



CHQ RELEASE GUIDE

Version 6.14

Build 6.14.34.0

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Sales

Customer sales and order history

TWD-28939

Build 6.14.34.0

The update allows users to view customer order history. This can be done via the **customer** dialog that is accessed by clicking the required customer under **chq > sales > customers**.

There are two possibilities to review the customer order history:

- Sales Orders linked to the customer

customer - [Customer Name]

general

membership

gift cards

ship to

people

notes

custom

orders

sales

system

PLU	store description	attribute 1	attribute 2	order qty	filled qty	cancelled qty	sales order #	order date
9791869	S/S STRIPE POLO	WHITE	L	1	0	1	1000012348	03/27/2020 11:01 AM
69827	SILK SKIRT PUR	WHITE	S	4	1	0	1000012343	03/26/2020 6:20 PM
69822	"PICASSO" TSHIRT	INDIGO	S	1	0	0	1000003171	03/17/2020 10:48 AM
69827	SILK SKIRT PUR	WHITE	S	1	0	0	1000012300	03/13/2020 12:31 PM

4 records

page 1 of 1

save cancel

- Sales Receipts linked to the customer

customer - [Customer Name]

general

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system

PLU	store description	attribute 1	attribute 2	qty	sales receipt #	type	receipt date	sales order #
9791869	S/S STRIPE POLO	WHITE	L	1	1000003794	S	03/27/2020 11:01 AM	1000012348
69827	SILK SKIRT PUR	WHITE	S	4	1000012300	S	03/26/2020 6:20 PM	1000012343
69822	"PICASSO" TSHIRT	INDIGO	S	1	1000003171	S	03/17/2020 10:48 AM	
69827	SILK SKIRT PUR	WHITE	S	-1	1157400040	R	03/13/2020 12:31 PM	

4 records

page 1 of 1

save cancel

Country-based filtering of postal codes in autocomplete

TWD-28614

Build 6.14.34.0

Now, when entering a postal code in CHQ, values in the autocomplete drop-down menu are filtered based on the selected country:

The screenshot shows the 'new customer' form with the 'bill to address' section selected. The 'country' dropdown is set to 'United States of America'. The 'postal code' field contains '456', and an autocomplete dropdown menu is open, showing a list of Ohio postal codes starting with '456'. The dropdown is highlighted with a green border. Other fields include 'mobile', 'home', 'work', 'other', 'preferred phone', 'trading partner ID', 'price level', and 'VAT registration number'.

NOTE:

By default, such filtering is available for the United States only. To add other countries, contact your Teamwork Customer Support representative.

This applies to any areas, where the postal code is used:

- **chq > sales > customers > <new customer>**:
 - **customer primary address**
 - **customer ship to address**
 - **customer person address**
- **purchasing > vendors > <vendor>**
- the **ship to** field under **chq > sales > order management > <sales order>**
- the **ship to** field under **chq > sales > ship memos > <ship memo>**
- **settings > security > users > <user>**
- **settings > company settings > company information**
- **settings > location settings > franchise groups**
- **settings > location settings > locations / location settings > <location> > details**

Settings

Prioritizing payment methods for split payment refunds

TWD-29346

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We have added the capability to prioritize payment methods that are used for split payment refunds within a single order.

To set priority for the available payment methods, you need to:

- specify the “refund to” option at the payment method level
- arrange available “refund to” options in the desired priority at the sales document level

When the return is complete, you can check the refund in the **Return Worksheet**.

Configuring the “refund to” option for a payment method

To configure the “refund to” option at the payment method level in CHQ, go to **settings > payment methods**. Then, select the required payment method and proceed to the **returns manager** area:

Adyen CC

general

payment type: credit card

code: Adyen *

description: Adyen

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:

max positive over-tender \$: \$0.00

max positive over-tender %: 0.00

returns manager

refund to: original card

* - required

save cancel

In the **refund to** field under **returns manager**, select the required option.

NOTE:

For existing installations:

- if the payment type is set to **credit card**, the **refund to** option will be "credit card" by default.
- if the payment type is set to **global-e**, the **refund to** option will be "credit card - Global-E" by default.

For all new installations, the default value is empty.

Configuring "refund to" option priorities

Configuration of the "refund to" option priorities is available under the **returns manager – auto process priority for split payments** section in **chq > settings > sales > sales documents**:

The screenshot shows the 'sales documents' configuration page in the Teamwork Commerce settings. The left sidebar contains a navigation menu with 'sales documents' selected. The main content area shows various settings for sales documents, including checkboxes for 'auto transfer when returning from another location', 'return worksheets - auto process exchanges', and 'allow to make changes in sales receipt with payments'. A red box highlights the 'returns manager - auto process priority for split payments' section, which contains a list of refund options: 'original card', 'virtual gift card', 'store credit', and 'offline payment'. The 'original card' option is currently selected and highlighted in blue. Above the list are 'move up' and 'move down' buttons. At the bottom right of the settings area are 'save' and 'cancel' buttons.

The default **refund to** options are as follows:

- original card
- virtual gift card
- store credit
- offline payment

The **move up** and **move down** buttons can be used to change the order of these options. This order defines the logic of the refunding auto process.

Checking the refund in a Return Worksheet

The process of returning items is done through a Return Worksheet, and the **refunded to** option can be viewed in the **items** tab of the selected **Return Worksheet**, under **chq > sales > return worksheets**.

return worksheet 1000000060 - completed

general		edit remove finalize return actions		auto process	
items		search to add	condition:	filter	
avail. for return	refund amount	refunded to	return receipt #	return status	
1	\$14.00	original card, store credit, virtual...	1000000353	verified return	

Updated multiple payment capturing for Adyen

TWD-29392

Build 6.14.34.0

Now, instead of simply enabling the **multiple capture** option for Adyen payments, it is possible to specify if:

- the original transaction token is used for authorization for subsequent captures, or
- a recurring token is applied and a new transaction is created.

The configuration is available in CHQ under **settings > payment processing > adyen:**

The screenshot shows the 'payment processing' settings for Adyen. The 'multiple capture' dropdown menu is highlighted in red, showing the following options: 'no', 'use recurring token', and 'use original token'. The 'use original token' option is currently selected.

The following options are available in the **multiple capture** field:

- **no**: multiple capturing is not allowed; *default*
- **use recurring token**: multiple capturing is allowed; however, the original transaction token isn't used for subsequent captures, and a new transaction is created for capturing the remaining part of reserved funds.
- **use original token**: multiple capturing is allowed and original transaction token is used for all the subsequent captures

NOTE:

If the **multiple partial captures** option is enabled at the Adyen side and the **use original token** option is selected in CHQ, but the original token for some reason becomes unavailable, the recurring token will be used for subsequent captures.

Other enhancements

Updated `EmployeeIdentifierSetting` for multiple JSON-based export APIs

TWD-28645, 28646, 28649, 28650, 28659, 28661, 28662, 28663, 28672

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We've added the `FullName` parameter to **`EmployeeIdentifierSetting`** in the following JSON-based export APIs:

- ASN
- Customer
- Purchase Order
- Purchase Receipt
- Ship Sales Order
- Tas Report
- Vendor
- Vendor Invoice
- Time Card

This allows getting more detailed information about the employee: first name and last name.

New parameter in JSON-based Customer export API

TWD-28804, 28806

Build 6.14.34.0

We've added the `TeamworkId` parameter to **`ShippingMethodIdentifierSetting`**, **`LocationIdentifierSetting`** in the JSON-based **Customer** Export API.

This parameter contains the GUID and allows getting more detailed information about the shipping method and the location.

New parameter in the JSON-based Service Fee export API

TWD-28806

Build 6.14.34.0

We've added the `TeamworkId` parameter to **`TaxCategoryIdentifierSetting`** in the JSON-based **Service Fee** export API.

This parameter contains the GUID and allows getting more detailed information about the tax category.

Updated validation for postal code fields

TWD-29900

Build 6.14.34.0

Now, only the following is allowed in postal code fields:

- Latin letters
- numbers from 0 to 9
- spaces
- hyphens

If the entered symbols differ from the above, the following error message appears: "Only Latin letters, numbers, hyphens, and spaces are allowed".

Issue resolutions

Linking gift cards to locations and location currencies

DS-674

Build 6.14.34.0

Now, when a new gift card is created in CHQ, it is linked to the location it's been created at, as well as to that location's currency.

TECHNICAL NOTE:

The above *linking* means that the gift card is created within the same CRM Namespace as the gift card's *create at* location.

It has been done to avoid situations when, for example, a gift card, created in a dollar zone location, would support pounds only.

Also, please be advised that it is not possible to link the gift card to a customer if that customer doesn't belong to the CRM Namespace where that gift card has been created.

Improved tax calculations

TWD-29652, DS-692

Build 6.14.34.0

Issue

Previously, our European clients could experience the following during tax calculation:

- the **state** field in the **ship to address** area (**chq > sales > order management > new**) was required not only for the USA
- the tax amount was not calculated properly for VAT tax areas

Resolution

The following updates have been made:

- the **state** field is now optional
- the tax amount for VAT tax areas is now calculated according to the correct formula

Epilogue

This guide was published on **April 29, 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](tel:7272101700) and [select 1](#) to leave a message that will immediately be dispatched to an on-call tech.