CHQ RELEASE GUIDE

Version 6.13

Builds 6.13.79.0

6.13.59.0

6.13.65.0

6.13.70.0

6.13.76.0

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Inventory

Optimal Stock: Updates in status display and replenishment initiation

TWD-26520

Build 6.13.59.0

Security Rights

To be able to use the functionality provided by the enhancement, the user must be granted the following rights:

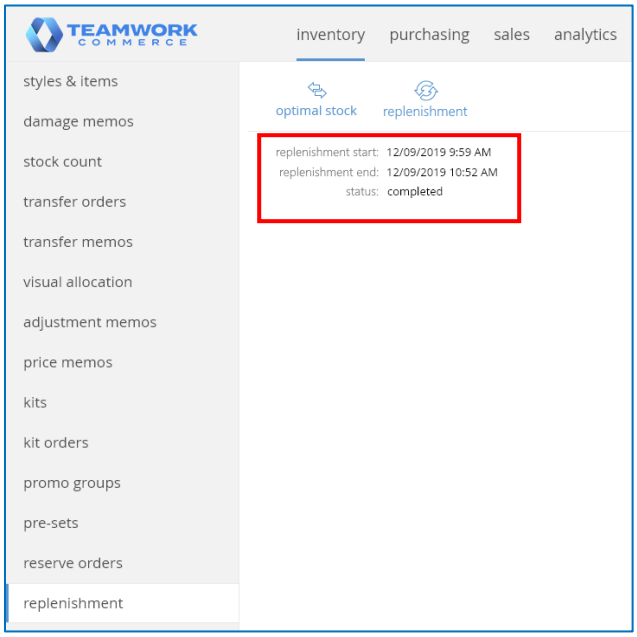
Security Right	Area	Description
CHQ - Run Replenishment Process	Inventory	Allows a user to run a replenishment process
CHQ - Cancel Replenishment Process	Inventory	Allows a user to cancel a replenishment process

Checking replenishment start/end dates and status

The update allows users to find out:

- the status of the last replenishment (can be one of the following: *in process, failed, cancelled, cancelling,* or *completed*)
- the date and time of the last replenishment

The information is available in CHQ under **inventory** > **replenishment**:

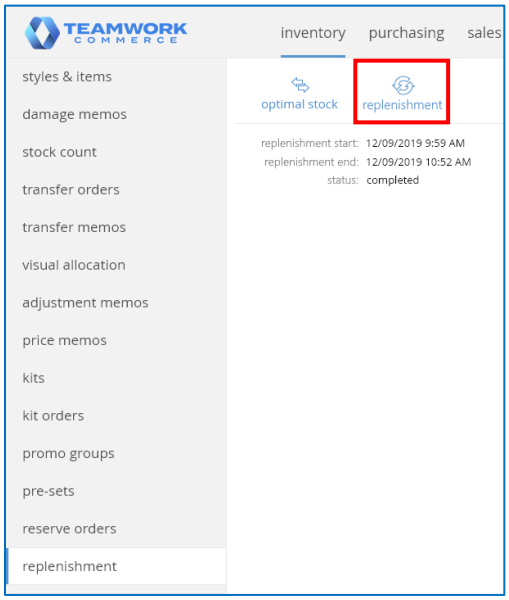


The fields are visible if the **replenishment mode** is set to *optimal stock* in CHQ under **settings** > **inventory/catalog** > **inventory settings** > **replenishment area**.

Running and cancelling replenishment

Also, the update allows users to run replenishment in the *trial* and *production* modes as well as to completely cancel the replenishment process.

To do any of the above, in CHQ, click **replenishment** under **inventory** > **replenishment**:



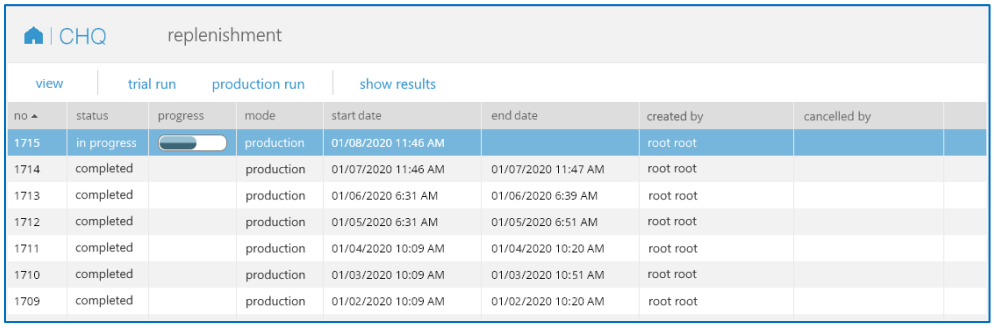
NOTE:

The **replenishment** button is visible if the **replenishment mode** is set to *optimal stock* in CHQ under **settings** > **inventory/catalog** > **inventory settings** > **replenishment area.**

Clicking the **replenishment** button opens the **replenishment** list view.

Replenishment list view

The list view provides information on replenishments that are currently in progress as well as on those that were run earlier:



no	status	progress	mode	start date	end date	created by	cancelled by
1715	in progress		production	01/08/2020 11:46 AM		root root	
1714	completed		production	01/07/2020 11:46 AM	01/07/2020 11:47 AM	root root	
1713	completed		production	01/06/2020 6:31 AM	01/06/2020 6:39 AM	root root	
1712	completed		production	01/05/2020 6:31 AM	01/05/2020 6:51 AM	root root	
1711	completed		production	01/04/2020 10:09 AM	01/04/2020 10:20 AM	root root	
1710	completed		production	01/03/2020 10:09 AM	01/03/2020 10:51 AM	root root	
1709	completed		production	01/02/2020 10:09 AM	01/02/2020 10:20 AM	root root	

The following information is available for every replenishment:

- **no**: the replenishment number
- **status:** replenishment status, can be one of the following – in process, completed, failed, cancelling, cancelled
- **progress**: progress bar showing the replenishment progress
- **mode**: indicates if the replenishment is run in the *trial*, *production*, or *test* modes
- **start date**: the date-time when the process started
- **end date**: the date-time when the process finished
- **created by**: initiator's username
- **cancelled by**: the username of the person who cancelled

Also, in the list view:

- click **trial run** to run replenishment in the trial mode
- click **production run** to run replenishment in the production mode
- click **show results** to view results in the report form
- click **view** to see replenishment details

IMPORTANT NOTE:

The **trial run** and **production run** buttons are visible if the user has the *Run Replenishment Process* right granted.

The **show results** button is enabled if the selected replenishment is completed.

Replenishment details dialog

On selecting a specific replenishment process and clicking the **view** button in the replenishment list view the **replenishment <replenishment number>** dialog opens:

The dialog contains two areas: **general** and **progress**.

In the **general** area, the fields are not editable and show the basic information on the replenishment process.

In the **progress** area, the information on the data processing steps is shown:

- filling data
- preparing data
- creating reserve orders
- preparing transfer orders
- creating transfer orders
- check results (only in test mode)

The progress bar located next to each step can be of the following three types:

- indicates *success*
- indicates *in progress*
- can indicate *not started, cancelled*, *failed*, and *skipped*

IMPORTANT NOTE:

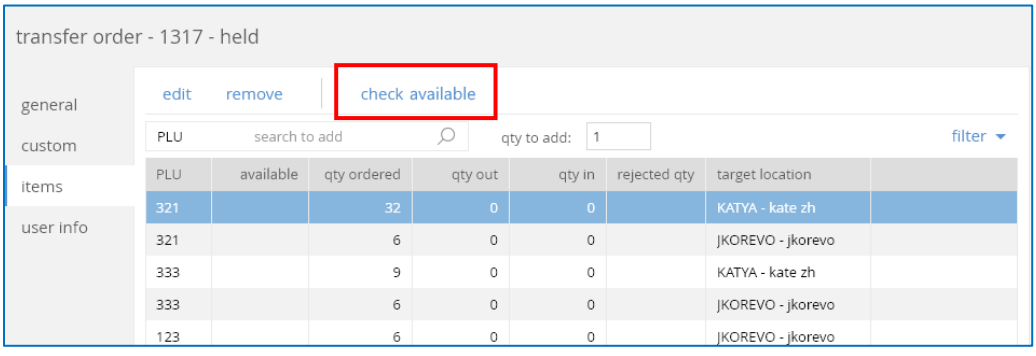
The **cancel** button displays in the lower left corner of the dialog only if the status of replenishment is *in progress* and the user has been granted the *Cancel Replenishment Process* right.

Optimal Stock: Check available items in Transfer Orders

TWD-26464

Build 6.13.59.0

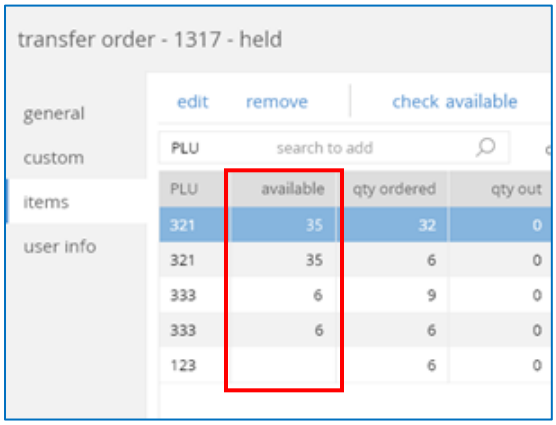
It is now possible to check available items in a Transfer Order. To do so, under CHQ, go to **inventory** > **transfer orders** > **items tab** and click the **check available** button.



NOTE:

The **check available** button is visible if no items were transferred out or rejected in the Transfer Order as well as if the Transfer Order is being edited.

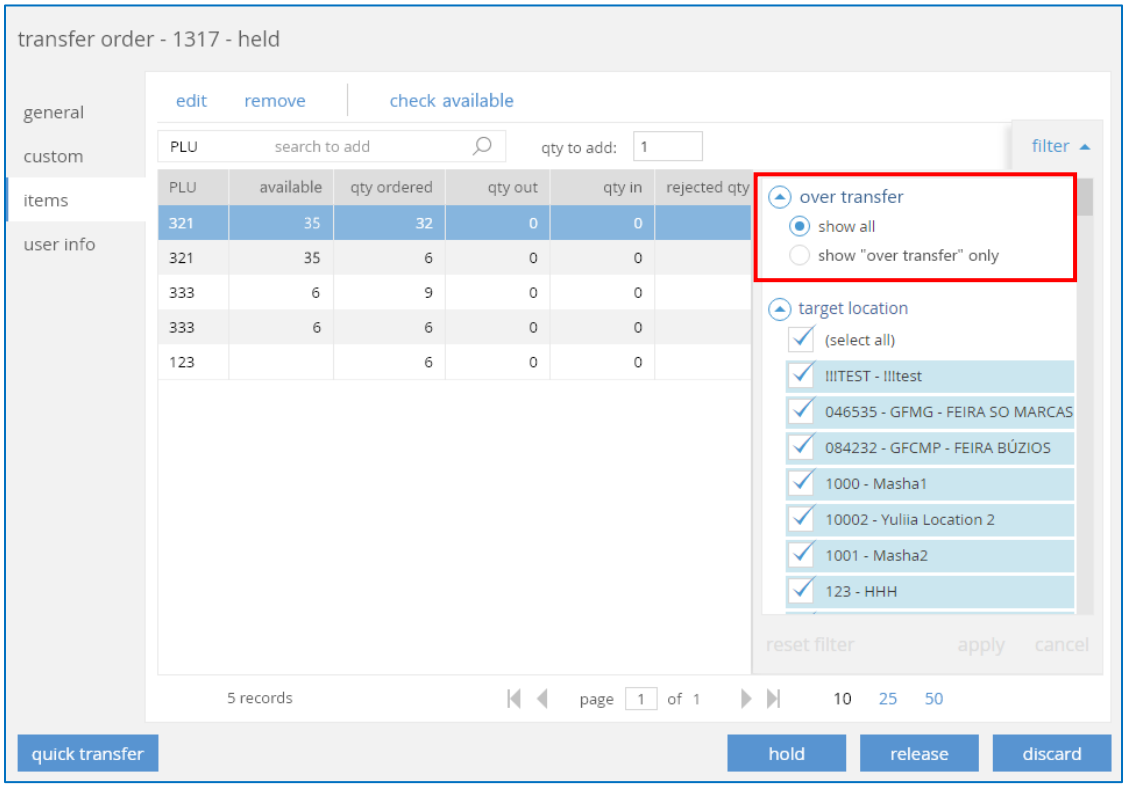
On clicking the **check available** button, item quantities are updated in the **available** column.



The available quantity is calculated as the *RTA* value for the corresponding item in the source location.

Filter options in the transfer order dialog

A new filter option has been added: **over transfer**. By selecting the **show "over transfer" only** radio button, only the lines where the quantity ordered is more than the quantity available are shown.



IMPORTANT NOTE:

If the **source location** has been changed in the **transfer order dialog** > **general tab**, the *available* value is cleared in the *available* column.

Checking item availability before Transfer Order creation

Also, the update allows for checking the available items on the source location prior to creating a Transfer Order (TO) as a part of the replenishment process.

If the quantity of items to transfer is more than the available quantity, then the error message displays and the TO is not created.

Correcting item quantity in a posted Transfer Memo

TWD-22559

Build 6.13.59.0

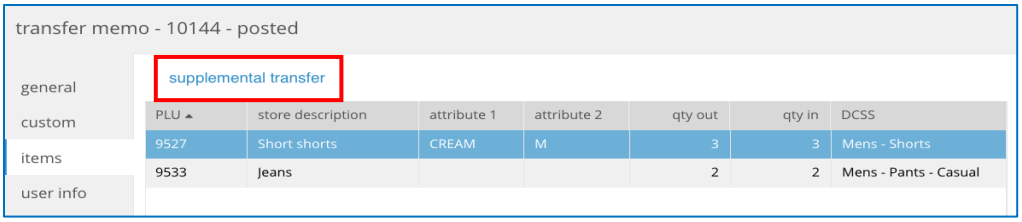
This update allows users to manually correct (or supplement) item quantities in a posted transfer memo. It is possible to specify whether a bigger or a smaller number of items has been transferred than it was originally indicated.

As a result, a corrective Transfer Memo is created. This process follows the logic:

- If *fewer* items have been transferred, the corrective transfer will move the difference from the original target to the original source location.
- If *more* items have been transferred, the corrective transfer will move the difference from the original source to the original target location.

The out and in quantities of the corrective transfer must have the same date/time as the original in posting date/time.

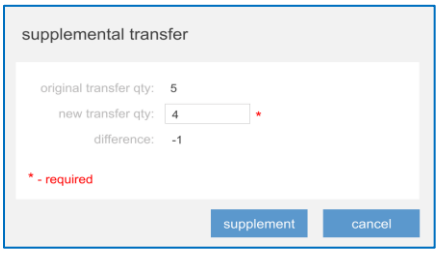
The described procedure can be initiated by clicking the **supplemental transfer** button, which is found under **chq** > **inventory** > **transfer memo** > **items tab**.



NOTE: WARNING

The **supplemental transfer** button is only available for a posted transfer.

Upon clicking the **supplemental transfer** button, a **supplemental transfer** dialog opens.



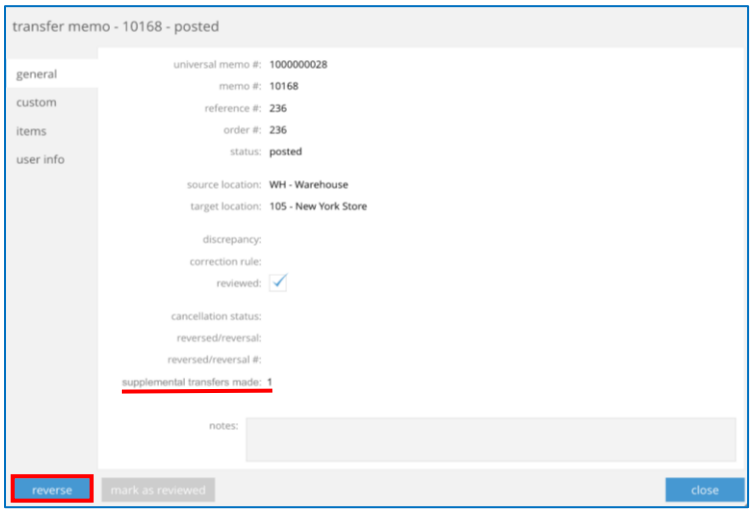
In the **new transfer qty** field, you can enter the new quantity that was actually transferred. Editing this field updates the difference field.

The **difference** field shows the difference between the original transfer qty and revised transfer qty.

Upon clicking the **supplement** button and closing the Transfer Memo, a new transfer to correct is created.

This new Transfer Memo is a separate document that can be accessed from the Transfer Memo **list view**, as well as from the **recent** section under **chq** > **inventory** > **transfer memos**.

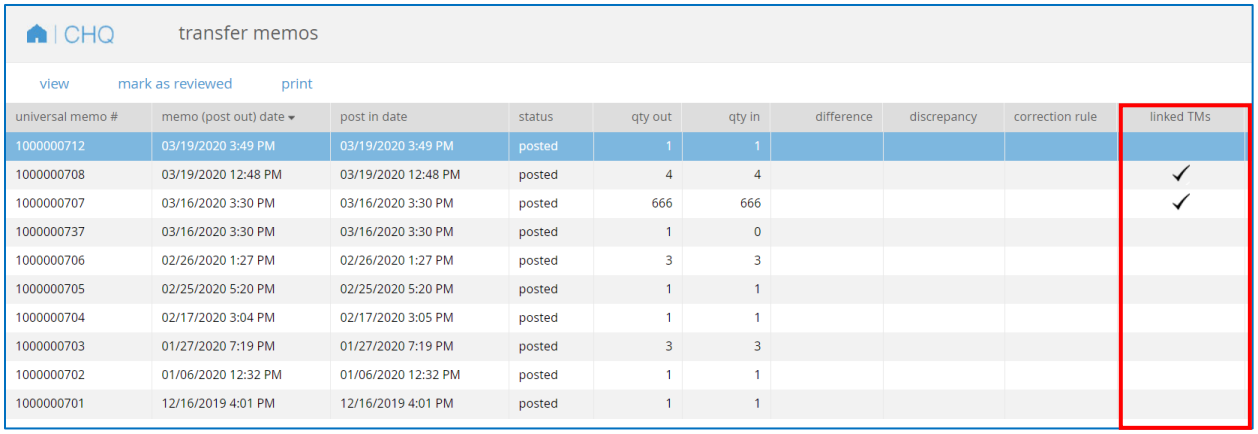
In that new supplemental Transfer Memo, a new **supplemental transfers made** field shows the number of supplemental transfers that have been made for any items in the document.



Upon clicking the **reserve** button (see the screenshot on the previous page), a transfer for the specified difference is created:

- If the difference is negative, the transfer moves that quantity from the original target to the original source location
- If the difference is positive, the transfer moves that quantity from the original source, to the original target location

In the Transfer Memo list view, the **linked TMs** column displays if a Transfer Memo has had any supplemental transfers made.



universal memo #	memo (post out) date	post in date	status	qty out	qty in	difference	discrepancy	correction rule	linked TMs
1000000712	03/19/2020 3:49 PM	03/19/2020 3:49 PM	posted	1	1				
1000000708	03/19/2020 12:48 PM	03/19/2020 12:48 PM	posted	4	4				✓
1000000707	03/16/2020 3:30 PM	03/16/2020 3:30 PM	posted	666	666				✓
1000000737	03/16/2020 3:30 PM	03/16/2020 3:30 PM	posted	1	0				
1000000706	02/26/2020 1:27 PM	02/26/2020 1:27 PM	posted	3	3				
1000000705	02/25/2020 5:20 PM	02/25/2020 5:20 PM	posted	1	1				
1000000704	02/17/2020 3:04 PM	02/17/2020 3:05 PM	posted	1	1				
1000000703	01/27/2020 7:19 PM	01/27/2020 7:19 PM	posted	3	3				
1000000702	01/06/2020 12:32 PM	01/06/2020 12:32 PM	posted	1	1				
1000000701	12/16/2019 4:01 PM	12/16/2019 4:01 PM	posted	1	1				

Optimal Stock: backdated Transfer Orders

TWD-26367

Build 6.13.59.0

Now, the replenishment process creates Transfer Orders **one** day backdated to ensure that they are handled with the correct priority by the warehouse.

For example, if replenishment ran at 2 AM, November 23, the Transfer Orders is dated November 22.

> IMPORTANT NOTE:
>
> Please be advised that the dating logic changed in build 6.13.79.0.

Optimal Stock: Transfer Orders and Sales Orders dating

TWD-32446

Build 6.13.79.0

The Optimal Stock replenishment process now creates Transfer Orders and Sales Orders with the time and date at which the replenishment process is run.

For example, if replenishment runs at 2 AM on November, 23, the time and date of order creation will be 2 AM on November, 23.

Additionally, for Sales Orders, the promise date for the whole order and individual items on it also matches the replenishment date.

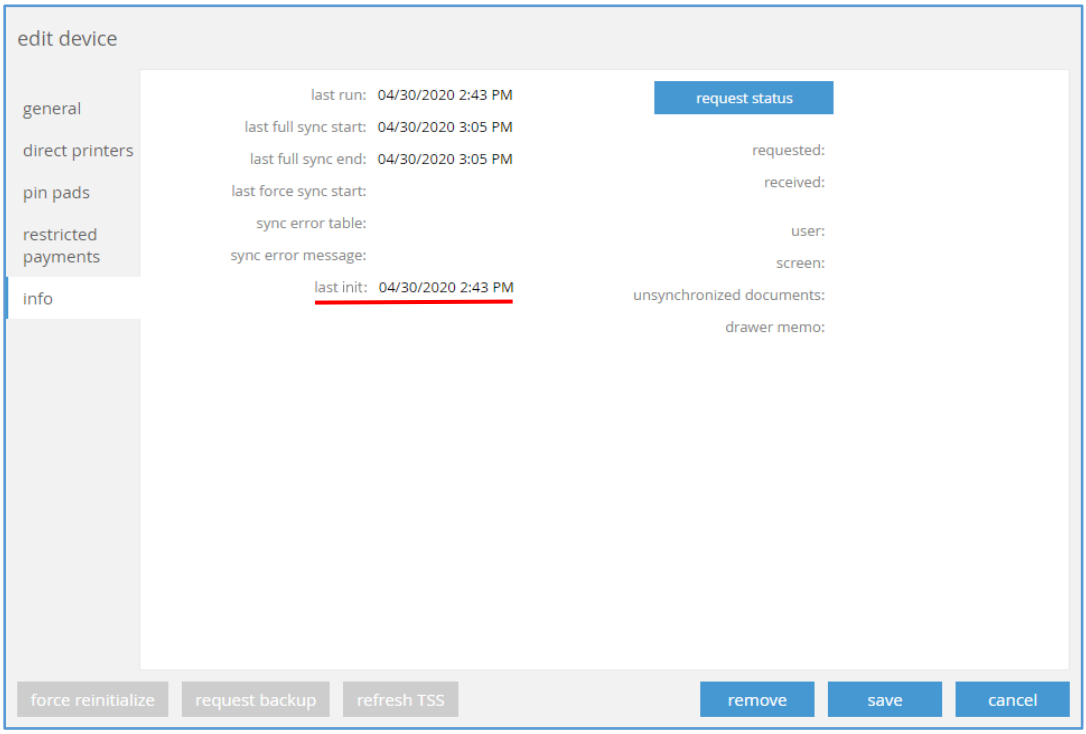
Services

Device Controller: last initialization date and time

TWD-31189

Build 6.13.76.0

It is now possible to see the date and time of the mobile app last initialization. This information is visible in the new **last init** field, under **chq** > **services** > **device controller** > **edit device** > **info**.



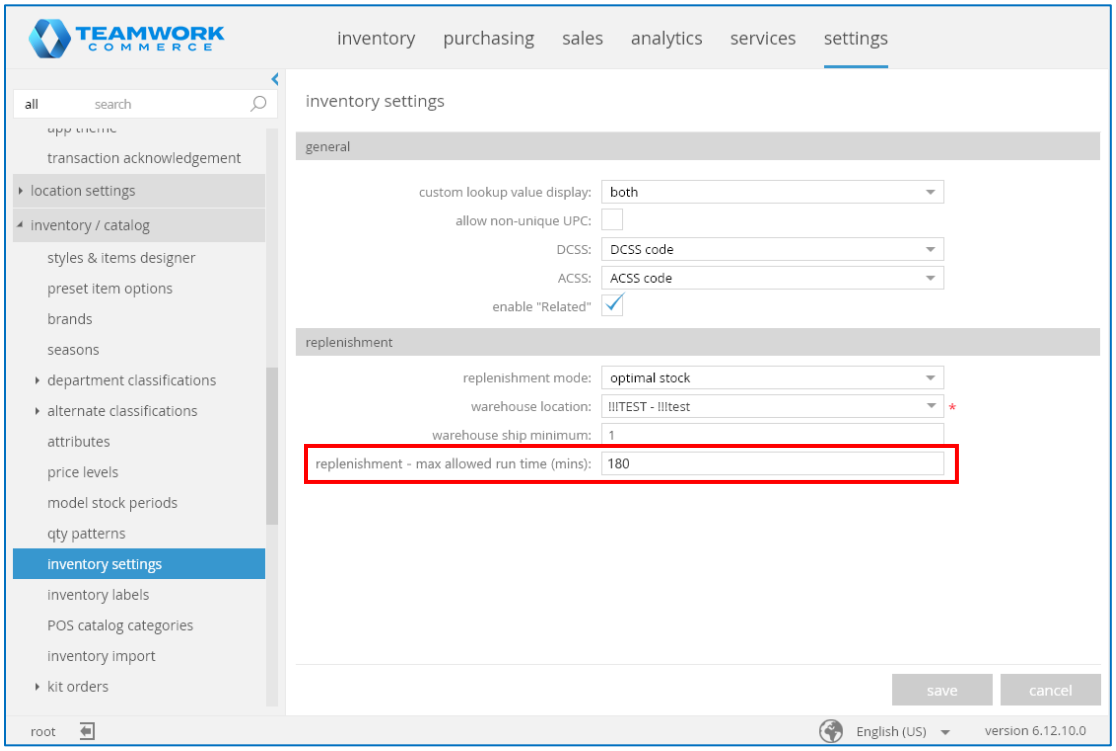
Settings

Optimal Stock: limiting the replenishment process run time

TWD-26521

Build 6.13.59.0

We've added the **replenishment - max allowed run time (mins)** setting to **chq** > **settings** > **inventory/catalog** > **inventory settings**.



In the **replenishment - max allowed run time (mins)** field, it is possible to set the time when the replenishment process should be stopped and cancelled; it will not run longer than that specified value.

> NOTE: Rights and validation
>
> This field is editable if the user has the *Add/Edit Inventory Settings* right.
> The value must be a whole number (not negative and not zero). The default value is *180*.

Before cancelling the replenishment process, the system checks the replenishment status.

If the replenishment process is in the *creating transfer orders* status, it is **not cancelled**.

In any other cases the replenishment status is changed to *cancelling* and the process is cancelled. All progress steps are marked as *cancelled*.

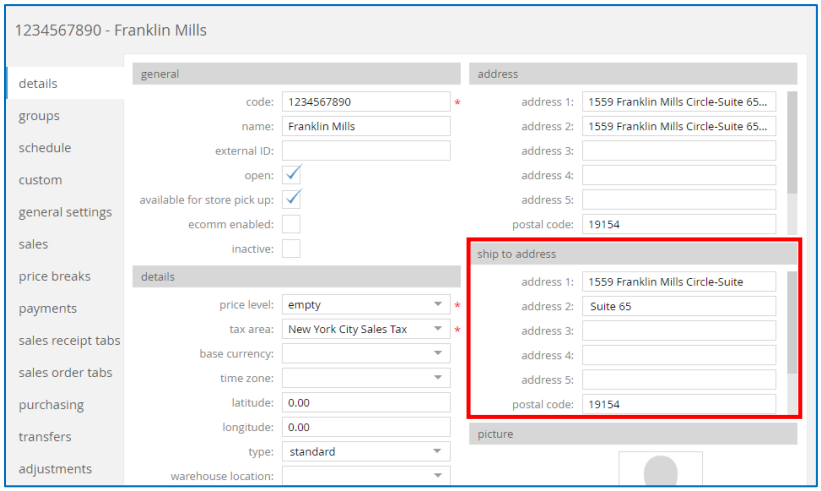
New ship to address fields added for locations

TWD-27511

Build 6.13.59.0

It is now possible to add a ship to address, which can be different from the primary address. The address can be used to define a second or alternate location.

The ship to address can be set under **chq** > **settings** > **locations / location settings** in the new **ship to address** area of the **details** tab:



In the area, the following information is available:

- address 1–5
- postal code
- city
- state/province
- country (empty by default)
- fiscal code
- phone
- fax
- email
- contact
- home page

IMPORTANT NOTE

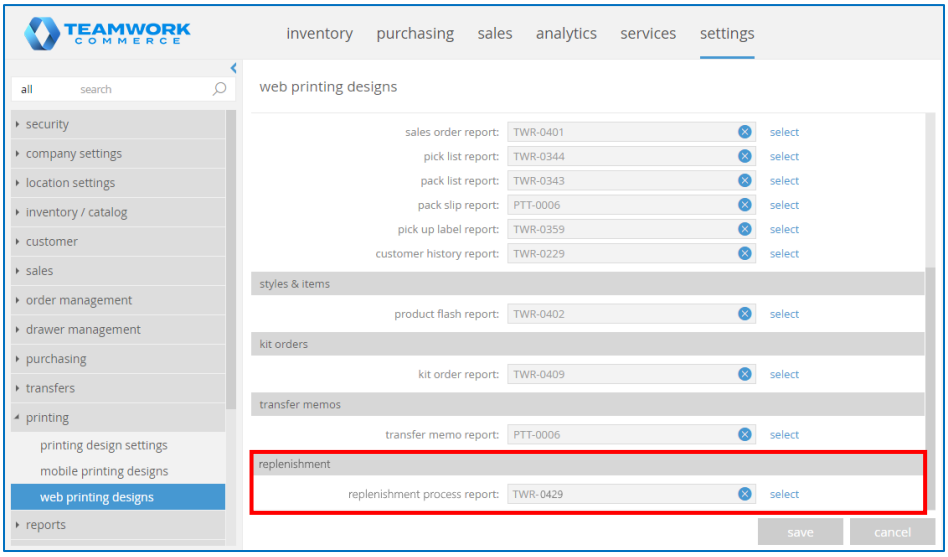
When a new location is created, the fields are not copied via the **copy from existing location** functionality.

Configuring a replenishment process report

TWD-26520

Build 6.13.59.0

We've added the **replenishment process report** field to the **replenishment** area in CHQ under **settings** > **printing** > **web printing designs** > **replenishment**.



The setting allows for selecting the replenishment report template for printing.

New security rights

TWD-28271

Build 6.13.59.0

New security rights have been added to CHQ for POS Count Memos:

Application	Security Right	Area	Description
V6-POS	Show ledger quantity	Count Memos	Shows the ledger quantity and difference qty values in Count Memo
V6-POS	Run Count Memo Report	Count Memos	User may select the Count Memo report button

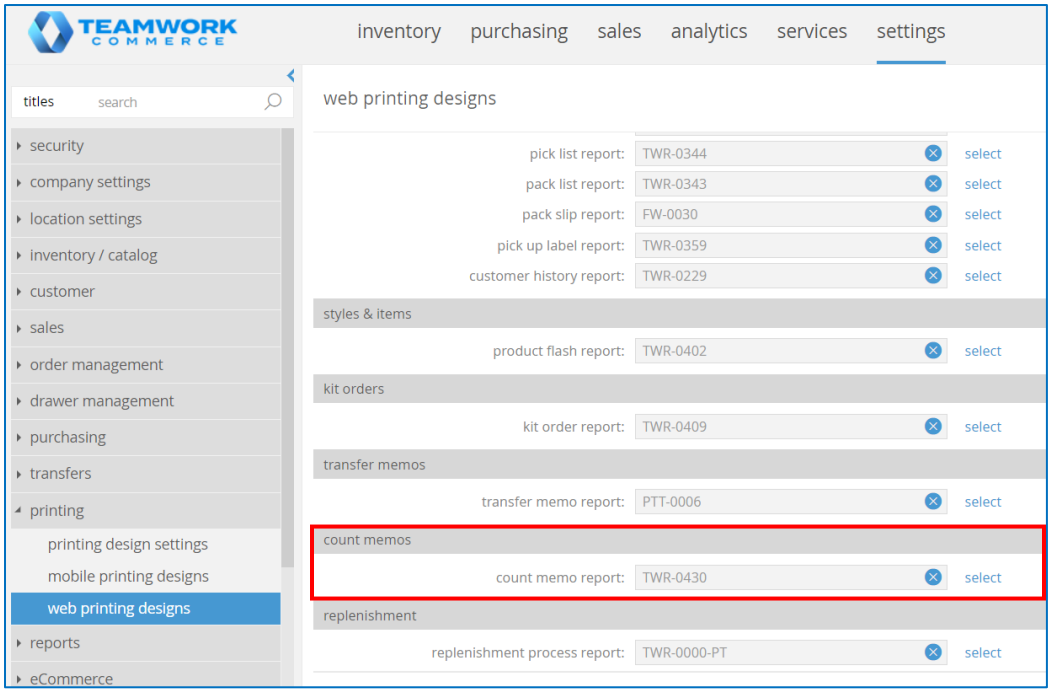
Count Memo reports

TWD-28271

Build 6.13.59.0

This update allows users to define a Count Memo report that can be accessed from version 6 POS Pro.

To do so, go to **chq** > **settings** > **printing** > **web printing designs tab**. In the new *count memo report* field, select a report.



Other Enhancements

A new sorting option for Sales Order History API

TWD-27600
Build 6.13.59.0

We've updated the Sales Order History Export API by adding a new sorting option – **SalesOrderDate**.

The new option allows for sorting the output chronologically either in the ascending or descending order.

New mobile printing areas for item ticket printing

TWD-25297
Build 6.13.59.0

This update has been made to respect a change in the POS Pro application.

The change in POS allows for printing item tickets with an item condition (for example, damaged or defective) indicated right from transfer, purchase, or adjustment documents.

In CHQ, we've added 3 new printing areas under **settings** > **printing** > **mobile printing designs**.

These areas include:

- transfer item ticket
- purchasing item ticket
- adjustment item ticket

Performance improvements

TWD-27328, TWD-27374, TWD-27386
Build 6.13.59.0

Database updates have been provided to ensure faster performance.

Exportv2 (json export) performance improvements

TWD-26497
Build 6.13.59.0

The JSON-based export algorithm has been optimized to work faster.

Increase of speed for Sales Receipt and Sales Order import

TWD-27563, TWD-28725
Build 6.13.59.0

We've increased the speed of Sales Receipt and Sales Order import documents processing to maximum possible depending on the system's available resources.

Device Transaction Number sequential generation

TWD-26673
Build 6.13.59.0

With this improvement, the Device Transaction Number (DTN) values continue to be generated sequentially even after the device has been updated.

This helps store the DTNs in order and prevents error generation once documents with the same DTNs are created.

This upgrade includes Sales Receipts, Transfer Memo, Purchase Receipts, Adjustments, Count Memo.

Enhanced security for password retrieval

TWD-24616
Build 6.13.59.0

On the CHQ UI side, we've enhanced the security of password data management in the following areas:

- **company settings** > **general settings** > **SMTP server password**
- **sales** > **payment processing**
  adyen (service and reporting passwords, as well as client secret), fortress, TopUp, card connect, shopify, givex (password and merchant secret), and CAFIS Pitt
- **reports** > **report settings** > **general settings** > **password**
- **reports** > **report settings** > **dashboards** > **client secret**
- **location settings** > **location dialog** > **payments** > **payment processing**
  miTPV, adyen (service and reporting passwords), fortress, card connect, client secret

New API added

TWD-26326
Build 6.13.59.0

We've added a new JSON-based *Custom tables import* API.

New field in the JSON-based Ship Sales Order Export API

TWD-26731
Build 6.13.59.0

A new field, *SerialNumber*, has been added to the JSON-based Ship Sales Order API at the *Items* level.

Reduced loading time for locations list

TWD-24617
Build 6.13.59.0

Previously, in some areas, it used to take some extra time to get the location list:

- **security** > **users** > **dialog** > **locations tab**
- **company settings** > **SVS** > **location groups** > **edit SVS location group** > **locations tab**
- **locations / location settings** > **list**
- **availability group** > **list** > **locations btn**
- **order management** > **sell from locations**
- **order management** > **fill locations**
- **transfers** > **transfer locations**

That would happen because a request was sent to the server to load the location logo images.

Now, the logo images are not included in the request, which ensures a faster location list displaying.

New filter added to Sales Order History API

DS-638
Build 6.13.59.0

A new filter has been added to the JSON-based Sales Order History API: *SellToEmail*.

> IMPORTANT NOTE:
>
> The *SellToEmail* filter is required for export to be performed.

All the customer orders that contain the email that's been specified in the *SellToEmail* parameter will be filtered out.

Updates in the JSON-based Count Memo API

TWD-29152

Build 6.13.65.0

We've updated the following two JSON-based Count Memo control flow APIs:

- Create Count Memo
- Create adjustment for Count Memo

JSON-based Count Memo control flow API - Create Count Memo

We've added a new filter to the API – *FilterOutItemsWithoutQty*. If the filter is used, no Count Memo items are created for inventory items with zero on-hand qty.

JSON-based Count Memo control flow API – Create adjustment for Count Memo

We've added a new parameter *–IdentifyUnrecognized*. If the parameter is set to "true", before creating an adjustment, a Count Memo item is created for every unrecognized item scan only if there is a corresponding inventory item.

Updated algorithm for JSON-based Count Memo Export API

DS-711

Build 6.13.70.0

We've updated the algorithm used for filtering Count Memos as a part of Count Memo export via API requests.

The updated algorithm prevents any export failures related to filtering Count Memos by Device Transaction Number.

Updated JSON-based Sales Receipt export API

DS-712

Build 6.13.70.0

The **LineDiscReason** field in the Sales Receipt export API is now available only for Sales Receipts of the “Sale” type.

Database updates for the Replenishment process

DS-773

Build 6.13.76.0

We have updated our database to ensure that the Replenishment process runs at a faster speed.

Enhanced Sales Receipt posting

TWD-32499

Build 6.13.79.0

The procedure of posting Sales Receipts to CHQ database has been enhanced to provide faster performance.

Issue Resolutions

Updated gift card transaction sending process

DS-572

Build 6.13.59.0

Issue:

Earlier, the Teamwork integration with the Clutch platform would stop working properly due to CHQ continuous attempts to post transactions that cannot be posted in Clutch.

> NOTE:
>
> Clutch is a third-party system that one of our clients uses in connection with Teamwork CRM.

Resolution:

The issue has been fixed. Now, transactions that are failed to be posted are resent every hour. If a transaction fails to be sent successfully within 48 hours, it will never be resent anymore.

Override quantity in Count Memo not included in total counts

DS-691

Build 6.13.70.0

Issue:

Previously, when manually changing the override quantity of an item in a Count Memo, the override quantity was not updated in the **# of items counted** and **total quantity scanned** fields in the Count Memo **general** tab under **chq** > **inventory** > **count memos**.

Resolution:

Changes have been made in the Cloud Service HQ and in CHQ to include the override quantities into the calculations.

Purchase Receipt # displayed instead of Purchase Order # in Shipments History

DS-671
Build 6.13.70.0

Issue:

CHQ did not transmit the correct Purchase Order number for the POS Pro app. As a result, in POS Pro, under the Shipments History list view, the **Purchase Order #** would display instead the **Purchase Receipt #**.

Resolution:

This issue has been fixed with changes made in CHQ, now the **Purchase Order #** displays in the **Shipments History** list view.

Ship Method Id field display issue fixed for Sales Receipt import

DS-677
Build 6.13.70.0

Issue:

Previously, when importing a Sales Receipt and the shipping method was set to **SSO carton** in the related Ship Memo, that receipt would have an empty **Ship Method ID** field.

Resolution:

This issue has been fixed. Now, the **Ship Method Id** field contains the appropriate value.

Failure of Sales Order lines import

DS-695
Build 6.13.76.0

We have fixed the issue that caused the item import process to freeze at the *Document Processing* pop-up. Now, the import process is completed properly.

Items with no quantity included in eCommerce Reserve Orders by Replenishment

DS-772

Build 6.13.76.0

The replenishment process could include an item without any available quantities to an eCommerce Reserve Order.

We have fixed that issue and an item without any available quantities is not included in an eCommerce Reserve Order.

Epilogue

This guide was published on *June 18, 2020* by Teamwork Commerce.

CHQ is accessed online through a browser and 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.