CHQ RELEASE GUIDE

Version 6.14

Build 6.14.34.0

Table of Contents

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

- Sales Receipts linked to the customer

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:

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>**:
    - o **customer primary address**
    - o **customer ship to address**
    - o **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
Build 6.14.34.0

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:

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 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**.

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 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
Build 6.14.34.0

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 and select 1 to leave a message that will immediately be dispatched to an on-call tech.