

Now, OFL would wait the specified number of hours before creating a new Ship Memo for the rejected item, as expected.

PayPal: Initiating re-authorization for voided transactions

DS-697
Build 6.16.206.0

For one of our clients, we've updated the PayPal re-authorize process.

Now, the re-authorize process is run for transactions that are in the "voided" status.

JSON-based Sales Receipt Export API: Return Receipts are not retrieved

DS-1040
Build 6.16.206.0

Issue

In the JSON-based Sales Receipt Export API, when retrieving information about Sales Receipts by the number of the associated Sales Order, the information about Return Receipts could not be retrieved.

Resolution

The issue has been fixed. Now, the information about a Return Receipt can be retrieved successfully.

JSON-based Sales Order Import API: Returning ship-to information from the Sales Order item level

DS-1042
Build 6.16.206.0

The JSON-based Sales Order Import API now returns ship-to information from the Sales Order item level if:

- the Order is in the "completed" status
- a Ship Memo has never been created for that item

JSON-based Ship Sales Order Export API: Returning incorrect Ship Memo status

DS-924
Build 6.16.206.0

Prior to 6.16.206.0, the JSON-based Ship Sales Order Export API could return an incorrect Ship Memo status.

For example, when a Ship Memo would have the "Prepare Shipment" status in CHQ, the API would display the "Rejected" status.

Now, the Ship Sales Order Export API returns the correct status.

JSON-based Sales Receipt Export API: ActualReturnLocationId doesn't respect LocationIdentifierSetting

DS-1092
Build 6.16.206.0

Issue

In the JSON-based Sales Receipt Export API, the **ActualReturnLocationId** value would always display as GUID and would not respect the **LocationIdentifierSetting**.

Resolution

In this release, the **ActualReturnLocationId** has been renamed to **ActualReturnLocationIdentifier** and configured to respect the **LocationIdentifierSetting**.

JSON-based RMA Order Export API: Filtering by ExchangeSalesOrder not working

DS-792
Build 6.16.206.0

We've corrected the issue where filtering by **ExchangeSalesOrder** would not work in the JSON-based RMA Order Export API.
Now, filtering can be performed without any issues.

JSON-based Sales Order Import API: Account number not imported

DS-1004
Build 6.16.206.0

Issue

When importing a Sales Order via the JSON-based Sales Order Import API with the payment account number defined, that account number would not be imported and displayed in CHQ.
Resolution

The issue has been fixed. The account number can now be imported and displays in CHQ as expected.

Email notifications for pickup-ready orders not working

DS-788
Build 6.16.206.0

Prior to 6.16.206.0, after a Store Pickup Memo would be finalized in POS with the "Pick Up Ready" status, an email notification would not be sent to the customer even if the corresponding settings were configured in CHQ.
Now, as expected, the customer receives a notification when the order is pickup-ready.

Error when cancelling an exchange order

DS-1283
Build 6.16.210.0

Prior to 6.16.210.0, when cancelling an exchange order in CHQ under **sales** > **order management** > **list**, the "Unable to refund the unused deposit" error message would sometimes display and that exchange order would not be cancelled.

The issue has been fixed and exchange orders are now cancelled as expected.

Unable to create EC ATS control order

DS-1265
Build 6.16.210.0

We've fixed the issue where an EC ATS control order with multiple EC sell and fill locations as well as with multiple items could not be created. Instead, the **document processing** dialog would display under **chq** > **inventory** > **EC ATS control orders**.

Unable to export Transfer Orders using XML-based Transfer Order Export API

DS-1300
Build 6.16.210.0

Issue:

When trying to export Transfer Orders using XML-based Transfer Order Export API, the result data would not be created and thus could not be pulled by Teamwork Integrator.

Resolution:

The issue has been fixed. Transfer Orders are now exported as expected.

Epilogue

This guide was published on November 12, 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.