TEAMWORK RETAIL
a product of Retail Cloud Technologies

TEAMWORK CHQ RELEASE GUIDE

Version 5.0

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Sales and OMS

RMA – Return Worksheet

Version 5.12 – TWD-4670

August 2017

RMA stands for Return Merchandise Authorization. Every store, whether a physical store or online, has items that get returned at some point, and using RMA codes is the key to simplified and easy returns.

Stores typically have an order number for the entire order, so when processing a return, associates have to find the order and then find the individual item. This is not so tedious if it's a small order, but can take some time if it's a large order with multiple items.

RMA codes takes out this middle step of having to locate the items, because the RMA codes is already associated, and that's the only information needed.

Each time a Sales Receipt is created, from either a Ship Memo or POS, each line on the Sales Receipt has a specific RMA code. This is a unique code that points to that specific line on the receipt.

RMA codes are alphanumeric, so that a unique number can be represented in just a few characters (11 to 12).

For example, if a customer purchases a pair of shoes, a t-shirt, and a jacket, each of those line items has a unique number that points to that specific item.

When the packing slip gets printed, this gets shipped out with the merchandise. Again, each item on that return slip has a unique RMA code.

So, if the customer brings the item and packing slip into a store to process the return, the associate can either scan the barcode or enter the RMA code number into the system, for an easy return.

Similarly, if the customer send the item (or items) back via mail, the receiving warehouse just quickly scans or enters the RMA code into a Return Worksheet, and the relevant information is pulled up in CHQ.

This includes information such as sales history, the item info, payment info, and more. The associate then clicks Return to return the money to the customer, create a Return Receipt, and put the item back in stock.

For larger companies that deal with many different boxes of returns at a time, this can all be entered into one Return Worksheet, and saved at the same time – no need to create different worksheets for different items or orders.

Worksheets can show returns for the day or shift, making reporting and analytics very easy.

If the returned item is damaged or unable to be resold, there is an option on the worksheet to reject the return or select the quality of the item. If the item is so damaged that the customer is not going to be refunded, the return can still be processed without refunding the customer.

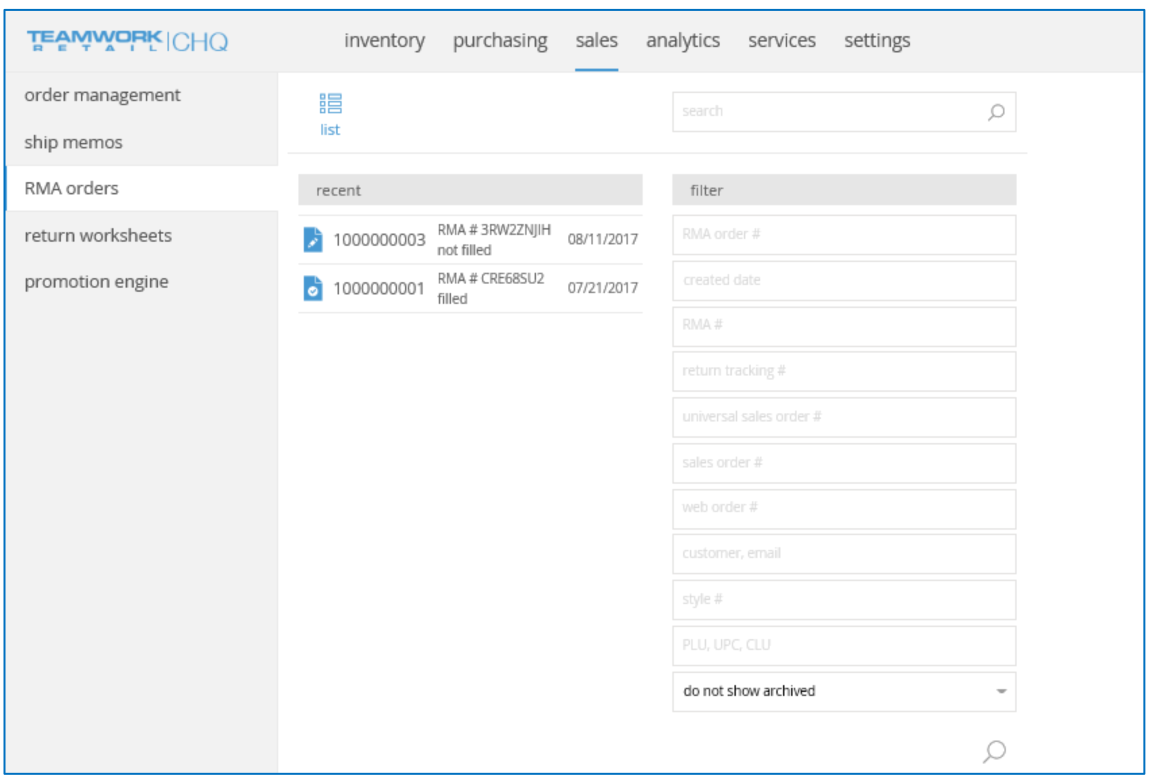
Return Worksheets are customizable per company return policies and individual preferences. There is also an option to make notes for the item.

If no RMA code or packing slip is included with a return, the original receipt can still be pulled up using different information, such as the return address on the box, customer name, etc.

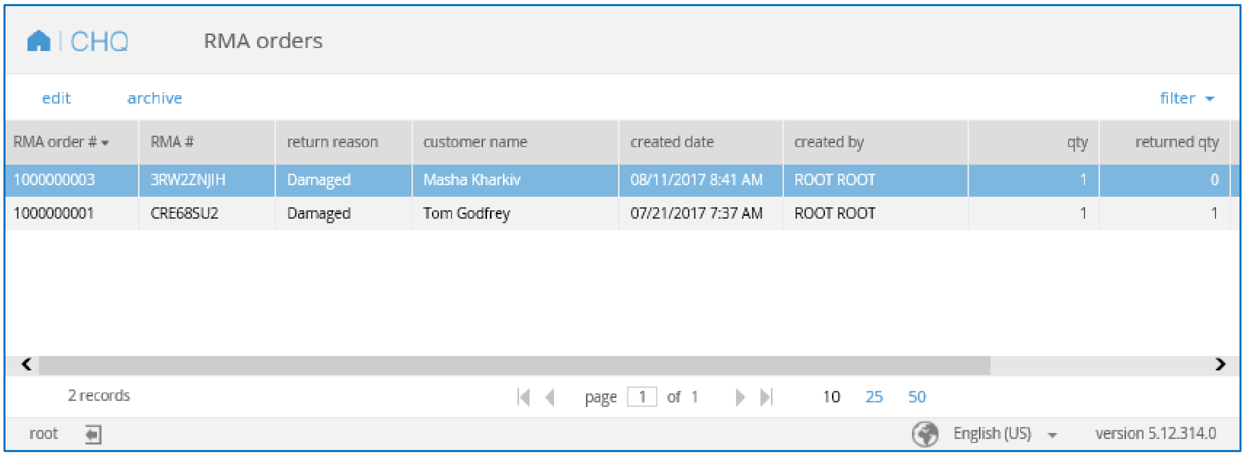
RMA Orders

To view return orders, go to Sales > RMA Orders. This tab functions the same as all other similar tabs in that the recent orders display, you can filter out or search for orders not shown, or select **List** to go to the list view.

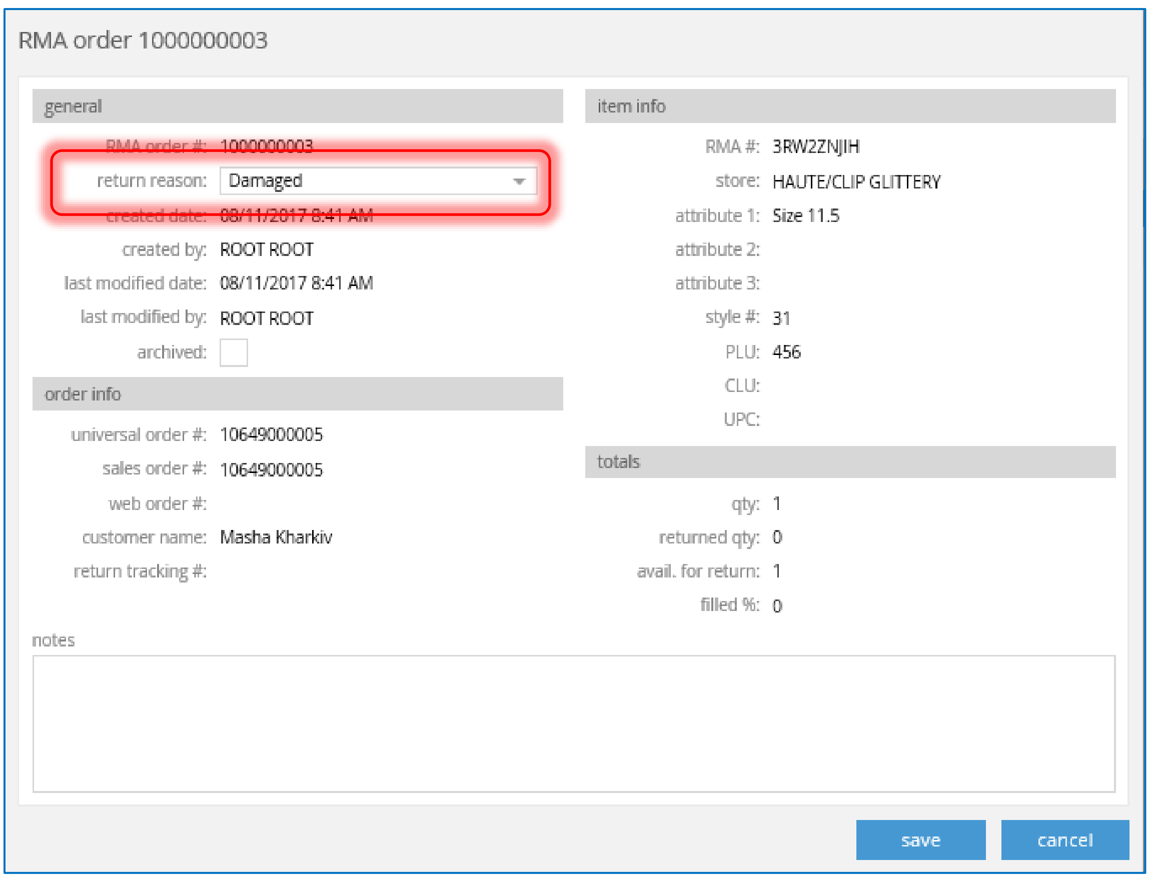
This tab is only visible with the security rights enabled.



The screen below shows the List view.



Select **Edit** to view the details of the selected RMA order. Notice the *Return Reason* field where users can select the return reasons created in Settings (see the section below for more information on setting these up).

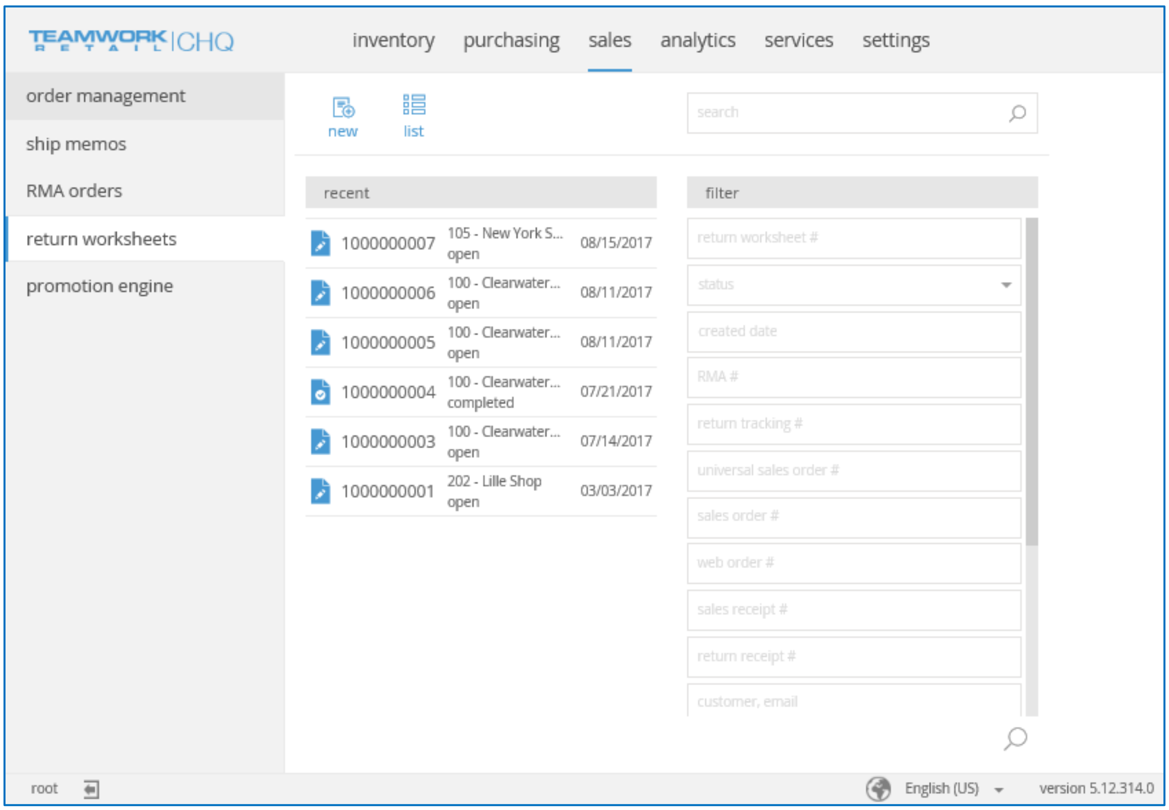


Return Worksheets

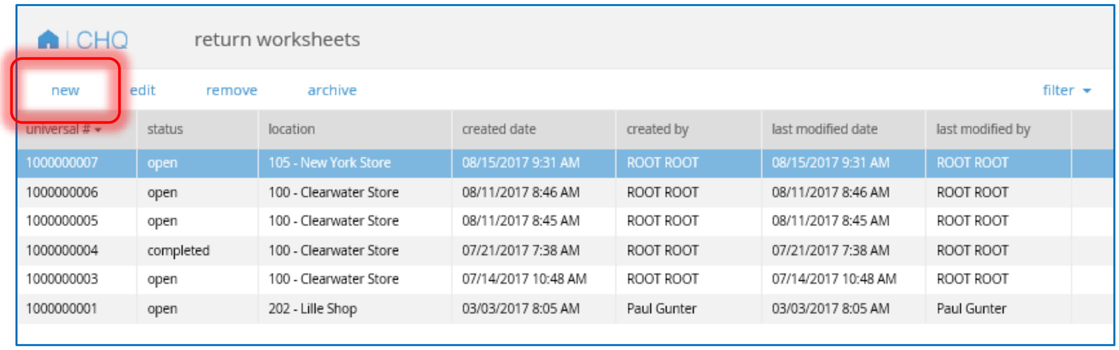
To view return worksheets or to create a new one, go to Sales > Return Worksheets. Again, return worksheets are used for processing returns, and can be used for a single return or to process multiple returns all at once.

This tab functions the same as all other similar tabs in that the recent worksheets display, you can filter out or search for worksheets not shown, or select **List** to go to the list view.

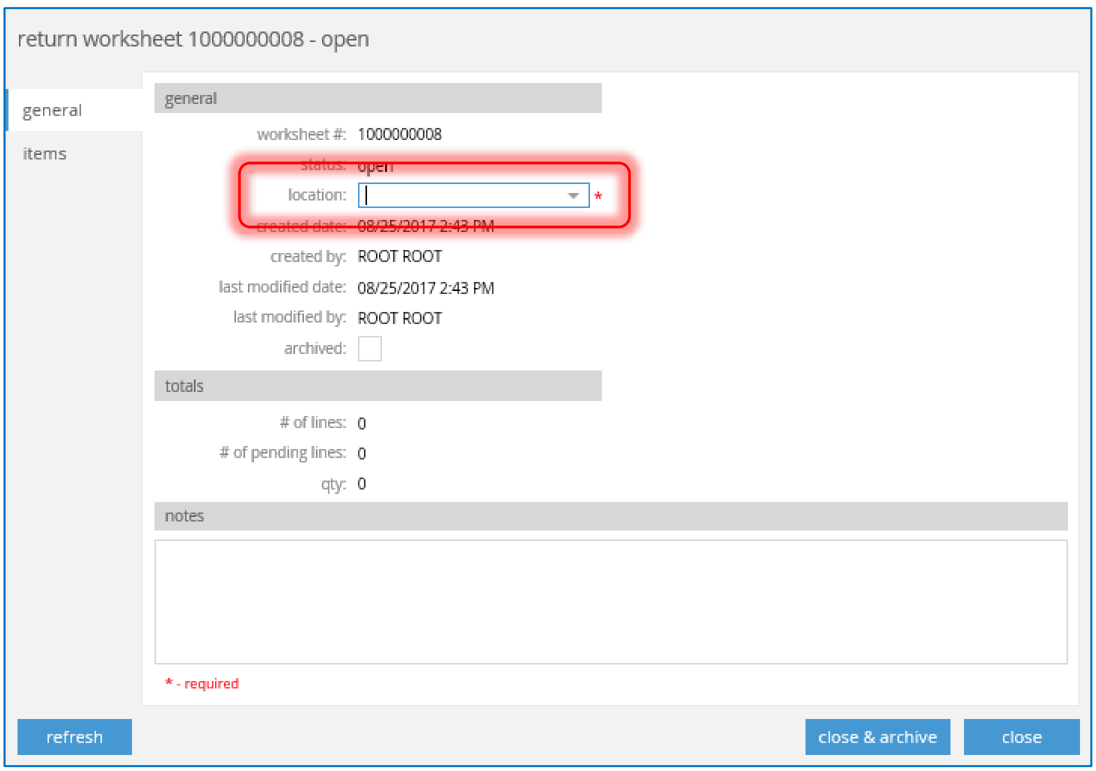
This tab is only visible with the security rights enabled.



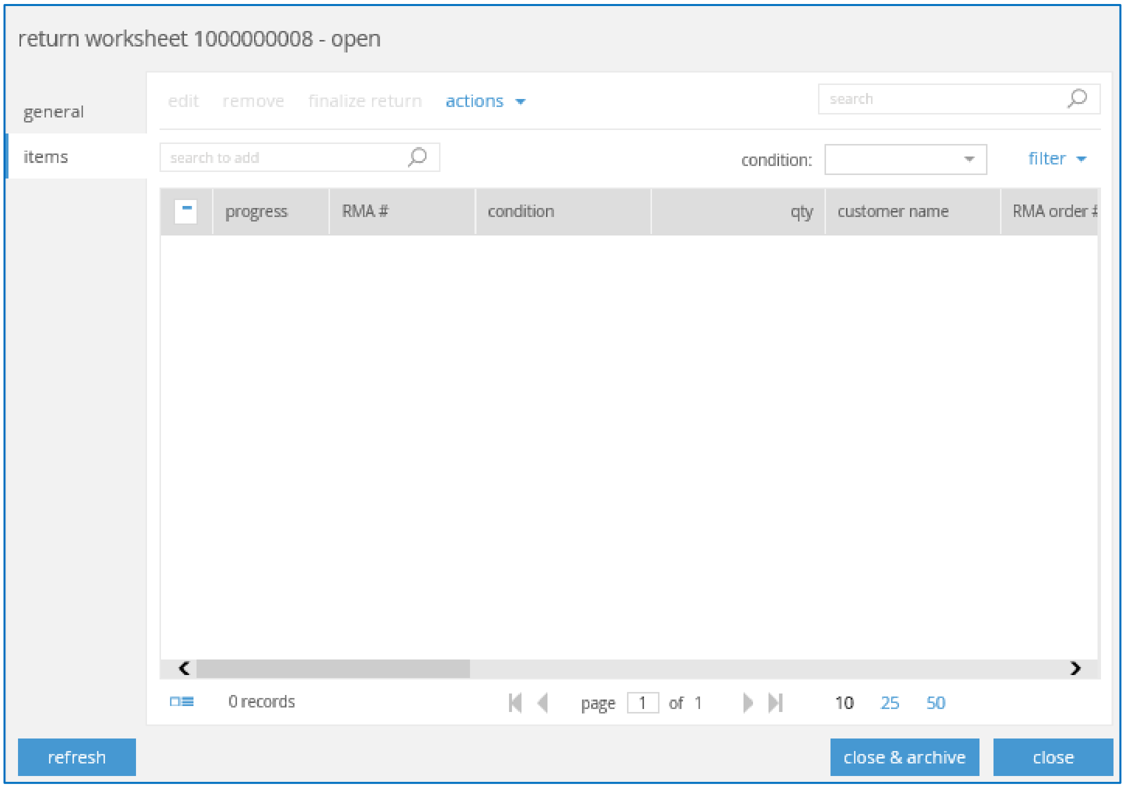
From the main page, or the list view shown below, click **New** to start a worksheet.



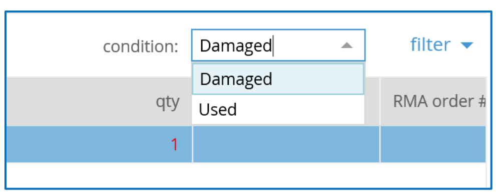
Most of the fields on the *General* tab are auto-filled by Teamwork, except you'll need to fill in the *Location* field, which is the location where the return is being done.



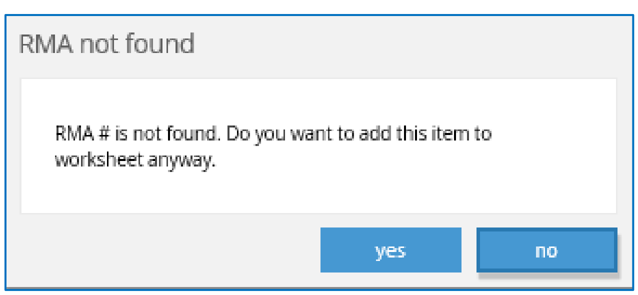
The next tab, *Items* is where you'll add the items included in the return. Use the *Search to Add* field to look up the item or items you want.



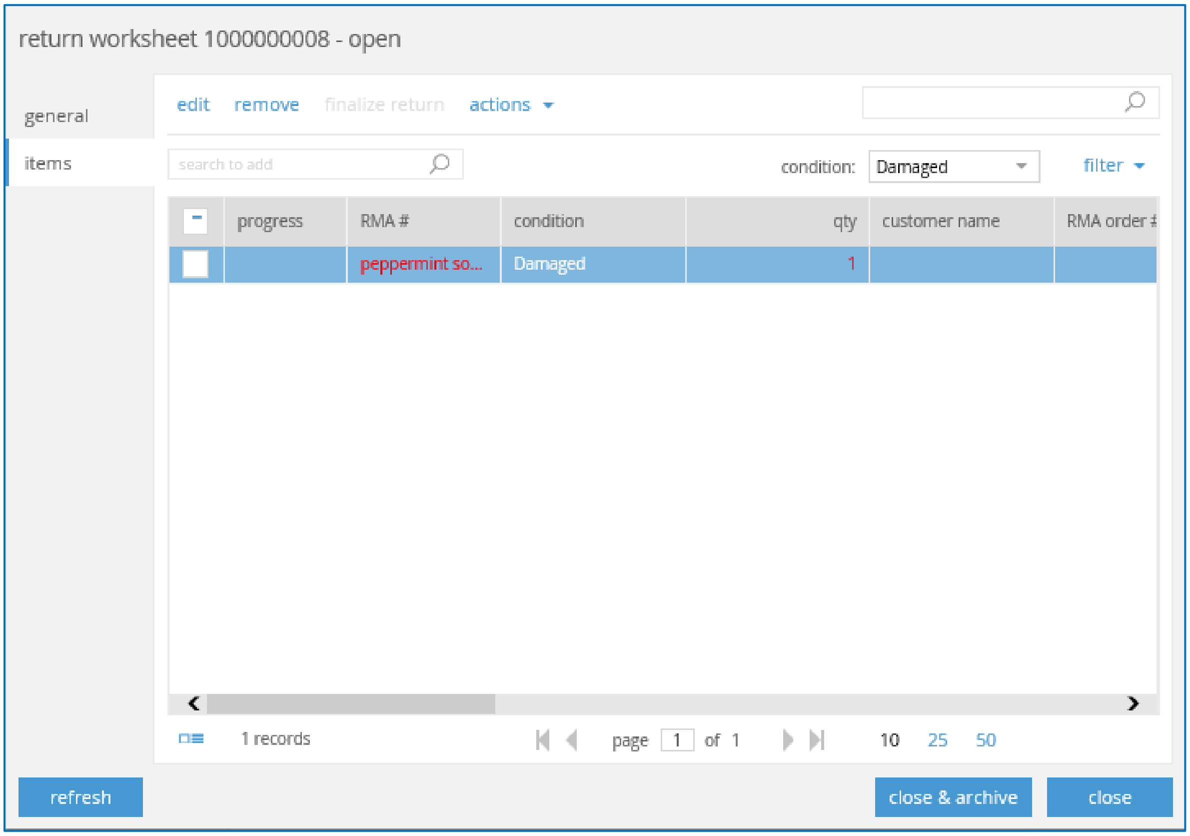
Use the *Condition* field to select the condition of the return item. The options in this drop-down are created in Settings > Sales > Return Conditions (see the next section for more information).



If there is no RMA # for the item you're trying to add, an error message displays. Click **Yes** to continue adding the item to the worksheet, or **No** to close the dialog and return to the open worksheet.



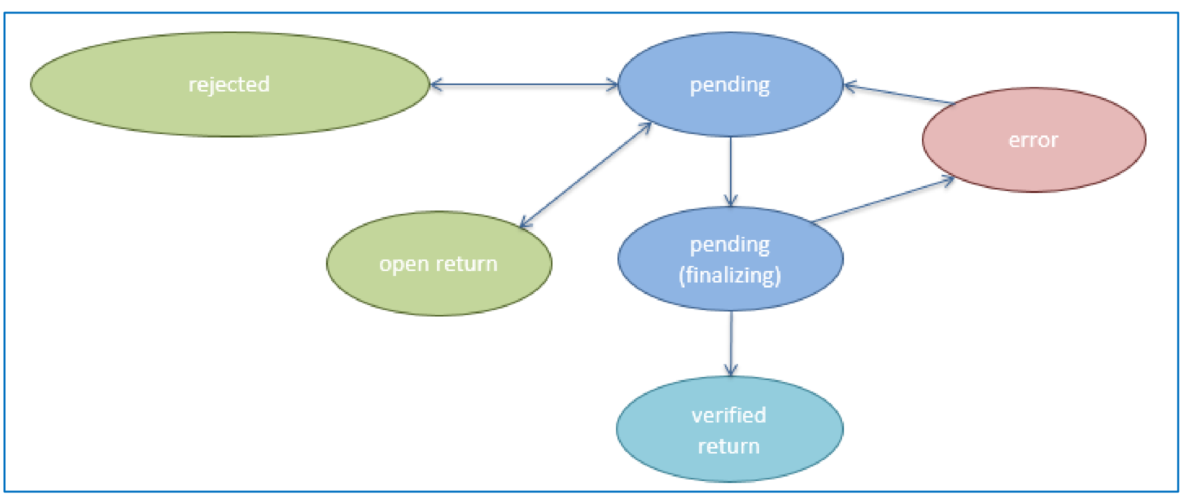
If the added item doesn't have an RMA#, the name displays in red, as shown below.



Every time changes are made on this dialog, those changes are immediately saved to the server. Clicking the **Refresh** button ensures that the information displayed is the most current.

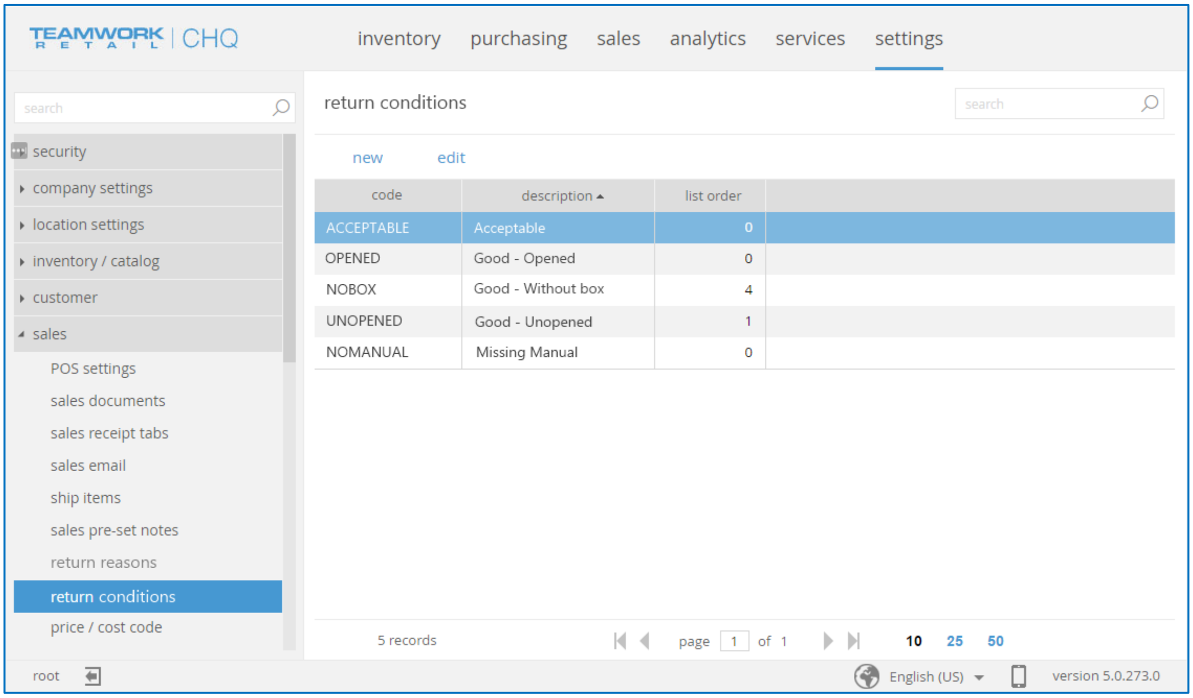
When finished adding items, click **Close** to close this dialog but keep the worksheet open, or **Close & Archive** to mark the worksheet as closed and archive it.

The diagram below shows the way return statuses work.

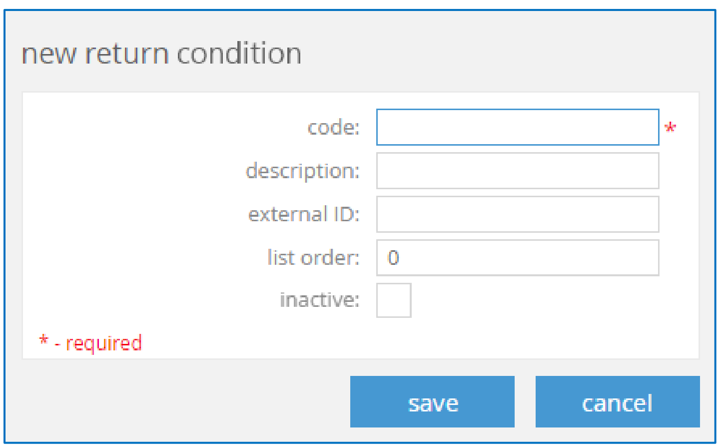


New Settings

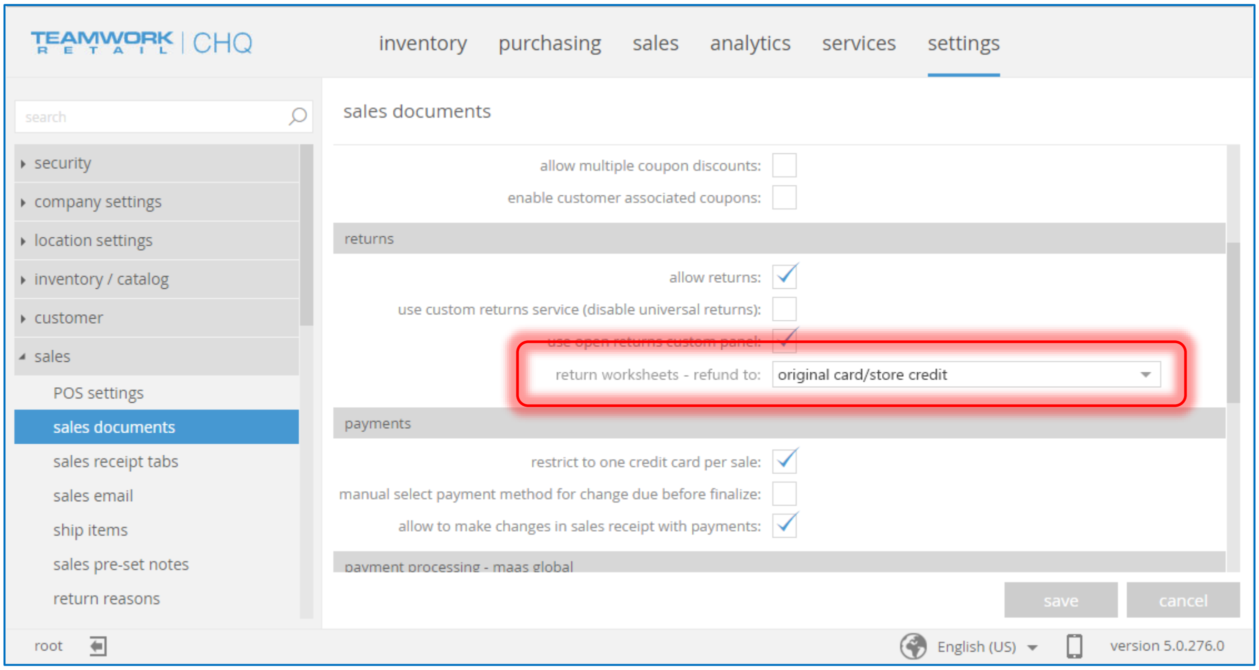
Under Settings > Sales, there is a new Return Conditions tab for defining allowable return values.



Selecting **New** brings up the *New Return Condition* dialog for defining the return condition terms.



Additionally, under Settings > Sales > Sales Documents, there is *Return Worksheets – Refund To* field for defining how the refund is processed (back to original credit card, store credit, etc.)



New Security Right

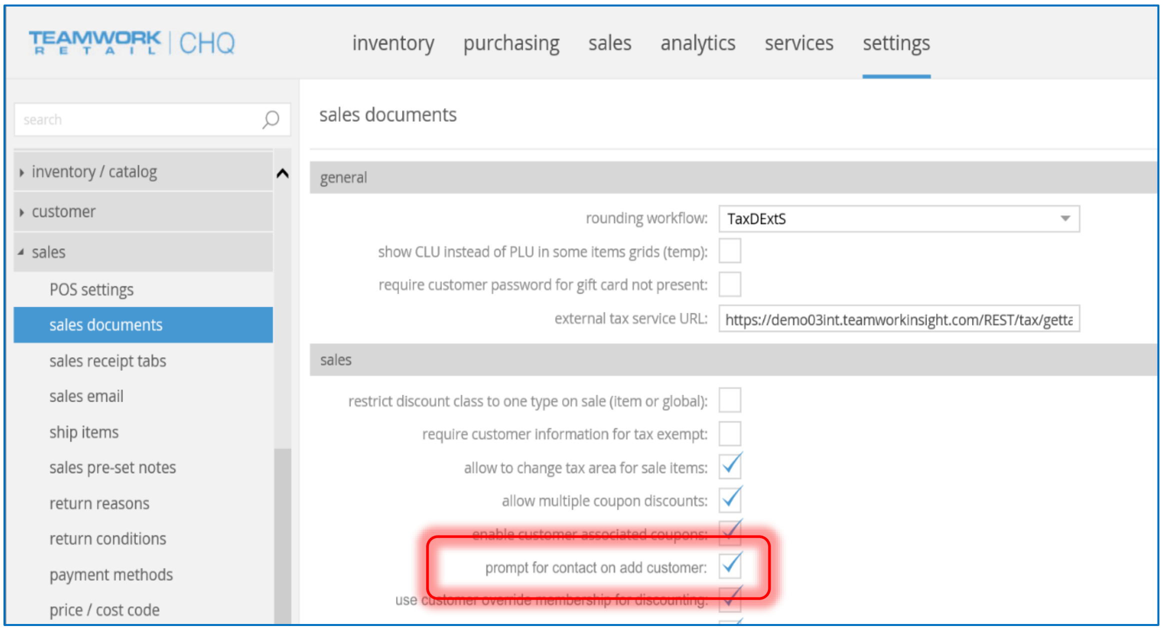
Area	Right	Name	Description
Return Worksheets	RMA-ACCESS	Access	Access to Return Worksheets
Return Worksheets	RMA-ADDEDIT	Add Edit	Add new, edit, and remove Return Worksheets
Return Worksheets	RMA-FINALIZE	Finalize Return	Finalize Return in Return Worksheets
RMA Orders	RMAORDERS-ACCESS	Access	Access to RMA Orders
RMA Orders	RMAORDERS-ADDEDIT	Add Edit	Add new, edit RMA Orders

Select Contact

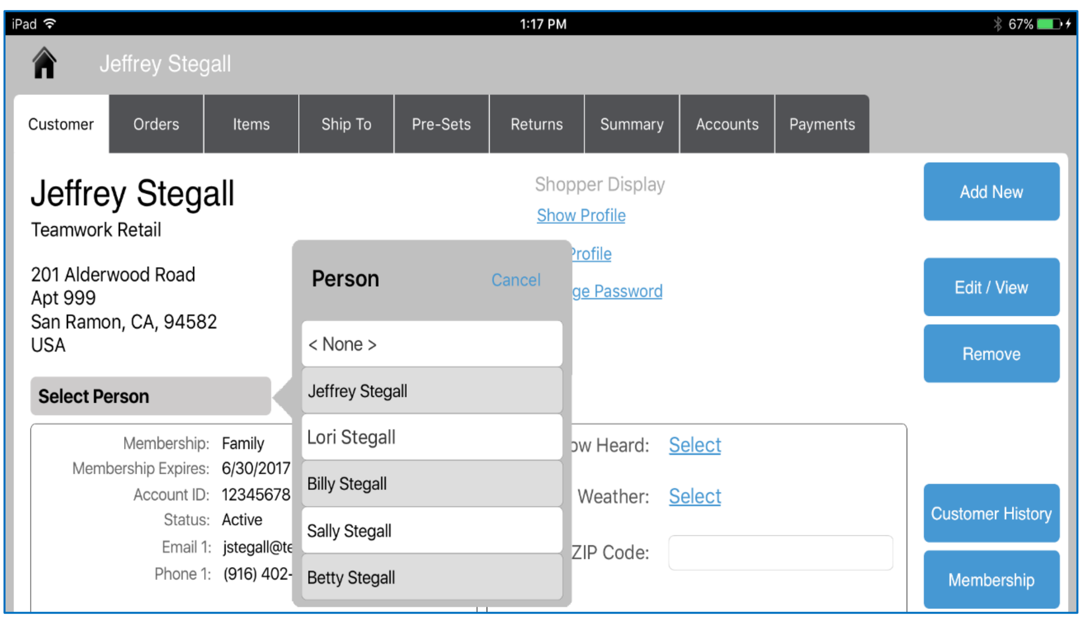
Version 5.10 – TWD-2660

August 2017

Under Settings > Sales > Sales Documents > Sales, we've added a new "Prompt for Contact on Add Customer" flag. When enabled, when a customer is added in POS, a prompt displays to select the customer record.



Additionally, when a customer is added to a receipt, a pop-up contact selection dialog displays.



Pre-Sale

Version 5.10 – TWD-2731

August 2017

We've added new pre-sale fields on the item level. Pre-sale is for items that are purchased ahead of time, before the item is available in inventory.

The added fields are as follows:

- Pre-sale start date – Date/time when an item pre-sale starts
- Pre-sale end date – Date/time when an item pre-sale ends (and becomes a regular item)
- Pre-sale max quantity – Max number of units that can be sold between pre-sale start date/time and end date/time

These three fields are now in:

- Settings > Inventory/Catalog > Styles & Items Designer on the General Single Item, General Service Item tabs, and Edit Style/Item dialog.
- Inventory > Styles & Items > Open Style/Model dialog for style that contains more than 1 item > Items tab > Control & Usage section
- Inventory > Styles & Items > Import. Can assign these fields when importing items.
- Inventory > Styles & Items > Imports > Edit > Inventory Catalog Import Dialog > Items Tab > Edit > Inventory Item > General Tab > "Control & Usage" Section
- Inventory Export report
- Inventory Catalog export

OMS

The Presale flag is added to the following places:

- Sales Order Details dialog
  - Sales Order Details Dialog > Items tab > Items grid. This flag is enabled if the current date/time is prior to the pre-sale end date.
  - Presale items can't have a Ship Memo, so the Create SM button is disabled.
- Order Management list view:
  - If at least one item on the order is presale, then the pre-sale flag is enabled.
  - New multi-select filter to choose *pre-sale only*, *mixed orders*, or *regular only*.
  - Create SM and Auto-Process buttons are disabled for pre-sale items.
- Order Management interaction view:
  - Pre-sale filter added (to display or filter out *pre-sale only* orders)
  - *Pre-sale only* are orders where all items are pre-sale. When the *Show pre-sale orders* option is selected, this displays all orders, with and without pre-sale items.

Rename Pre-Sale to Pre-Order

Version 5.12 – TWD-5490

August 2017

Mention of Pre-Sale has been renamed to Pre-Order in the following areas.

Inventory

- Default labels of *Pre-Sale Start Date*, *Pre-Sale End Date*, and *Pre-Sale Max Quantity* fields now read *Pre-Order Start Date*, *Pre-Order End Date*, and *Pre-Order Max Quantity* in the Styles & Items designer (Settings > Inventory/Catalog > Styles & Items Designer) in the tabs:
    - General Single Item
    - General Service Item
- Default labels of *Pre-Sale Start Date*, *Pre-Sale End Date*, and *Pre-Sale Max Quantity* fields now read *Pre-Order Start Date*, *Pre-Order End Date*, and *Pre-Order Max Quantity* in the Control & Usage section in the Style/Model dialog, Items tab (Inventory > Styles & Items > Open Style/Model dialog for style that contains more than 1 item > Items tab).
- Default labels of *Pre-Sale Start Date*, *Pre-Sale End Date*, and *Pre-Sale Max Quantity* fields now read *Pre-Order Start Date*, *Pre-Order End Date*, and *Pre-Order Max Quantity* in the Import Inventory Item edit dialog (Inventory > Styles & Items > Imports > Edit > Inventory Catalog Import Dialog > Items Tab > Edit > Inventory Item > General Tab > Control & Usage section).
- Default labels of *Pre-Sale Start Date*, *Pre-Sale End Date*, and *Pre-Sale Max Quantity* fields now read *Pre-Order Start Date*, *Pre-Order End Date*, and *Pre-Order Max Quantity* in the Inventory Export report. In Inventory Import, both labels for each field are supported.
- Inventory Catalog import and export.

Sales Orders

- On the Sales Order Details dialog > Items tab, the *Pre-Sale* flag now reads *Pre-Order* on the Items grid.

Order Management List View

- *Pre-Sale* flag now reads *Pre-Order*
- *Pre-Sale* filter now reads *Pre-Order* (options are now: Pre-Order Only orders, Mixed Orders, and Regular Only orders.

Order Management Interaction View

- *Pre-Sale* filter now reads *Pre-Order* (options are now: Do not Show Pre-Order Only orders, or Show Pre-Order orders).

OMS Payment Capture After Ship

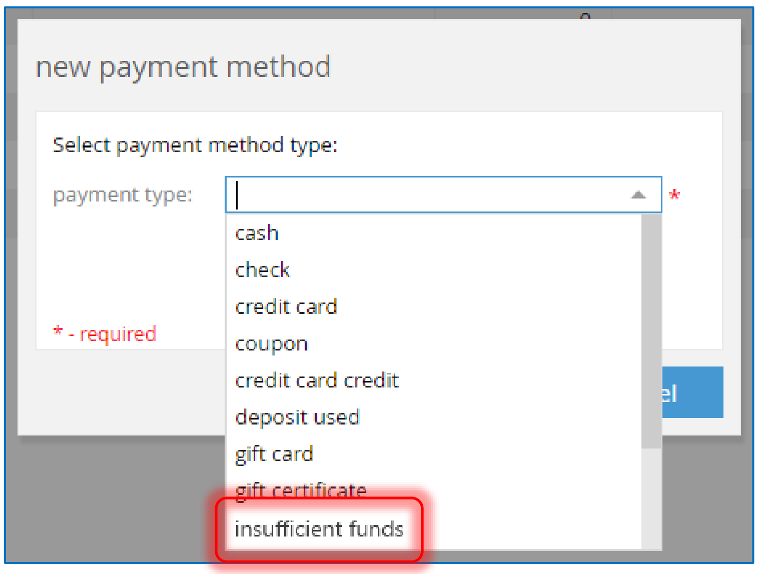
Version 5.10 – TWD-2635, TWD-2474, TWD-2475

August 2017

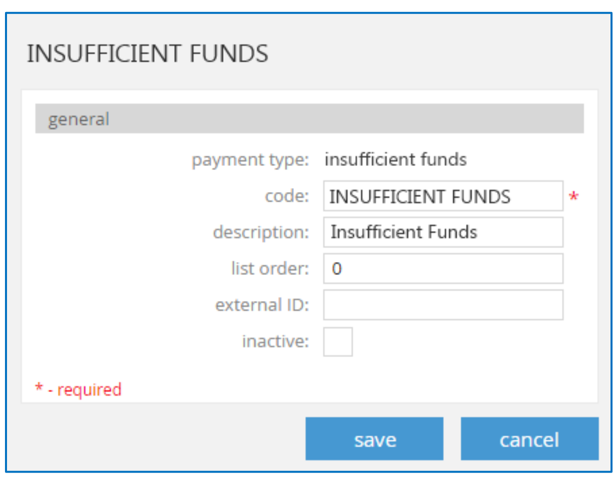
This feature is for the "Capture After Shipping" option for the Auth and Capture workflow.

Auth and Capture means the card is authorized and the order is processed, and the funds are taken AFTER the order is processed.

There is a new payment type called Insufficient Funds.

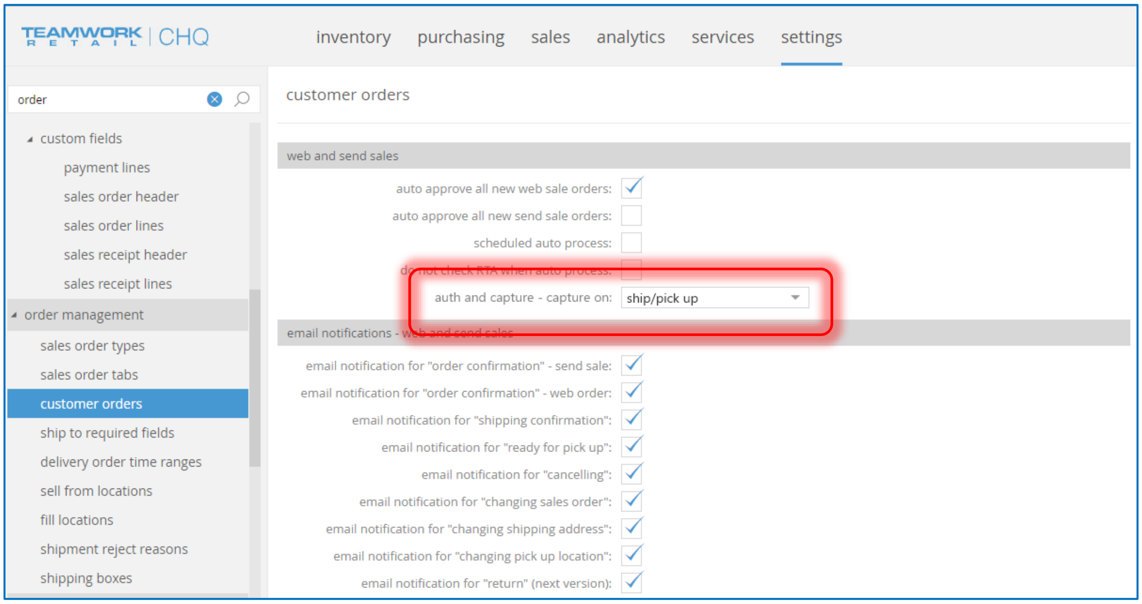


The New/Edit dialog for this payment method is shown in the image below.



New Settings

There is a new "Auth and Capture – Capture On" setting. This can be found in Settings > Order Management > Customer Orders > Web and Send Sales.



In this drop-down you can select either Create Ship Memo (the default) or Ship/Pick Up.

If Ship/Pick Up is selected and there is no payment method with the payment type Insufficient Funds then an error displays and you will be unable to save.

If Create Ship Memo is selected and there is a Sales Order where the total for the SO lines with the status of Delivery Pending is MORE than the total of the unused deposits PLUS the payment due, then an error displays that the amount is not enough to fulfil the order and you will be unable to save.

New Security Right

Right Code	Right Name	Right Description
SM-PROCWITHOUTFUNDS	Process Insufficient Funds SM	Process Ship Memos with Insufficient Funds

If the user doesn't have this right enabled then the option to fulfil a ship memo with insufficient funds is disabled.

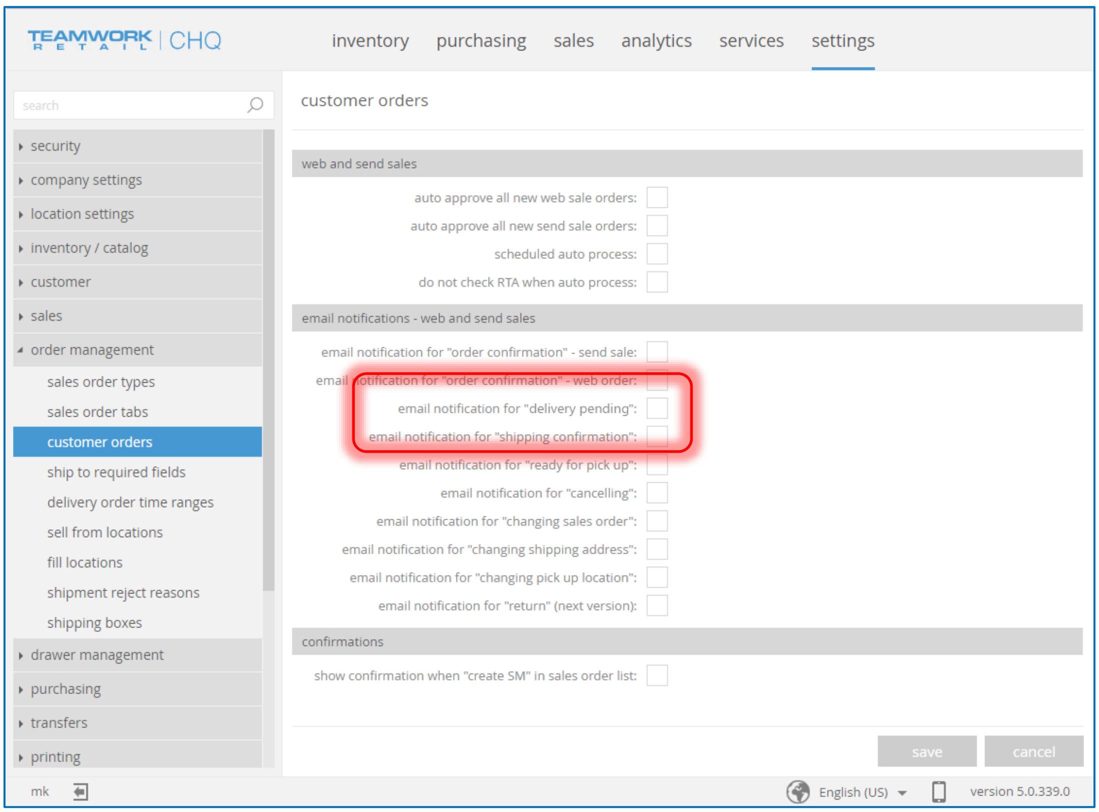
OMS Email Notifications – Delivery Pending

Version 5.12 – TWD-4394

August 2017

A customer email notification is often desired at the time of creating a Ship Memo. There is a new Email Notification type called Delivery Pending. With this setting enabled, an automated email can be sent to the customer when the status of the order changes to *Delivery Pending*.

This new *Email Notification for Delivery Pending* setting can be found under Settings > Order Management > Customer Orders.



Customer Override Membership

Version 5.10 – TWD-2655

August 2017

There are two new fields to the customer record.

- Override Membership Level: This is a second field to store a membership level for the customer record. This field is blank by default in a new customer record, but can be manually edited. Users must have the appropriate security rights to manually assign membership levels in order to edit this field. Security permissions are recommended as the capability to change Membership Level allows the Associate/Manager to invoke automatic price discounts and/or other membership benefits.
- Override Membership Expires: This is a date field users can set to override when the membership expires.

Both fields are blank by default in a new customer record, and users must have the appropriate security rights to manually assign a membership level to edit this field.

These fields allow for defining a "second" membership level to a customer. Or, another option is to use these fields on a Sales Receipt as the "active" membership. By doing this second options, you can apply a Sales Receipt discount or special price associated with the membership level.

If there is a defined expiration date within range and the new setting below is true, then:

- If Override Membership Type is *Price Level* OR regular Membership Type is *Price Level*, any "base" membership is ignored for discounting and this override membership will be used.
- If BOTH Override Membership Type and regular Membership Type is *Percent*, then the higher percentage is applied.
- If the override membership is expired then the "base" membership is used.
- If no date is defined then the override membership is used.
- If the setting below is false, neither override membership level or expiration date is used.

If the **Membership Override** option on the Customer tab of a Sales Receipt is selected, this overrides BOTH the membership fields and the manually selected override membership (as is done currently).

For purchased memberships, member benefits take effect immediately. If a customer adds some items and then adds a membership as well, the membership benefits are applied to all items on the sale.

With the new settings enabled, if the customer already has an active membership but purchases a new membership (upgrading or extending the membership), then the PURCHASED membership takes effect, not the existing membership. The exception to this is if the customer has an Override Membership level on account and purchases a membership, then the Override membership is used.

New Security Setting

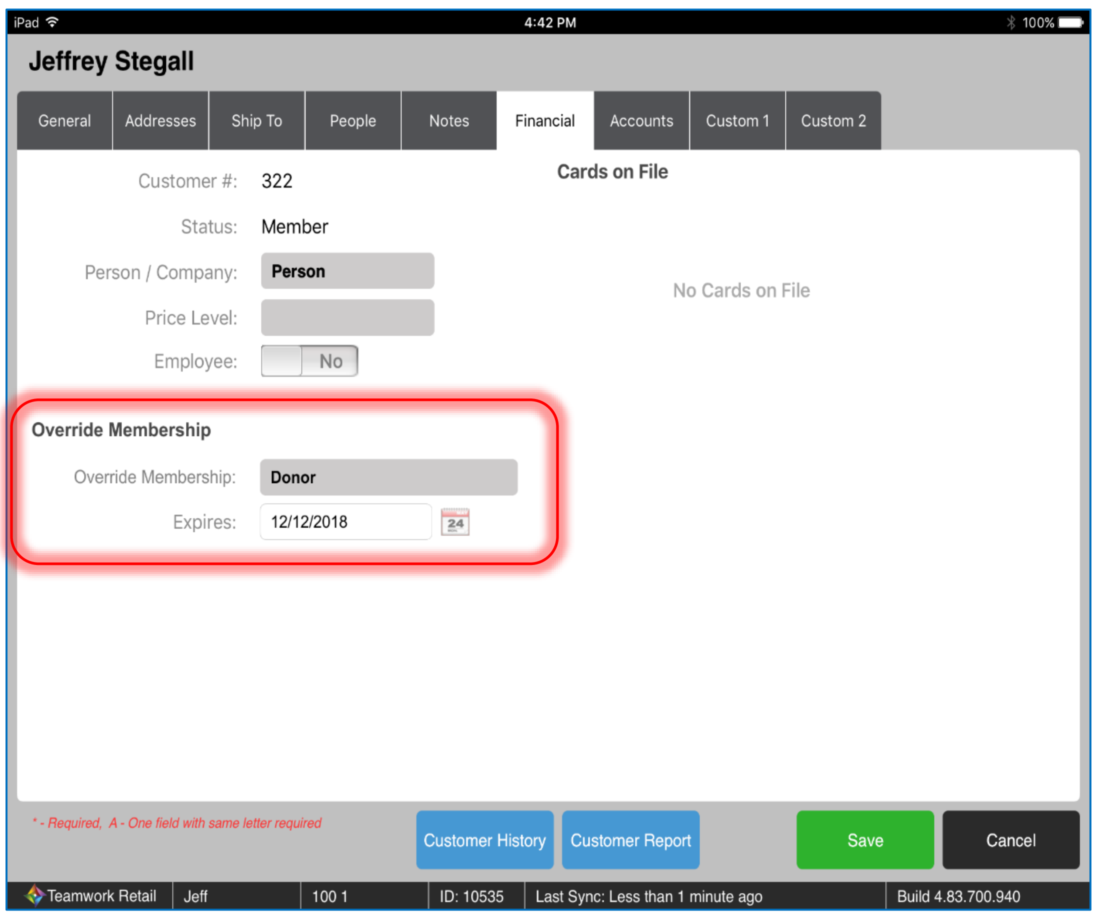
Settings > Sales > Sales Documents

- Use customer override membership for discounting
- Apply sold membership benefits to current sale

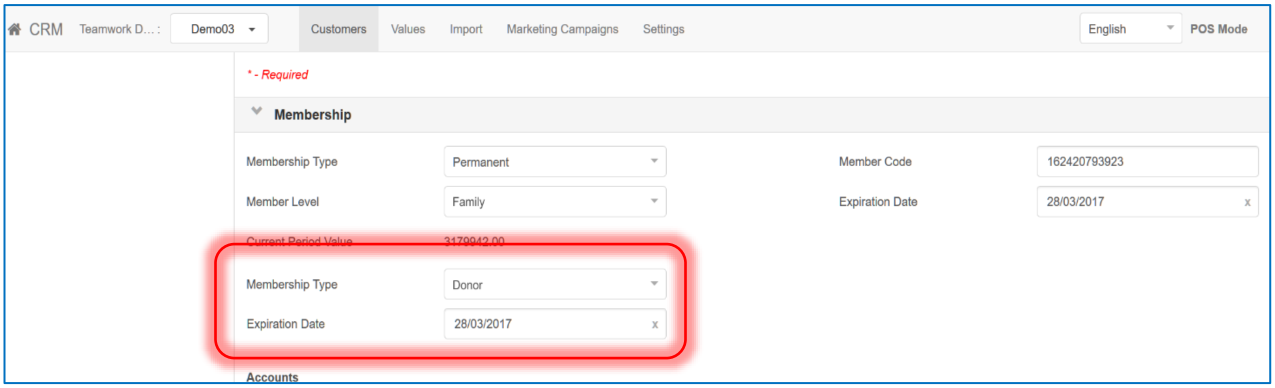
Settings > Customer > Device Customer Info > Edit

- Override Membership Level field
- Override Membership Expires field

With these settings enabled, the Override Membership field displays on the Financial tab in POS. If settings are disabled, this area is not visible.



Membership Type and *Expiration Date* fields are now visible in CRM.



Layaway Order Expiration

Version 5.10 – TWD-2723

August 2017

Layaway orders are now set to expire 60 days after creation. This applies to any Incomplete orders (not yet fulfilled), even if the deposit is paid in full.

50 days after an order is created, a notification email can be configured to automatically be sent to the customer, informing they have 10 days to complete the order. Once configured, this is automatically sent out by Teamwork.

Once the order expires, the deposit amount goes on the customer's account as store credit. All expired orders are automatically archived.

Populate FiscalDate Field During Posting

Version 5.10 – TFS # 54557

August 2017

We've made updates to populate the FiscalDate field during posting of Sales Receipts, Purchase Receipts, Adjustment Memos, Transfers In/Out, Drawer Memos, and new records.

CHQ Ledger – Tracking Cost Changes for LedgerDetail

Version 5.10 – TFS # 54178

August 2017

There is a new View/Table to quickly track cost changes for Ledger Detail. This is needed for fiscal reports.

New Ship Memo Item Field

Version 5.11 – TWD-3684

August 2017

We've added the following fields to the *ShipSalesOrderItem* table:

- SerialNumber
- SerialNumberCustomText1
- SerialNumberCustomText2
- SerialNumberCustomNumber1
- SerialNumberCustomDate1
- SerialNumberCustomFlag1
- SerialNumberCustomGUID1
- SerialNumberAssociateId

Right to Access Integrations Area in Settings

Version 5.10 – TWD-2734

August 2017

In the Settings area of CHQ there are security rights to restrict access to all areas except Integrations and Server Tasks.

We've now added security rights to restrict these areas, the same as for other areas.

Additionally, the Settings area is hidden completely from users without Settings access at all.

New Security Rights

Right Code	Right Name	Right Description
INTEGRATIONSETTINGS	Integration Settings CHQ	Access to Integration settings in CHQ

Settings for Email Address Verification

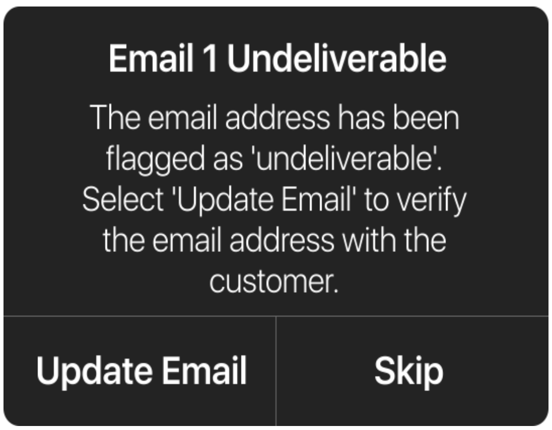
Version 5.11 – TWD-3772

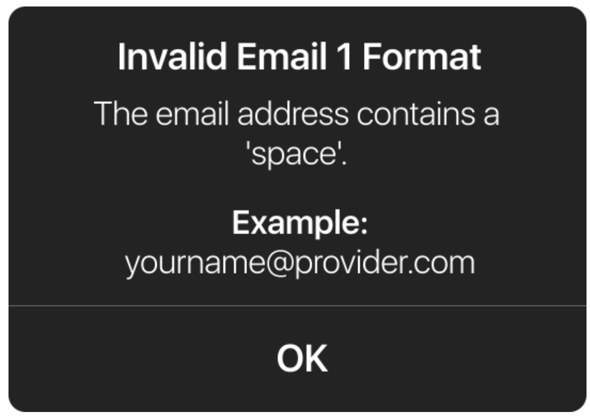
August 2017

We've added a new email address verification feature that checks and validates that the entered email address is properly formatted and valid (meaning there are no spaces, has an @ sign, etc.).

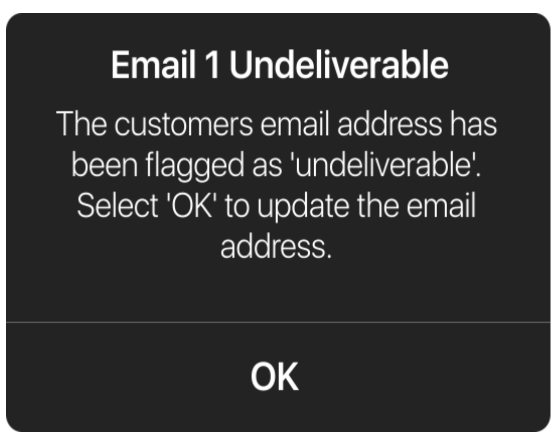
Various prompts will display for the associate to fill out the field, or that the address is incorrect and needs to be fixed.

Two examples of these prompts are shown below.

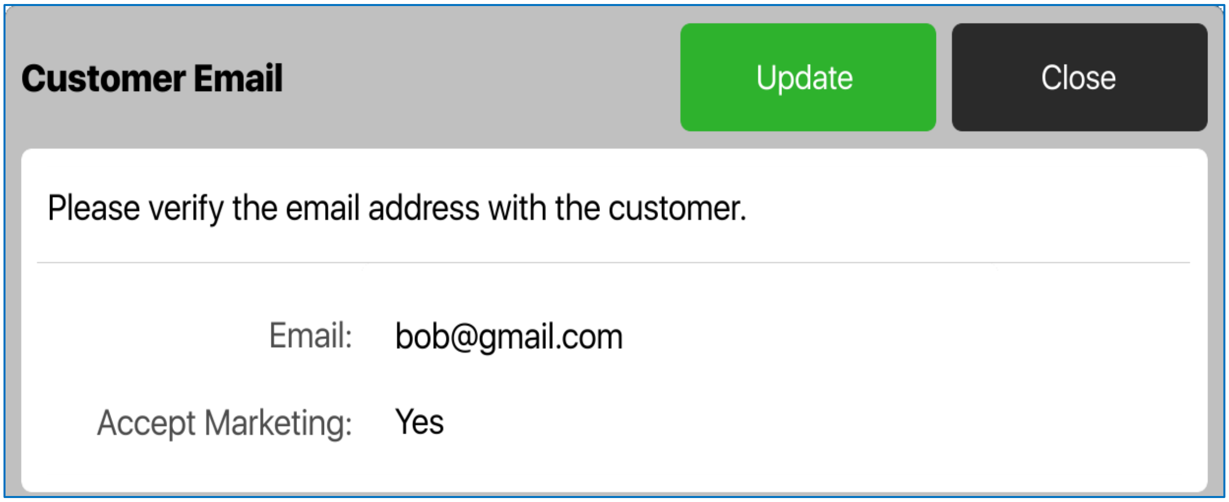




If the Email 1 field is set as a required field, the following prompt displays if it has been left empty.



Depending on the settings, a verification prompt might display for the associate to verify that the customer's email address is correct.



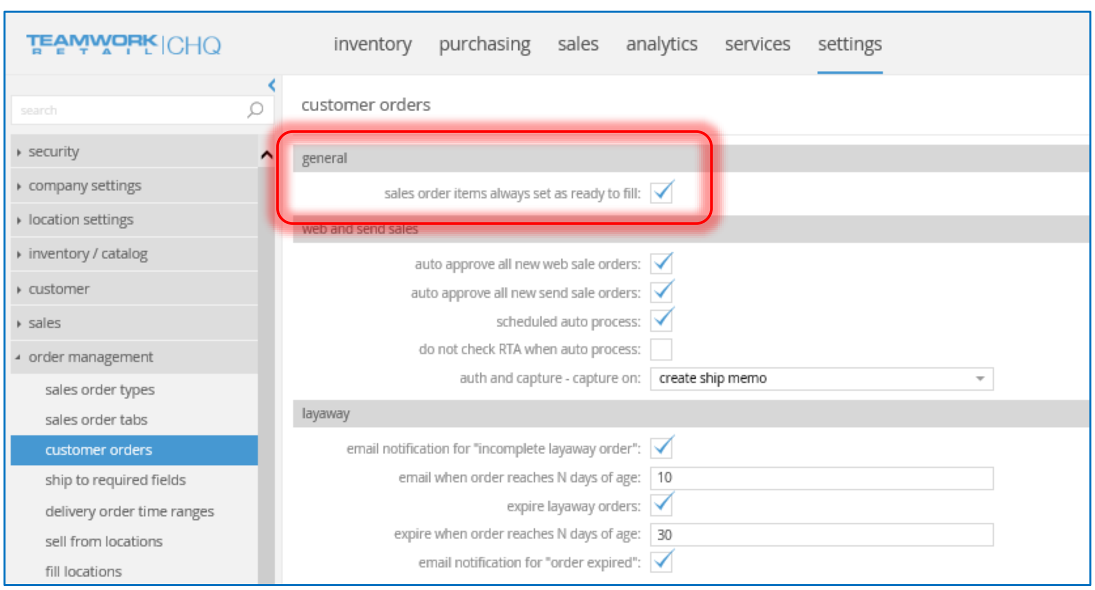
Require Ready to Fill to Sell SO Items

Version 5.12 – TWD-4982

August 2017

When enabled, this setting only allows filling Sales Orders that are marked *Ready to Fill.* When this setting is not in use, items are flagged as *Ready to Fill* by default.

This setting can be found in Settings > Order Management > Customer Orders > General area.



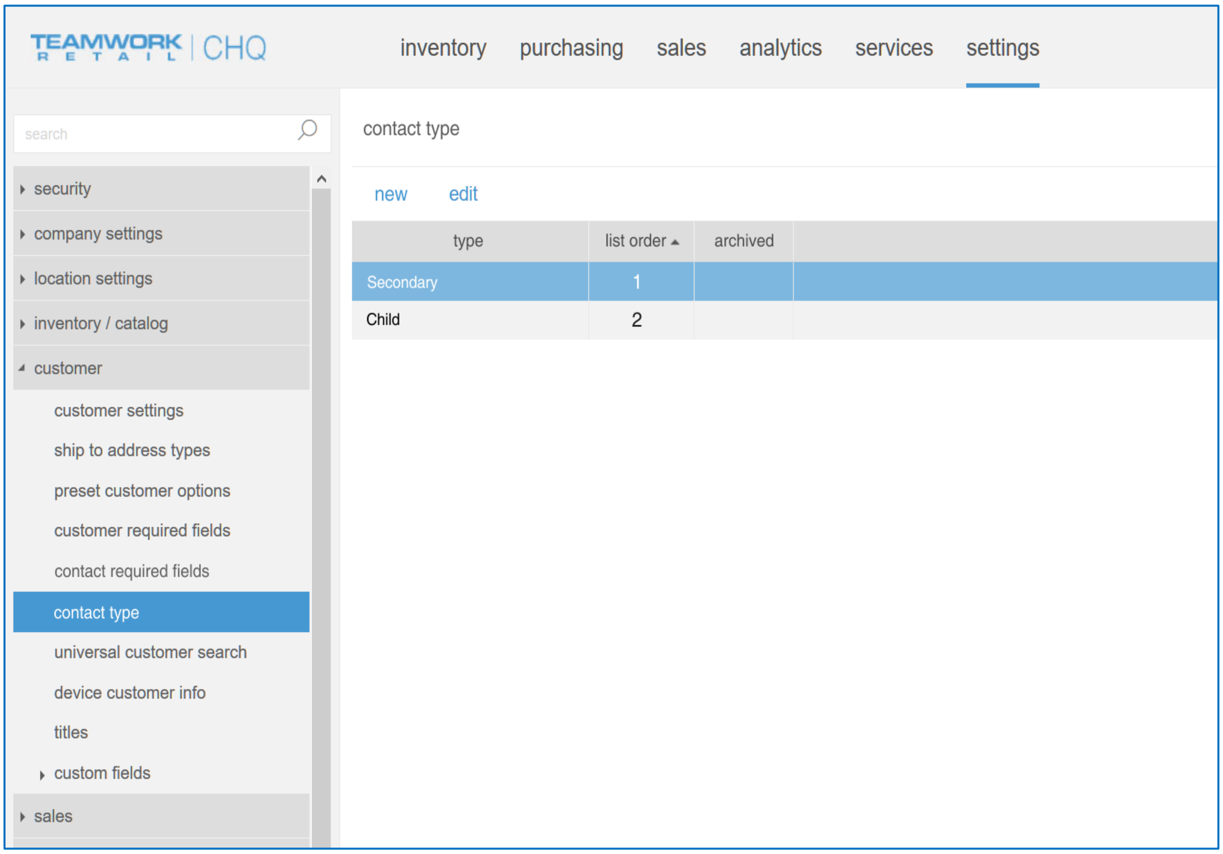
Contact Records Type

Version 5.10 – TWD-2659

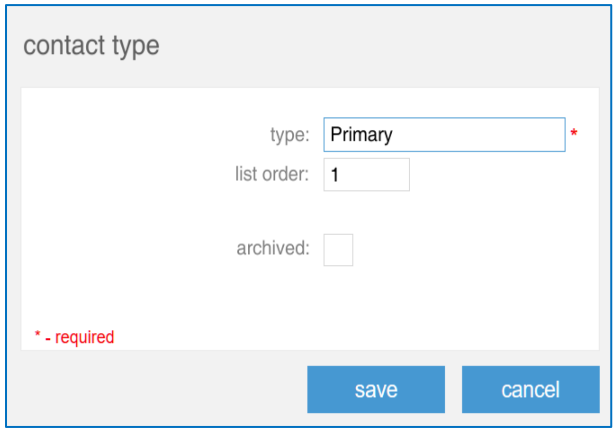
August 2017

Under Settings > Customer > Contact Type, there's a new drop-down selection field for selecting the type of contact being added (such as child or spouse).

Users can add as many types of contacts as desired and may edit existing records.

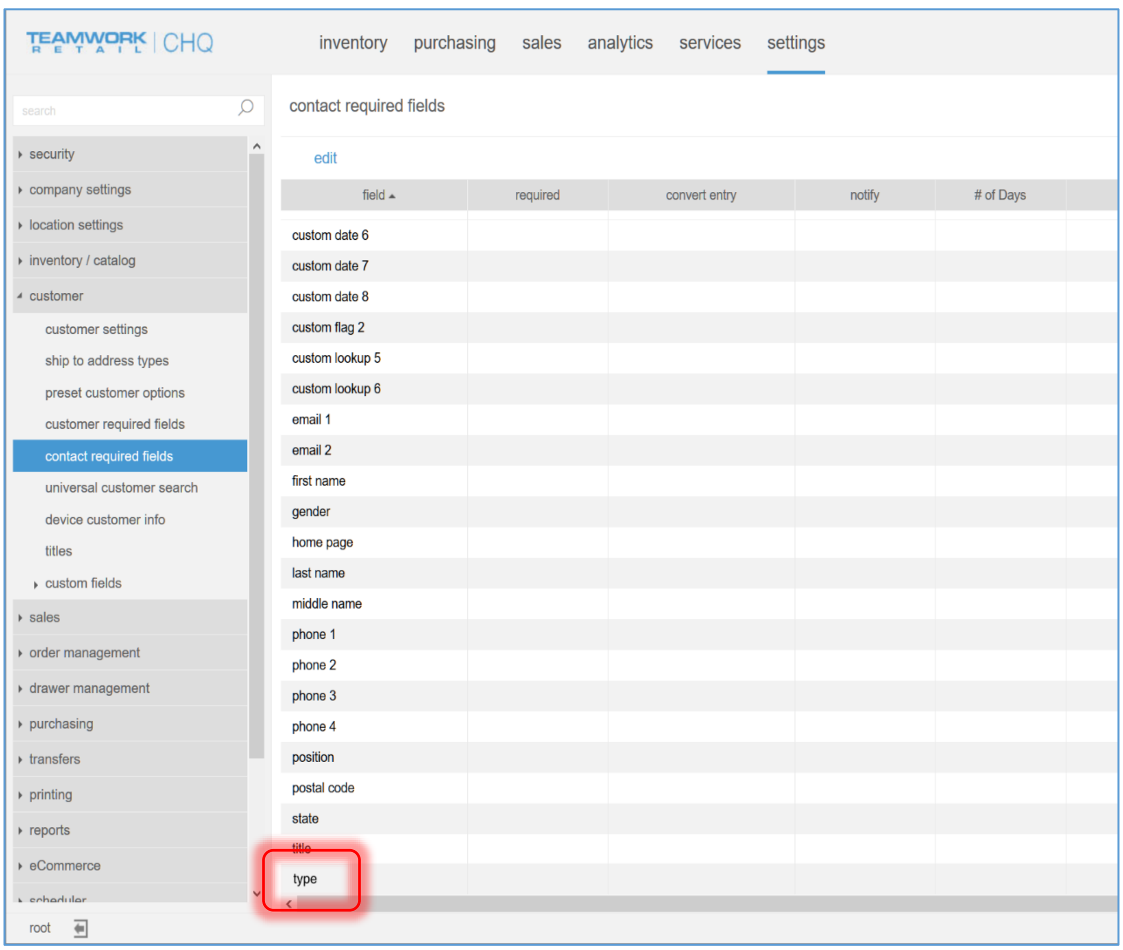


Selecting **New** or **Edit** brings up the *Contact Type* dialog.

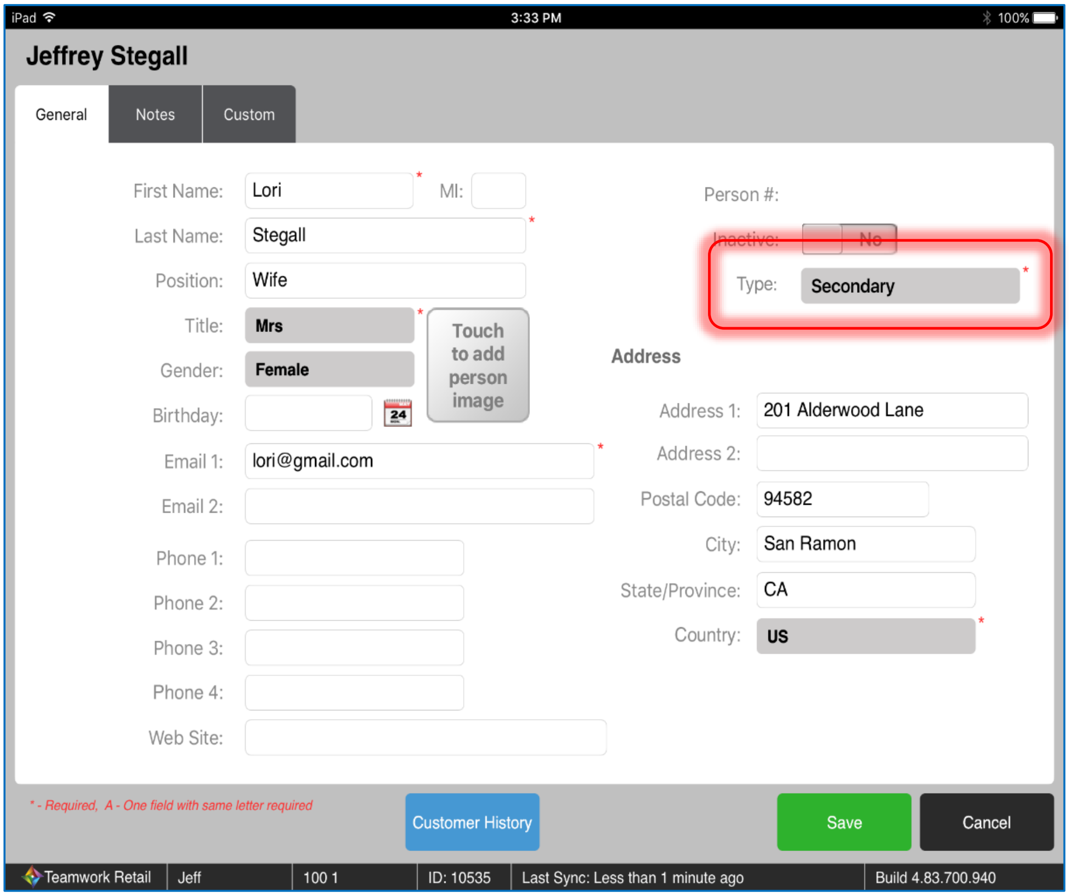


The maximum length for the *Type* field is 25 characters, and must be a unique entry.

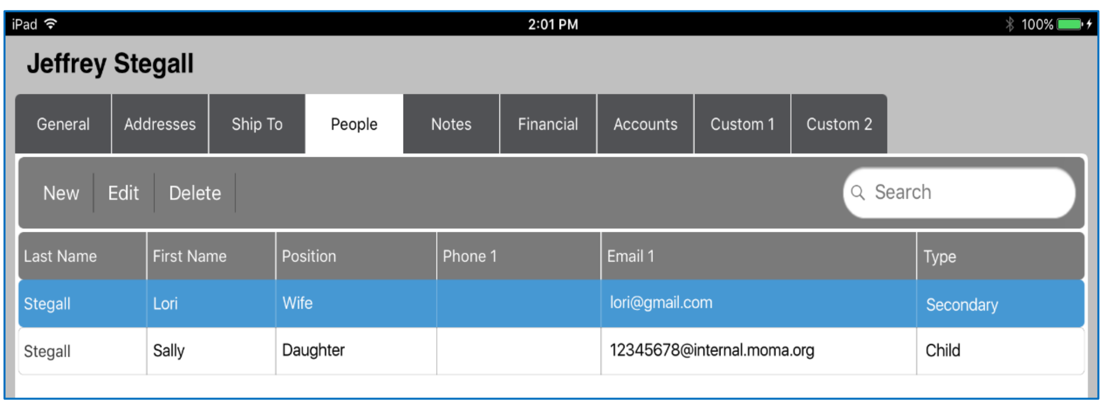
The *Contact Type* field also displays under Settings > Customer > Contact Required Fields.



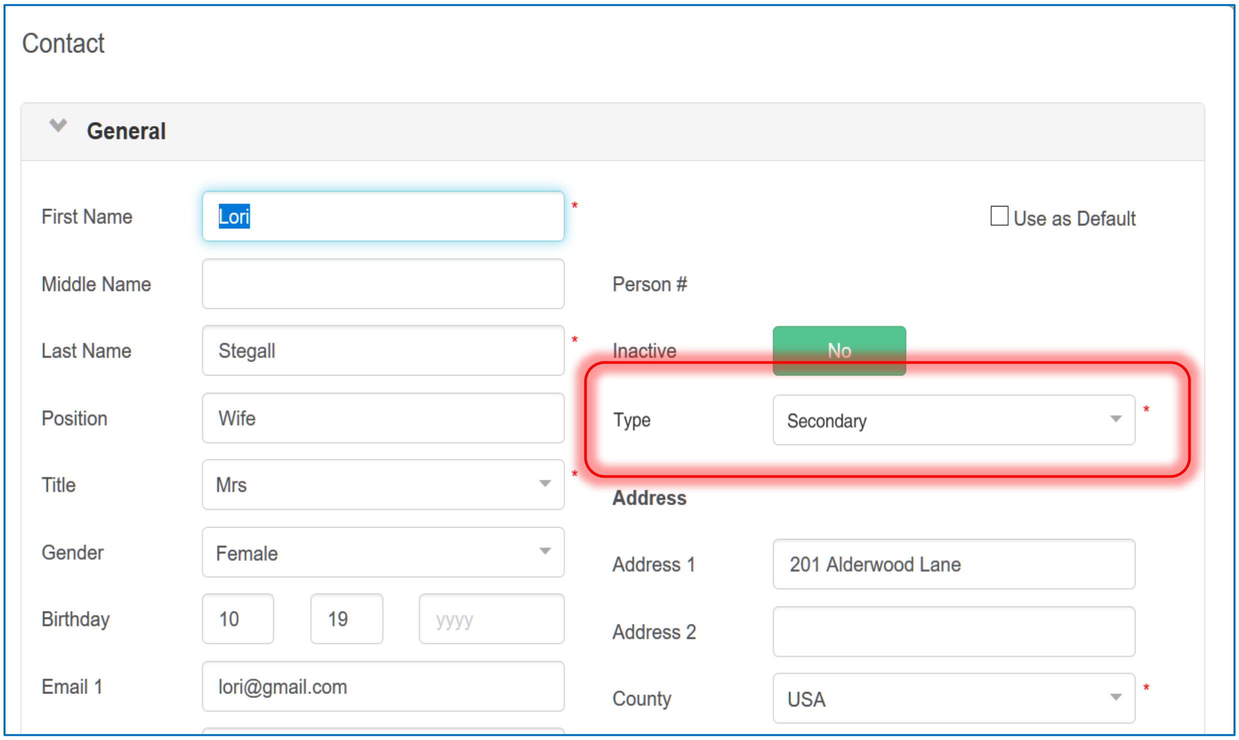
Under the General tab in POS, this field displays as *Type*.



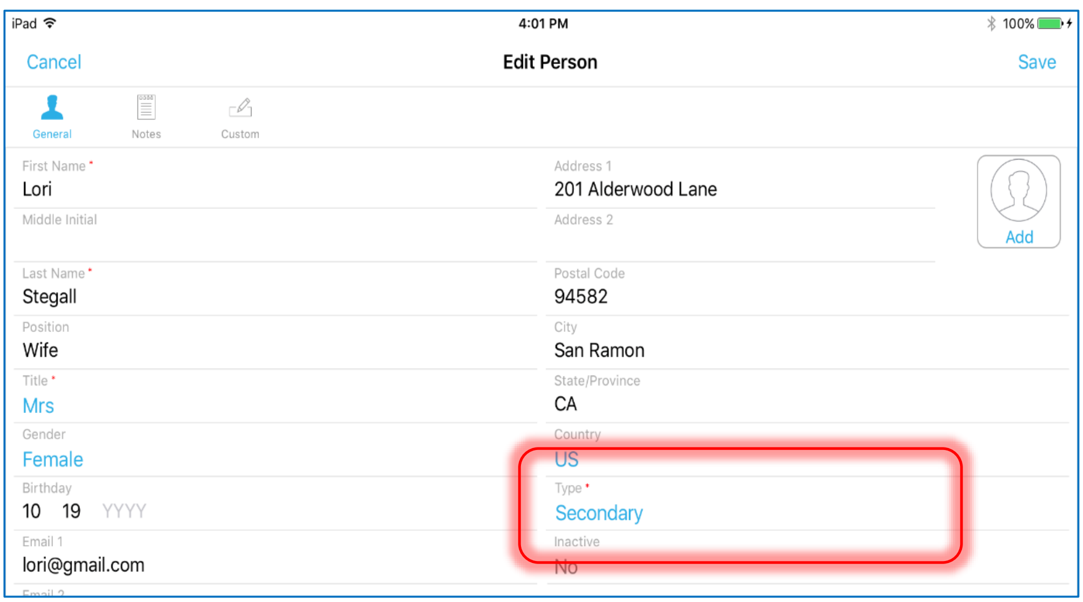
Entries in this field display in the People tab, as shown below.



In CRM, this *Type* field displays on the General tab when creating a new contact.



This field is also present in Client Book.



miTPV Payment Processing

Version 5.11 – TWD-3877

August 2017

We've added support of the new payment processor miTPV to both iPad POS and CHQ.

Extended Simplified Sales Order API with Custom Fields

Version 5.12 – TWD-5044

August 2017

In order to support selling memberships online, we've extended the Simplified Sales Order API. The following custom fields are added to Sales Order Item:

- 4 Custom Text
- 4 Custom Flag
- 4 Custom Number
- 4 Custom Decimal
- 4 Custom Date

Purchasing

Matching Vendor Invoice – Unmatch

Version 5.11 – TWD-3678

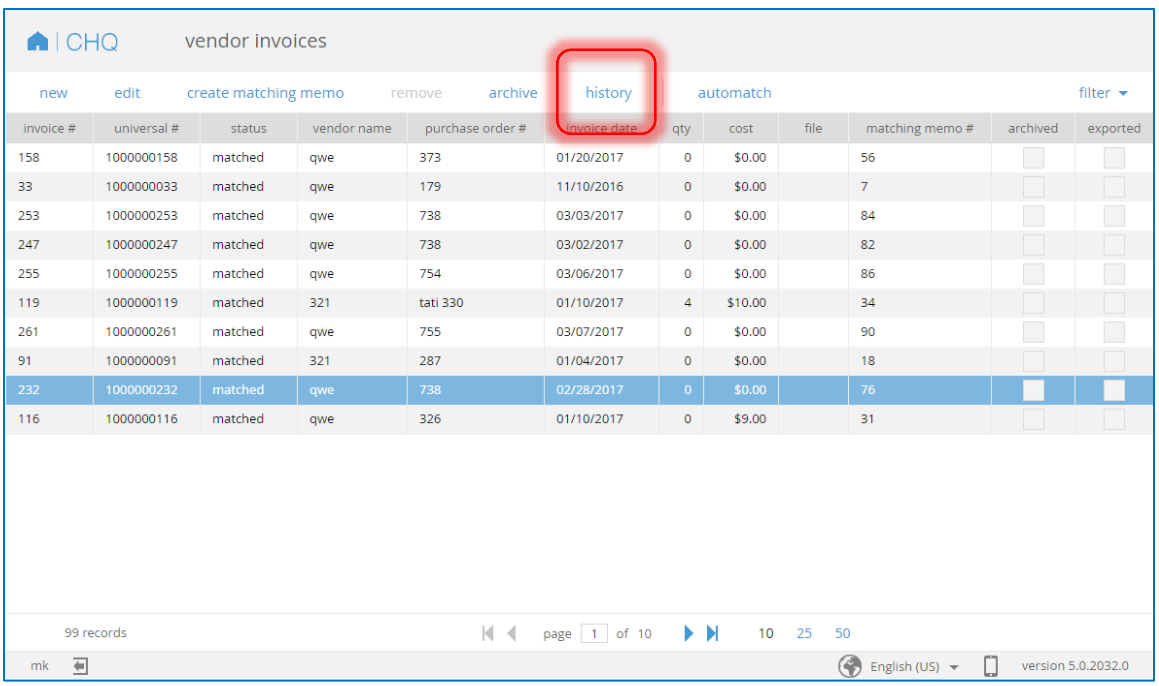
August 2017

This feature adds the capability to unmatch posted matching memos in order to perform the reverse or reverse/redo functionality in Purchase Receipts, or edit a Vendor Invoice that was matched.

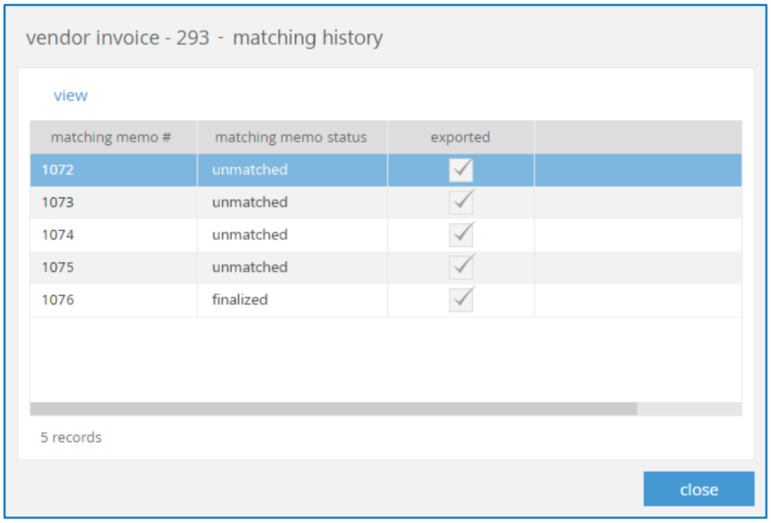
Vendor Invoices can only have the status of Matched or Not Matched (Unmatched has been renamed to Not Matched).

- Matched: The Vendor Invoice is linked to a finalized Matching Memo.
- Unmatched: The Vendor Invoice is NOT linked to a finalized Matching Memo.

There is a new History button on the Vendor Invoices list view.

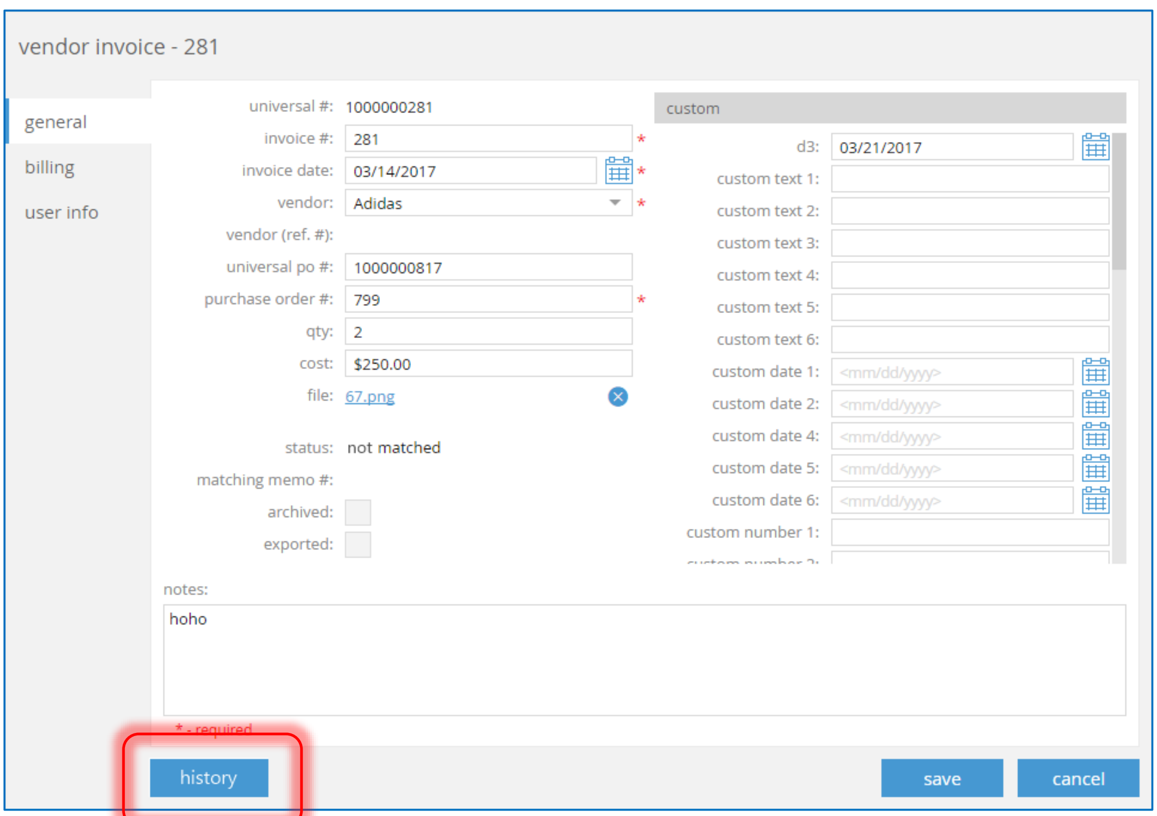


Selecting **History** opens the *Matching History* dialog, as shown below. This dialog displays all Invoice Matching Memos (with the status of *Finalized* or *Unmatched*) that are linked to the Vendor Invoice.



Selecting **View** opens a read-only dialog for the selected memo. Click **Close** to close this dialog and return to the Vendor Invoices screen.

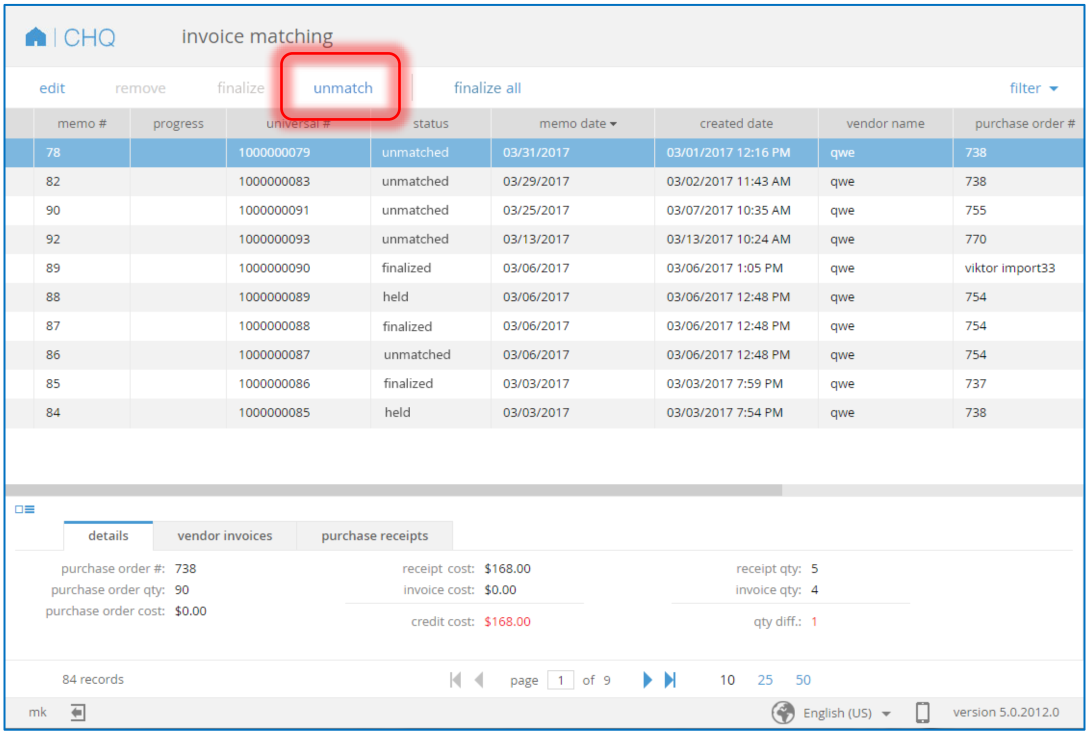
A History button also displays in the Vendor Invoice Edit dialog.



Invoice Matching

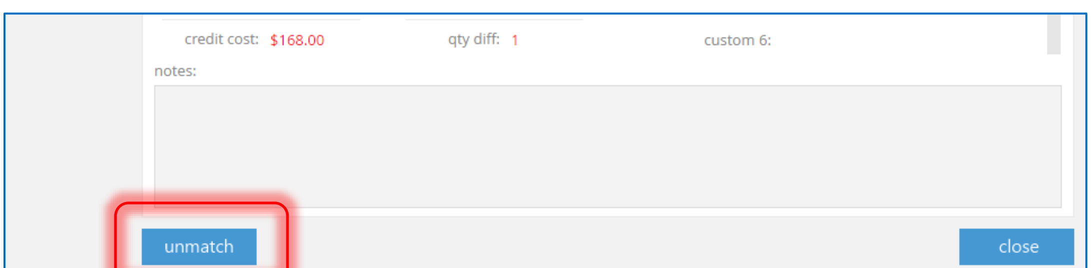
The status options for matching memos are Held, Finalized, and Unmatched (Posted has been renamed to Finalized).

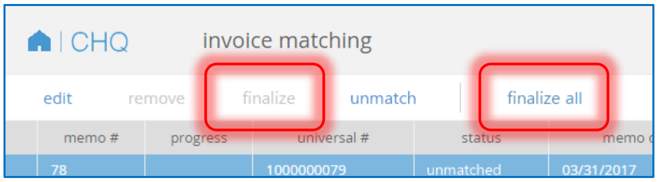
Under Invoice Matching list view, there is a new Unmatch button (visible only with the appropriate security rights enabled).



Selecting Unmatch is a nonreversible process which unmatches the selected memo from the related vendor invoice.

This button also displays at the bottom of any tab on the Invoice Matching Memo dialog.



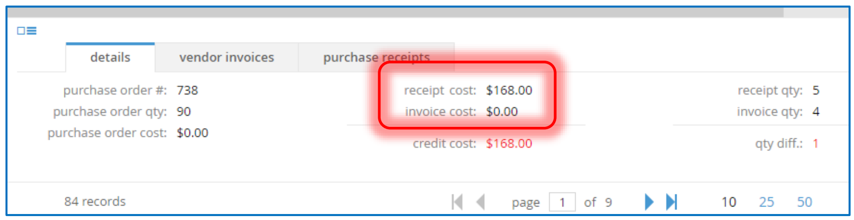


Please note that the Finalize button replaces the Posted button, and Finalize All replaces Posted All.

The Remove button is only enabled with the security right PI-DELETE.

The following columns are removed from the Invoice Matching screen.

- Actual Cost
- Adjustment Cost



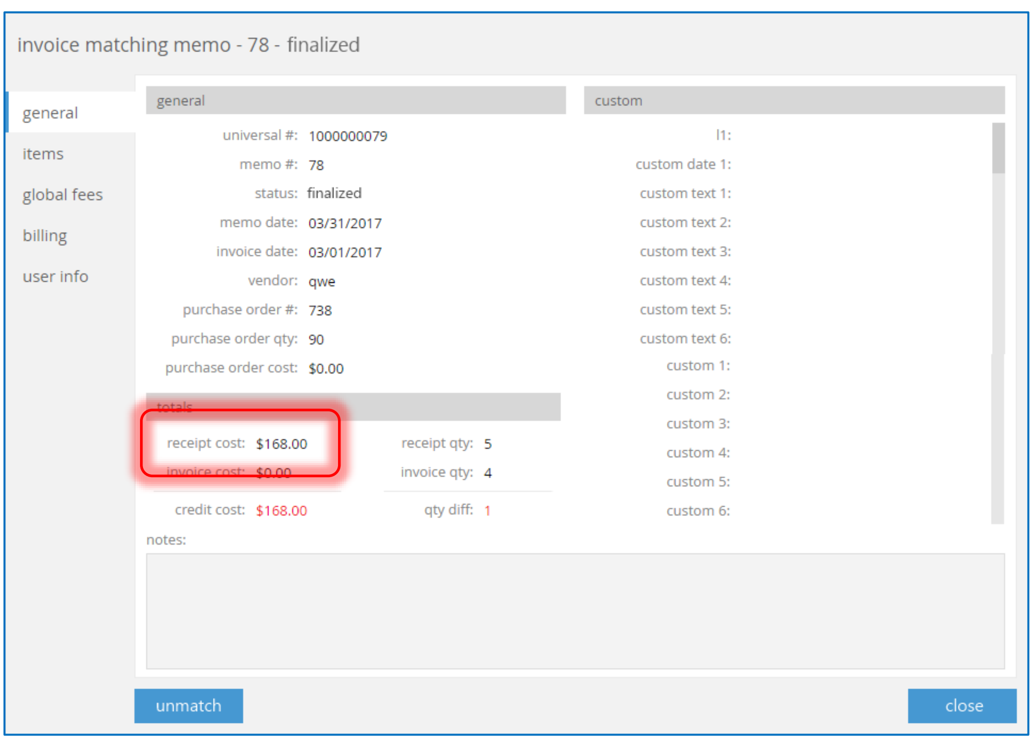
Additionally, the *Adjustment Cost* section is removed from the Details panel.

The *Receipt Cost* field replaces the *Actual Cost* field.

Invoice Matching Memo

General Tab

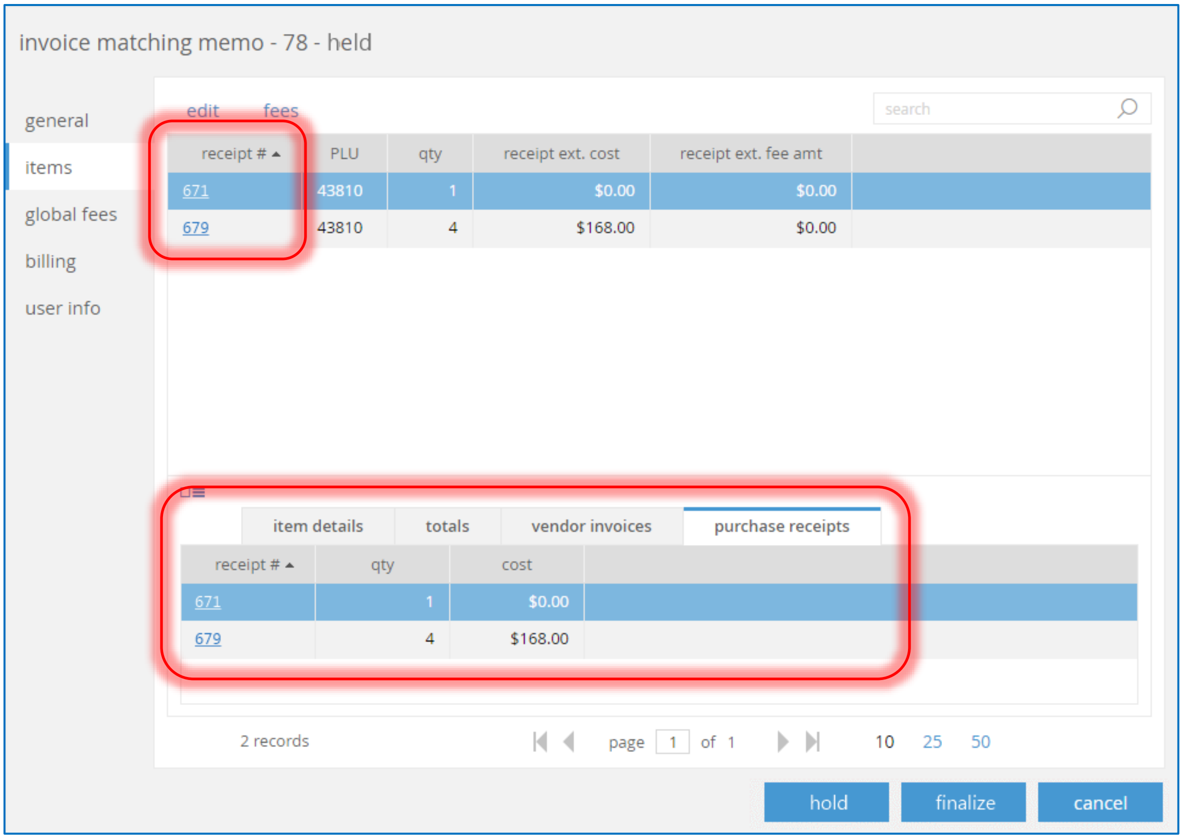
On the General tab of a finalized Invoice Matching Memo, the *Adjustment Cost* section is removed and *Receipt Cost* has replaced the *Actual Cost* field.



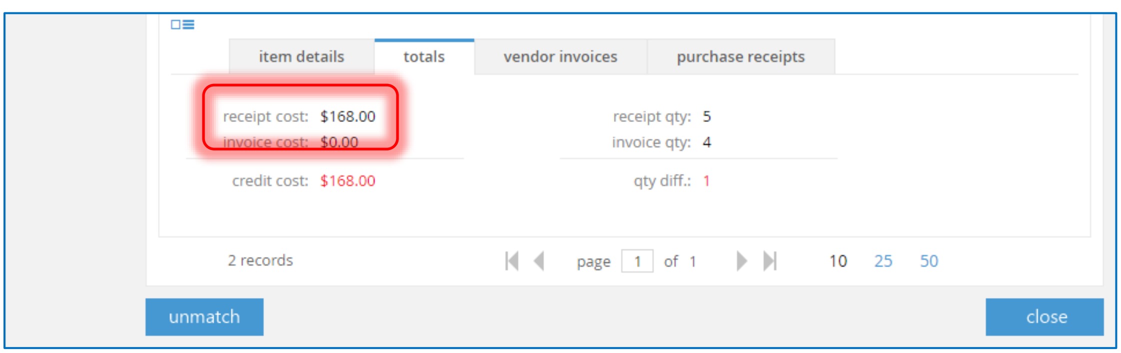
Items Tab

When viewing the Items tab on a finalized Invoice Matching Memo, selecting the *Receipt #* now links directly to the Purchase Receipt.

This link also displays in the Purchase Receipts panel.



In the Totals panel, *Receipt Cost* displays instead of *Actual Cost*.



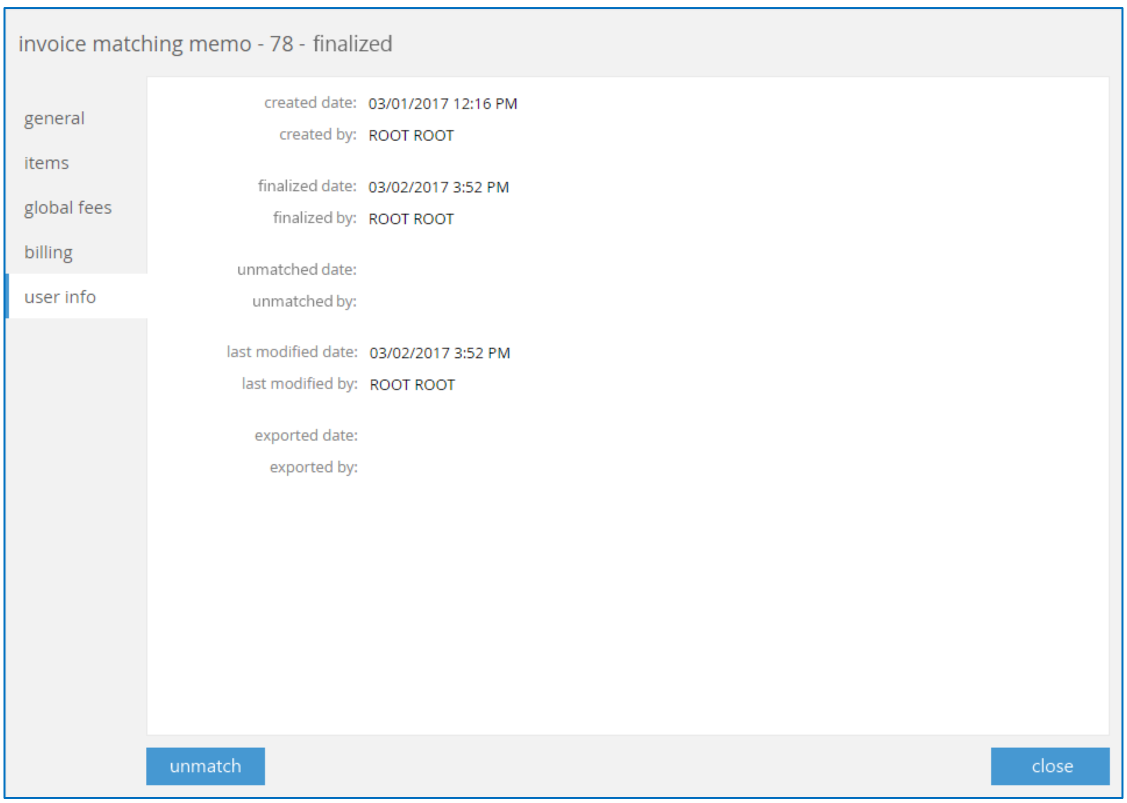
The following columns are removed from the Items tab:

- Actual Disc. %
- Actual Disc. Amt
- Actual Ext. Cost Incl. Fee
- Actual Ext. Cost
- Actual Ext. Fee Amt
- Actual Unit Cost
- Adjustment Cost

User Info Tab

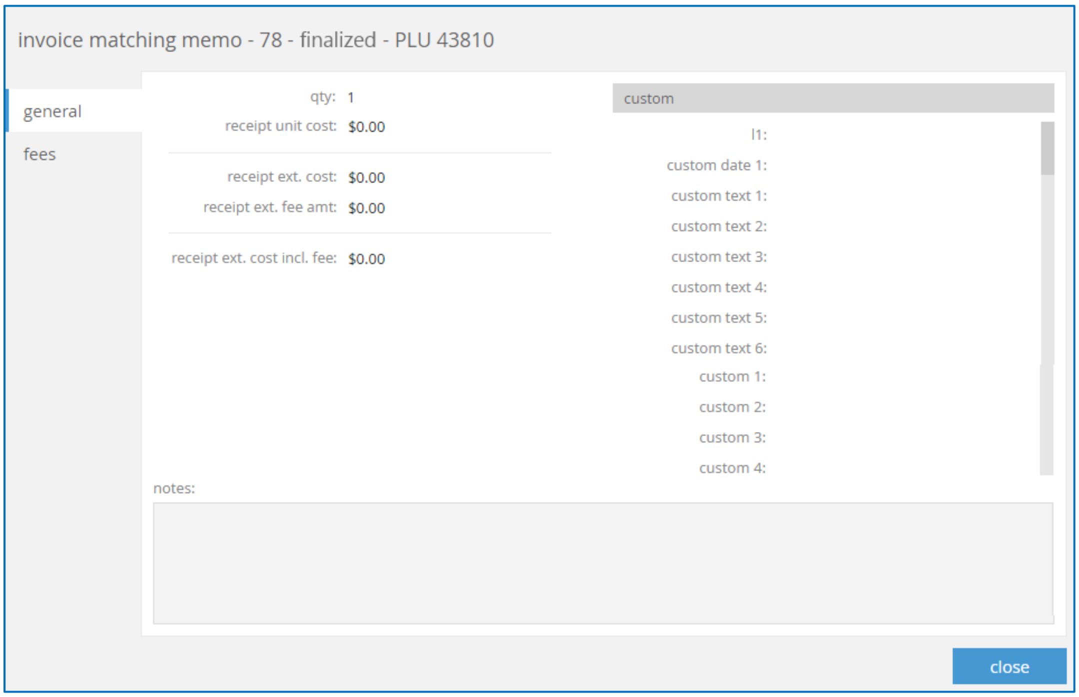
On the User Info tab, there are several new fields:

- Finalized Date: The date when the Matched Memo was finalized.
- Finalized By: The user who finalized the Matching Memo.
- Unmatched Date: The date when the Matched Memo was unmatched.
- Unmatched By: The user who unmatched the Matching Memo.



In the View/Edit Item dialog, the following fields are removed:

- Actual Unit Cost
- Actual Disc. Amt
- Disc. %
- Actual Ext. Cost
- Actual Ext. Fee Amt
- Actual Ext. Cost Incl. Fee
- Adjustment Cost



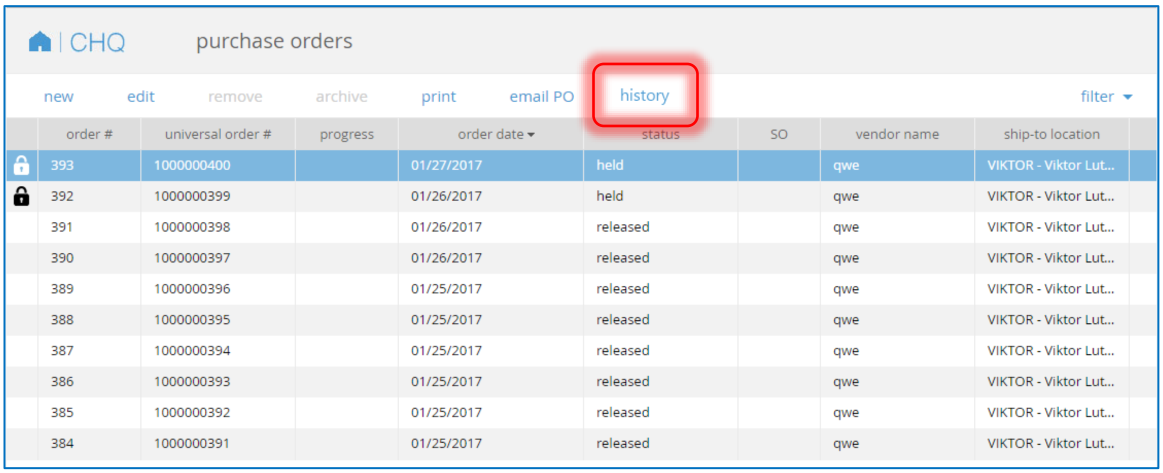
Purchase Order History

Version 5.10 – TWD-2633

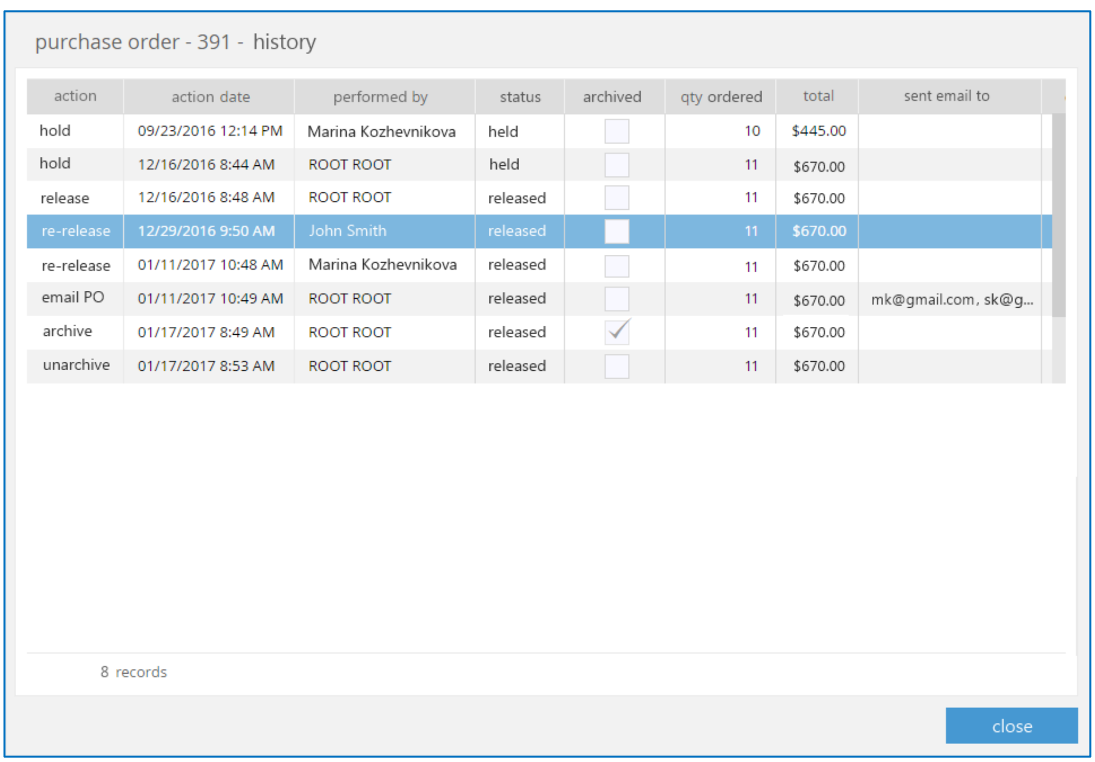
August 2017

We've added a new read-only History dialog to Purchase Orders. This dialog only displays actions related to the Purchase Order (from PO Import, OMS, Visual Allocation, etc.)

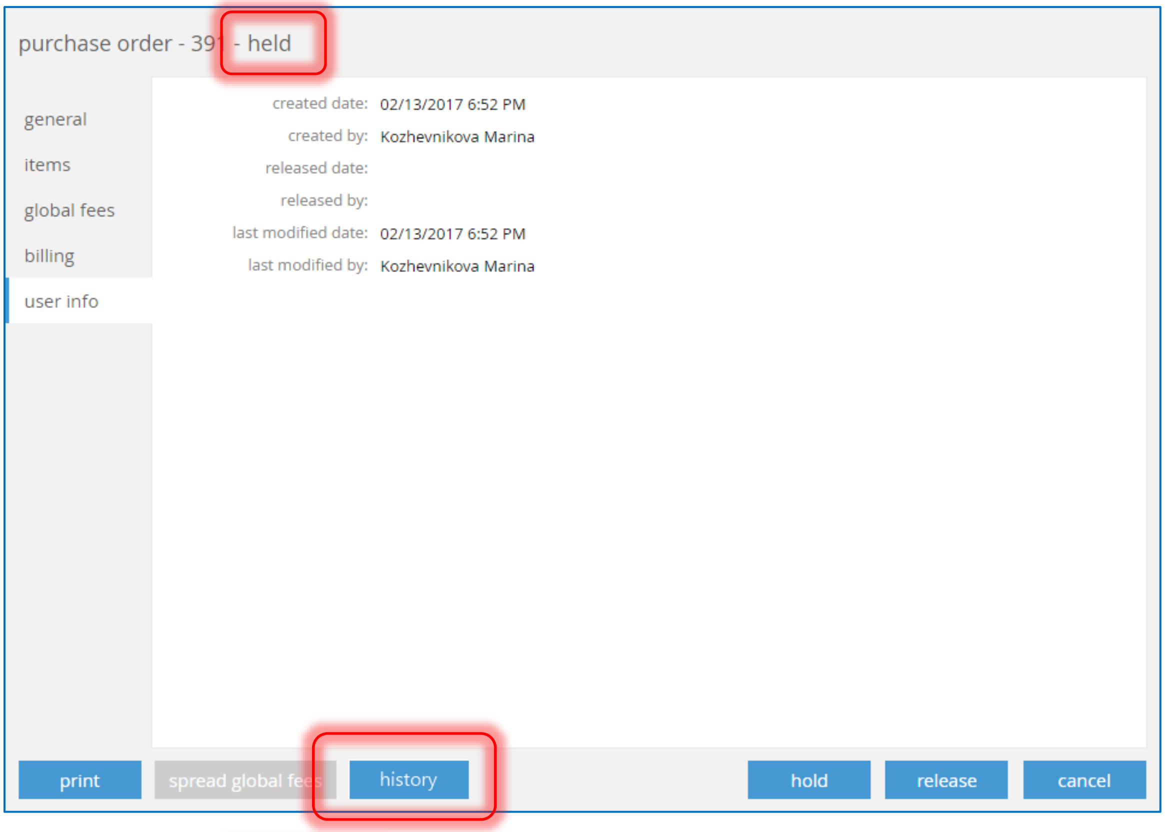
To access this dialog, select **History** from the Purchase Orders list view.

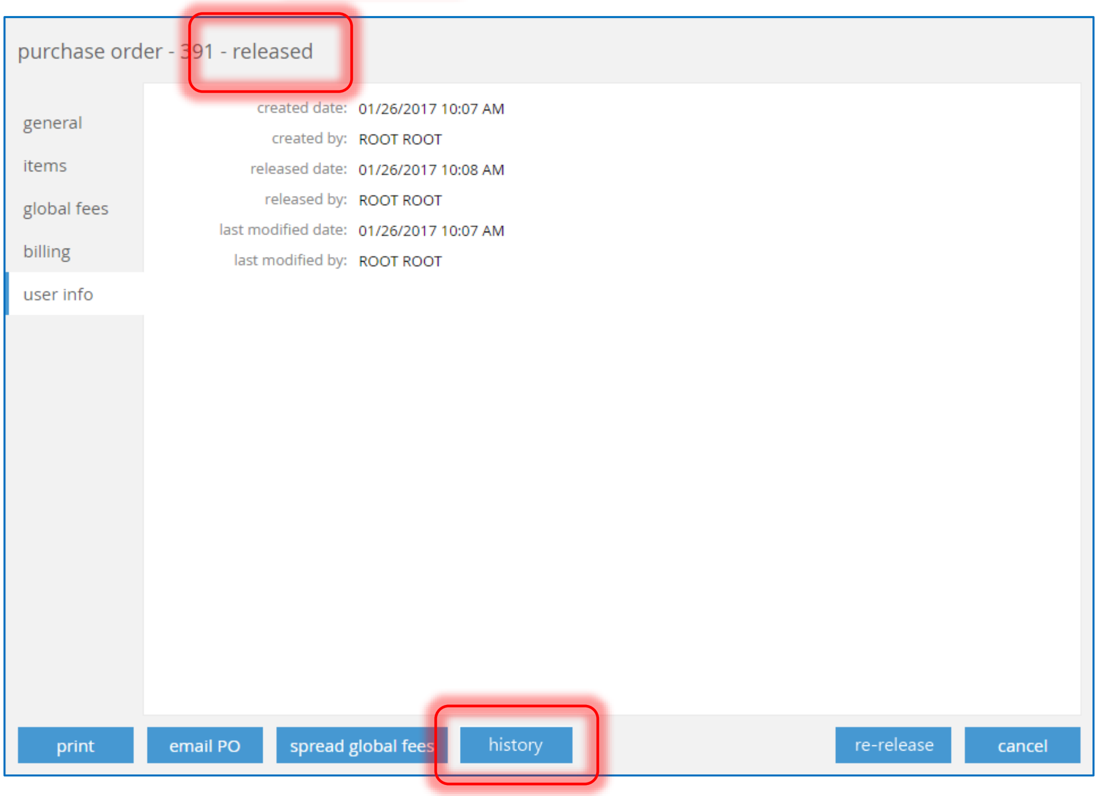


This dialog shows the history and past action made to this Purchase Order.

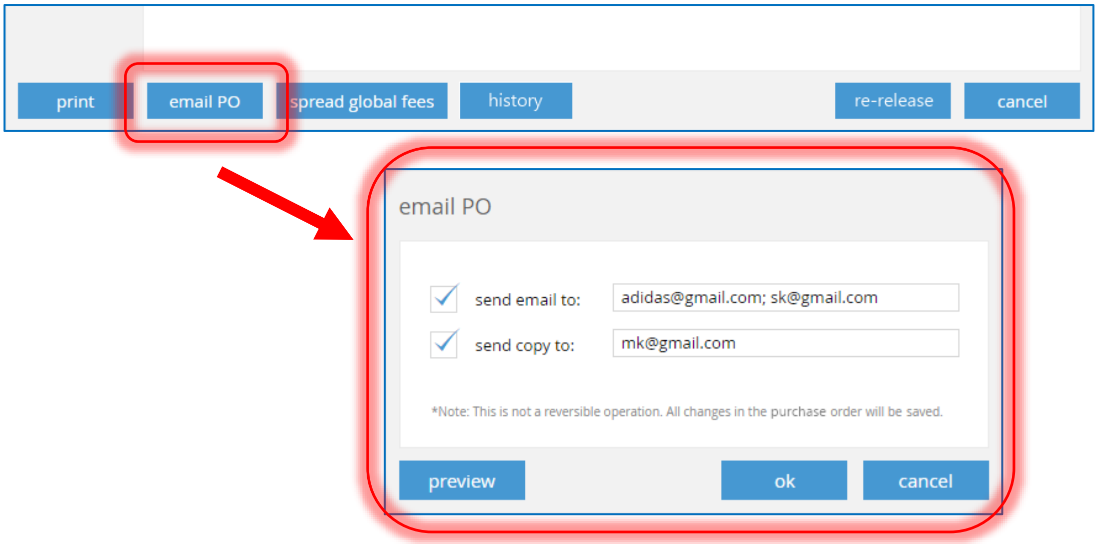


The History button is also on the User Info tab for both a Held and Released PO. To access this screen, select a PO from the list on the main screen and click **Edit** then click the **User Info** tab.





At the bottom of the screen, for a released PO, the Email PO button is only enabled if the requires fields are already populated. Selecting this brings up a dialog to directly email the PO.



Support of Avalara Services in Sales Orders

Version 5.11 – TWD-3807

August 2017

We've included support of Avalara tax service to iPad POS Sales Orders for Send Sale and Web Sale Orders. We've also added tax calculation to CHQ.

In CHQ in the Ship Memos dialog, if the Ship Memo has tax calculated by a tax service, the Ship To address of items is unable to be changed.

Avalara Integration – Eliminate Integrator

Version 5.11 – TWD-3802

August 2017

We've added Avalara as a core part of our system and eliminated the use of Integrator.

Selected Row Should Open on Enter

Version 5.11 – TWD-3049

August 2017

Under Purchase Receipts > List view, select any record and press enter to open that record. So when a receipt is highlighted (selected), pressing enter automatically opens the receipt.

Purchase Order Export API – SO Item ID

Version 5.11 – TWD-4228

August 2017

There are new Sales Order number (based on the SalesOrderNo field in a Sales Order) and SO Line Number (based on LineNo.) fields added to the Purchase Order Export API.

Search and Filter by Vendor No.

Version 5.12 – TWD-5491

August 2017

You can now filter or search by *Vendor No* in Purchasing > Vendors.

Auto-Create Drop Ship POs

Version 5.12 – TWD-4395

August 2017

This feature allows for auto-issuing a Purchase Order for SFV (Ship from Vendor) items.

Drop Ship POs are automatically created for items after the status of a Sales Order is changed to **Accepted**. This also updates the status to PO Issued.

Inventory

Visual Allocation

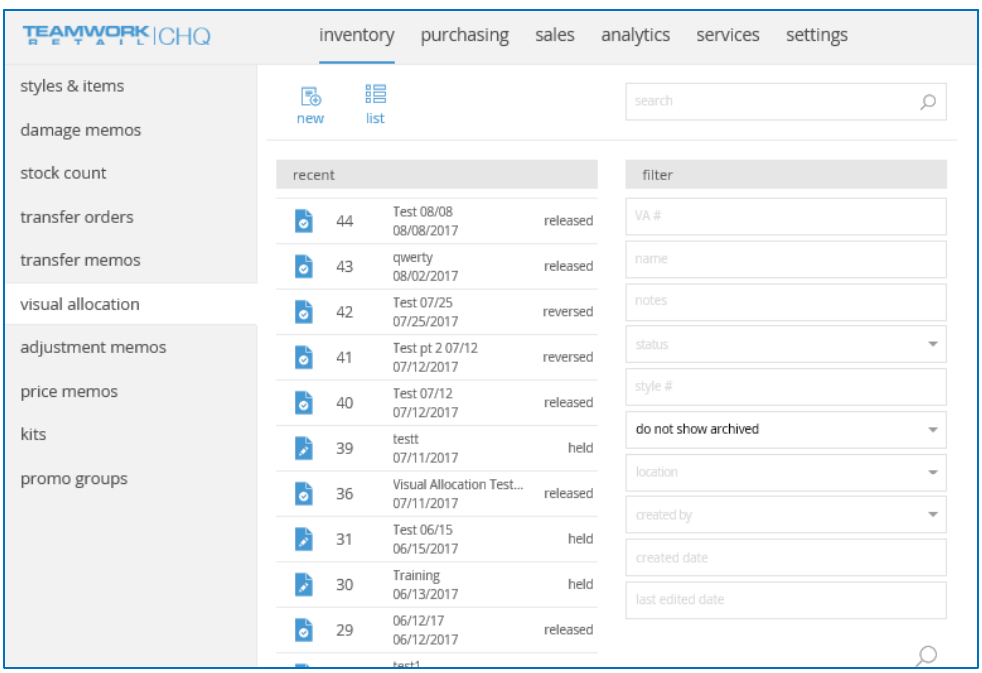
Version 5.11 – TWD-2717

August 2017

Visual Allocation is a feature that allows users to visualize the stock distribution of a style and easily click to purchase or transfer items. Below are some terms used for Visual Allocation:

- **ATS – Available to Sell**: The quantity on-hand that is available to sell to customers.
- **PATS – Potential Available to Sell**: The quantity that will be available to sell, taking into account incoming purchase order quantities, in-transit quantities, and incoming transfer order quantities.
- **NPATS – New Potential Available to Sell**: The new PATS quantity as a result of purchases of transfers specified in the Visual Allocation decision matrix for the item.
- **ATP – Available to Purchase**: The quantity is available at an external location for purchase from a vendor.

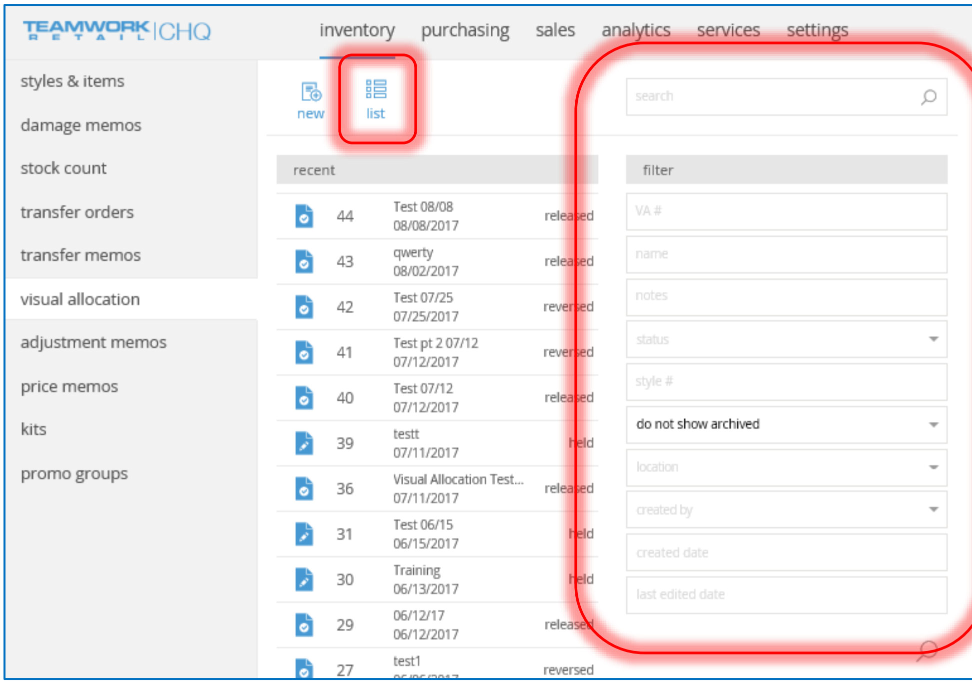
To access this feature, go to Inventory > Visual Allocation. Users must have the appropriate security rights enabled to use this feature.



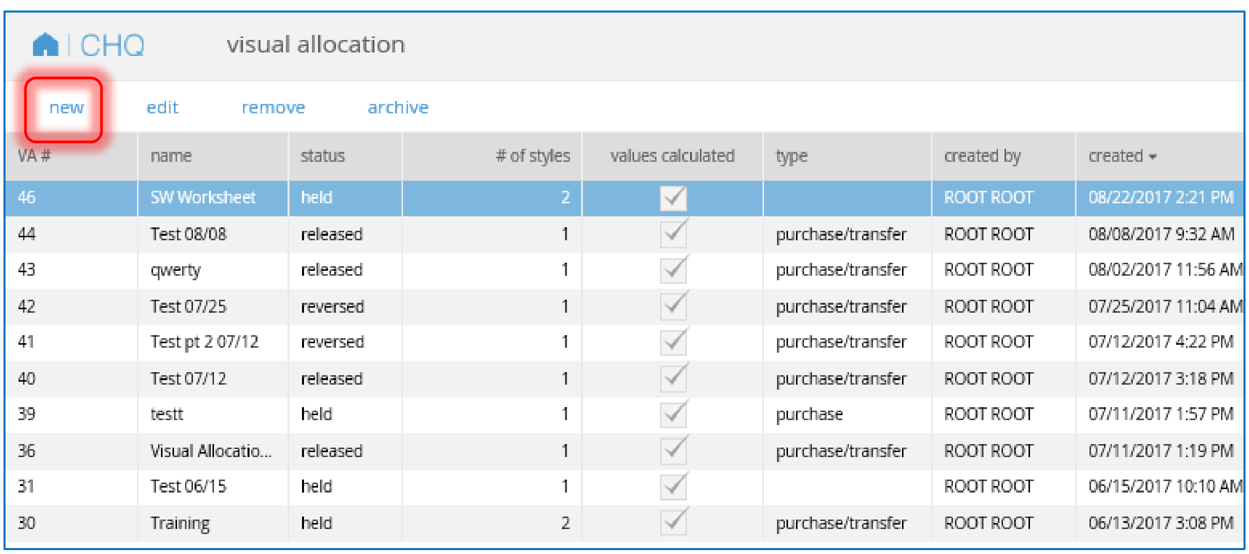
Here you can view the most recent worksheets, including those that are posted and those that are on hold (not yet posted).

At the top right of the screen, use the Search bar to find a specific worksheet that you don't see listed. Or use the Filter box below to narrow down the list results, if you're not exactly sure what you're looking for.

Click the **List** button to see a list view of the most recent memos.

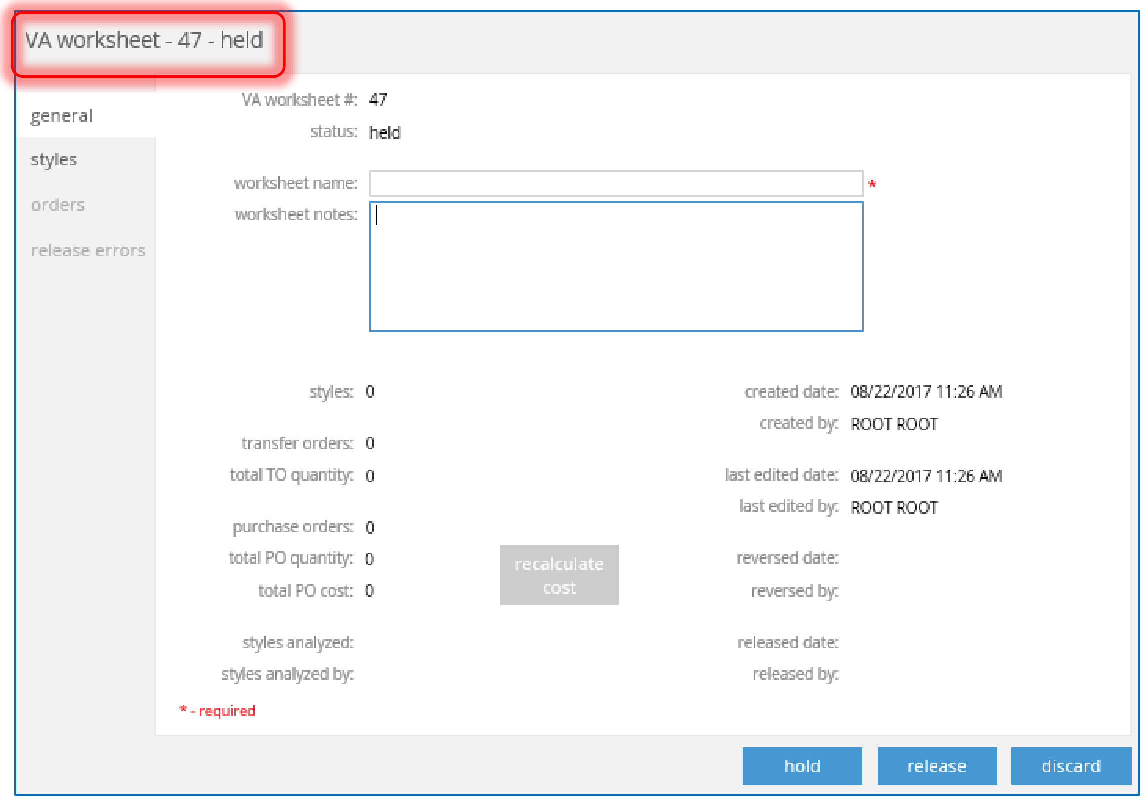


From either this list view screen or the main screen, click **New** to create a new Visual Allocation worksheet.



VA #	name	status	# of styles	values calculated	type	created by	created
46	SW Worksheet	held	2	✓		ROOT ROOT	08/22/2017 2:21 PM
44	Test 08/08	released	1	✓	purchase/transfer	ROOT ROOT	08/08/2017 9:32 AM
43	qwerty	released	1	✓	purchase/transfer	ROOT ROOT	08/02/2017 11:56 AM
42	Test 07/25	reversed	1	✓	purchase/transfer	ROOT ROOT	07/25/2017 11:04 AM
41	Test pt 2 07/12	reversed	1	✓	purchase/transfer	ROOT ROOT	07/12/2017 4:22 PM
40	Test 07/12	released	1	✓	purchase/transfer	ROOT ROOT	07/12/2017 3:18 PM
39	testt	held	1	✓	purchase	ROOT ROOT	07/11/2017 1:57 PM
36	Visual Allocatio...	released	1	✓	purchase/transfer	ROOT ROOT	07/11/2017 1:19 PM
31	Test 06/15	held	1	✓		ROOT ROOT	06/15/2017 10:10 AM
30	Training	held	2	✓	purchase/transfer	ROOT ROOT	06/13/2017 3:08 PM

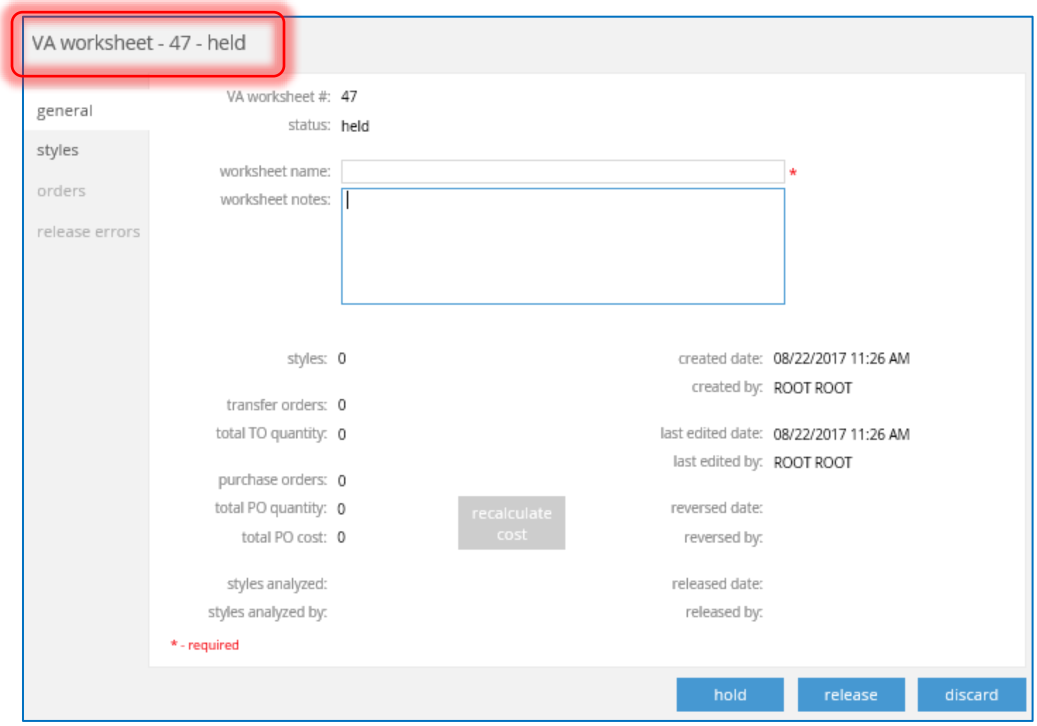
Until it is posted, Visual Allocation worksheets have the status of *Held*, as displayed in the heading. The *VA Worksheet #*, *47* in this case, is auto-generated by Teamwork in increasing numerical order with each additional worksheet that is created.



General Tab

The *General* tab is where you'll enter general worksheet information.

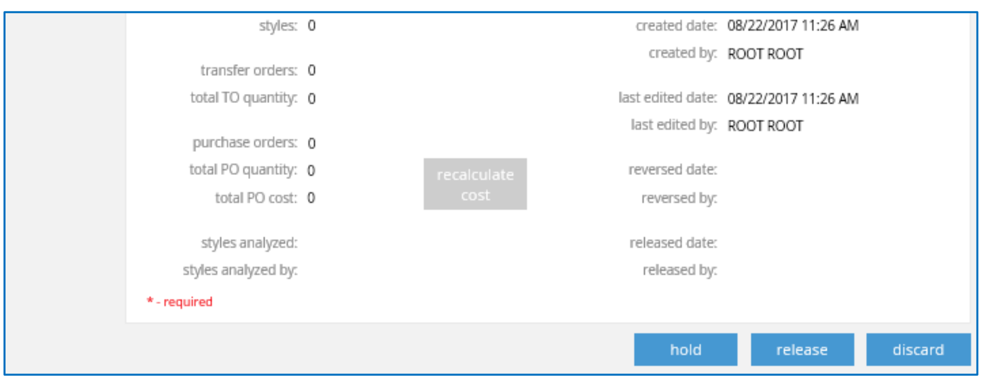
Until it is posted, Visual Allocation worksheets have the status of *Held*, as displayed in the heading. The *VA Worksheet #*, *47* in this case, is auto-generated by Teamwork in increasing numerical order with each additional worksheet that is created.



The only required field on this tab is a *Worksheet Name*. Additionally, you can enter any *Worksheet Notes* to help provide more information on this worksheet.

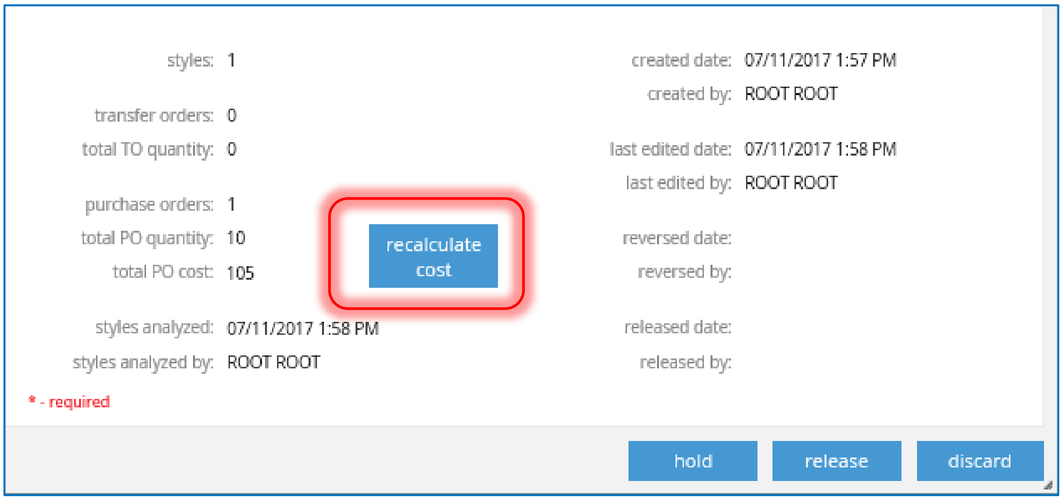
Before releasing this worksheet, you'll need to move to the Styles tab to add inventory. However, select **Hold** to put the worksheet on hold to work on at a later time, or **Discard** to delete the worksheet entirely.

The fields on the bottom half of this tab are purely for information only.



Once information has been added from the Style tab, these fields with update with values, including the number of styles on this worksheet, TO and PO values, the date and time the styles were analyzed, and more.

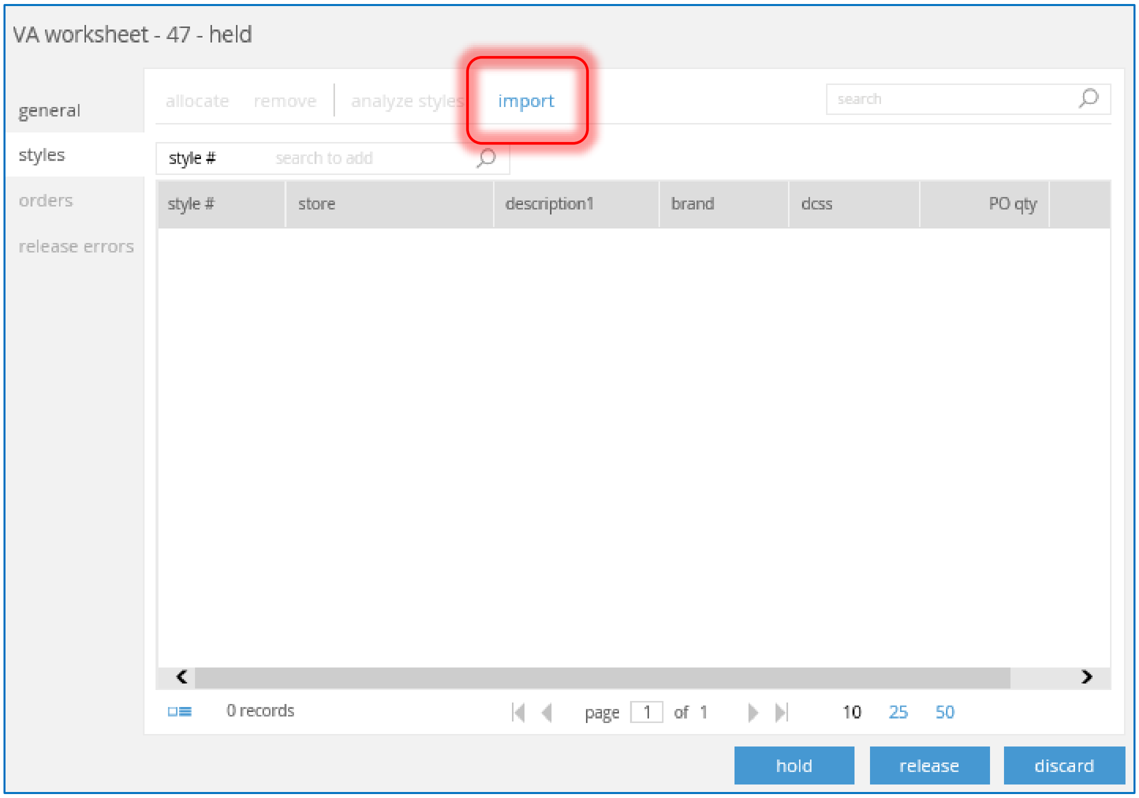
If you think the values look wrong or should be updated, click **Recalculate Cost** to automatically update the values (if there is any change).



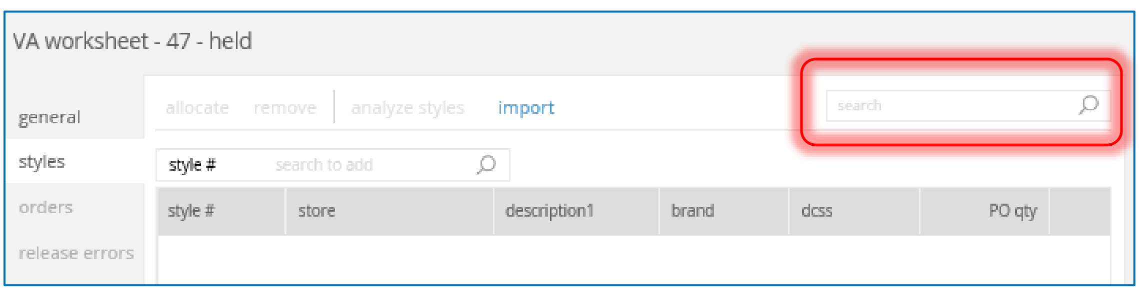
Styles Tab

The *Styles* tab is where you'll add styles or items for allocation.

If you have an Excel sheet of adjustments to import, click the **Import** button to quickly import this information.

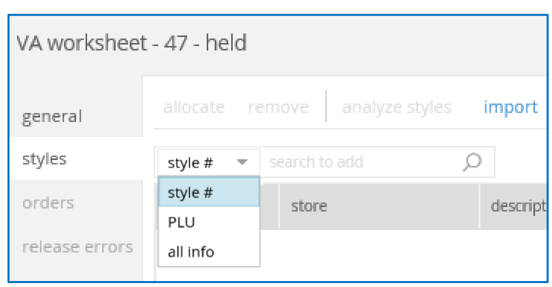


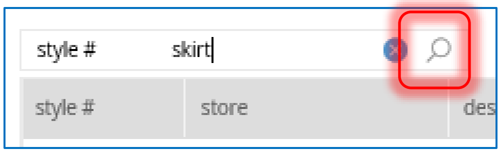
Use the search field at the top right of the screen to do a general (all info) search.



Alternatively, use the *Search to Add* field to look up specific items.

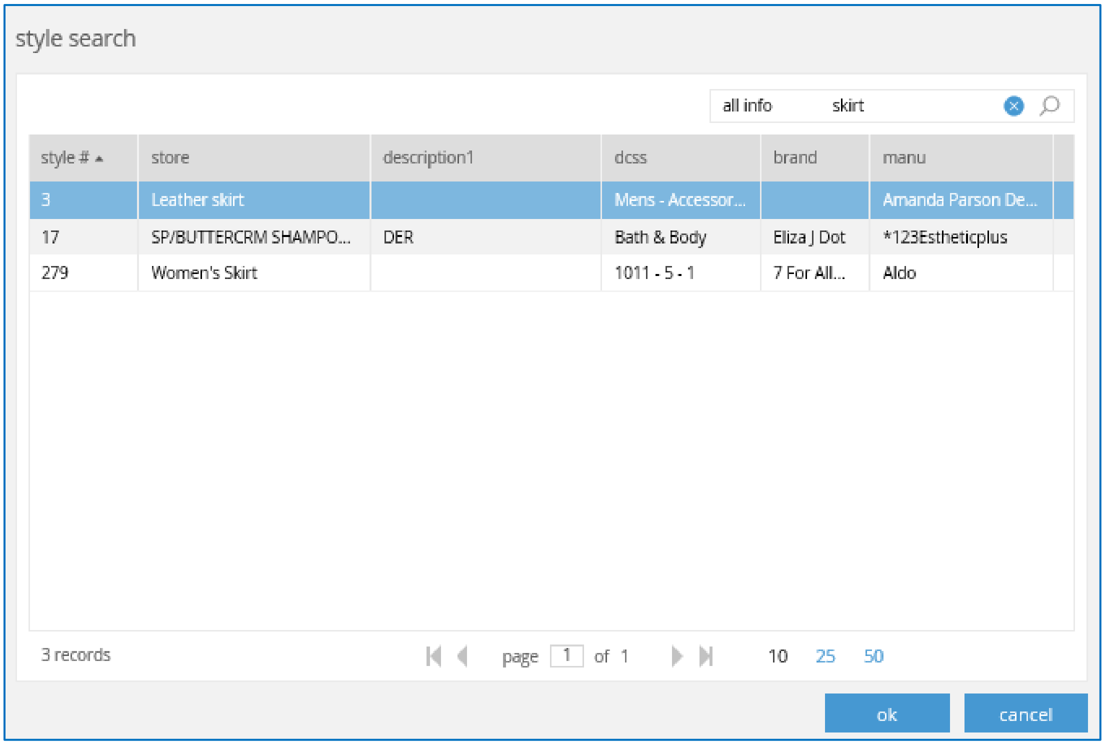
Here the field is set to *Style #*, but this can be changed to search by *PLU* or in include *All Info*.





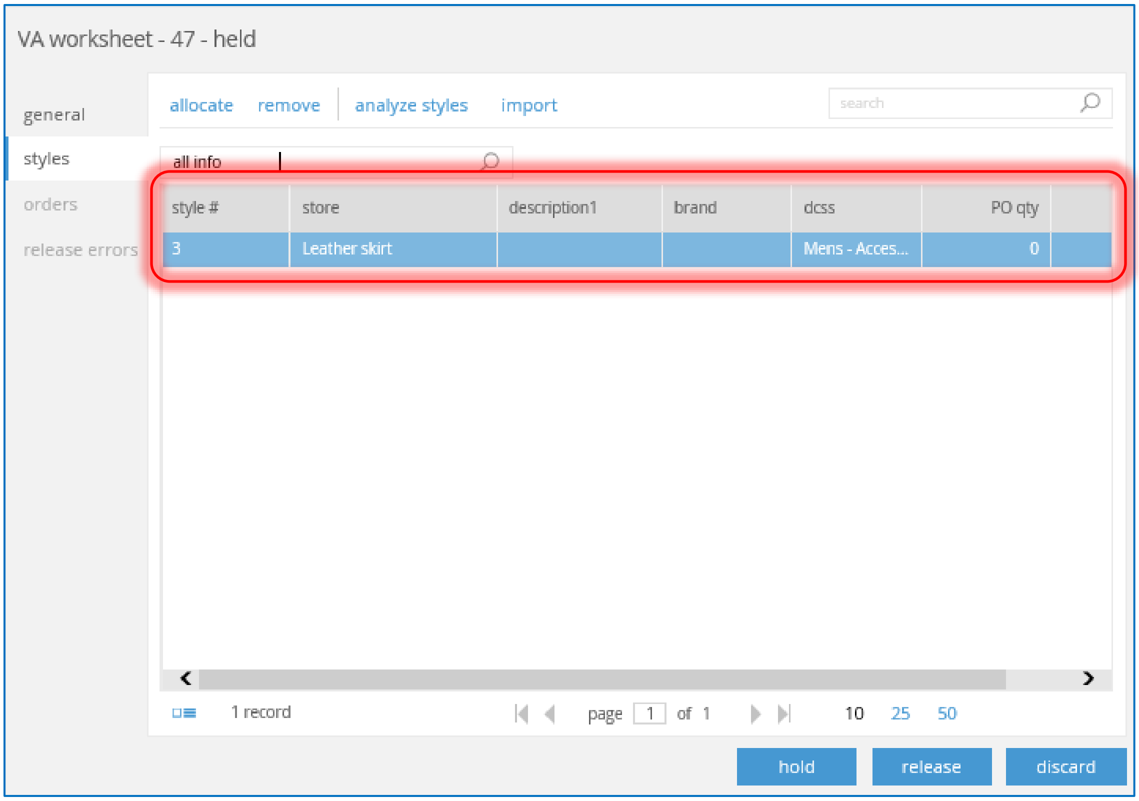
Type the item you're looking for into the search field and either click the Search icon or hit the **Enter** key on the keyboard.

If there are search results for that item, these come up in a new screen.

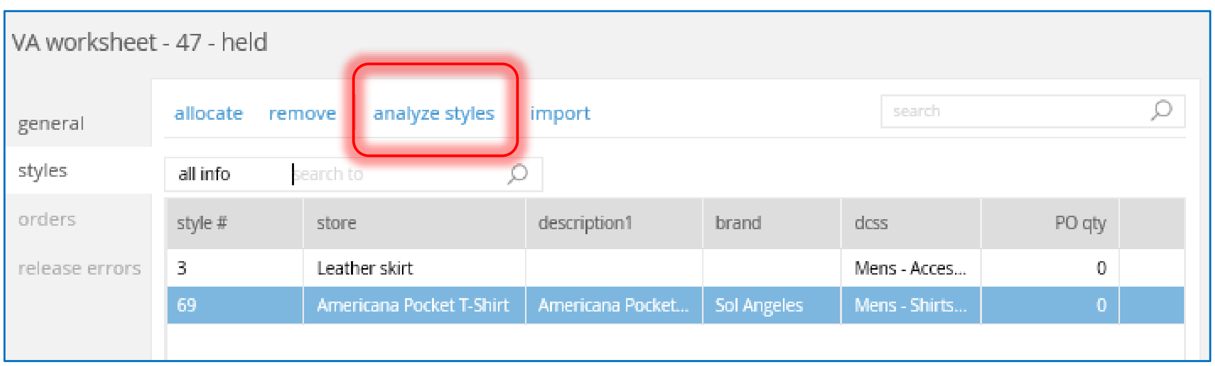


Select the item you want to adjust and click **Ok**. Or, if this is the wrong item, either select **Cancel** or type something different into the search field and run the search again.

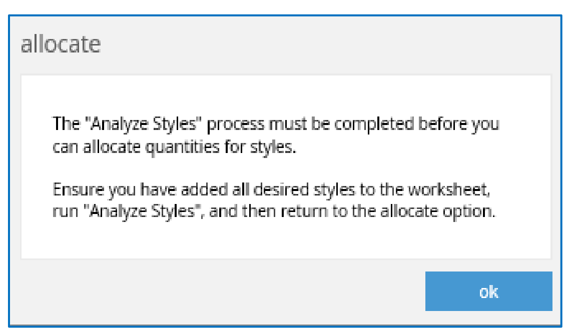
Selecting an item automatically adds it to the main screen. Add as many items as needed by following the above steps.



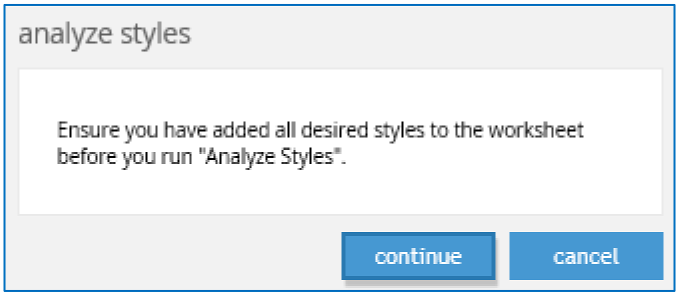
When you’re finished added the styles you want, click **Analyze Styles**.



If you select Allocate first, this error dialog displays.

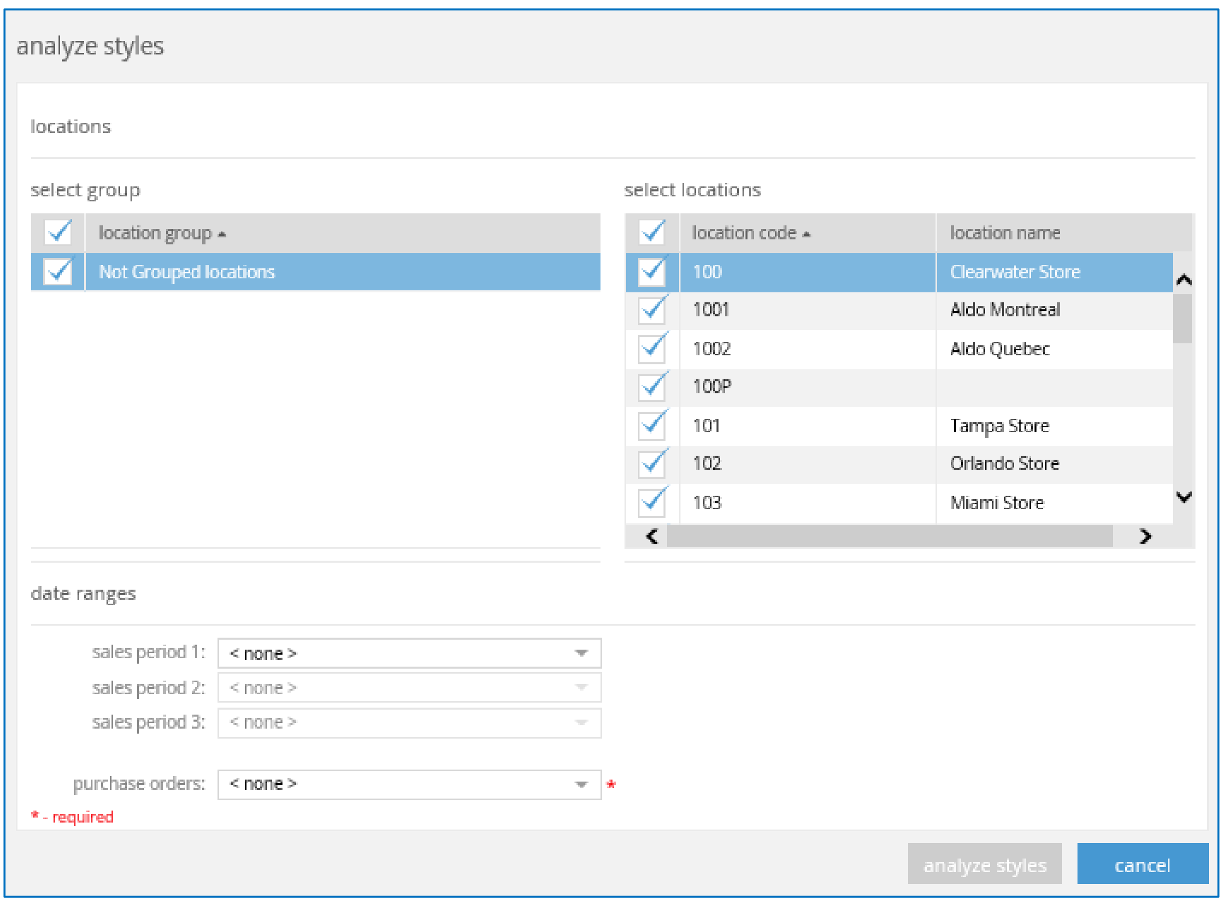


Selecting **Analyze Styles** brings up the following dialog. Click **Continue** if you're ready to continue with Visual Allocation (VA), or **Cancel** to return to the Styles screen to add or delete styles.

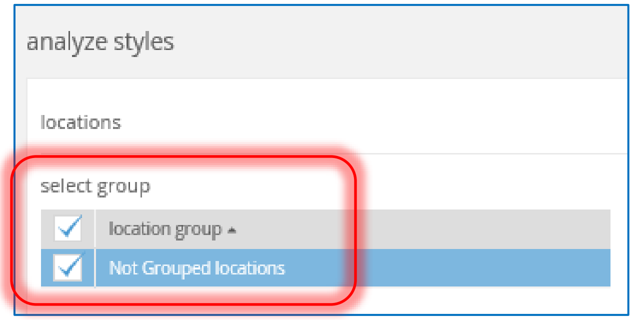


Selecting **Continue** brings up the *Analyze Styles* screen. This screen offers options for analyzing the styles to determine their sales value and Purchase Order/Transfer Order values for ATS (Available to Sell) and PATS (Potential Available to Sell).

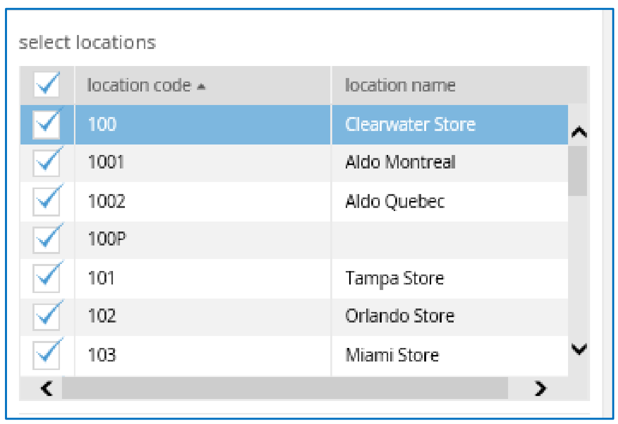
The Analyze Style option can only be run once for a VA worksheet. However, any selected options are saved for the current user and used the next time the analyze dialog is opened.



The *Select Group* area displays a list of all defined location groups. By default, all location groups are selected. You can either manually deselect the groups you want to exclude, or select the check mark box to deselect or select all.



The *Select Locations* area displays a list of all locations for the selected location group. Again, by default, all location groups are selected. You can either manually deselect the groups you want to exclude, or select the check mark box to deselect or select all.



Locations selected from this area are displayed in the decision matrix. These locations are shown in the location group and the location order by location code. The decision matrix is used when allocating styles and is explained further in this section.

If you want one group to display higher than another then each group name needs to be modified to include a number value (this is done in Settings).

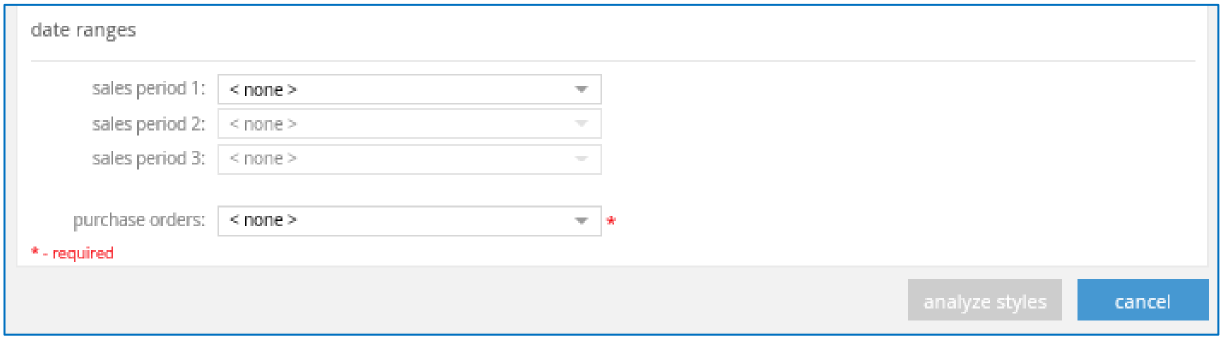
For example:

- 1-Warehouse locations
- 2-Northern California
- 3-Southern California
- 4-Outlets

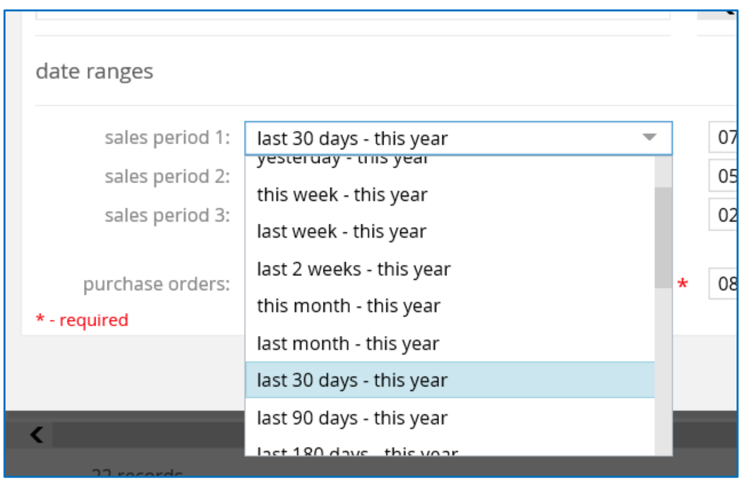
Below these location fields is a *Date Ranges* area. Here you can define a date period for each sales period.

NOTE

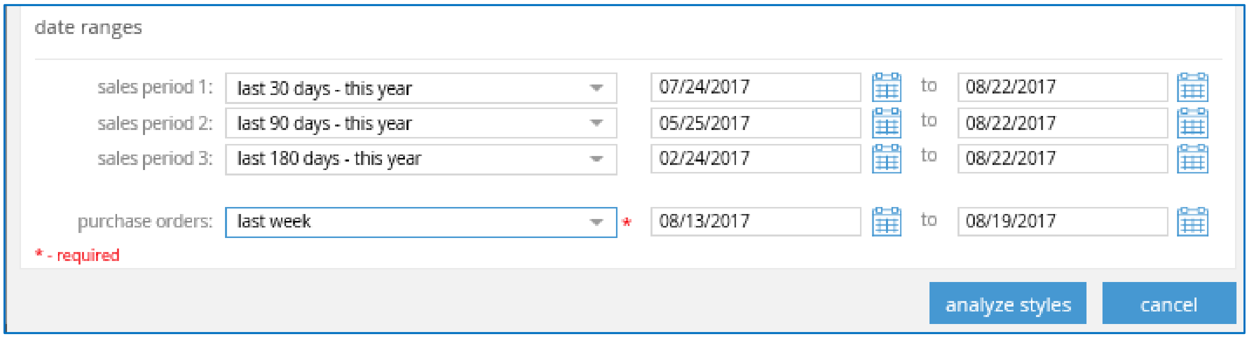
You can't define a higher sales period unless a lower period is already defined. For example, if all three periods are defined but Period 2 is defined as *None*, then this disabled Period 3.



Each period has a variety of pre-defined date periods. Use the scroll bar to view additional periods, then select the one you want to add.



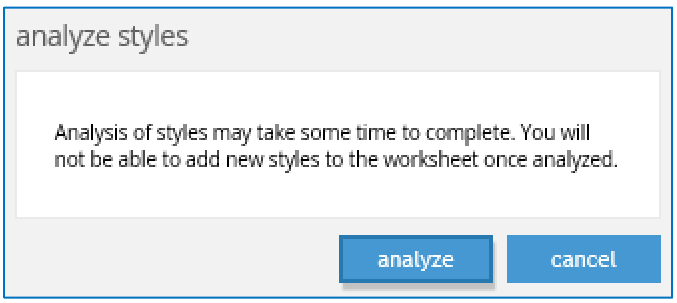
Each selection adds additional fields for further information.



When you've added all the information you want, click **Analyze Styles** to run the process.

Or select **Cancel** to return to the main screen without completing the process.

An information dialog displays if you selected to run the analysis. Click **Analyze** to continue or **Cancel** if this is not what you want to do.



Once analysis is complete, this returns you to the Styles tab on the VA Worksheet. In analysis is still in progress, a Progress column displays and you'll see a loading indicator.

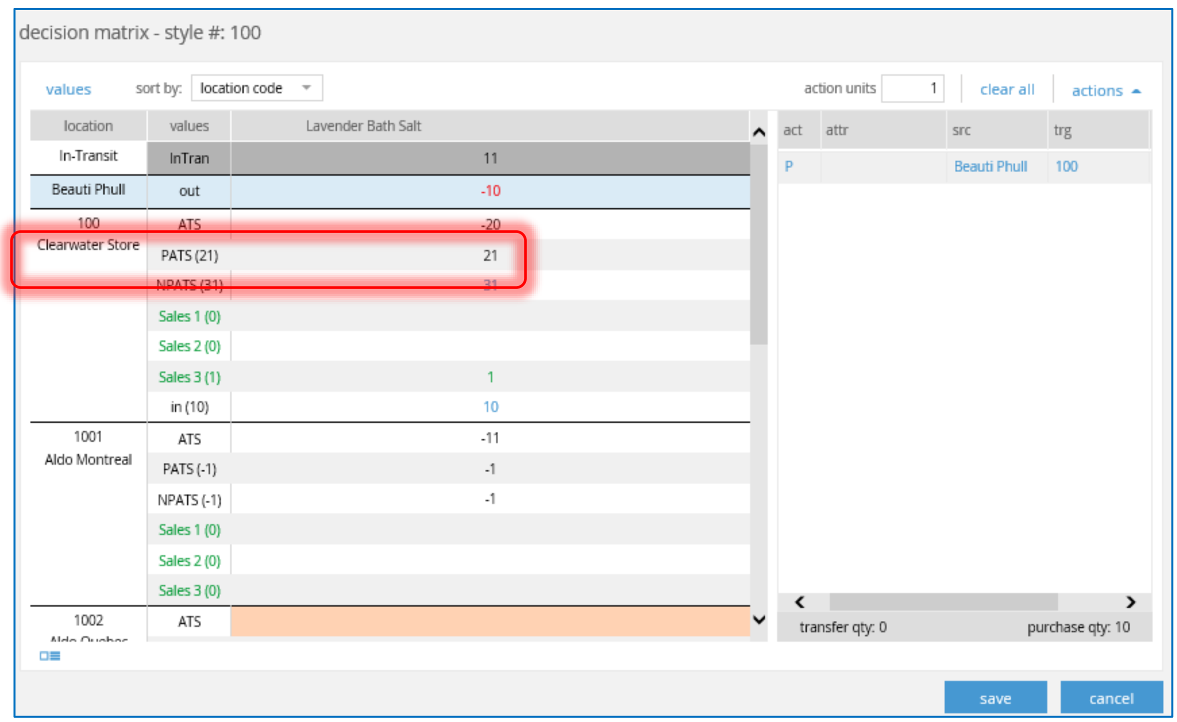
Running analysis always calculates the values for ATS and PATS. Sales values are calculated as defined in the analysis dialog.

Any style with a defined *Like Style ID* and selected checkbox to use this, is included in calculating the analysis.

After analyzing styles, select **Allocate**. This brings up a decision matrix for that style, in this case, S*tyle 3*. This matrix can be opened before or after analysis is completed, however, when viewing before analysis, all sales, ATS, PATS, and NPATS values are blank.

The basic layout of the decision matrix is a grid. The columns at the top are *Locations*, *Values*, and then the *Style*.

For example, the circled information below displays the number of items potentially available to sell at the Clearwater Store

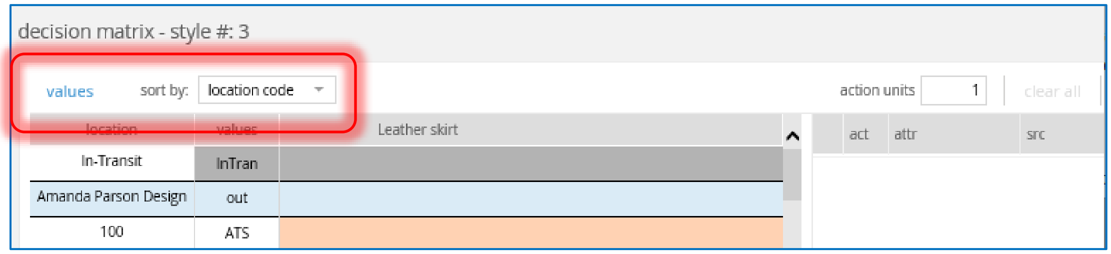


NOTE

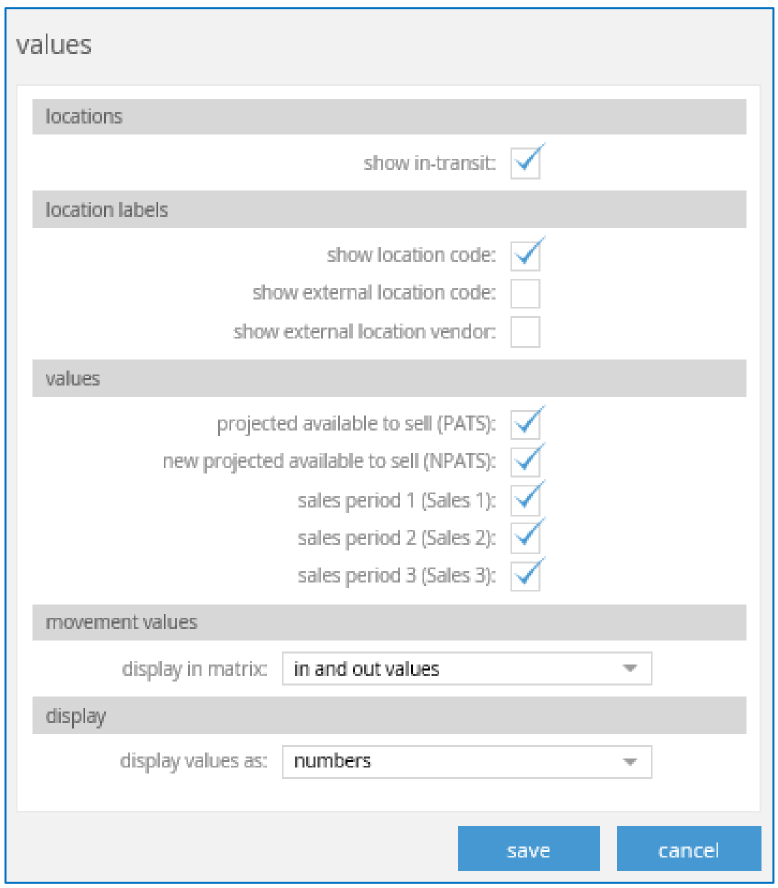
When using the decision matrix to define transfers, the *Allowed Transfer* matrix (as defined in Settings) is NOT used. This allows users to transfer from/to any combinations of displayed locations.

Adjust the *Sort By* drop-down to change how the display results are sorted, to your preference.

Click **Values** to open a dialog to choose values to display (rows) for each location/attribute combination.



Any selections made on this *Values* dialog are displayed for all styles on the worksheet. Here you can modify your matrix view by selected what to display and what to hide.

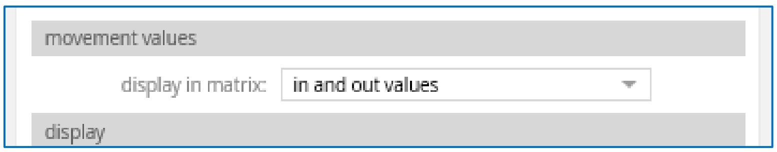


Under the Movement Values heading, the two values for the *Display in Matrix* field are *In and Out Values* or *Net*.

In and Out Values indicates that two separate rows will display, one for incoming quantities to the location and one row for outgoing quantities for that location.

Net means there is one row only to show the net difference between the in and out values.

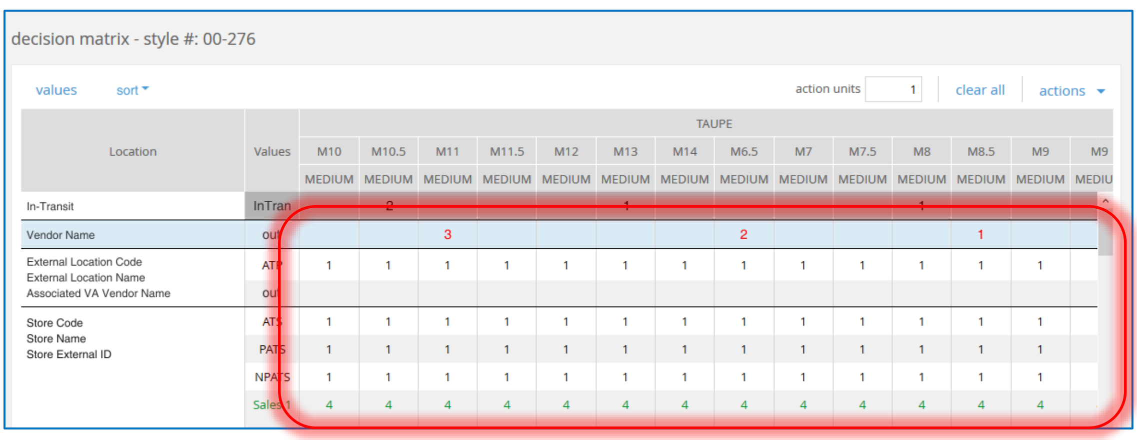
If more quantity is coming into the location than going out, this displays as a positive value in blue text. If more quantity is leaving the location than coming in, this displays as a negative value in red text.



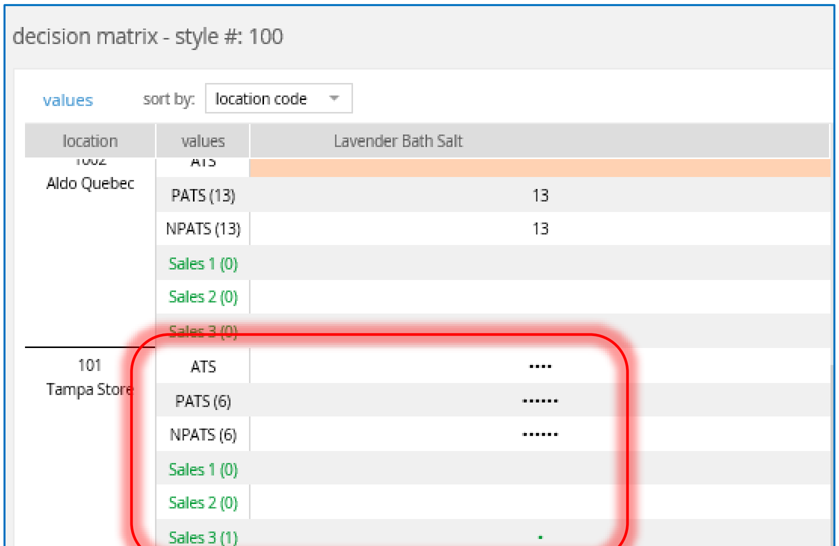
The last heading, Display is where you can select for the decision matrix to display all numerical values or two different symbols to display values.

The options for this drop-down are *Numbers*, *Dots*, or *Pipes*.

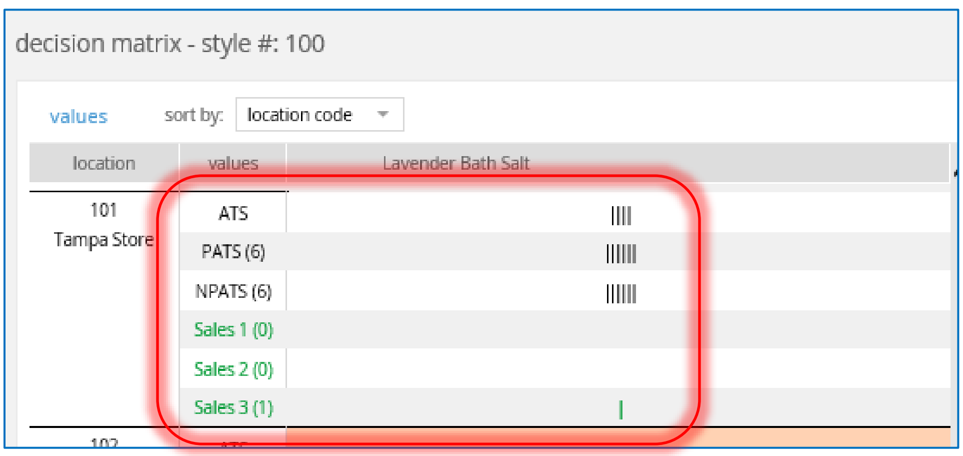
Selecting **Numbers** (the default) displays as shown below.



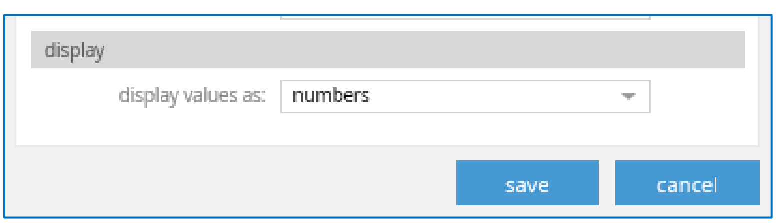
Selecting **Dots** displays as shown below.



Selecting **Pipes** displays as shown below.

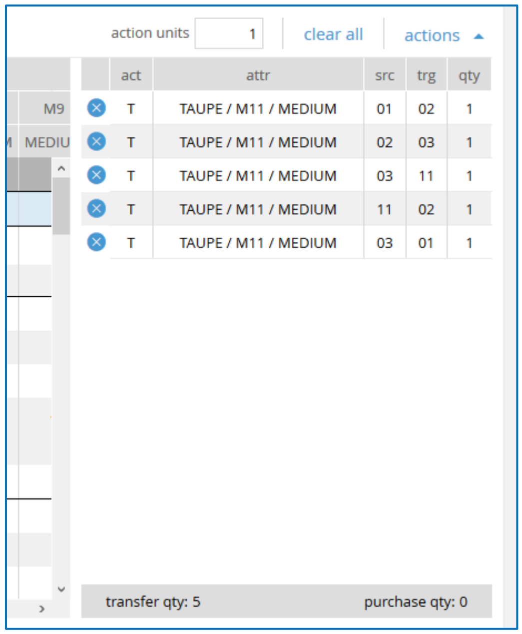


When finished, select **Save** to close the dialog and apply the changes. Or click **Cancel** to close without updating.

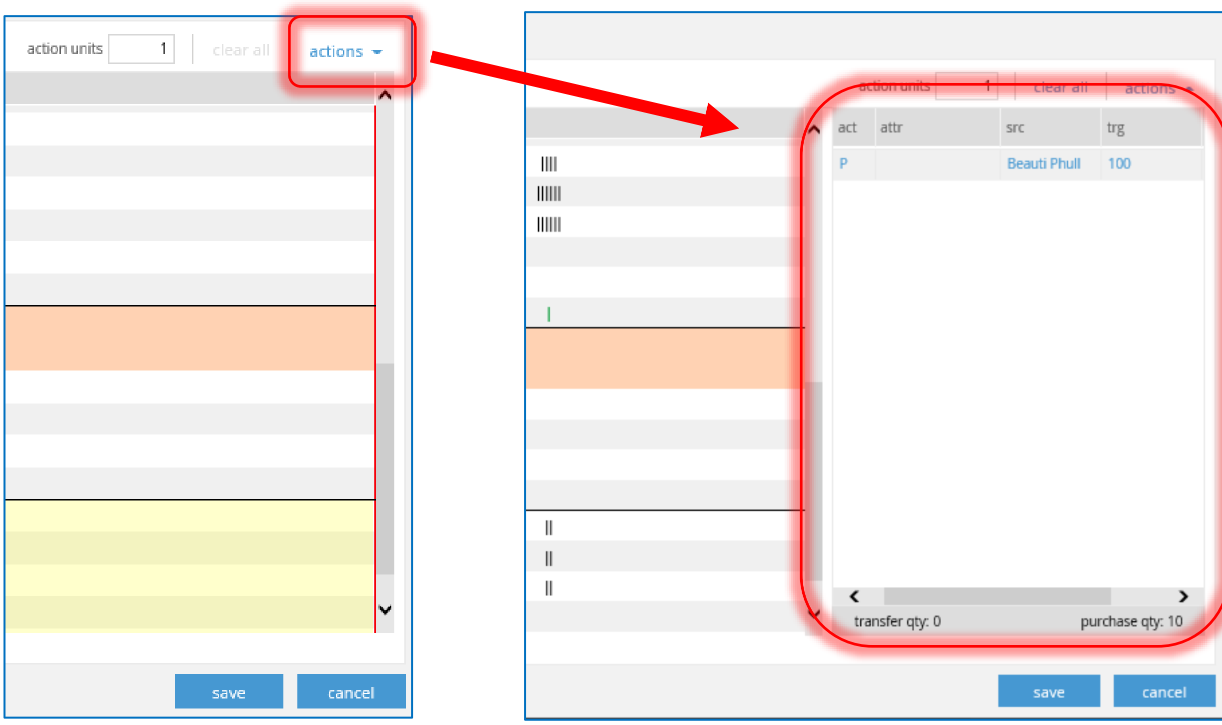


This returns you to the decision matrix. In the *Action Units* field, enter a numerical value that will be entered when clicking attributes for a location.

Click **Clear All** to quickly clear all proposed actions (clear all POs and TOs scheduled to be created).

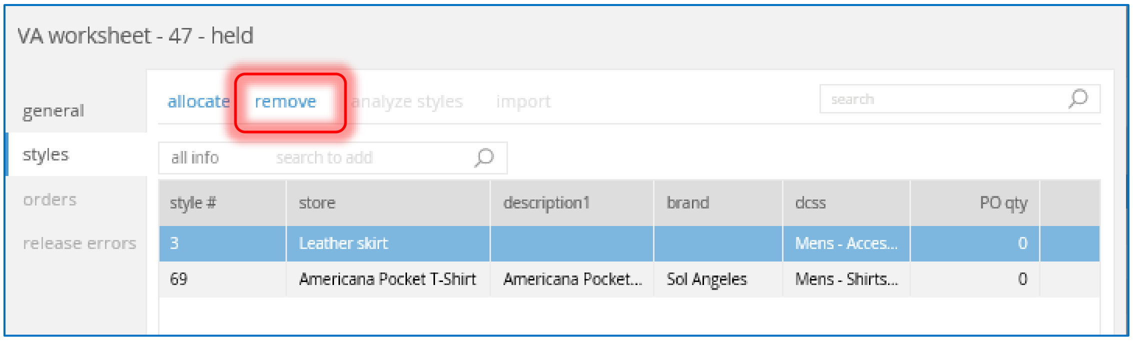


The **Actions** button hides or displays this panel.

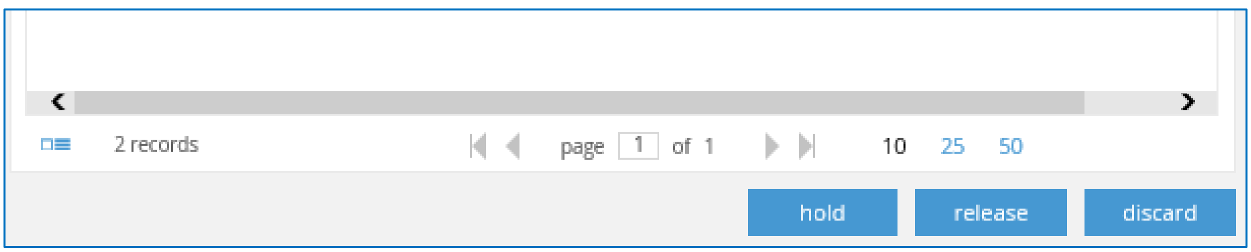


When finished viewing the decision matrix, click **Save** to close the dialog and return to the VA worksheet.

At any time (before or after analysis), select the style you want and then click **Remove** to delete the style from the worksheet.



When finished with the VA, click **Hold** to place the worksheet on hold to continue at a later time, or if you're finished, select **Release** to finalize the release the worksheet. **Discard** will cancel the worksheet without saving anything.

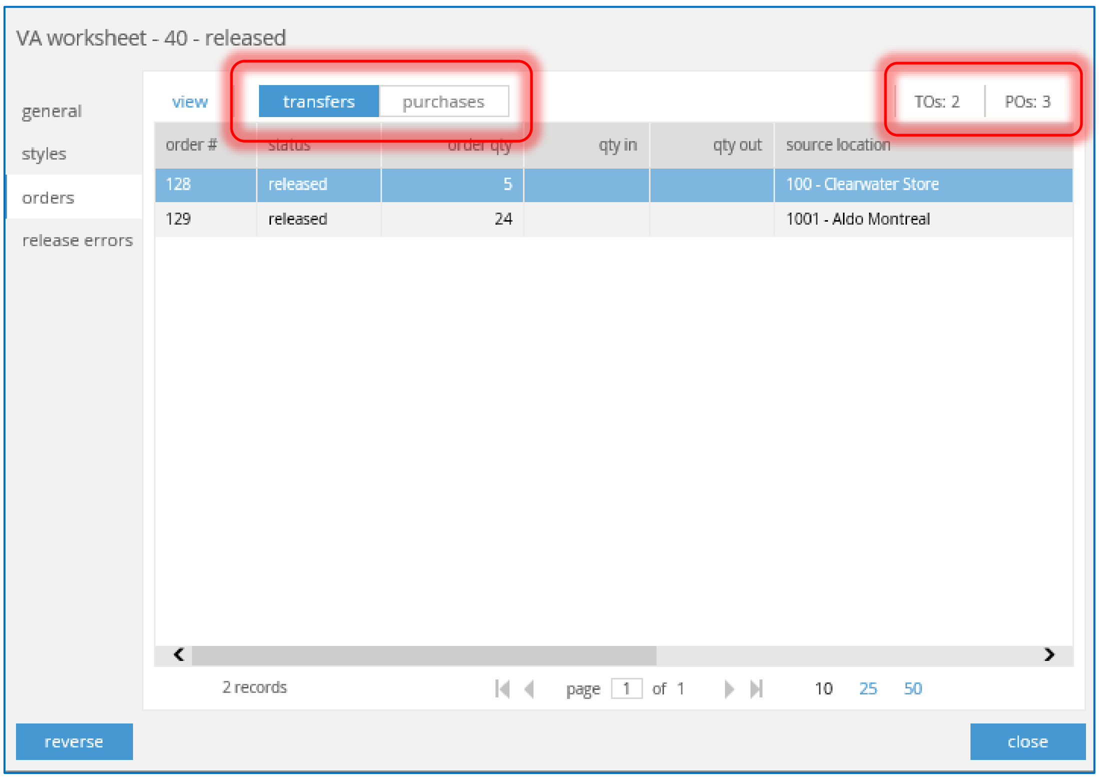


Orders Tab

Once a worksheet is released, the *Orders* and *Release Errors* tabs enable. The Orders tab, as shown below, displays all orders associated with this worksheet, as well as their status, order quantity, locations, etc.

Orders are sorted by either Transfer Orders or Purchase Orders. Click either the Transfers or Purchases button to display those orders.

At a glance, the total number of TOs and POs on this worksheet display in the upper right corner.

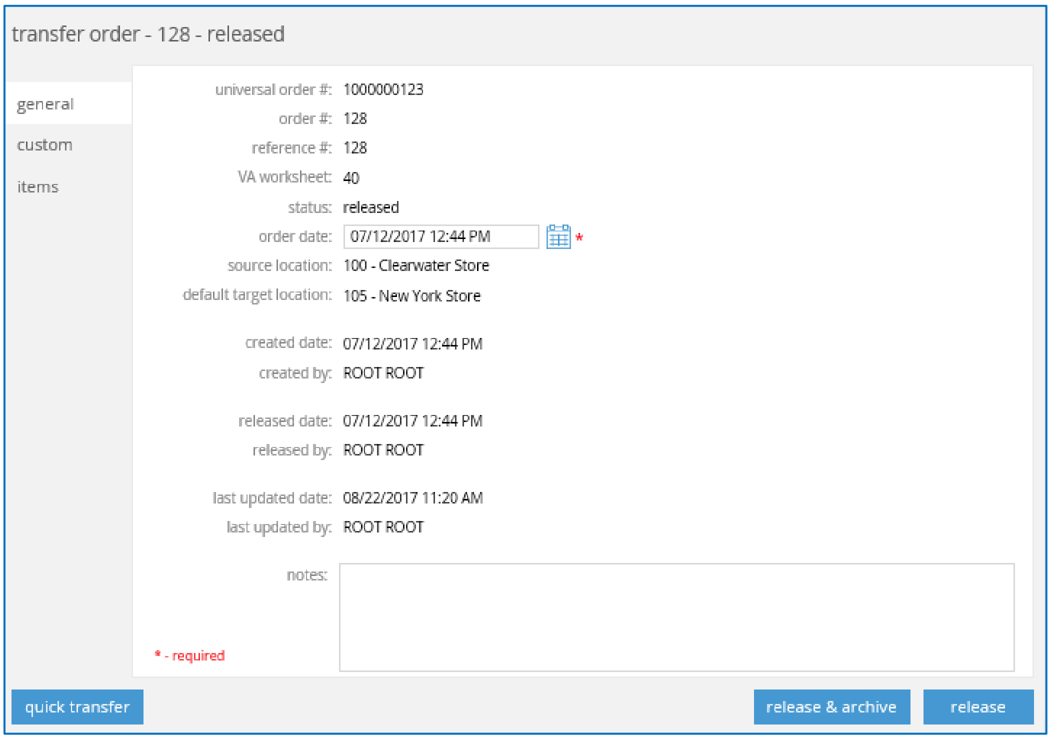


To view more information on an order, select the one you want from the list and click **View**.

Transfer Orders – View

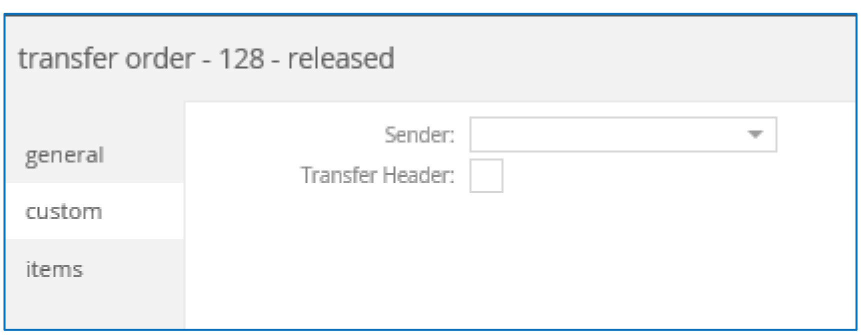
General Tab

For Transfer Orders, the General tab displays basic details about the order, including the order number, linked Visual Allocation worksheet, order date, etc. The only two fields able to be edited on this screen are *Order Date* and the *Notes* field.



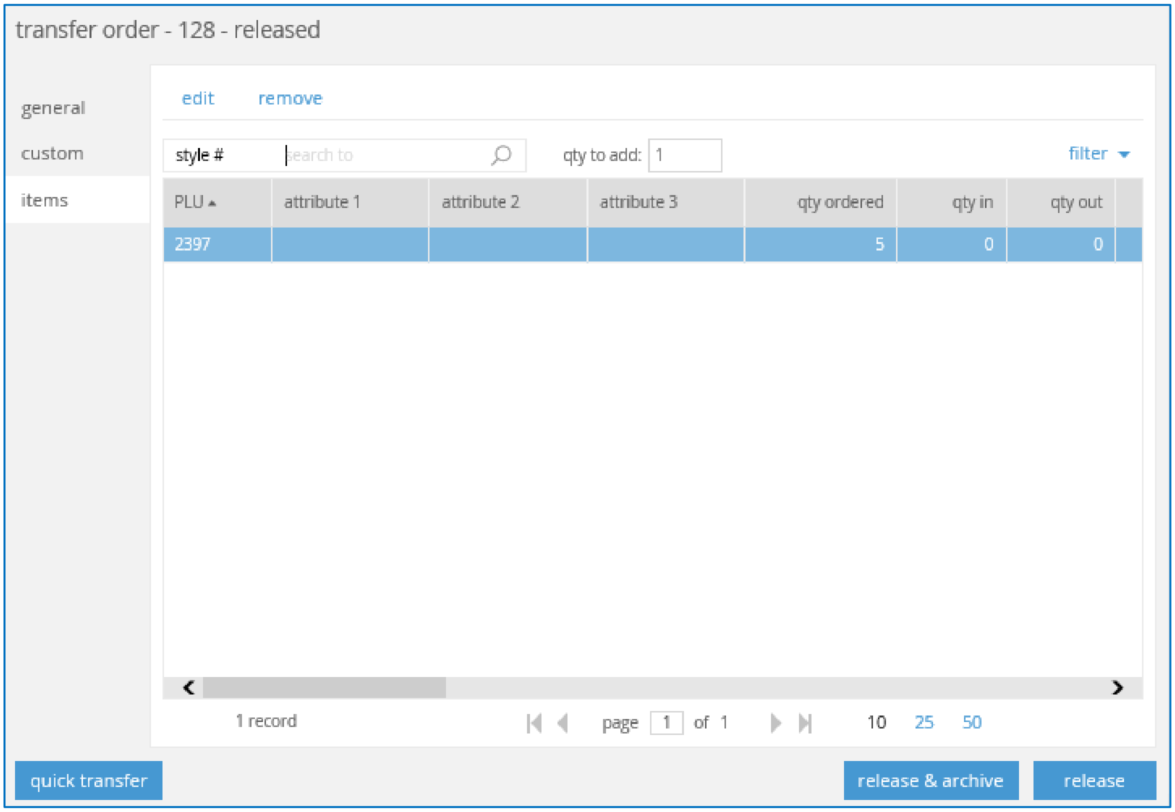
Custom Tab

The Custom tab displays any custom fields previously set up in Settings.

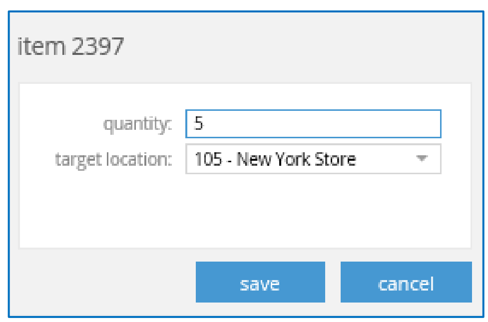


Items Tab

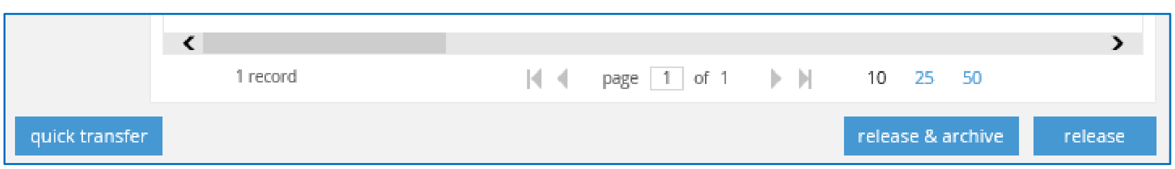
Lastly, the Items tab shows all items currently on the order. To delete an item, select it from the list and click **Remove**. Or, to make changes to an item select **Edit**.



This brings up the edit item dialog, where you can make changes to either the *Quantity* or the *Target Location* where the items are shipping to.



At the bottom of the screen, the Quick Transfer button quickly creates an Out or In Memo in the background and transfers exactly what is on the TO

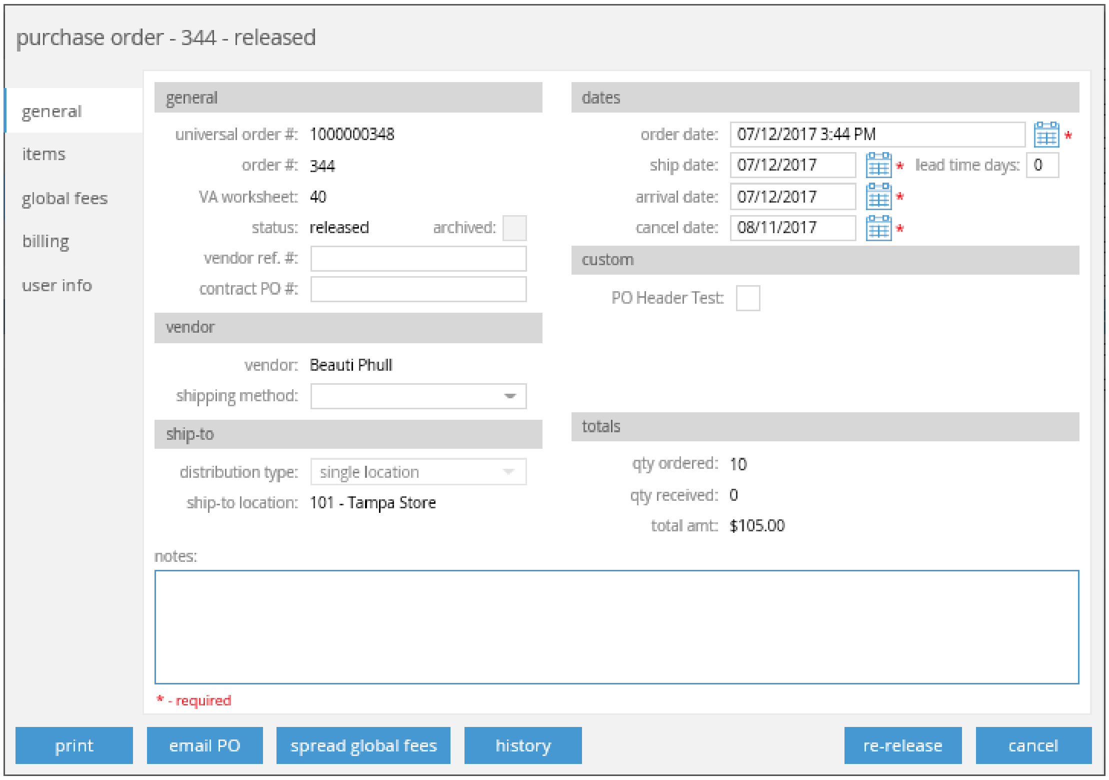


To close the screen, click **Release**, or **Release and Archive** to change the worksheet to archived after releasing.

Purchase Order – View

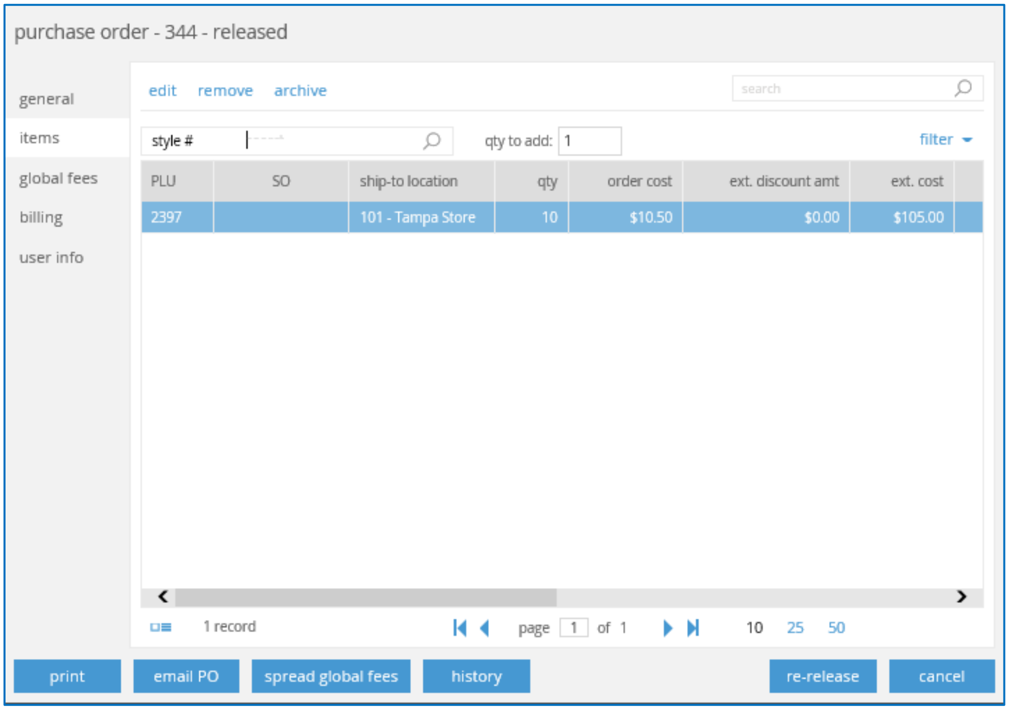
General Tab

For Purchase Orders, the General tab displays basic details about the order, including the order number, linked Visual Allocation worksheet, vendor, ship-to location, order date, etc.

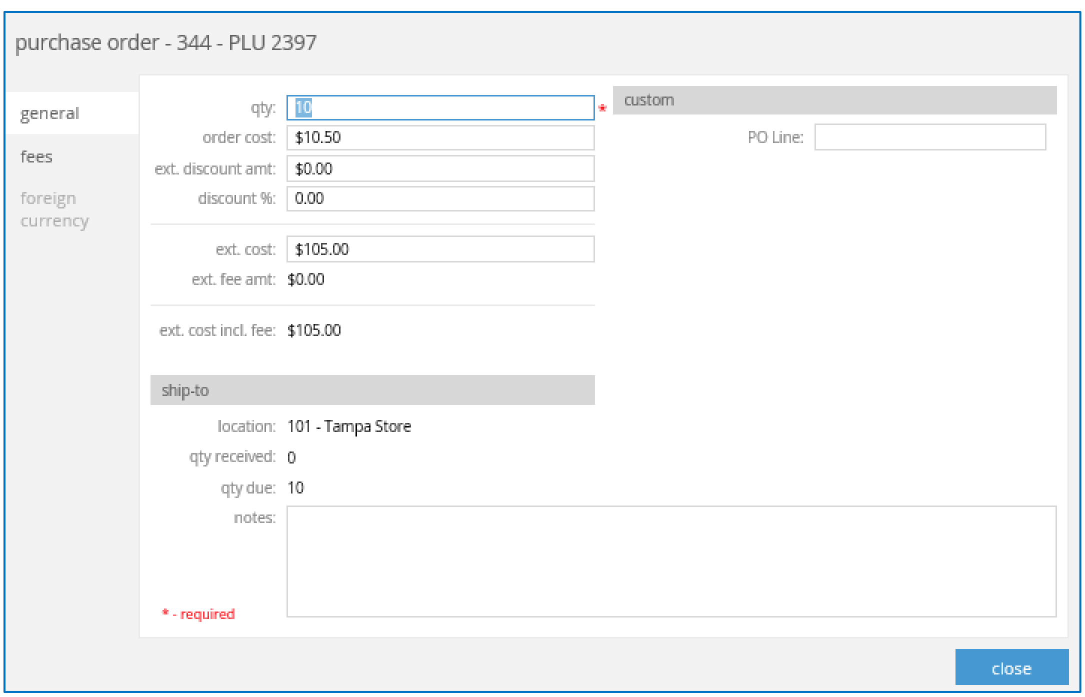


Items Tab

The Items tab shows all items currently on the order. To delete an item, select it from the list and click **Remove**. **Archive** marks the item was archived and removes it from the list. Or, to make changes to an item select **Edit**.

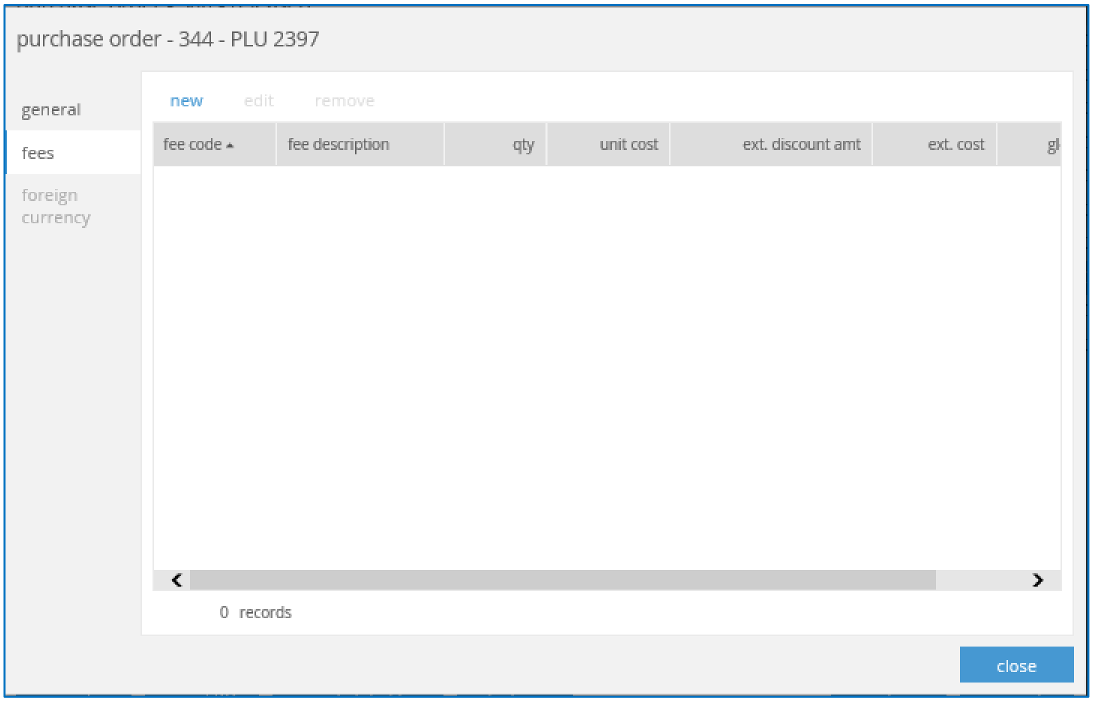


This brings up the edit information screen for that item.

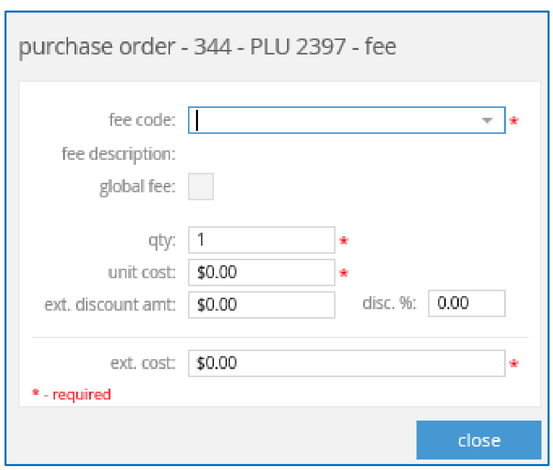


On this General tab, you're able to make changes to the order quantity, order cost, add a discount percentage, and more.

Move to the Fees tab to add fees to this specific item. As shown on the screen below, there are not currently any fees for this item. Select **New** to add a new fee.

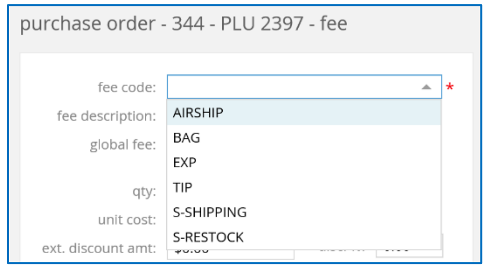


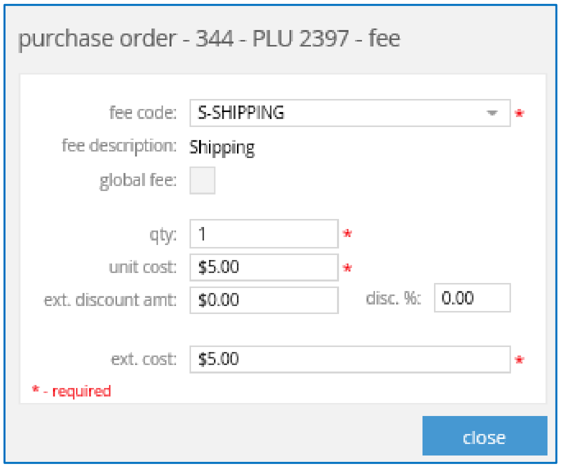
Required fields are marked with a red asterisk. Enter in the *Fee Code* using the drop-down selecting box.



Enter in the *Fee Code* using the drop-down selection box.

Now fill in the rest of the required fields and remaining information.

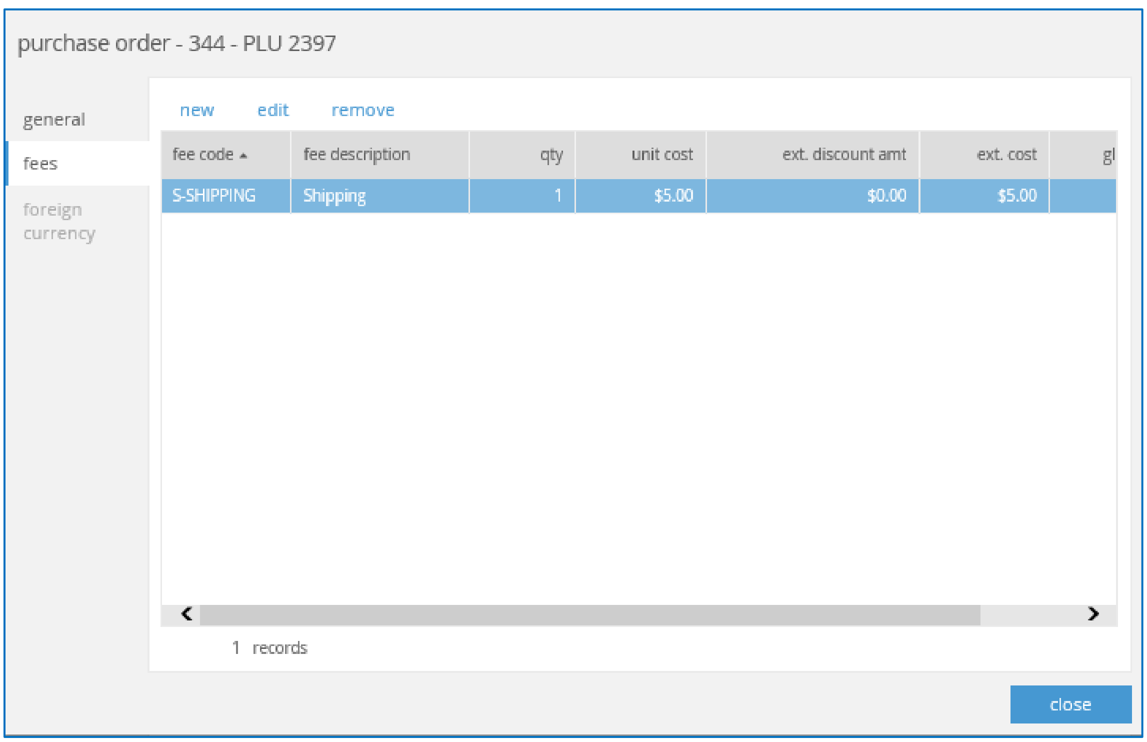




Some of the fields automatically update after entering information.

For example, after entering **$5.00** in the *Unit Cost* field, this automatically updated the *Ext. Cost* field.

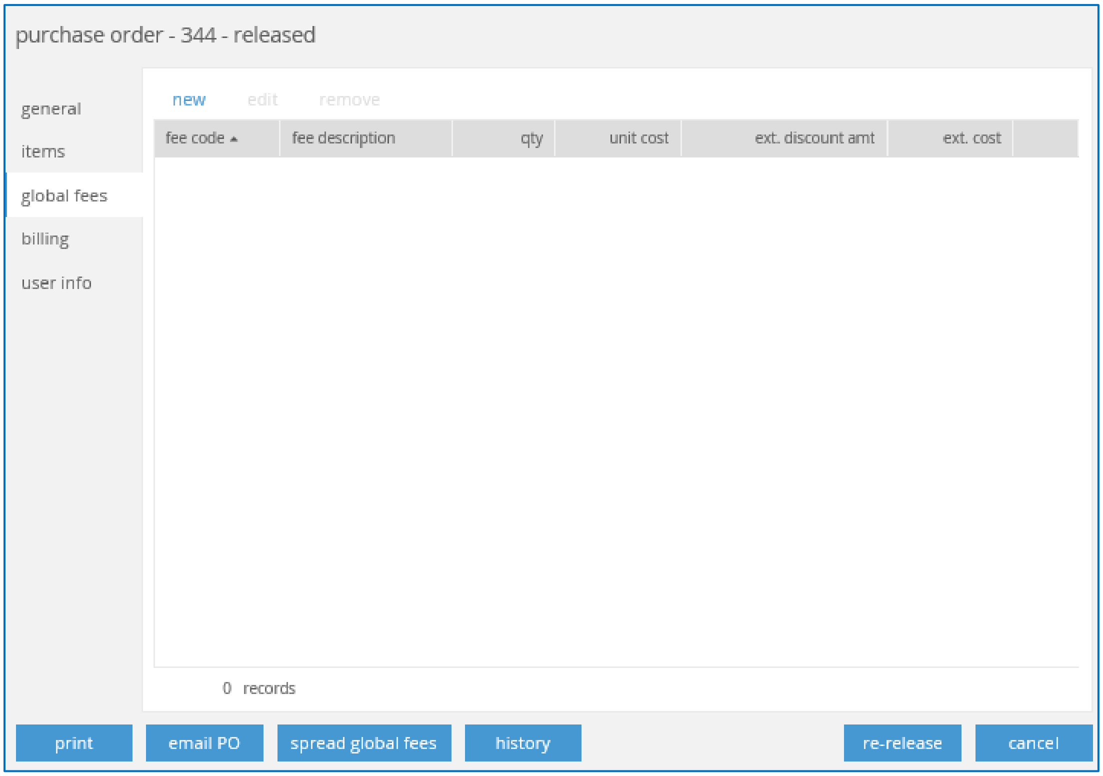
When finished, click **Close** to add the new fee to the order.



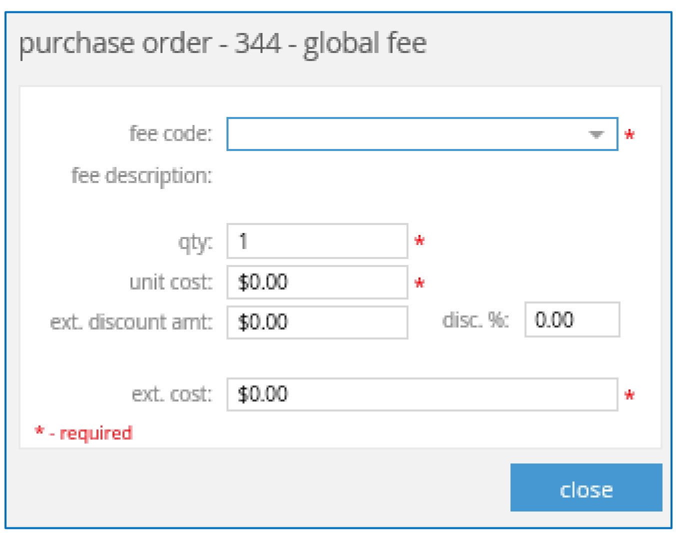
If there is any foreign currency on this order, then the Foreign Currency tab is enabled. Otherwise, click **Close** to close this style information and return to the PO.

Global Fees

If there are any global fees for this order, add them on this tab.

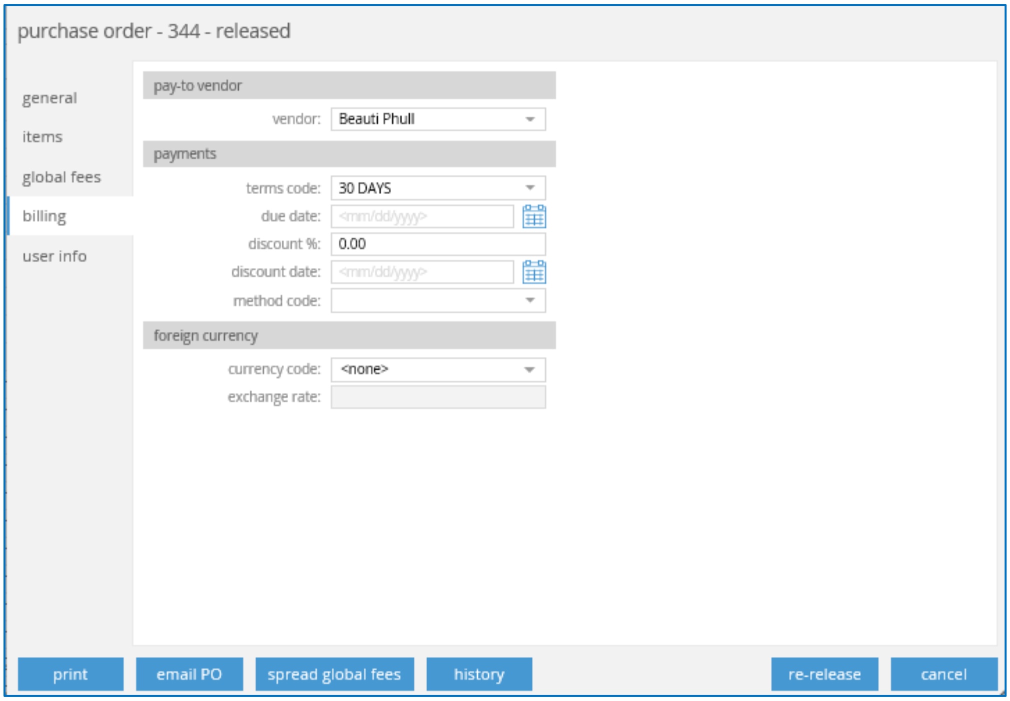


This fee dialog is the same layout as the fee dialog from the Fees tab, as described above.



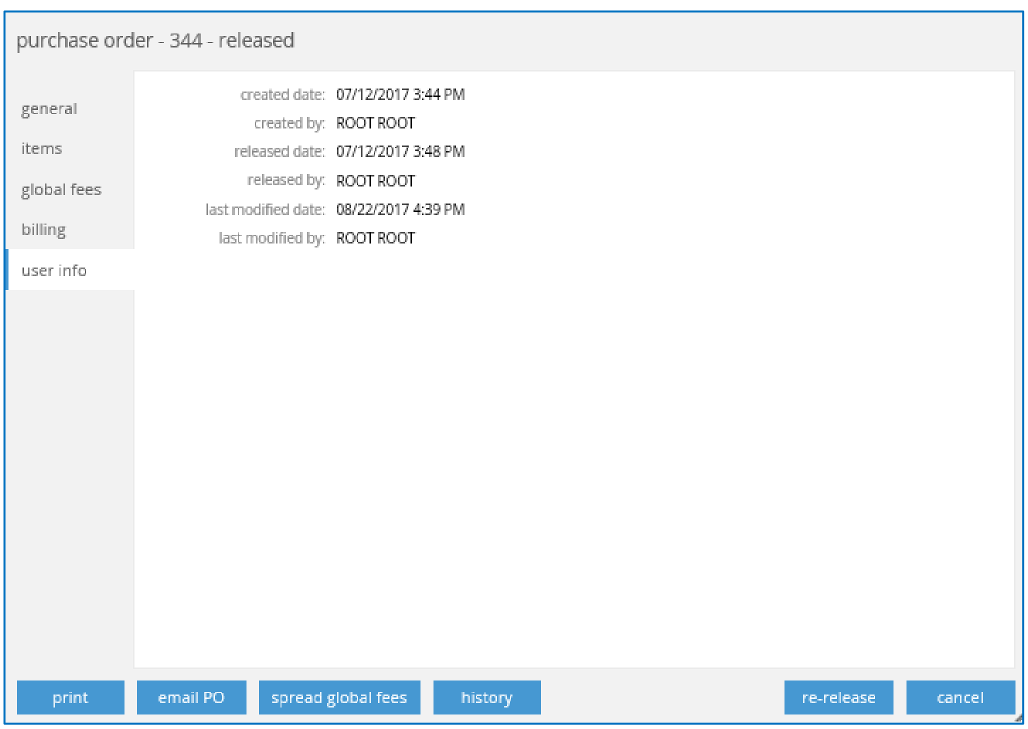
Billing

The Billing tab is for entering the vendor's billing information and payment terms, if desired.



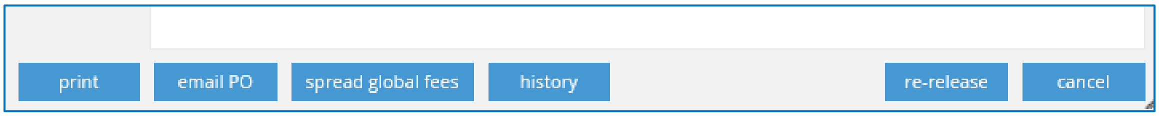
User Info

Finally, the *User Info* tab is a purely information tab that shows information on the user that created this PO, as well as the date and time created, modified, and released.

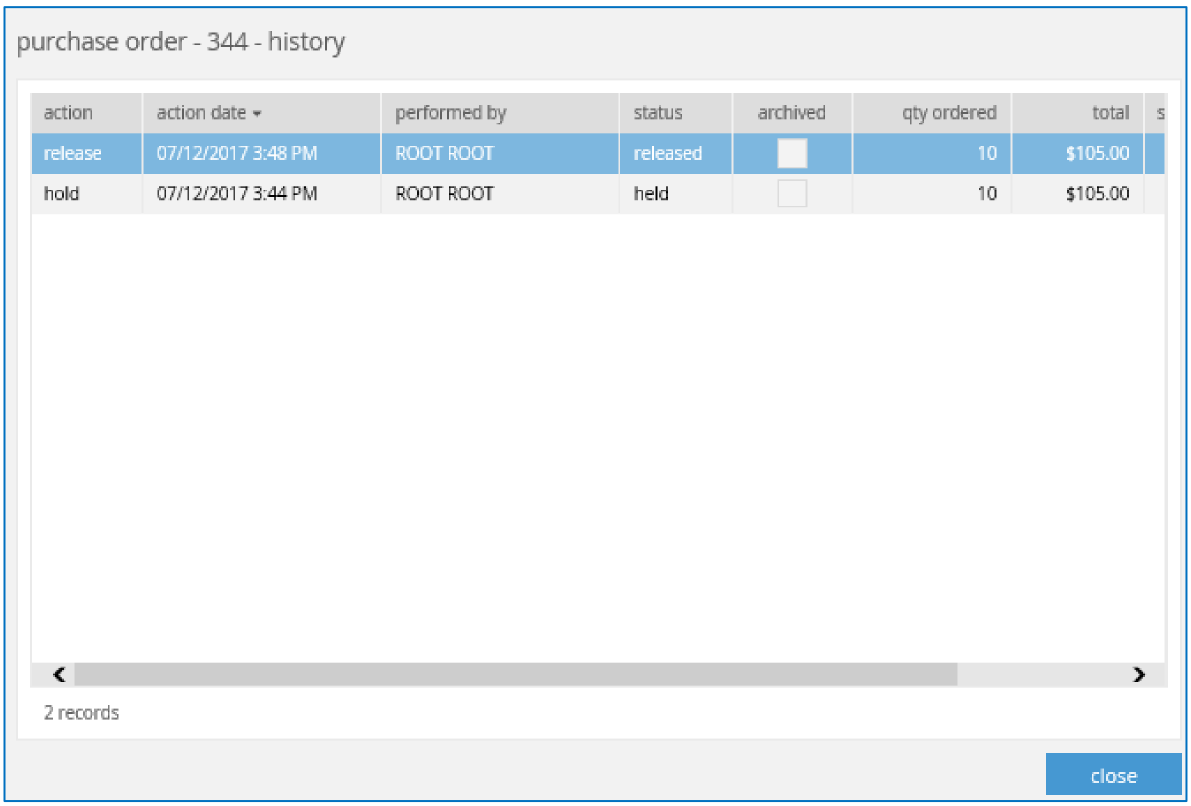


At the bottom of any of these tabs are various buttons. **Print** is for printing a copy of the order, **Email PO** brings up a separate dialog for directly email the PO.

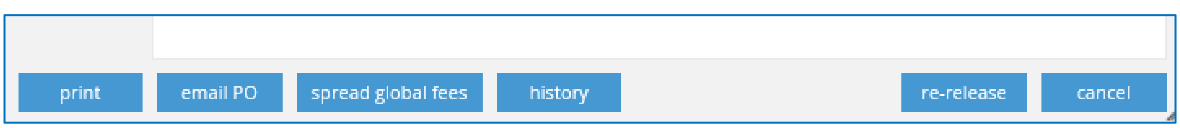
Spread Global Fees is used to quickly spread the global fee (if you created one on the Global Fees tab) across the entire PO.



The **History** button brings up a dialog that shows the history of the PO, including all actions.



When finished making changes and viewing any information, click **Re-Release** to release the update PO, or **Cancel** to close without saving.

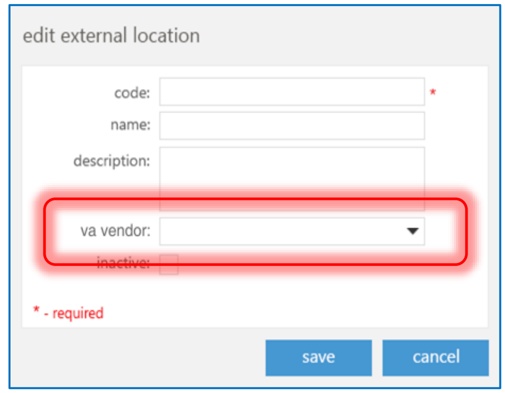


New Fields

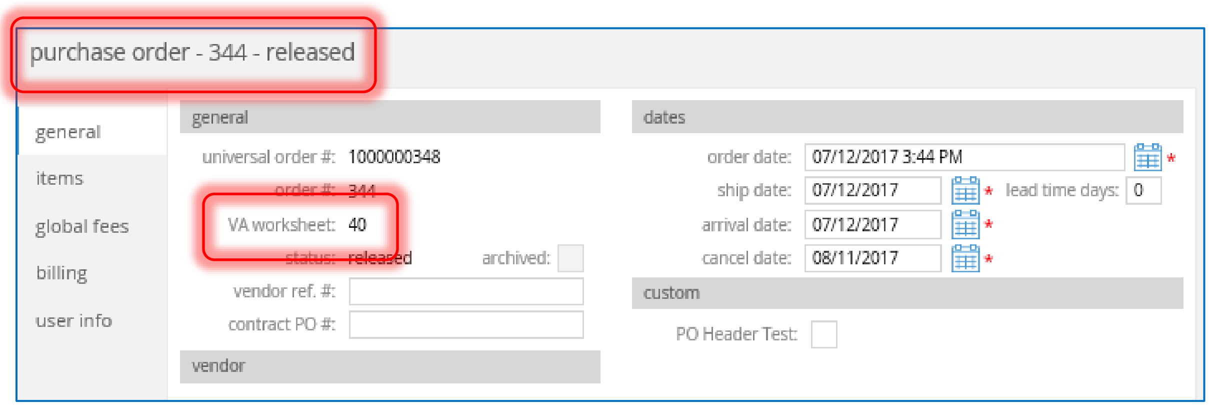
There is a new field in the Inventory area on the Style level. The field *Like Style No* is used to manually define a style number that this new style is similar to.

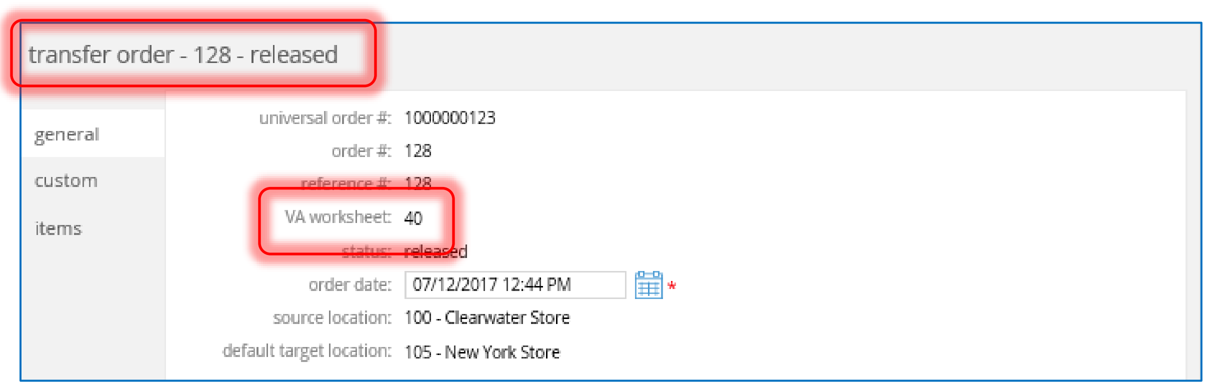
When defining an external location in CHQ, we've added a *VA Vendor* field to specific the vendor this external location is related to.

The vendor selected from this drop-down will be used to create POs to purchase from this external vendor location.



There is also a new *VA Worksheet* field on Purchase Orders and Transfer Orders. This field records/references the VA worksheet that created the order. This field only displays if there is a VA worksheet referenced.





Adjustment Memos

Version 5.0 – TFS # 46008

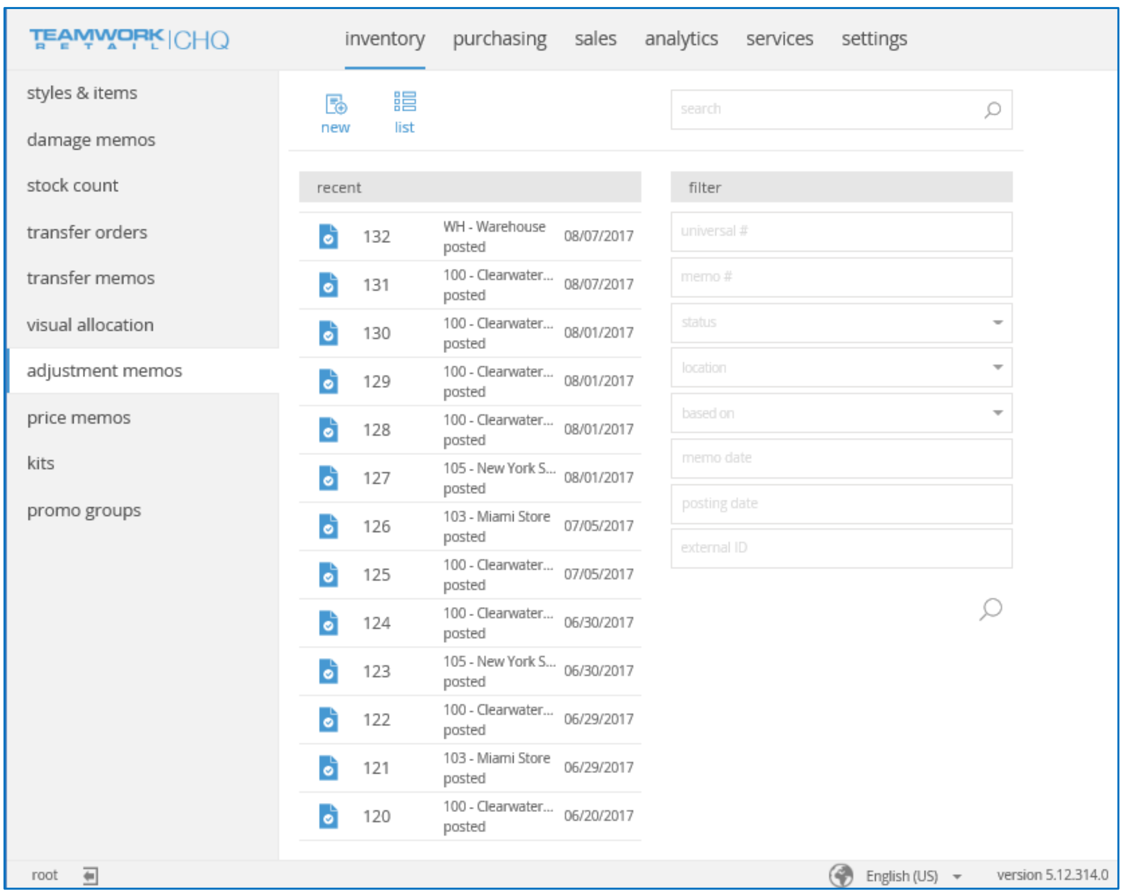
August 2017

We've added an Adjustment Memos functionality to CHQ, including the ability to add new, edit, delete, or post held adjustment memos, reverse posted adjustment memos, and print held or posted memos.

Adjustment Memos are used for used for making positive or negative adjustments on an item or items for a specified location.

For example, if an item is damaged, stolen, or given away for charity, you can make an adjustment to mark these items out. Or if an item is found, you can make a positive adjustment so your inventory remains accurate.

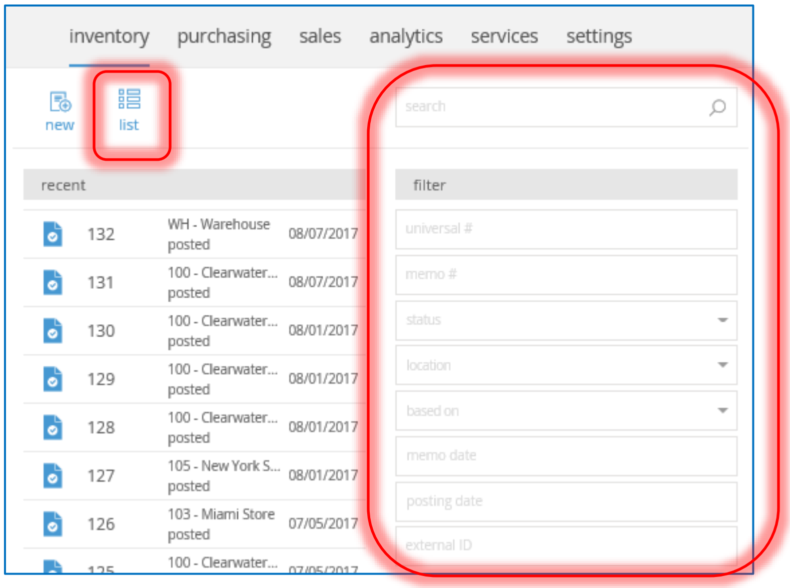
To access this feature, go to Inventory > Adjustment Memos.



Here you can view the most recent memos, including those that are posted and those that are on hold (not yet posted).

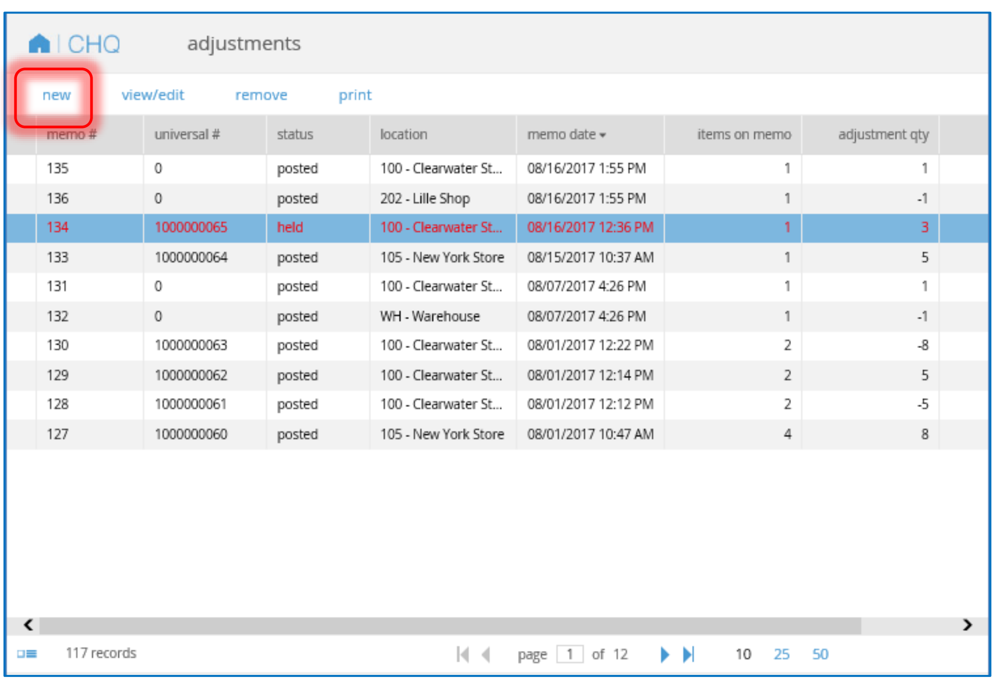
At the top right of the screen, use the Search bar to find a specific memo that you don't see listed. Or use the Filter box below to narrow down the list results, if you're not exactly sure what you're looking for.

Click the **List** button to see a list view of the most recent memos.

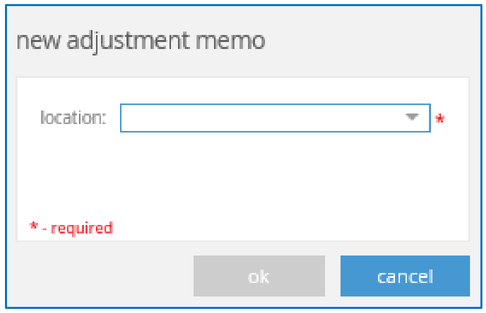


Any memos that are on hold will display in Red. All other posted memos display in black.

From either this screen or the main screen, click **New** to create a new Adjustment Memo. These buttons are only enabled with the appropriate security rights (New Security Rights).



First you'll need to set the location for this memo.



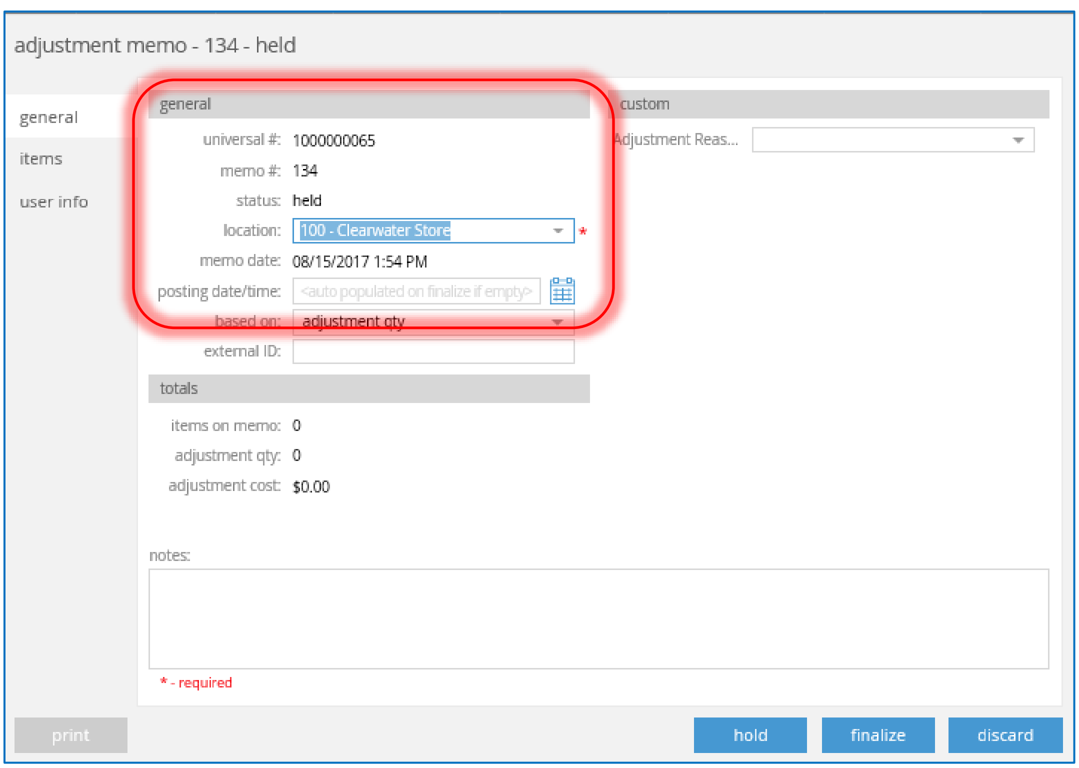
After selecting a location, click **Ok**.

Until it is posted, Adjustment Memos have the status of *Held*, as displayed in the heading. The memo number, *134* in this case, is auto-generated by Teamwork in increasing numerical order with each additional memo that is created.

General Tab

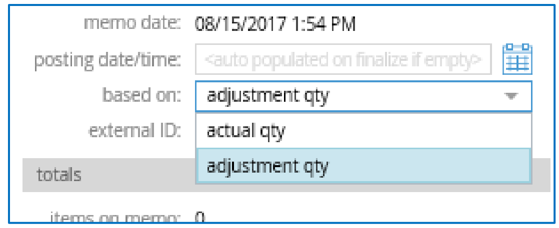
The *General* tab is where you'll enter general memo information. Note that the *Universal #*, *Memo #*, *Status*, and *Memo Date* fields are unable to be edited; these are all auto-filled by CHQ.

Use the *Posting Date/Time* field to enter in a future date you want this memo to post. If no alternative date is entered, this field auto populates with the current date and time after finalizing.

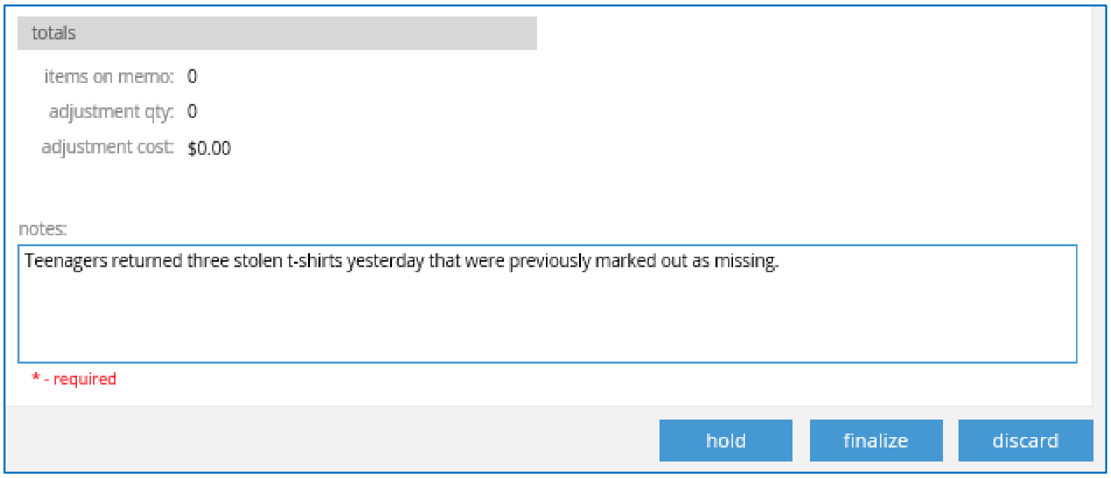


Based On refers to the *Actual Quantity* or the *Adjustment Quantity*, depending on which you select.

This means the Adjustment Memo and totals are based on the selected quantity.

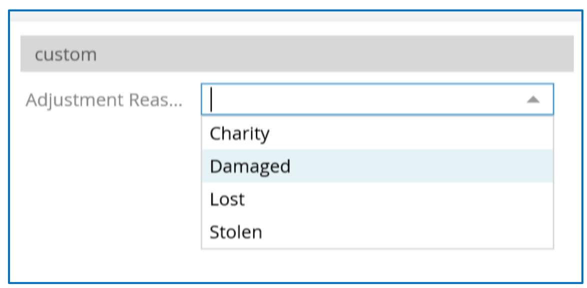


The fields under the *Totals* header automatically update after you've added items in the *Items* tab. Use the *Notes* field to manually enter any additional notes relating to this adjustment.

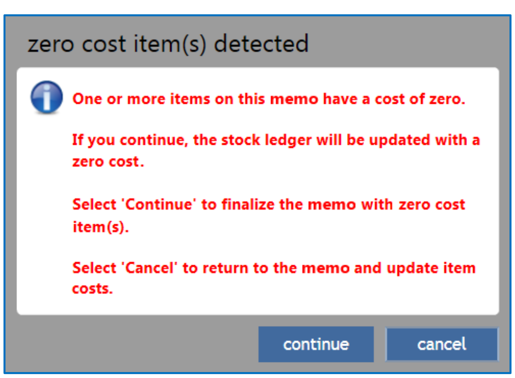


The *Custom* heading can be customized to have any field needed. In this case, a custom field was set up to offer *Adjustment Reasons*.

Employees can quickly select an adjustment reason, instead of manually typing one it. This helps keep responses uniform and consistent for reports and other information management.



From this screen you can put the memo on **Hold** to work on at a later time, or **Finalize** or **Discard** it. However, typically you would add items on the *Items* tab before finalizing.

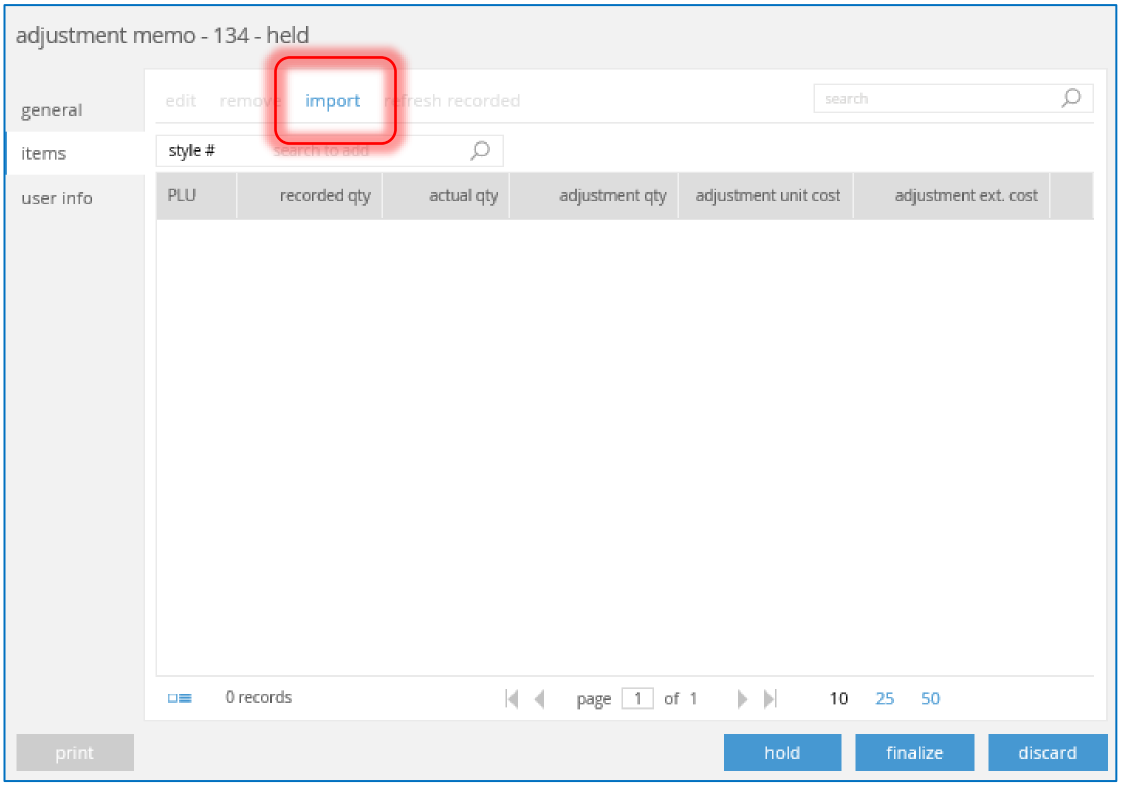


If the location setting "Warn when receiving at zero cost" is set to TRUE, the following dialog displays after selecting **Finalize**.

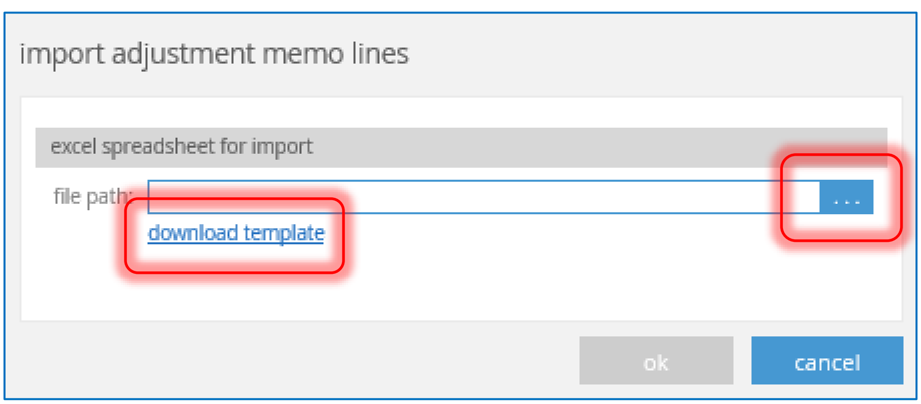
Items Tab

The *Items* tab is where you'll add items that need to be adjusted.

If you have an Excel sheet of adjustments to import, click the **Import** button.

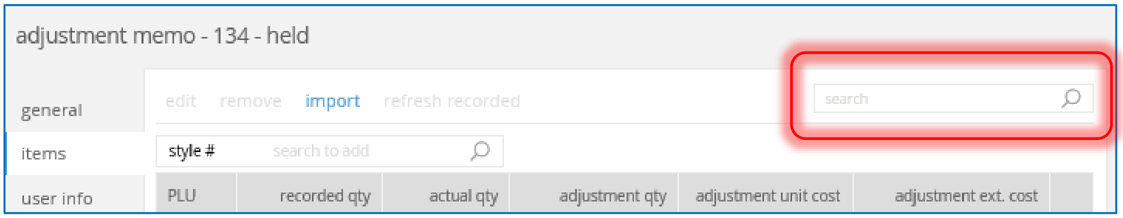


Click the blue box with three dots to choose the spreadsheet from your computer. Or click **Download Template** to download a blank template to start working on.



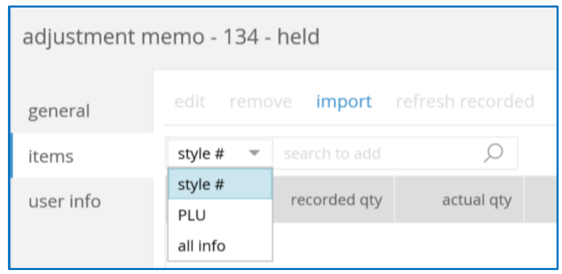
With a template uploaded, click **Ok** to complete the import.

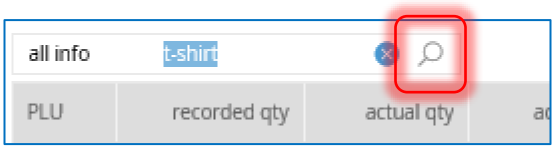
Use the search field at the top right of the screen to do a general (all info) search.



Alternatively, use the *Search to Add* field to look up specific items.

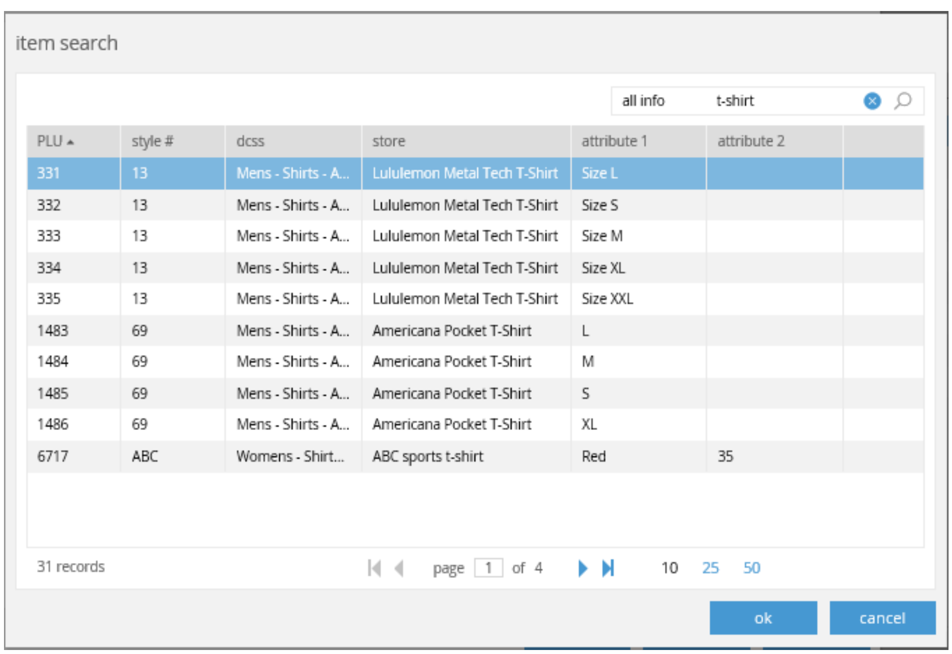
Here the field is set to *Style #*, but this can be changed to search by *PLU* or in include *All Info*.





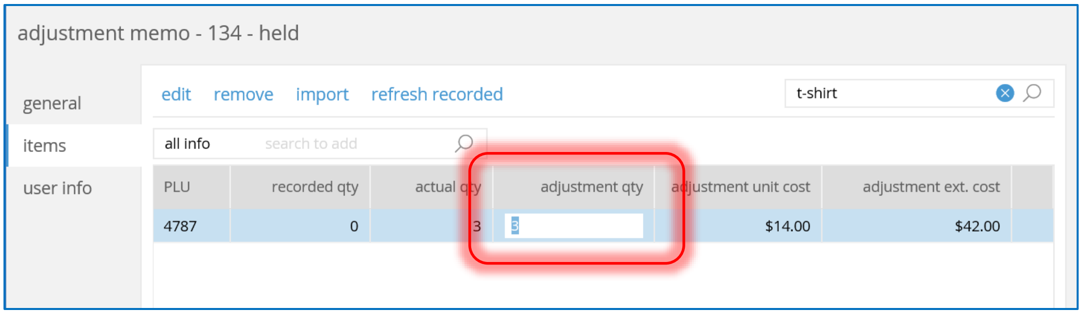
Type the item you're looking for into the search field and either click the Search icon or hit the **Enter** key on the keyboard.

If there are search results for that item, these come up in a new screen.



Select the item you want to adjust and click **Ok**. Or, if this is the wrong item, either select **Cancel** or type something different into the search field and run the search again.

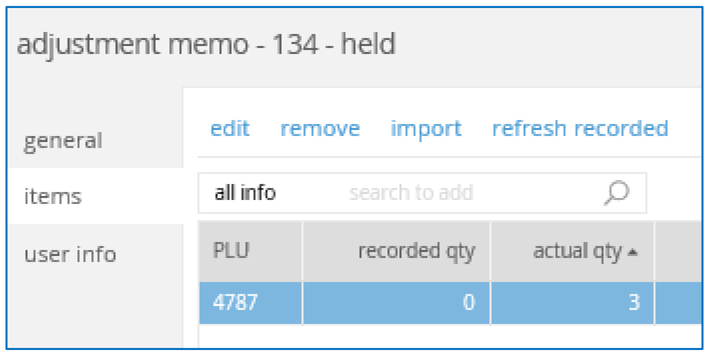
Selecting an item automatically adds it to the main screen. Next you'll need to enter the adjustment quantity for the item. Add as many items as needed by following the above steps.



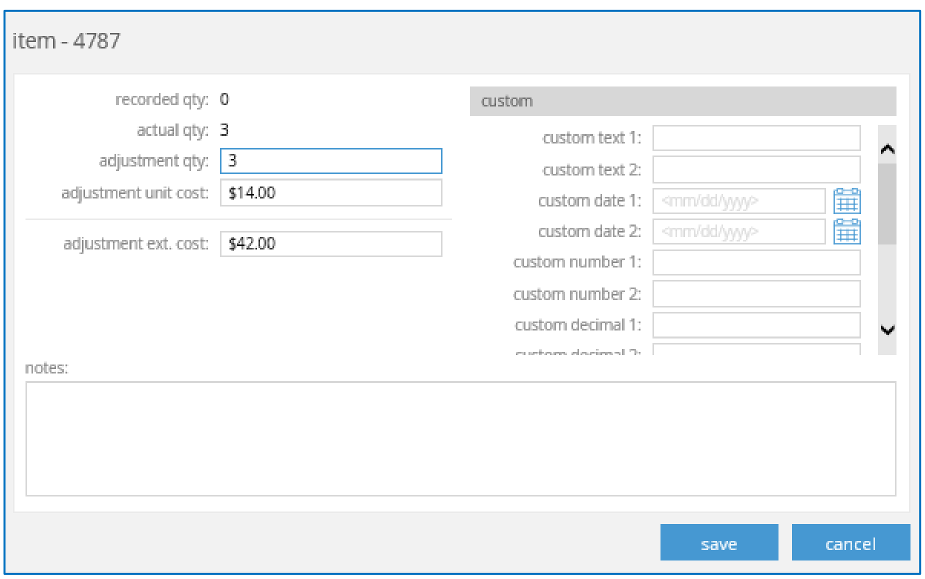
You can also change the *Adjustment Unit Cost* if needed. Any changes to these two columns automatically updates the *Adjustment Ext. Cost* column.

Once an item is successfully added to the memo, the *Edit*, *Remove*, and *Refresh Recorded* buttons enable.

If you need to make advanced changes to the item's information, select the correct item from the list and then click **Edit**.

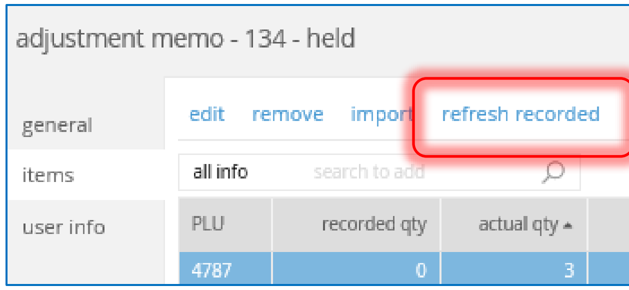


Here you can edit the same fields as on the main screen (such as *Adjustment Qty* and *Adjustment Ext. Cost)*, but you can also make changes in any custom fields that are set up.

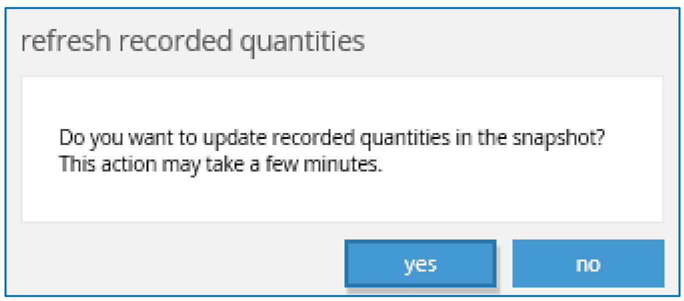


When finished making changes, click **Save** to update the item.

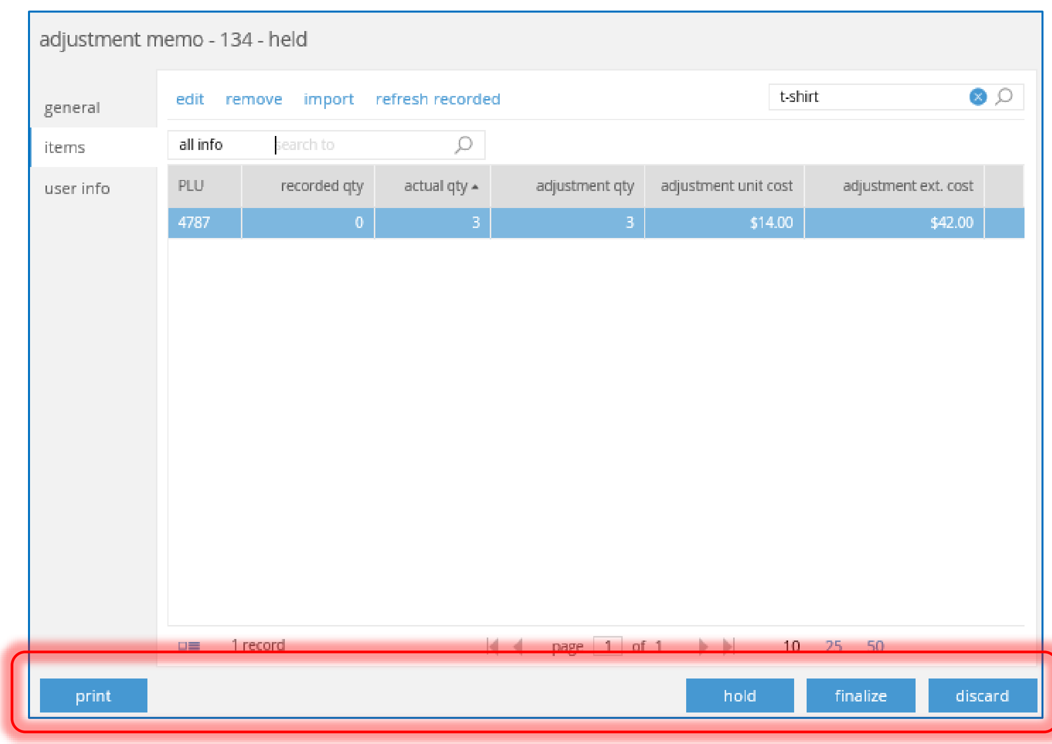
The **Refresh Recorded** button is used to refresh and recheck the inventory quantities. For example, if some items are purchased in-store while you are creating the memo.



Selecting this button brings up a confirmation dialog. To continue, select **Yes**, or click **No** to cancel and return to the main screen.

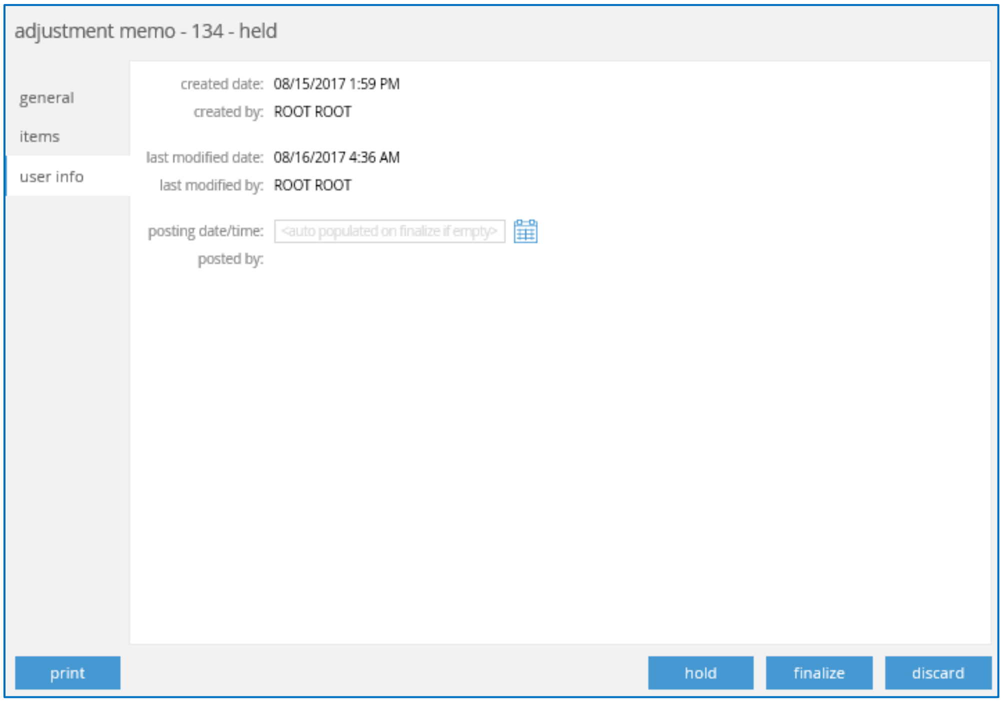


From the main screen you can put the memo on **Hold** to work on at a later time, **Finalize** or **Discard** the memo, or **Print** it. Or move to the next tab to view the user info for this memo.



User Info Tab

Almost everything on this tab is for information purposes only, and is unable to be edited.



You can update the *Posting Date/Time* field, which can also be changed on the *General* tab.

New Security Rights

ADJMEMO-ACCESS	Adjustment memos – Access new right	Basic access to adjustment memos.
ADJMEMO-ADD	Adjustment memos – Add new right	Add new, edit held, delete held, finalize adjustment memo.
ADJMEMO-REVERSE	Adjustment memos – Reverse new right	Reverse posted adjustment memo

New Security Setting

Adjustment Memo Report

- Settings > Printing > CHQ Printing Designs > Adjustment Memos

Confirmation Message on Adjustment Memo Finalization

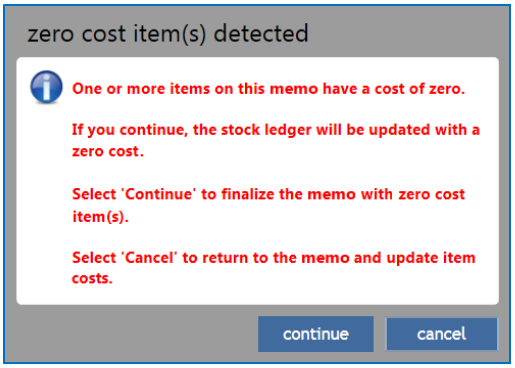
Version 5.0 – TFS # 52334

August 2017

After finalizing a Held Adjustment Memo, a confirmation dialog now displays. Two different messages display, depending on the security settings enabled.

First go to Adjustment Memo > List > select a held memo > View/Edit > General Tab

If the *Based On* field is set to *Adjustment Qty* or *Actual Qty*, and there are some items with a unit cost of zero, the following dialog displays.



Click **Continue** to finalize the memo with zero cost items, or **Cancel** to return to the memo and update item costs.

In all other cases, the standard confirmation dialog displays.

Created Adjustment Memos Display in Recent Area

Version 5.11 – TWD-3072

August 2017

Under Inventory > Adjustment Memos, all recently created Adjustment Memos displays in the Recent area.

Filtering Styles/Items by eCommerce Type

Version 5.0 – TFS # 53271

August 2017

We've updated the CHQ API to include the ability to filter styles/items by eCommerce type (for example, ec-offer, ec-discontinued, ec-suspended, etc.)

Add Ship From Vendor Field on Item Level

Version 5.0 – TFS # 53231

August 2017

We've added a *Ship From Vendor* field on the item level. This field can be found under Inventory > Styles & Items. You can also search for or filter out the *Ship From Vendor* field.

Price Level – Prevent Changing Price Level Code

Version 5.0 – TFS # 53845

August 2017

When opening a Price Level for editing, the Price Level Code is unable to be edited. Users are unable to change the code once a price level is saved.

Add Discontinued Flag on Item Level

Version 5.0 – TFS # 53230

August 2017

We've added a *Discontinued* flag on the item level. This applies to marking items as discontinued in Inventory, preventing importing discontinued items, and filtering out or searching for discontinued items.

When the flag is enabled, this also prevents creating a PO for discontinued items.

> NOTE
>
> The *Discontinued* flag means that an item is marked as discontinued, so the remaining items can be sold in store, but associates are unable to create a Purchase Order to order more.
>
> The *Inactive* flag means the item is completely inactive, unable to be sold, purchased, transferred, etc.

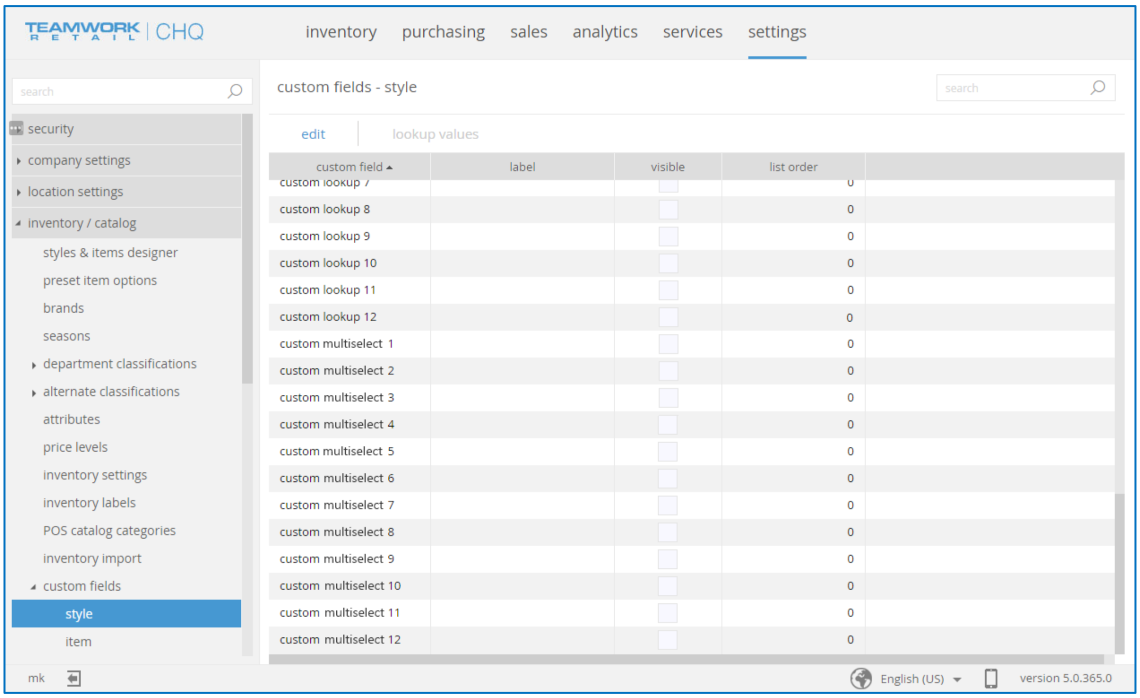
Custom Multi-Select Fields

Version 5.1 – TWD-2634

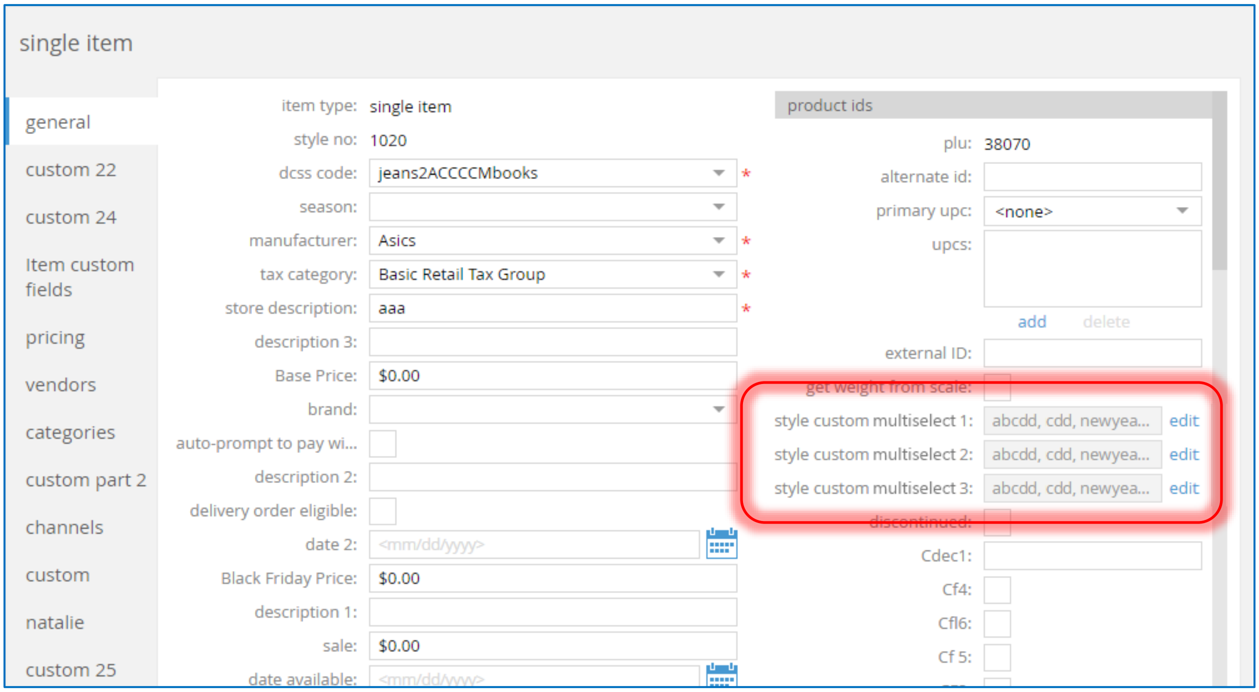
August 2017

We've added 12 custom multi-select fields at the Style level. These are similar to custom lookups, but allow the ability to select multiple values.

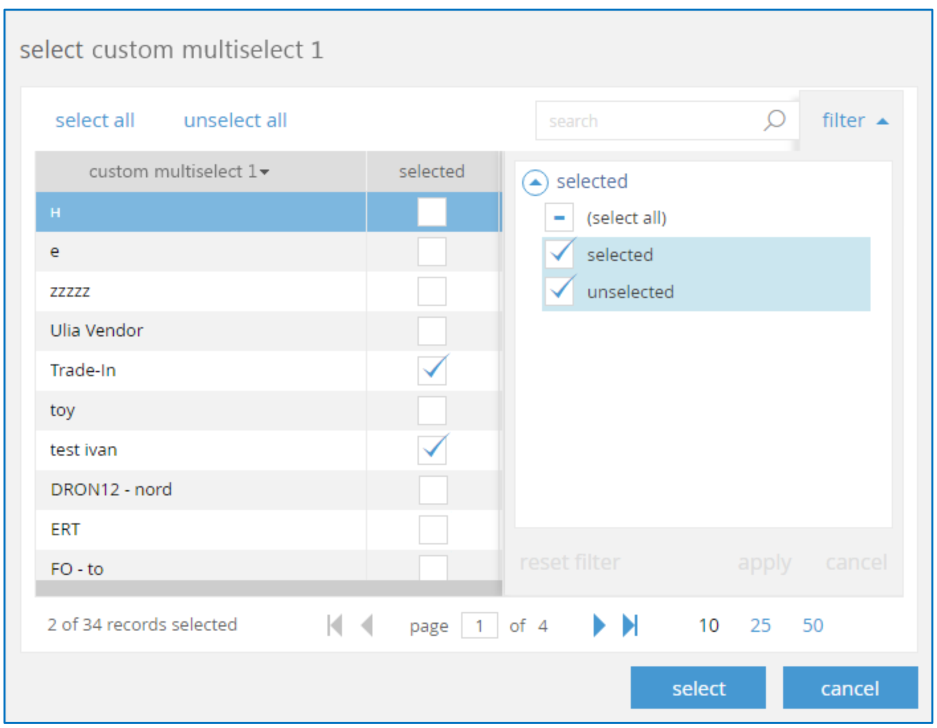
The enable these multi-select fields, go to Settings > Inventory/Catalog > Custom Fields > Style.



When enabled, the fields look similar to the screen shown below.



Selecting **Edit** brings up a similar screen as shown here.



Inventory Catalog Fields

Version 5.10 – TWD-2696

August 2017

The feature is for the Digital Asset, Product URL, and Country fields.

Digital Asset and Product URL fields are used for selling digital assets, such as e-books, webinars, etc.

When a Sales Receipt has an item marked as a "digital asset," an email goes to the customer with information from the "product URL" fields. This allows the customer to download the digital product.

When a Sales Order with a product marked as a "digital asset," is accepted into OMS, this item is automatically marked as shipped and an email goes to the customer.

A Digital Asset flag and Product URL field, have been added to the following areas:

- On the Item level
- To the list of fields in Styles & Items designer (CHQ > Settings > Inventory/Catalog > Styles & Items Designer) to the General Single Item and General Service Item tabs.
- In the Edit Style & Item dialog in the Styles & Items Designer.
- Inventory > Styles & Items > Open style/model dialog for style that contains more than 1 item > Items Tab.
- Imported items can be marked as a digital asset (Inventory > Styles & Items > Import).
- Inventory > Styles & Items > Imports > Edit > Inventory Catalog Import dialog > Items tab > Edit > Inventory Item > General tab > Control & Usage section.
- Inventory Export report
- Inventory Catalog import and export APIs

A Country field has been added to the following areas (where country represents country of origin, where the item was produced)

- On the Style Level
- To the list of fields in Styles & Items designer (CHQ > Settings > Inventory/Catalog > Styles & Items Designer) to the General Style/Model, General Single Item, General Service Item, and all Custom tabs.
- In the Edit Style/Item dialog in the Styles & Items designer. When a user starts typing a country, a drop-down displays matching names from the Countries table.
- Imported items can be marked as a digital asset (Inventory > Styles & Items > Import).

- An uneditable Country Code field is added to the Import Items list view (Inventory > Styles & Items > Imports > Edit > Inventory Catalog Import Dialog > Items tab).
- Inventory > Styles & Items > Imports > Edit > Inventory Catalog Import Dialog > Items tab > Edit > Inventory Item > General tab > Country Code field displays.
- Inventory Export report
- Inventory Catalog import and export APIs

Inventory Catalog – Extend Number of Style Custom Fields

Version 5.10 – TWD-2697

August 2017

There are now 12 Style custom fields for:

- Custom Dates (Style Custom Date 7–12)
- Custom Decimals (Style Custom Decimal 7–12)
- Custom Numbers (Style Custom Number 7–12)
- Custom Text (Style Custom Text 7–12)

There are now 18 Style custom fields for:

- Custom Flags (Style Custom Flag 7–18)
- Custom Long Texts (Style Custom Text 11–18)

New Settings

Settings > Inventory/Catalog > Custom Fields > Style.

New Fields

The following fields have been added to the Styles & Items Designer (Settings > Inventory/Catalog > Styles & Items Designer), the Styles & Items Import, and the Export and Import Inventory Catalog APIs.

- General style/model
- General single item
- General service item
- Custom
- All custom (created by user) tabs

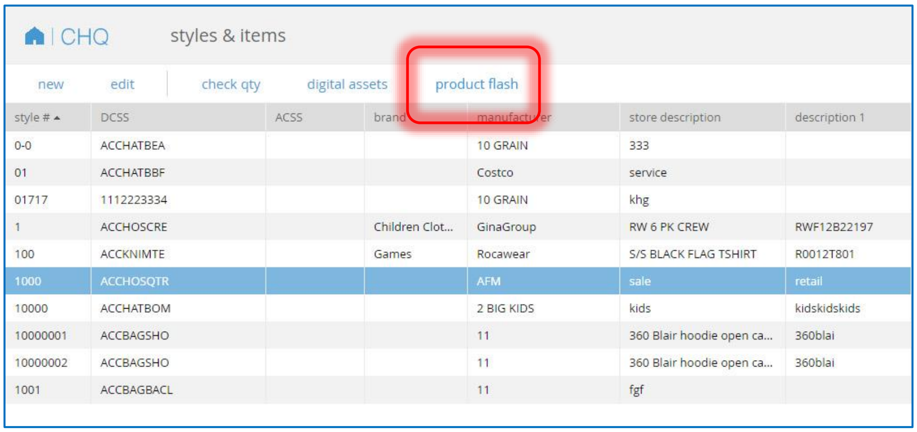
These fields are only visible when enabled in settings.

Style Details Report

Version 5.12 – TWD-5859

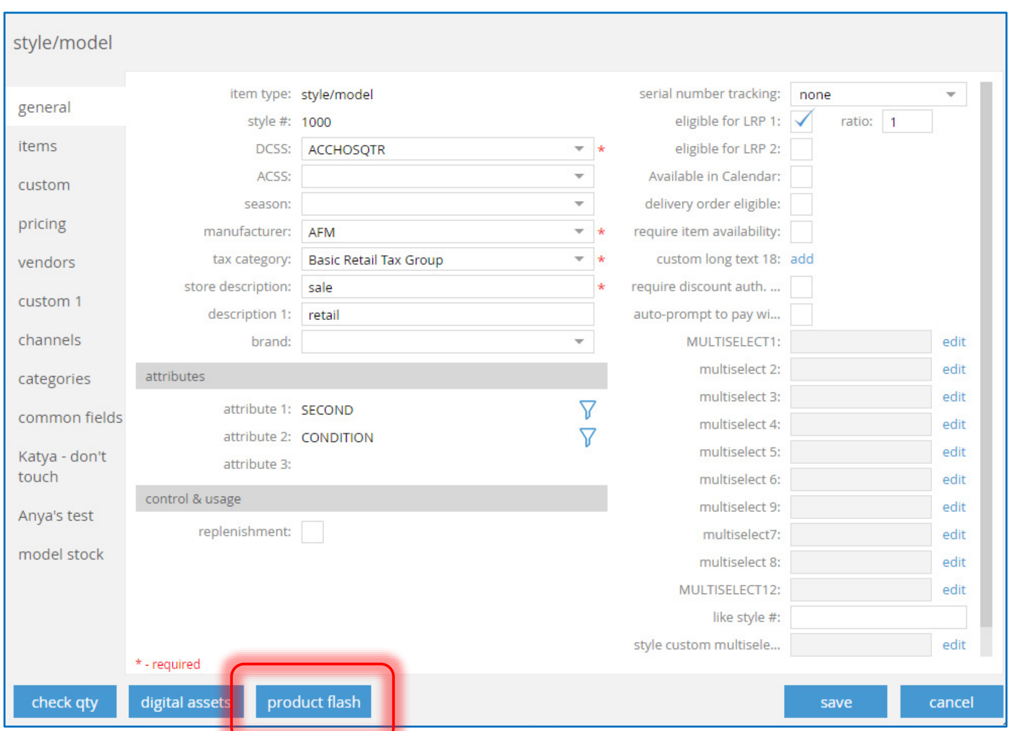
August 2017

There is a new Product Flash button in the Styles & Items area to quickly run a report by Style Details.



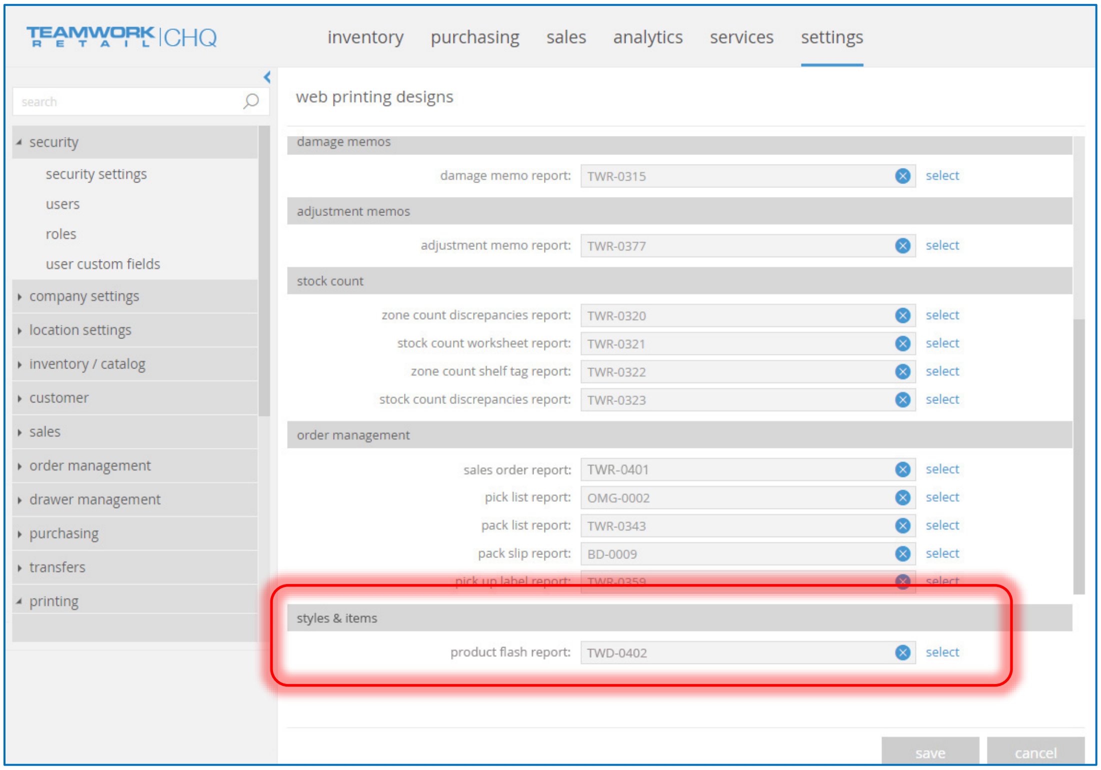
Selecting **Product Flash** opens a report for the style of the selected item, which runs the same as other reports.

There is also a Product Flash button at the bottom of a Style/Model dialogs.



New Settings

Under Settings > Printing > Web Printing Designs, there is a new Styles & Items section with a *Product Flash Report* field.



Allow Blank Labels for Fields in Styles & Items

Version 5.11 – TWD-2829

August 2017

We've made changes to the names of fields for a Style/Item/Service Item that is used as a label defining each field for tabs in the Styles & Items Designer. These label fields are required but we've updated them so they can be defined in different languages.

Changes are made to the flowing areas:

- In Styles & Items Designer:
  - Default name of the field is localized to be translated to different languages.
  - Label is not required for fields in the Styles & Items Designer.
  - Labels are blank by default
- In Style/Item/Service Item dialog:
  - If a label is not defined for the field, the default name of the field displays.
  - This allows the field name in the Item dialog to support multiple languages.

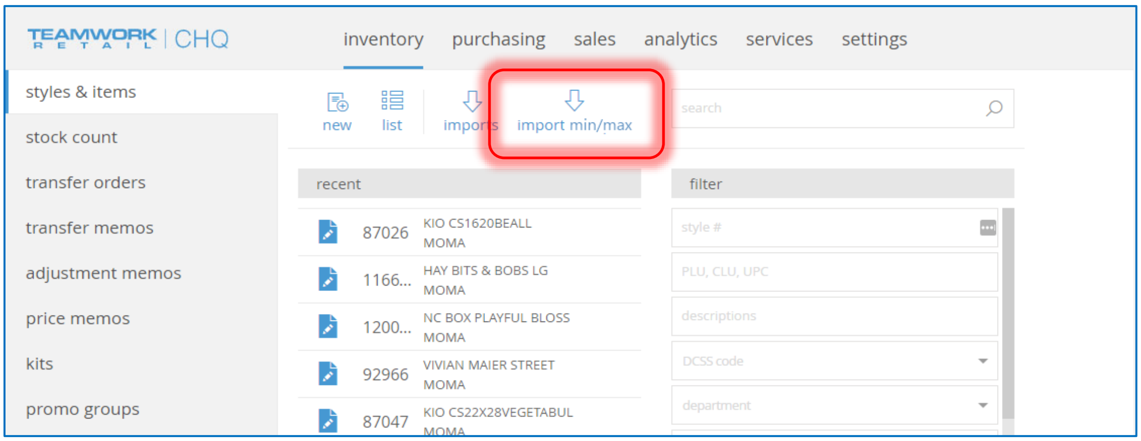
Min/Max Import

Version 5.12 – TWD-4221

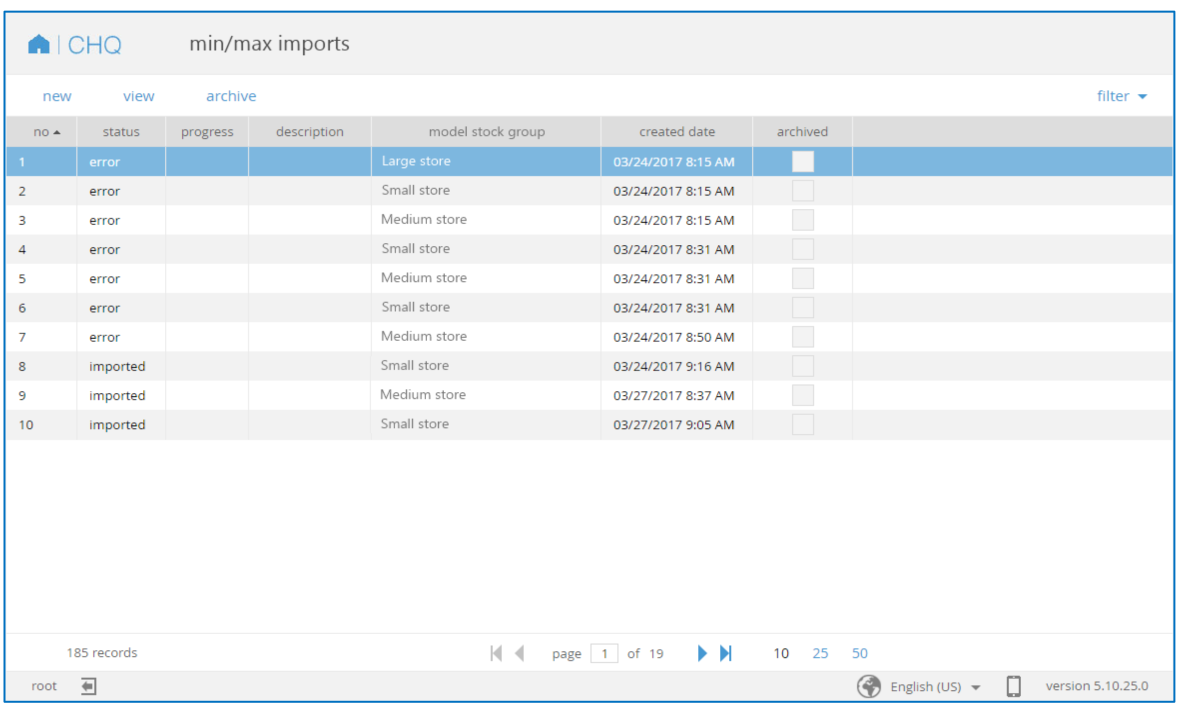
August 2017

This feature adds the capability to import Min/Max values. Min/Max values are used in Allocation Worksheet, Purchase Worksheet, and Replenishment Worksheet reports.

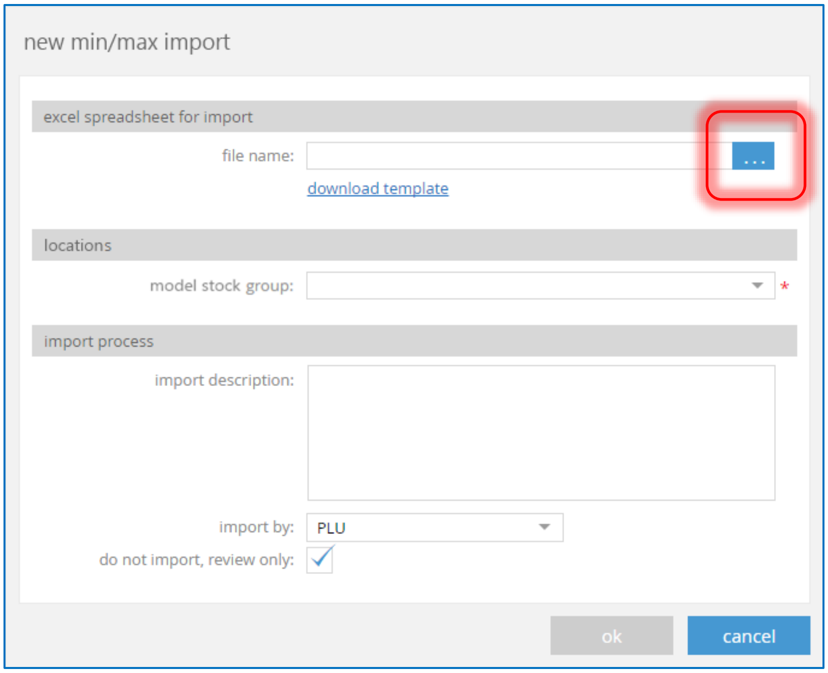
When enabled, an Import Min/Max button displays under Inventory > Styles & Items. This works similar to other import areas.



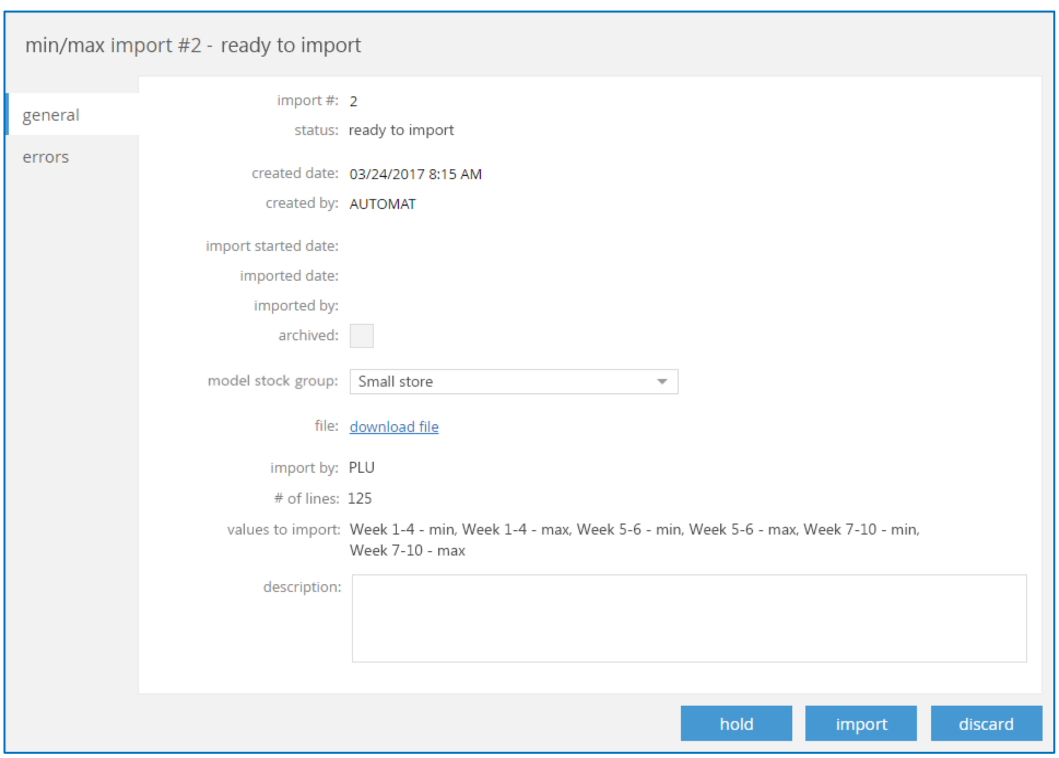
Selecting **Import Min/Max** brings up the following *Min/Max Imports* dialog. Here you can create new imports and view recent ones.



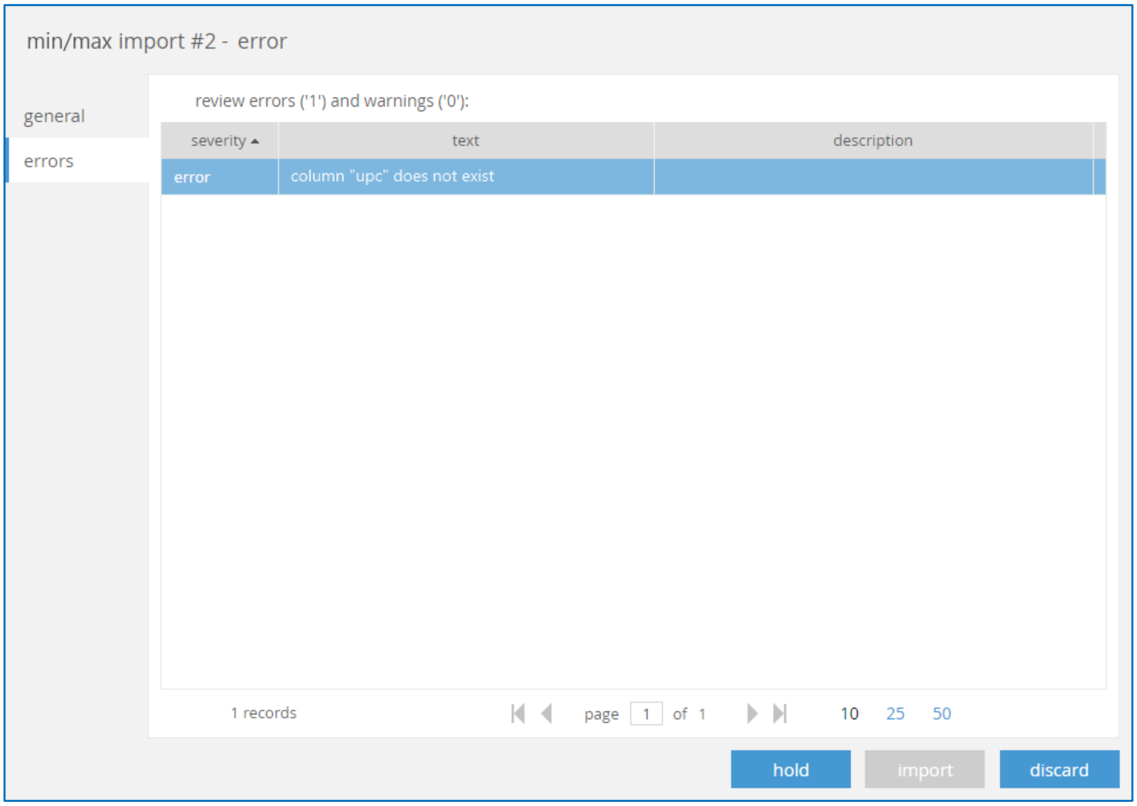
Clicking **New** brings up a dialog for creating a new import. Select the blue box to the right of *File Name* to choose the import from your computer.



Use the *Model Stock Group* drop-down to select the name of the model stock group for this import. After clicking **Ok** and running the import, this brings up a *Ready to Import* dialog.



If there are any errors or warnings after running the import, these display in the *Errors* tab.



New Security Right

Area	Right	Name	Description
Inventory		Min/Max Imports – Access	Allows user to access Min/Max imports list and view imports
Inventory		Min/Max Imports – Add/Edit	Allows user to create, edit, and delete a Min/Max Import

Inventory – Backorder Field

Version 5.11 – TWD-3682

August 2017

We've added a new Backorder field that is used to mark items as eligible or ineligible for backorder. This field is used for eCommerce integrations.

This field is added to the following places:

- Settings > Inventory/Catalog > Styles & Items Designer to the following tabs:
  - General Single Item
  - General Service Item
- Styles & Items > Edit Style/Item dialog
- Inventory > Styles & Items > Open style/model dialog for a style that contains more than one item > Items tab > Control & Usage section.
- Inventory > Styles & Items > Import (can import backorder field)
- Inventory > Styles & Items > Imports > Edit > Inventory Catalog Import Dialog > Items Tab > Edit > Inventory Item > General Tab > Control & Usage section.
- Inventory Export report.
- Inventory Catalog import and export APIs

Item Replenishment Fields

Version 5.12 – TWD-4393

August 2017

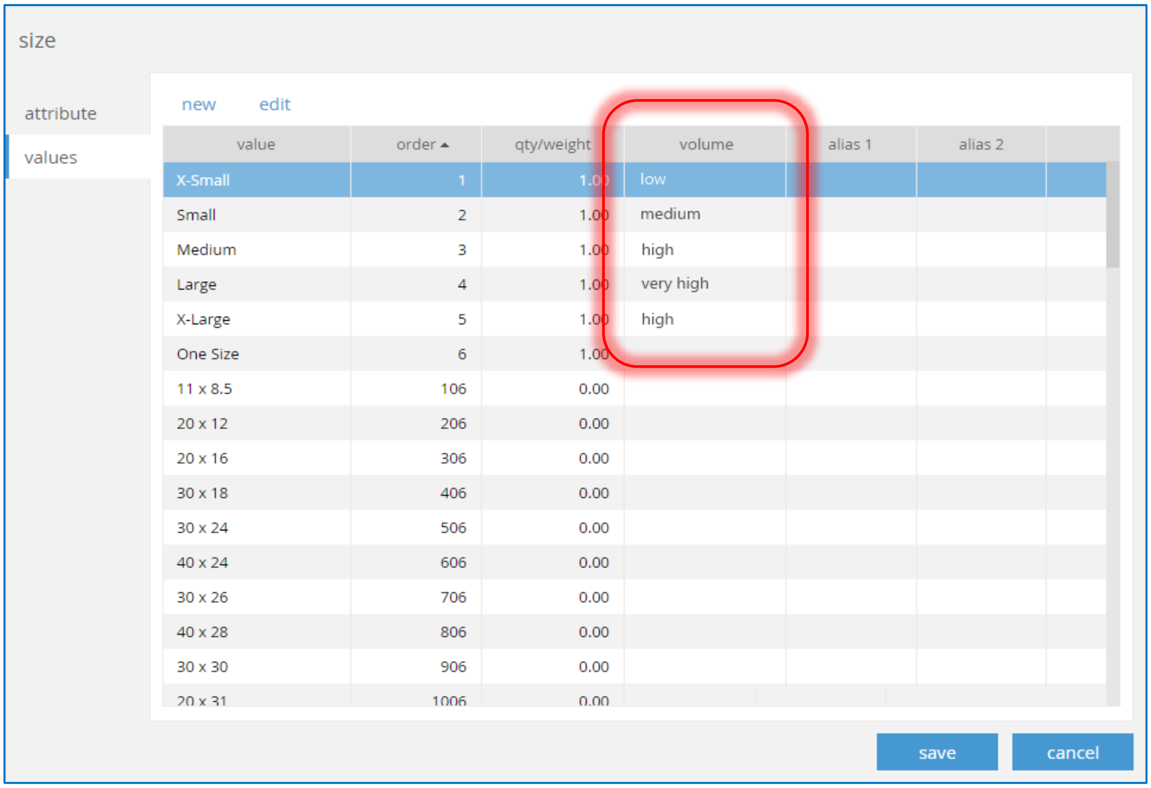
This feature provides a filter for all items with a set volume (of sales) for the purposes of working with a segment of inventory.

This feature is used to quickly set min/max values on items, for example, if you know a size 6.5 or a size 13 shoe are going to be Low (Min 1, Max 2), or Very Low (Min 0, Max 1).

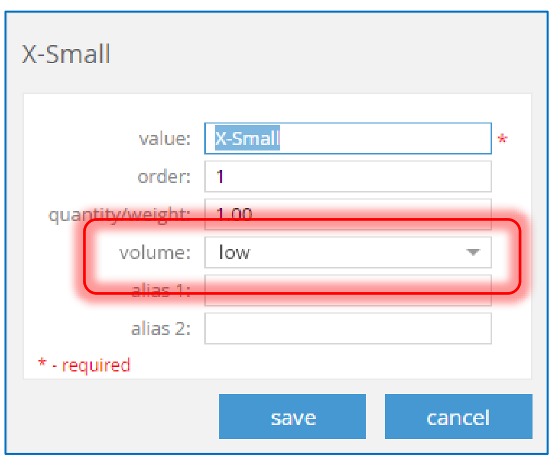
There is a new *Volume* field added to the Item record with the following available values:

- None
- Very Low
- Low
- Medium
- High
- Very High

When setting the Values on a specific item, a *Volume* column now displays.



A *Volume* field also displays when creating a new size or editing an existing one, as shown below.



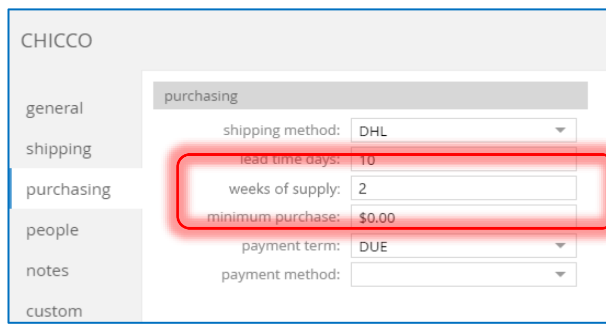
Additionally, you can run reports to see if the Volume is set correctly for the items. This is convenient for managing a broad range of inventory in the fastest way possible.

New Fields

A *Volume* field is added to the following areas:

- On the Item level
- Settings > Inventory/Catalog > Styles & Items Designer > General Single Item & General Service Item tabs
- Settings > Inventory/Catalog > Styles & Items Designer > Edit Style/Item dialog
- Inventory > Styles & Items > Import
- Inventory > Styles & Items > Import > Edit > Inventory Catalog Import Dialog > Items tab
- Inventory > Styles & Items > Import > Edit > Inventory Catalog Import Dialog > Items tab > Edit > Inventory Item > General tab
- Inventory Export report
- Inventory Catalog import

A *Weeks of Supply* field is added to the following areas:



- Purchasing > Vendors > New or Edit > Purchasing tab
- Vendor Import and Export
- Settings > Inventory/Catalog > Styles & Items Designer > General Single Item & General Service Item tabs
- Settings > Inventory/Catalog > Styles & Items Designer > Edit Style/Item dialog > Vendors tab
- Inventory > Styles & Items > Import
- Inventory > Styles & Items > Import > Edit > Inventory Catalog Import Dialog > Items tab
- Inventory > Styles & Items > Import > Edit > Inventory Catalog Import Dialog > Items tab > Edit > Inventory Item > General tab
- Inventory Export
- Inventory Catalog Import and Export

A *Lead Time* field is added to the following areas:

- Settings > Inventory/Catalog > Styles & Items Designer > General Single Item & General Service Item tabs
- Inventory Export
- Inventory Catalog Import and Export

Tax Group Setting Added to Inventory Export API

Version 5.11 – TWD-3940

August 2017

We've added a TaxGroupSetting to the Inventory Export API. Possible value are Code or EID.

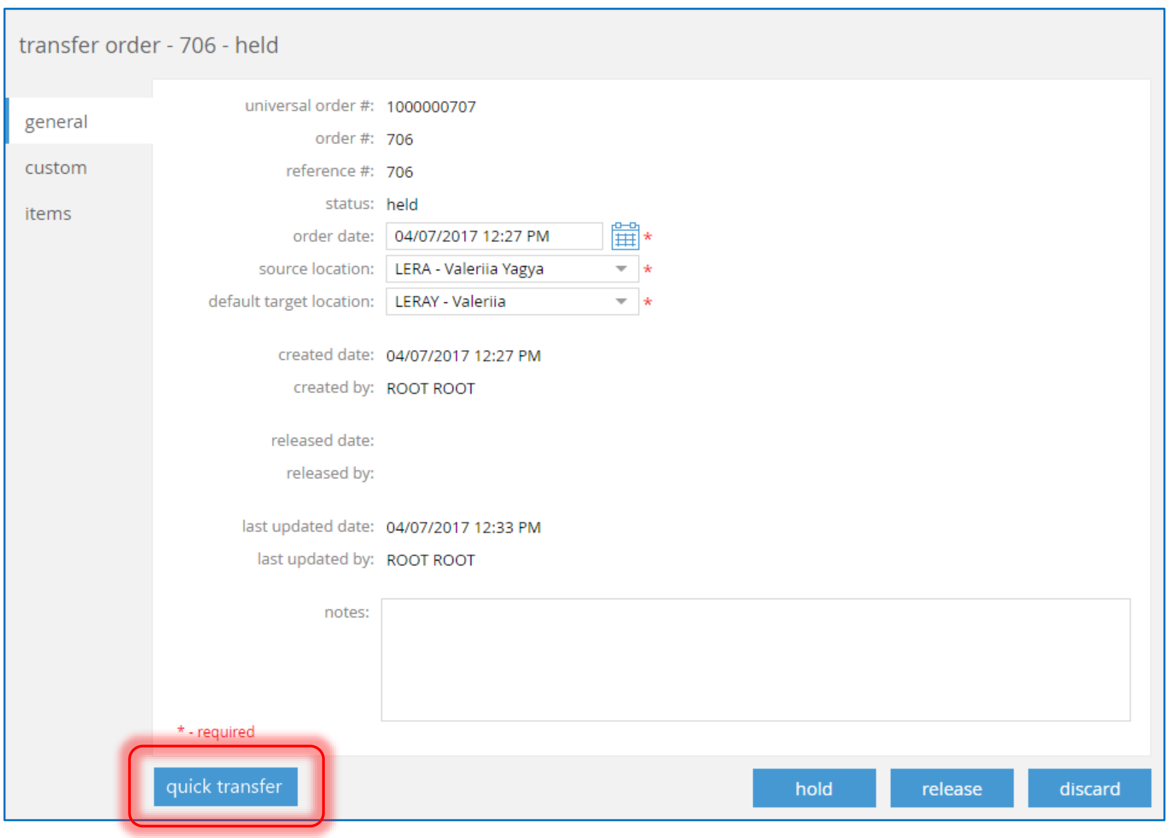
Quick Transfers

Version 5.11 – TWD-3725

August 2017

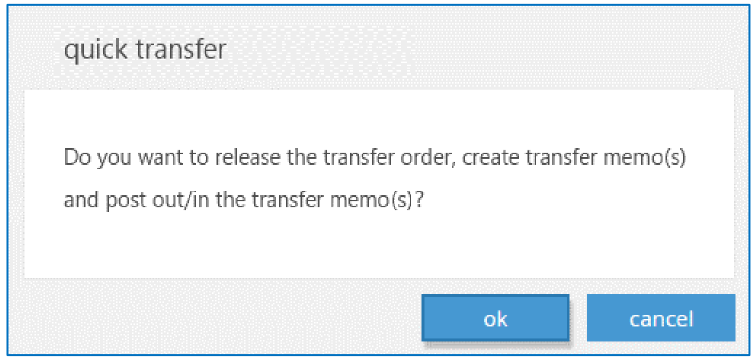
This feature adds the capability to create and post a Transfer Memo from the Transfer Order dialog in CHQ.

There is a new Quick Transfer button on Transfer Orders (both Held and Released orders). This quickly creates an Out or In Memo in the background and transfers exactly what is on the TO.

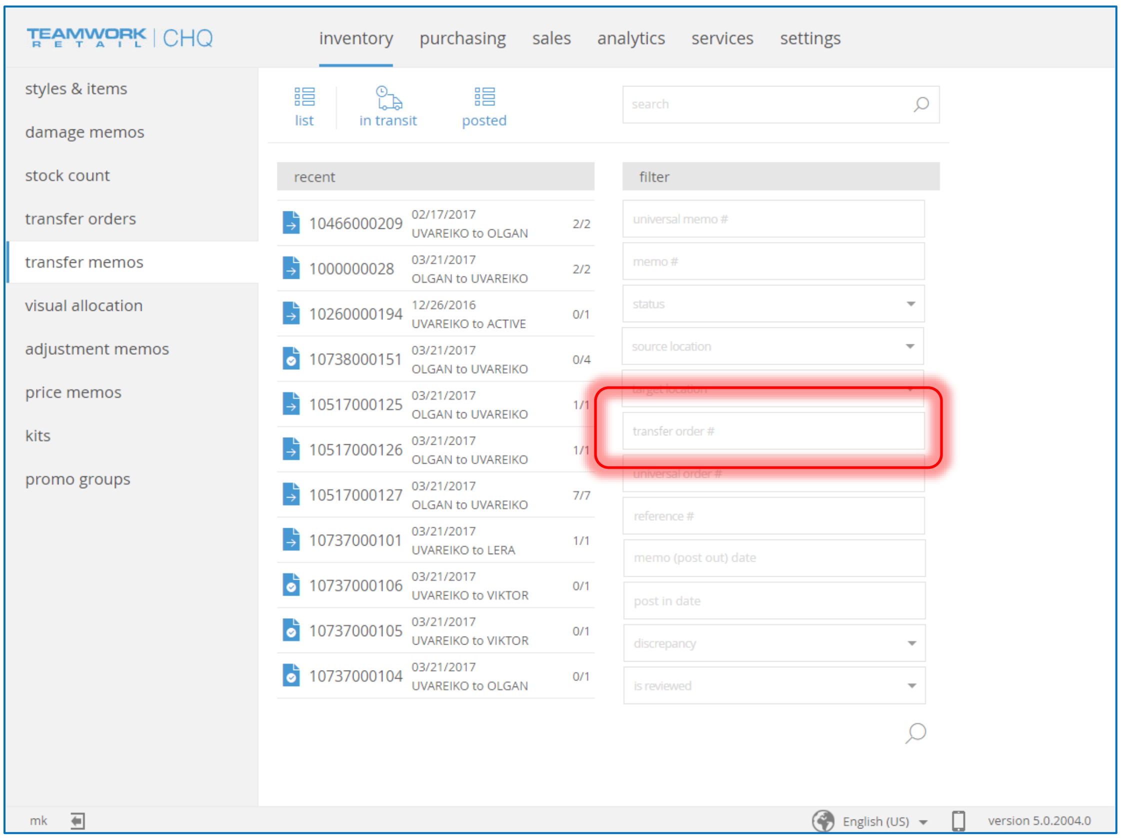


Selecting **Quick Transfer** brings up a confirmation dialog.

Click **OK** to release the Transfer Order or **Cancel** to close the dialog without processing.



Under Transfer Memos > Filter, there is a new *Transfer Order #* field.



New Security Right

Area	Right	Description
Transfer Memos	Transfer Memos – Add/Edit	Add new, edit, post out/in Transfer Memos.

SVS Support

LRP 1 & 2 Flags and Ratio on Item

Version 5.0 – TFS # 45428

August 2017

In previous versions we had an *Eligible for LRP* flag for an item which is used only for LRP1. We've now added an additional flag, so one is delegated for LRP1 and the other is LRP2, with a defined ratio for each program.

SVS Location Groups

Version 5.0 – TFS # 45992

August 2017

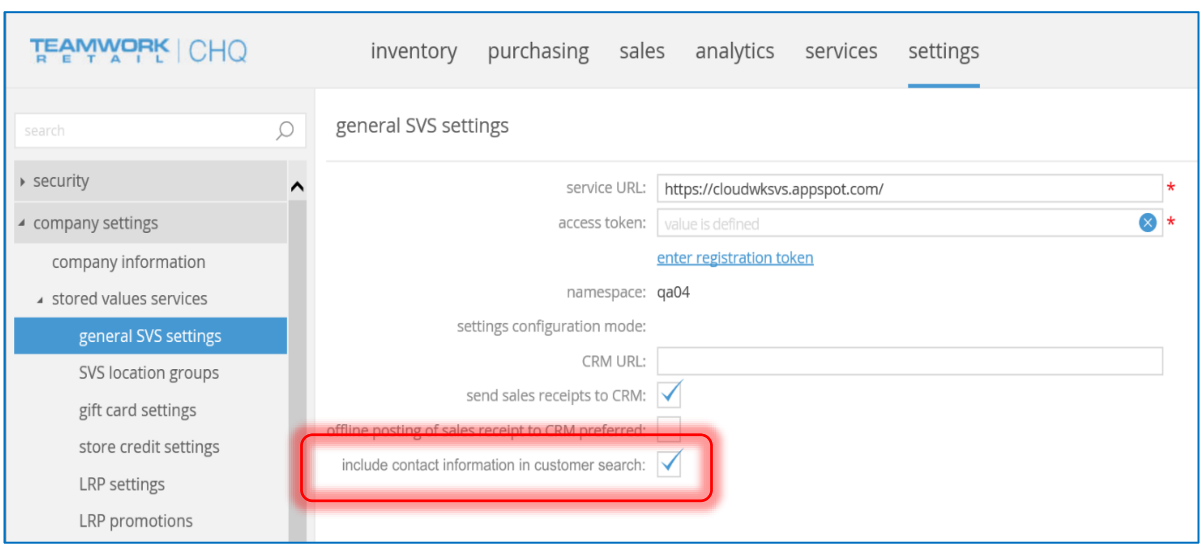
Some companies have stores in different countries, but use one server. These stores go by different SVS namespaces. To accommodate this, there is a new area in CHQ called SVS Location Groups to allow for stores with different SVS namespaces with assigned locations.

Customer Search – Adding Contact Fields

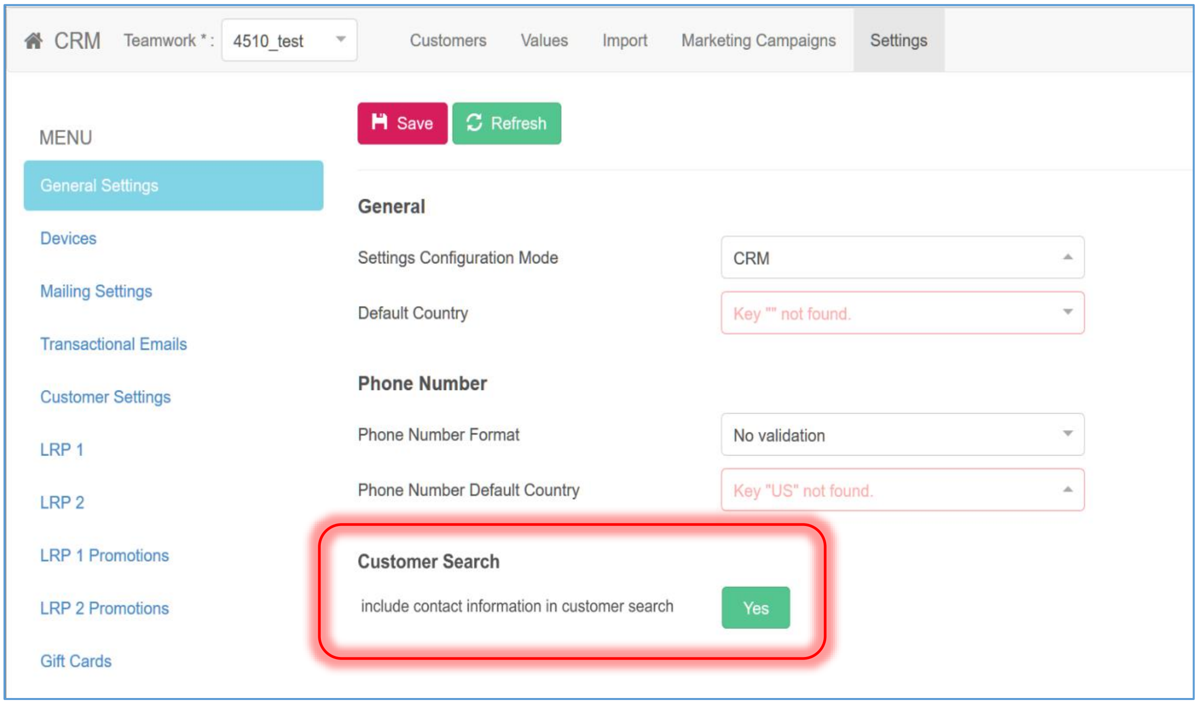
Version 5.10 – TWD-2657

August 2017

There's a new *Include Contact Information in Customer Search* flag in CHQ > Settings > Company Settings > General SVS Settings.



This flag also displays in CRM.



Share Customers Among all SVS Namespaces used by Company

Version 5.10 – TWD-2669

August 2017

Customer are now shared among all SVS namespaces used by the company (on the server), but NOT Demo and Production servers.

Analytics

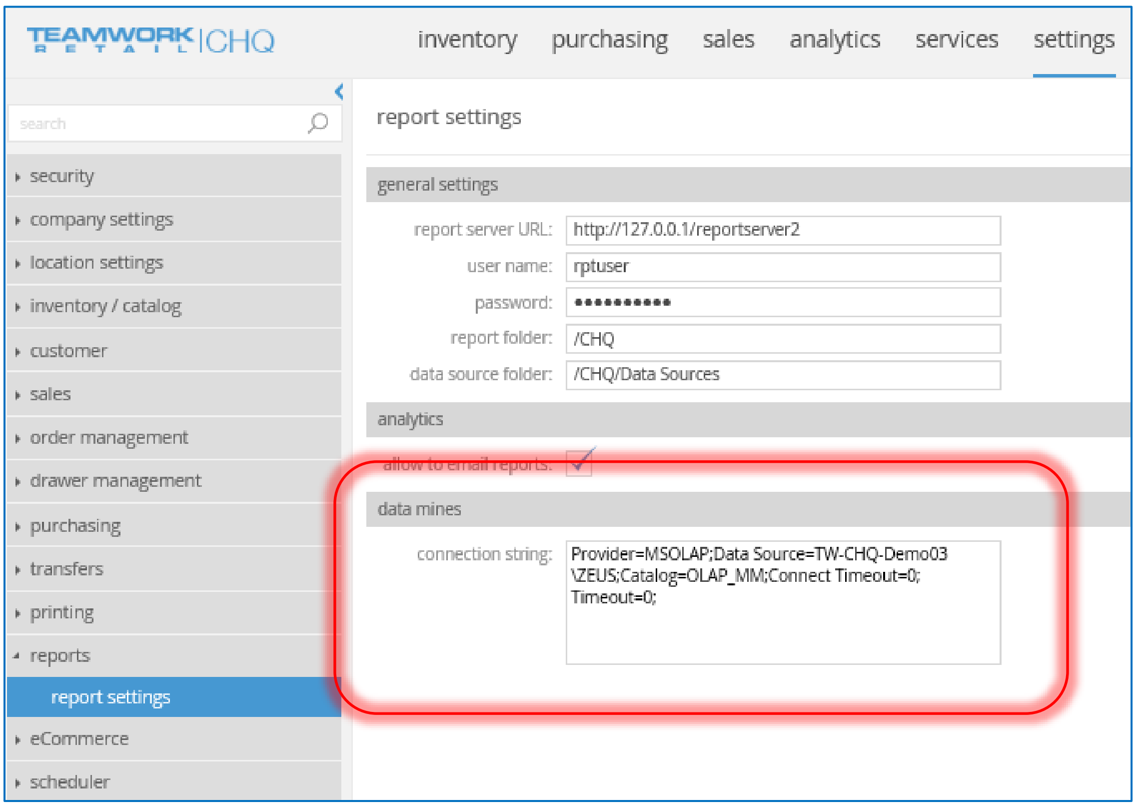
Data Mine Functionality

Version 5.11 – TWD-3679

August 2017

As Data Mine functionality was migrated from Silverlight CHQ 4.x to CHQ 5.x, we've made some minor improvements.

For more information on creating a data mine, read the Version 5.0 CHQ Analytics manual.



Security Rights

Area	Right	Notes
Data Mines	Access Data Mines	Allows user to access data mines sub-area, create personal data mines, run personal and team data mines.
Data Mines	Team Data Mines Administration	Allows user to create team data mines, doesn't allow to change team data mine to personal data mine if data mine owner is a different person
Data Mines	Super Data Mines Administration	Allows user to access, run, and edit personal data mines of other users and can change team data mine to personal data mine if data mine owner is a different person.

Added Localization in Data Mines

Version 5.11 – TWD-2832

August 2017

We've added localization for Dimensions, Values and Filters in Data Mines. This allows our International Partners to translate these various values in Data Mines.

Stock Ledger

Teamwork has created our own Stock Ledger where we "log" every transaction that occurs for a client. In the past, we have used NAV Stock Ledger.

By January 2017, we'll start installing ONLY the new ledger and clients will be upgraded to the new ledger.

NOTE

The OLD Stock Ledger reports have a TWR code at the beginning (ex. TWR-00001).

All NEW Stock Ledger reports will have just a TW code (ex. TW-00001)

Cost on Positive Adjustments in CHQ Stock Ledger

Version 5.0 – TFS # 52331

August 2017

When a positive adjustment with an item cost more than $0 (from an Adjustment Memo) is posted to CHQ Stock Ledger, this does not recalculate the cost. Instead, the adjustment is posted to in the ledger with the new cost from the adjustment memo.

When a positive adjustment with an item cost equal to $0 (from an Adjustment Memo, Stock Count, etc.) is posted to CHQ Stock Ledger, the cost gets recalculated during the posting (as currently happens).

Settings

Settings – Order Field in Printing for Mobile

Version 5.10 – TWD-2841

August 2017

We've added a new Order field to the Printing area for Mobile. Changes can be found in these areas:

- In the Printing Design dialog on the Printing Areas tab, there is now an Order column. This column is visible by default.
- There is an Order field in the Edit Printing Area dialog. This field is zero by default and negative numbers are allowed.

These changes can be found in Settings > Mobile Printing Designs.

Settings – Added External ID to UI for Location

Version 5.11 – TWD-3118

August 2017

We've added a field to define the External ID for locations to the following areas:

- Settings > Locations > Locations list > External ID column. By default this is not visible.
- Location dialog > Name field > External ID field. The maximum length for this field is 128 characters.

Settings – Hide Costing Method Field from Preset Item Options

Version 5.11 – TWD-3095

August 2017

In Settings under Preset Item Options, we've hidden the *Costing Method* field, as it is not used.

This means the *Costing Method* column is hidden from the grid and the Preset Item Option dialog.

For all new and existing Preset Item options, the *Costing Method* is set to FIFO.

Settings for Attribute Labels Added

Version 5.11 – TWD-3405

August 2017

We've added new settings for attribute labels under CHQ > Settings > Inventory/Catalog > Inventory Labels.

This includes a new Attributes section (listed underneath Alternate Classification Names) with the following settings:

- "Attribute 1" (default is "Attribute 1")
- "Attribute 2" (default is "Attribute 2")
- "Attribute 3" (default is "Attribute 3")

These are similar to other inventory label settings in that they are all text fields with a maximum of 120 characters allowed.

Changes to the Inventory Label Settings are as follows:

- The "Department/Class" setting is now "DCSS" which is also the default setting.
- The "Asset/Memo" setting is now hidden.

Settings – "Allow Negative" Flag for Store Credit Payment

Version 5.11 – TWD-3664

August 2017

Currently the Store Credit payment option in iPad POS Store Credit supports the "Allow Negative" setting, and this is now present in CHQ as well.

In CHQ Settings > Payment Methods for Store Credit payment method, we've added the following setting:

- In the grid of the Location Settings dialog, an *Allow Negative* column displays with a checkbox. This is placed before the *List Order* and is visible by default.
- An *Allow Negative* checkbox also displays in the Edit Location Settings dialog. This is placed before the *List Order* and is visible by default but NOT checked.

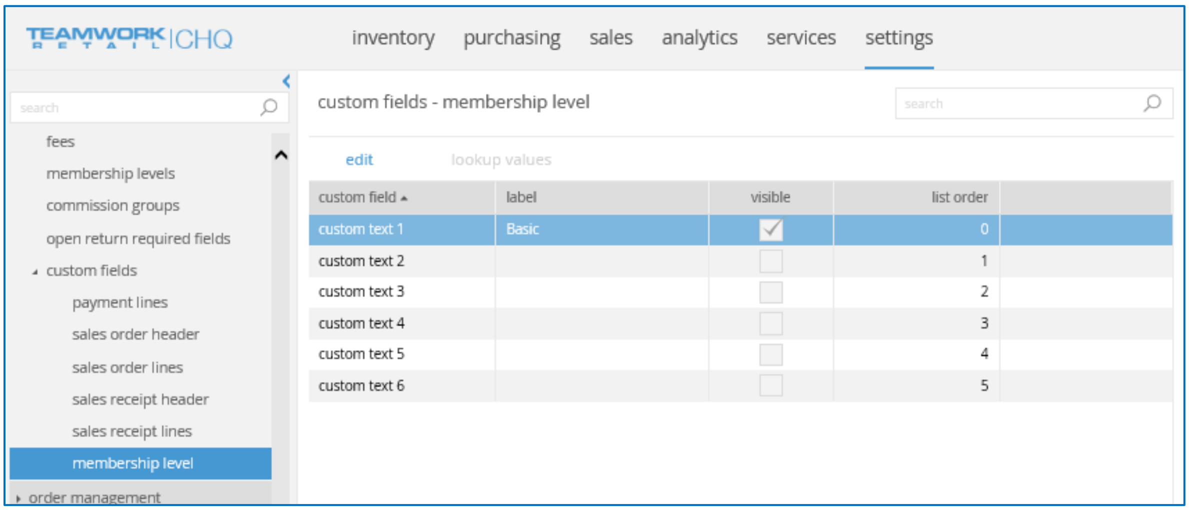
Settings – Membership Level Custom Fields

Version 5.12 – TWD-4498

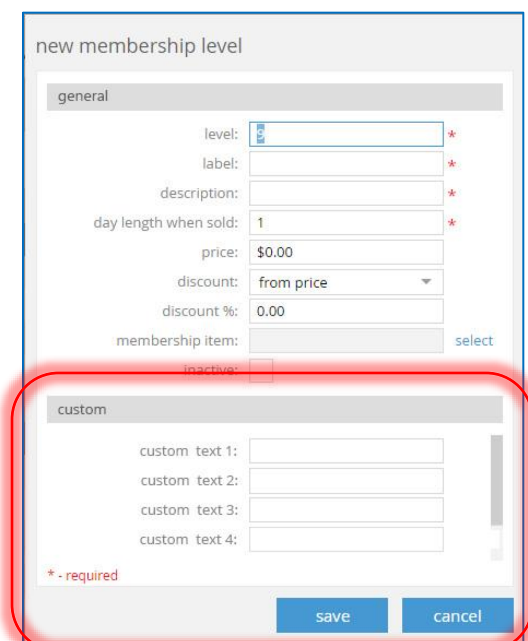
August 2017

We've added settings to configure custom fields for Membership Levels, including new Custom Fields to the Membership Level dialog.

Go to Settings > Sales > Custom fields to view the *Membership Level* area, which includes the six new custom fields.



When enabled, these custom fields can be visible on the Settings > Membership Levels > New Membership Level dialog.



Settings – Format Value in DCSS and ACSS Fields

Version 5.11 – TWD-2897

August 2017

There are two new settings added to Settings > Inventory Settings.

- DCSS (replaces DCSS Code/Name)
  - The selector has three values:
    - DCSS code (the default)
    - Dept Code > Class Code > Subclass 1 Code > Subclass 2 Code
    - Dept Name > Class Name > Subclass 1 Name > Subclass 2 Name
- ACSS (replaces ACSS Code/Name)
  - The selector has three values:
  - ACSS code (the default)
  - Alt Dept Code > Class Code > Subclass 1 Code > Subclass 2 Code
  - Alt Dept Name > Class Name > Subclass 1 Name > Subclass 2 Name

These settings are applied to the following areas

- Styles & Items Designer
- Styles & Items
- Damage Memos
- Stock Count
- Transfer Orders
- Transfer Memos
- Visual Allocation
- Adjustment Memos
- Kits
- Quick Adjustment Dialog
- Promo Groups
- Purchase Orders
- Purchase Receipts
- ASN
- Matching Memos
- Order Management

Settings – Coupon Programs Restricted by PLU or Promo Group

Version 5.12 – TWD-4052

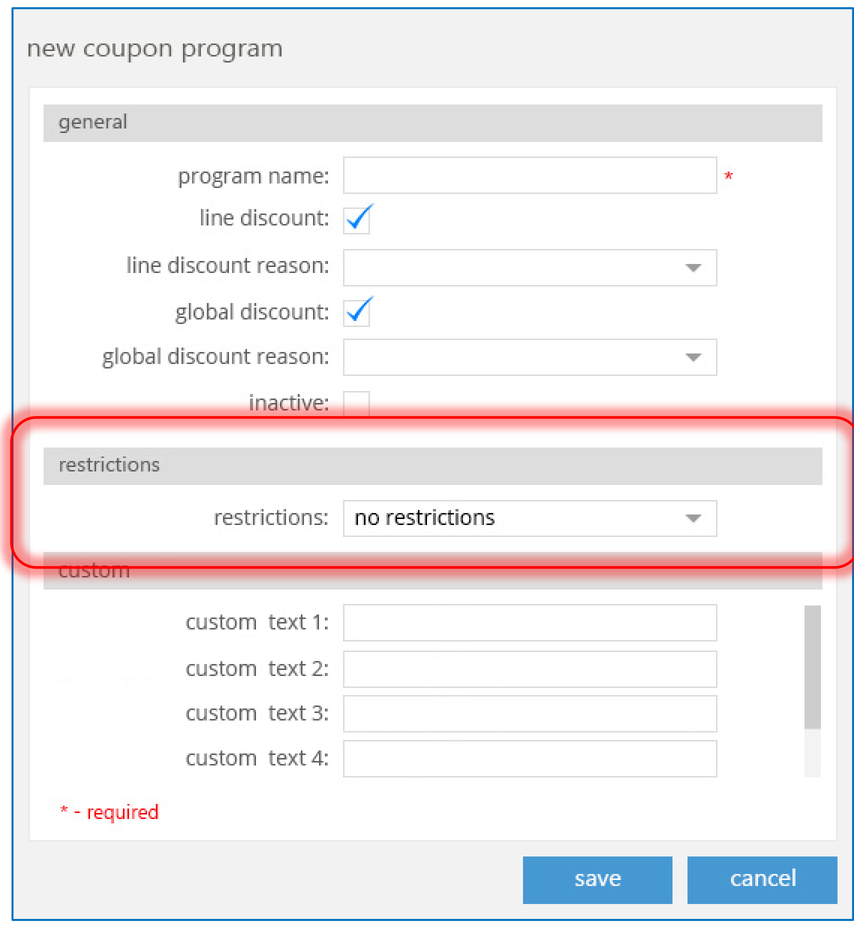
August 2017

We've added a restriction by item or by promo group to coupon programs and coupons. This is used for coupons that are only allowed to be used for certain items or promo groups.

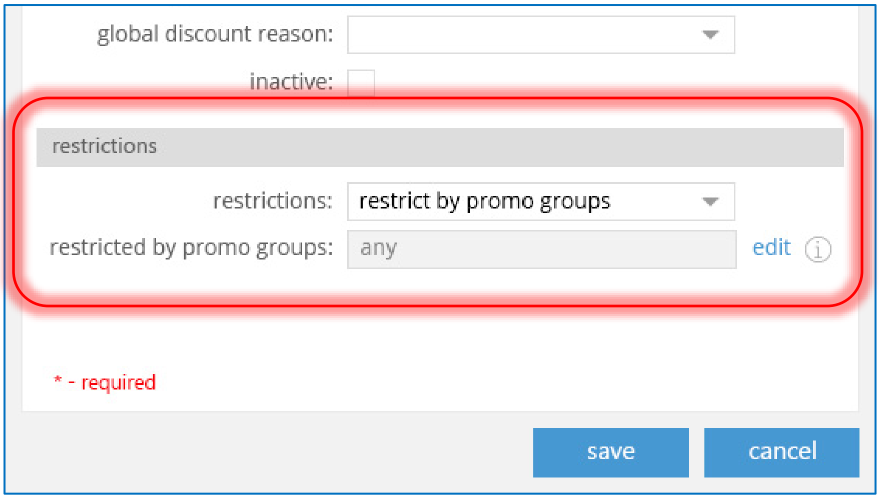
Additionally, there are six new Custom Text fields in the Coupon Program area.

Go to Settings > Company Settings > Stored Values Services > Coupon Settings > New Coupon Program.

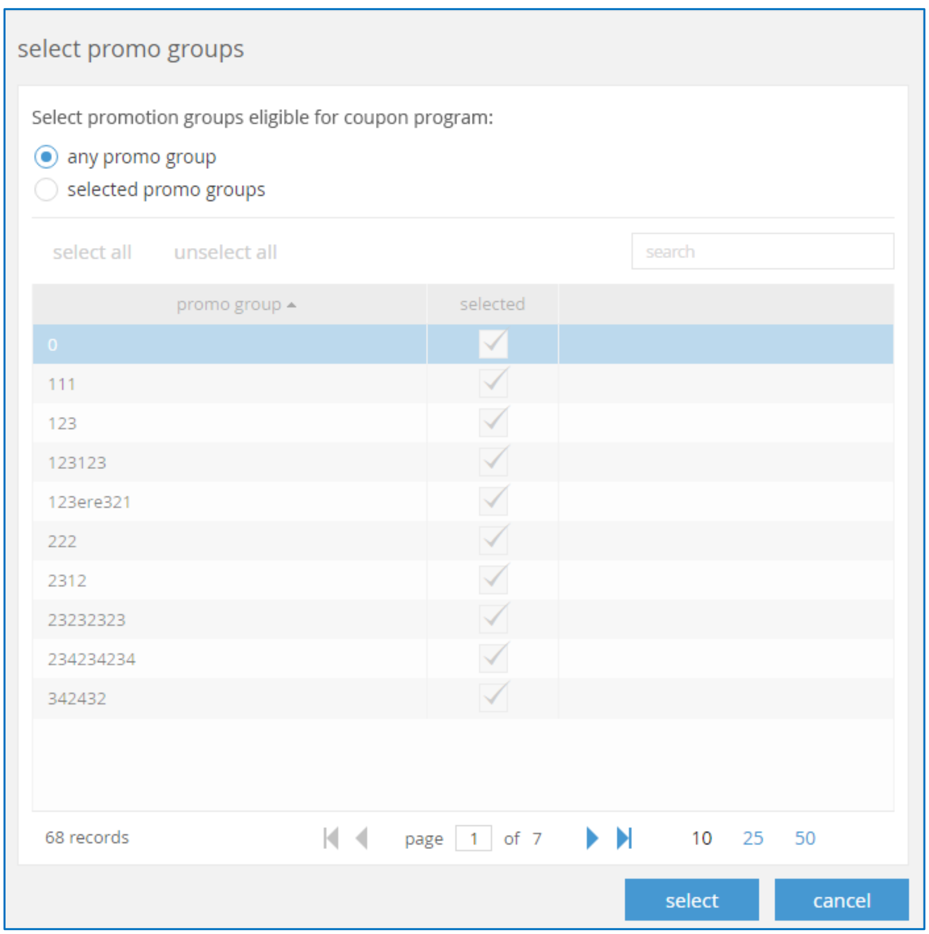
The *Restrictions* drop-down is where you can set up any restrictions on the coupon program. Available options in this field are *No Restrictions*, *Restrict by Promo Groups*, or *Restrict by Items.*



When **Restrict by Promo Groups** is selected, this enables the *Restricted by Promo Groups* field where you'll need to select the promo groups to restrict.



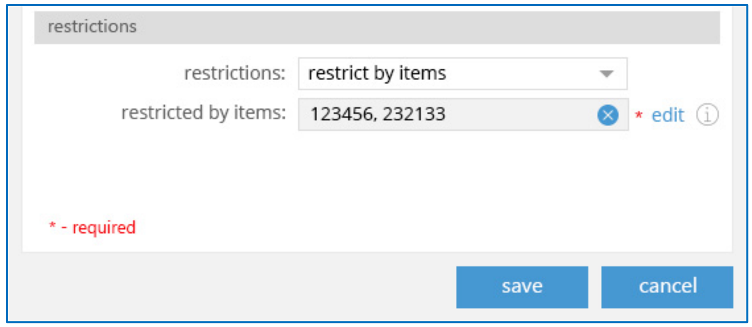
Clicking **Edit** brings up the following dialog for you to select Promo Groups.

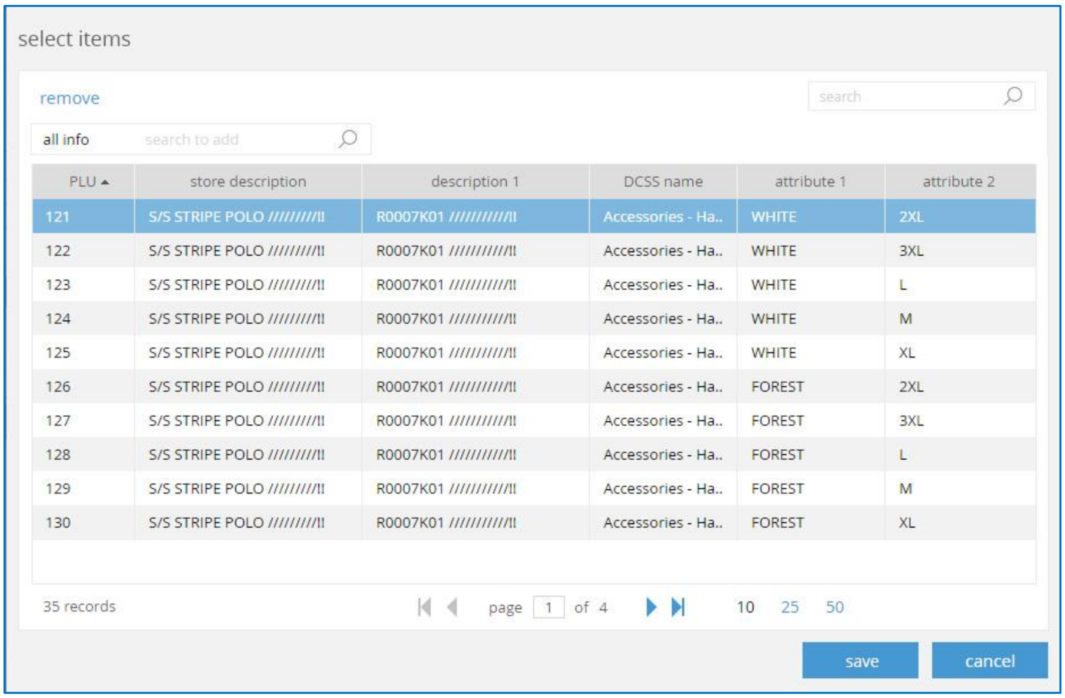


Any promo group selected is <u>excluded</u> from the coupon program.

Similarly, if **Restrict by Items** is selected, this enables the *Restricted by Items* field where you'll need to select the items to restrict.

Click **Edit** to bring up the *Select Items* dialog, as shown below.

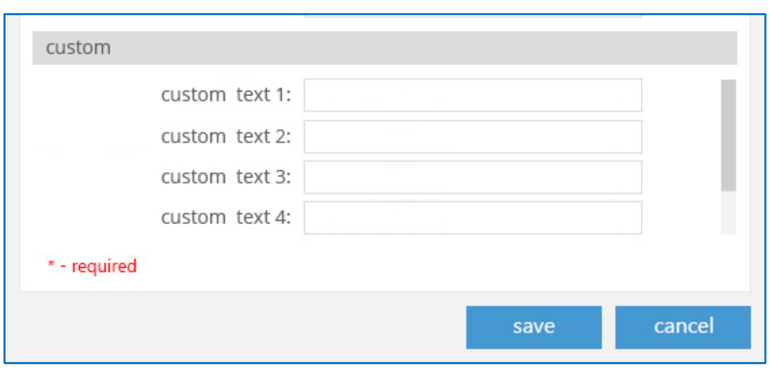




PLU	store description	description 1	DCSS name	attribute 1	attribute 2
121	S/S STRIPE POLO //////////!!	R0007K01 ////////////!!	Accessories - Ha..	WHITE	2XL
122	S/S STRIPE POLO //////////!!	R0007K01 ////////////!!	Accessories - Ha..	WHITE	3XL
123	S/S STRIPE POLO //////////!!	R0007K01 ////////////!!	Accessories - Ha..	WHITE	L
124	S/S STRIPE POLO //////////!!	R0007K01 ////////////!!	Accessories - Ha..	WHITE	M
125	S/S STRIPE POLO //////////!!	R0007K01 ////////////!!	Accessories - Ha..	WHITE	XL
126	S/S STRIPE POLO //////////!!	R0007K01 ////////////!!	Accessories - Ha..	FOREST	2XL
127	S/S STRIPE POLO //////////!!	R0007K01 ////////////!!	Accessories - Ha..	FOREST	3XL
128	S/S STRIPE POLO //////////!!	R0007K01 ////////////!!	Accessories - Ha..	FOREST	L
129	S/S STRIPE POLO //////////!!	R0007K01 ////////////!!	Accessories - Ha..	FOREST	M
130	S/S STRIPE POLO //////////!!	R0007K01 ////////////!!	Accessories - Ha..	FOREST	XL

Any promo item selected is <u>excluded</u> from the coupon program.

At the bottom of the *New Coupon Program* dialog, the six new Custom fields display.

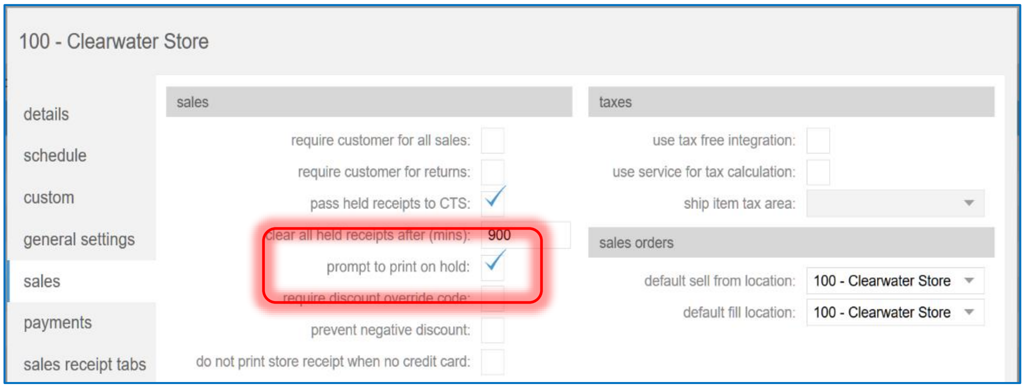


Verify Items from Held Customization

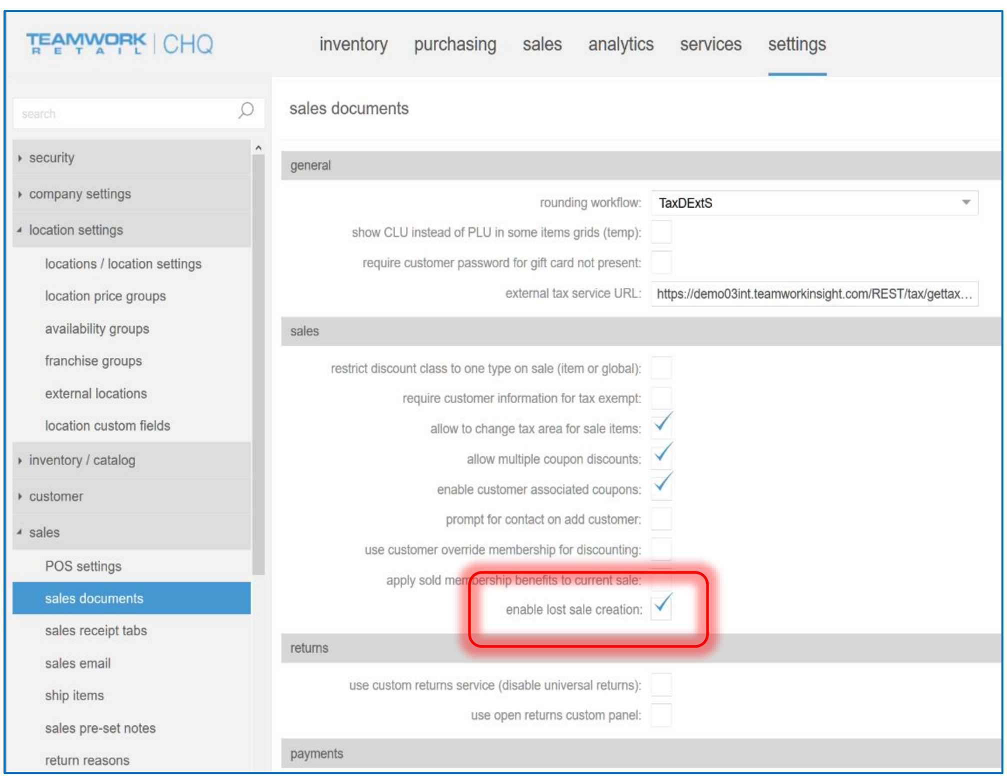
Version 5.12 – TWD-4729

August 2017

Under Settings > Sales > Sales field, we've added a new *Prompt to Print on Hold* checkbox. When selected, a prompt displays to print when a user is trying to put a Sales Receipt on hold.



Under Settings > Sales > Sales Documents, there is a new *Enable Lost Sale Creation* field. When enabled, when discarding items or receipts, a prompt displays to create a lost sale record and enter a *Lost Sale Reason*.



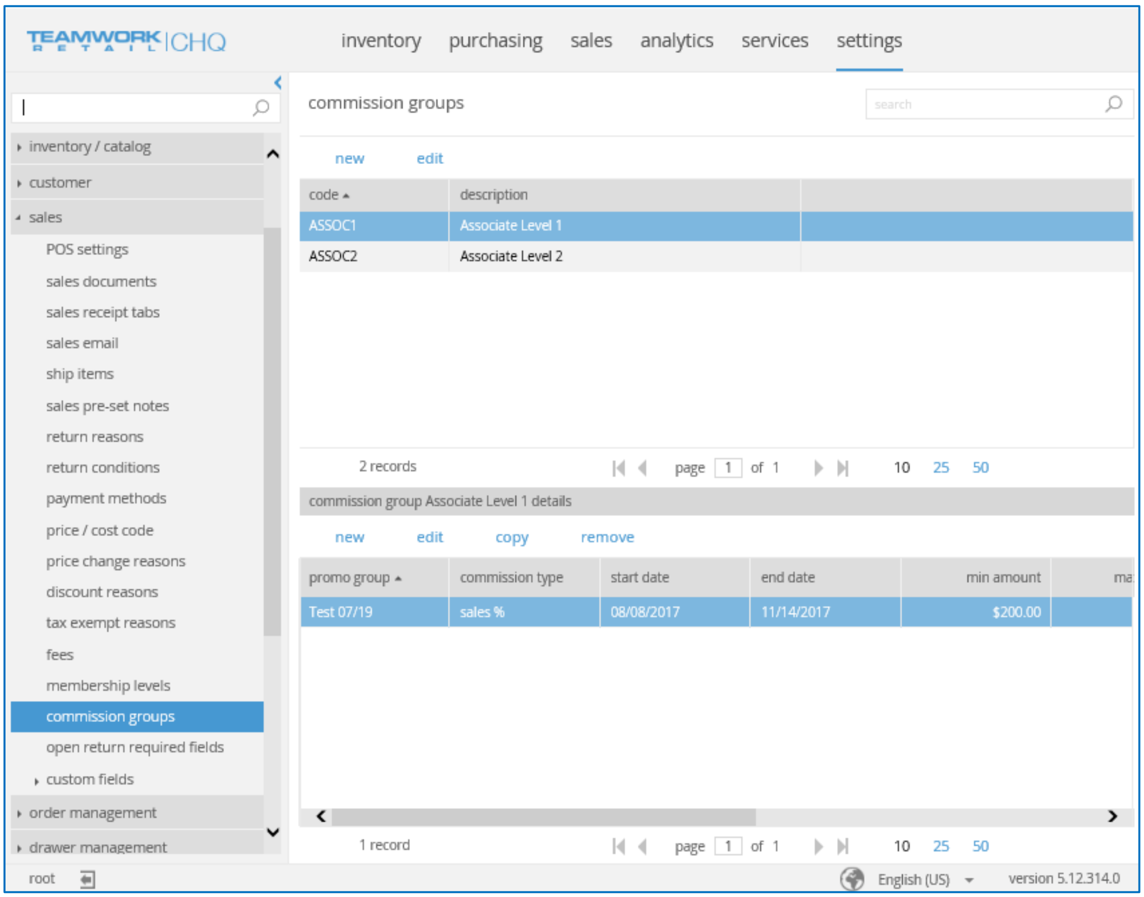
Commission Group

Version 5.12 – TWD-5056

August 2017

This feature allows for defining details for a commission group, which is a simplified replacement for the Navision Commission Schedules functionality.

Defining Commission Groups is done in Settings > Sales > Commission Groups.



Void/Reverse Time Settings

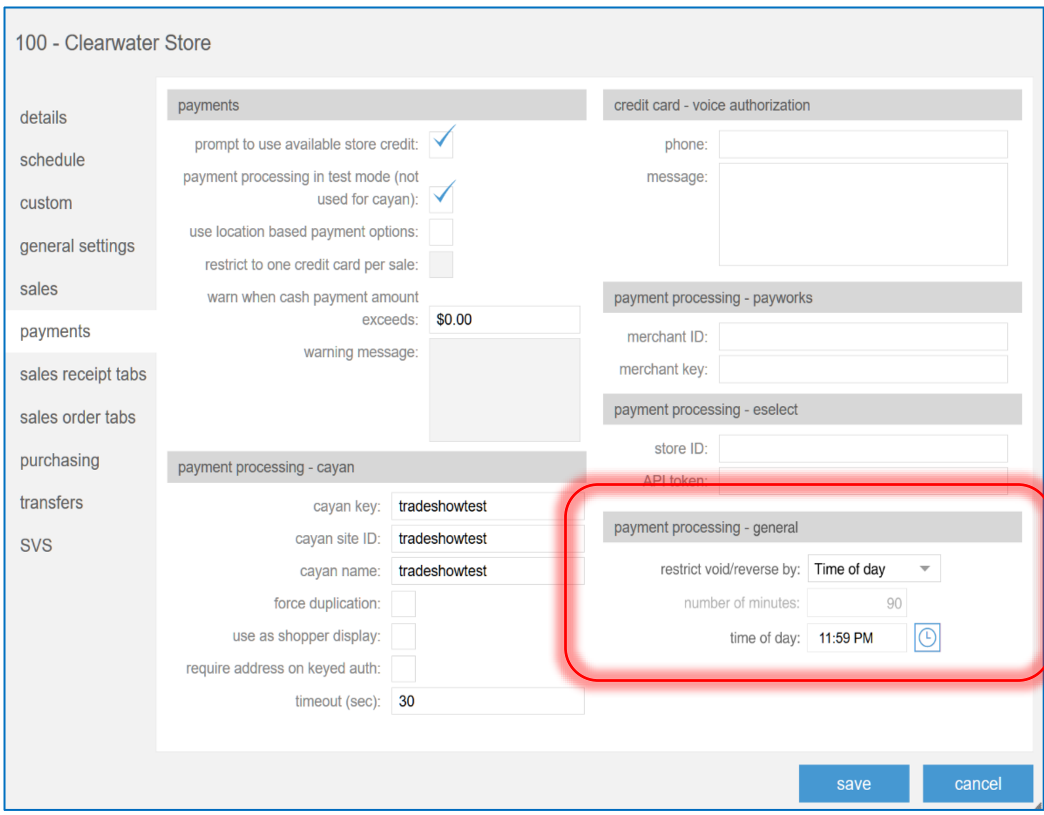
Version 5.12 – TWD-4906

August 2017

This feature adds the capability to extend the void/reverse to function until the end of the business day, instead of timing out after 90 minutes. The void function for iAcepta has also been added.

New Settings

A new *Payment Processing – General* area is added to Location Settings > Payments.



The *Restrict Void/Reverse By* drop-down is where you can set the length of time the void/reverse feature is restricted. The two options are:

- **Time of Day**: The time of day the void/revers is no longer permitted
- **Number of Minutes**: The number of minutes a user may void/reverse the document after finalizing.

Selecting **Number of Minutes** enables the *Number of Minutes* field.

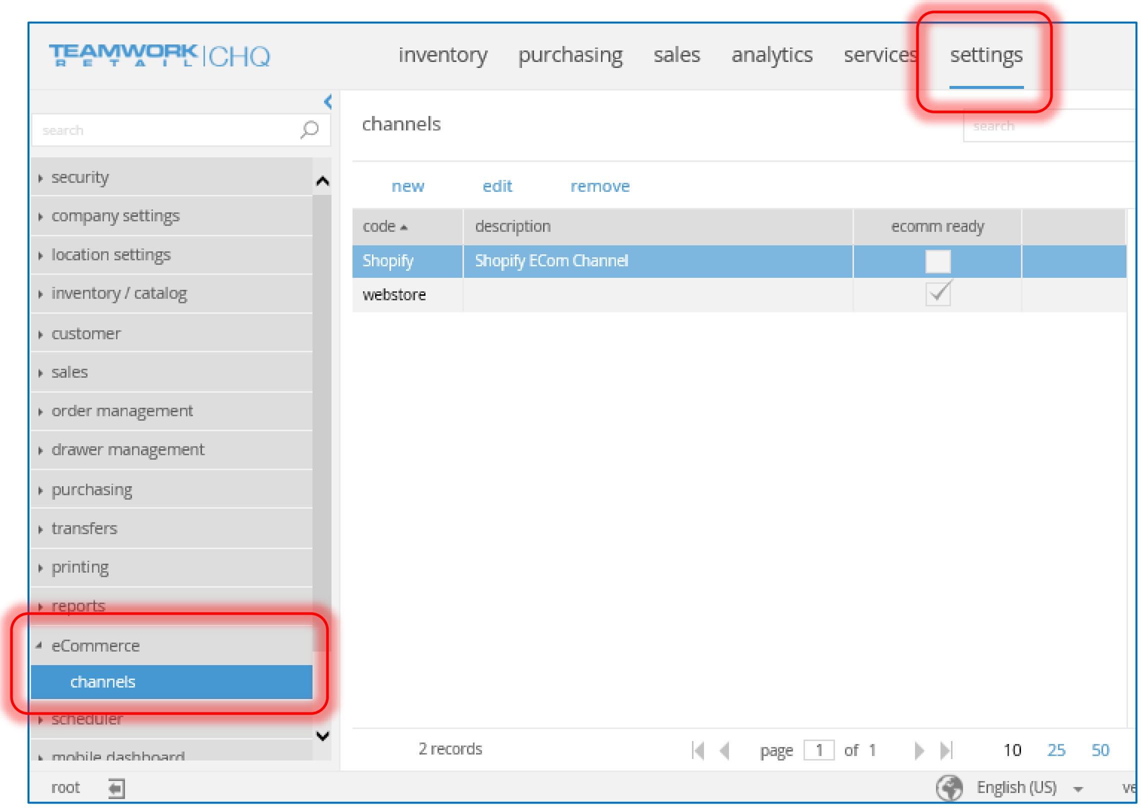
Selecting **Time of Day** enables the *Time of Day* field.

Settings – Channels

Version 5.0 – TFS # 45607

August 2017

All settings for channels are moved from Silverlight to CHQ. These can be found under Settings > eCommerce > Channels.



Other Enhancements

Javascript-Based Reports Replace Siverlight

Version 5.0 – TFS # 41011

August 2017

We've converted reporting in CHQ from Silverlight to Javascript. This is done in conjunction with our new interface for "favorite" reports.

Updated "About" Info

Version 5.0 – TFS # 49361

August 2017

We've updated the About info and copyright information in CHQ.

Additional UPC Verification

Version 5.0 – TFS # 48020

August 2017

We've extended the UPC validation to the following logic:

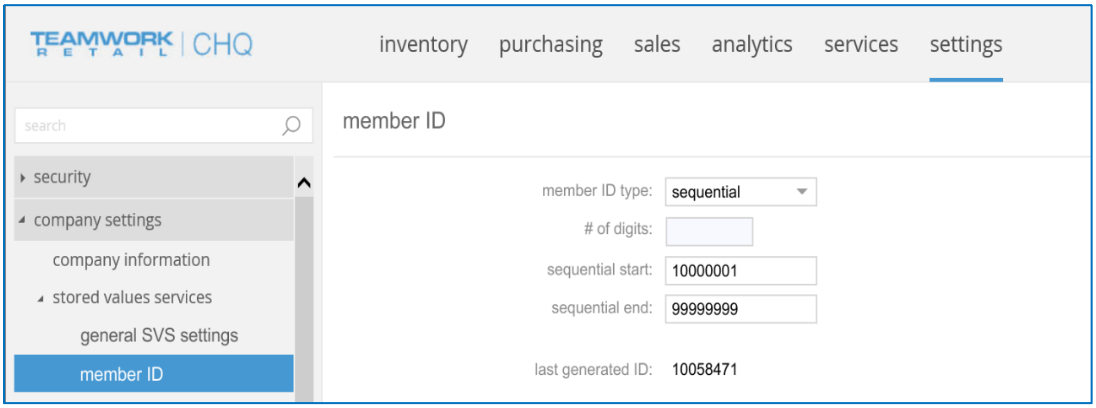
1. If the UPC length is 18 or 15 characters and the UPC didn't pass the current validation, take the first 13 characters of the UPC and run validation again. If this 13-characters string passes the validation, then the original UPC is also correct.
2. If UPC length is 17 or 14 characters and the UPC didn't pass the current validation, take the first 12 characters of the UPC and run validation again. If this 12-characters string passes the validation, then the original UPC is also correct.

Customer Membership Code

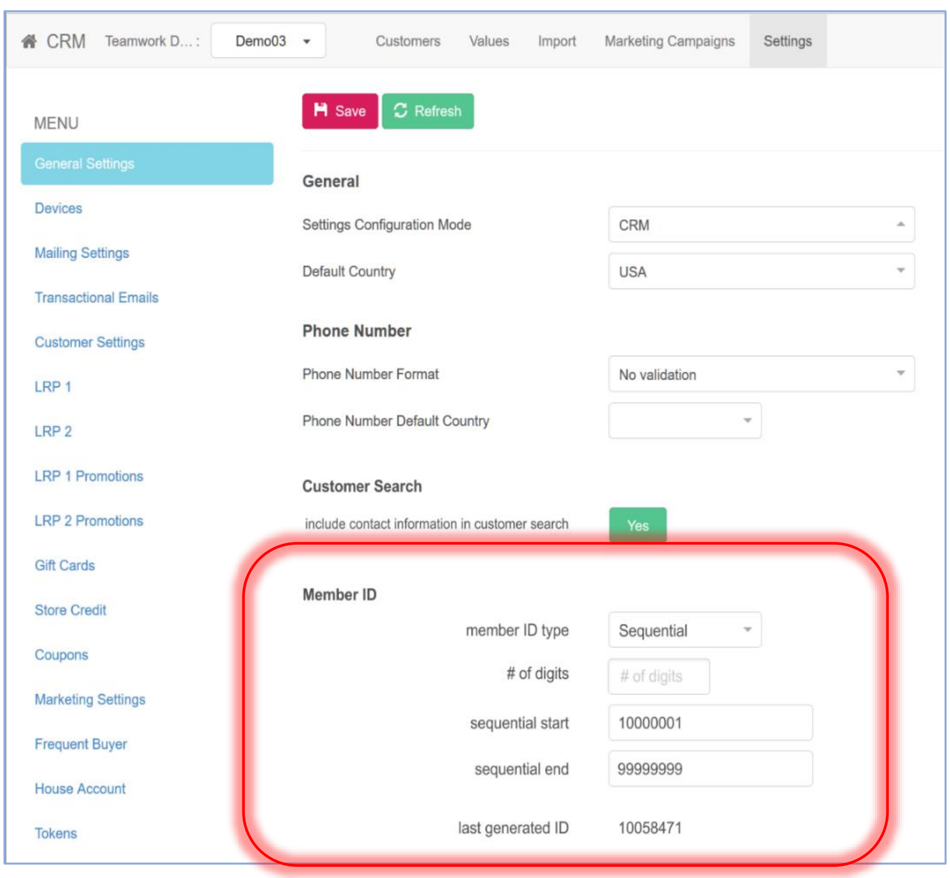
Version 5.10 – TWD-2658

August 2017

Under Settings > Company Settings > Member ID, there's a new tab for creating Member IDs for customers.



There is also a Member ID area in CRM.



Updated List of Predefined Countries

Version 5.10 – TWD-2733

August 2017

We've updated the list of predefined countries with ISO codes (that display when filling in a field). For more information on the country codes, please contact your Teamwork representative.

Clean Up of Security Rights

Version 5.10 – TWD-2816

August 2017

We reviewed all security rights to remove those that are obsolete. Additionally we updated the Area, Application, Name, and Description on existing security rights.

All areas not currently used for security rights were removed.

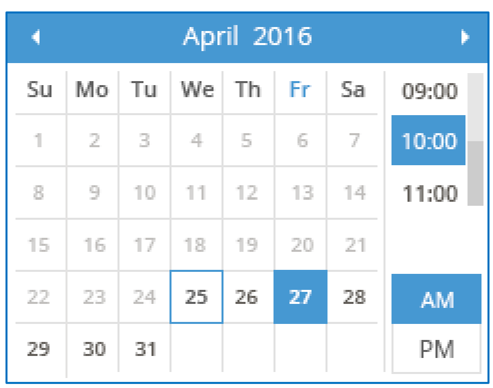
Updated Date Picker to Match Time Picker

Version 5.10 – TWD-3224

August 2017

We've updated the Date Picker to be consistent with the Time Picker.

In CHQ update UI of date picker for it to be consistent with time picker.



The current date is displayed with a blue border. The selected date and time is displayed with a solid blue box, and the name of the weekday of the selected day shows in blue font.

New Length of Location Name Field

Version 5.11 – TWD-3408

August 2017

We've made changes to the length of the Location Name field in CHQ > Settings > Locations/Location Settings > New/Edit Location dialog. Now the maximum length is 128 characters.

If more than 128 characters are entered, an error message displays and you're unable to save.

CRM – Extended Email Status Information

Version 5.11 – CRM-88

August 2017

Customer information from SVS includes extended status information for the customer's email address. This information includes flags if the customer unsubscribed or marked the email as spam, if the email address is confirmed as invalid, etc.

CHQ saves this information so it is available for Reports.

Magento 1.9 – SL ECM Replaces EC API

Version 5.11 – TWD-3748

August 2017

In Magento version 1.9, SL ECM replaces EC API.

Update Authorize.net SDK

Version 5.11 – TWD-3772

August 2017

We've updated Authorize.et SDK to the latest version.

FedEx Address Verification Service

Version 5.12 – TWD-4478

August 2017

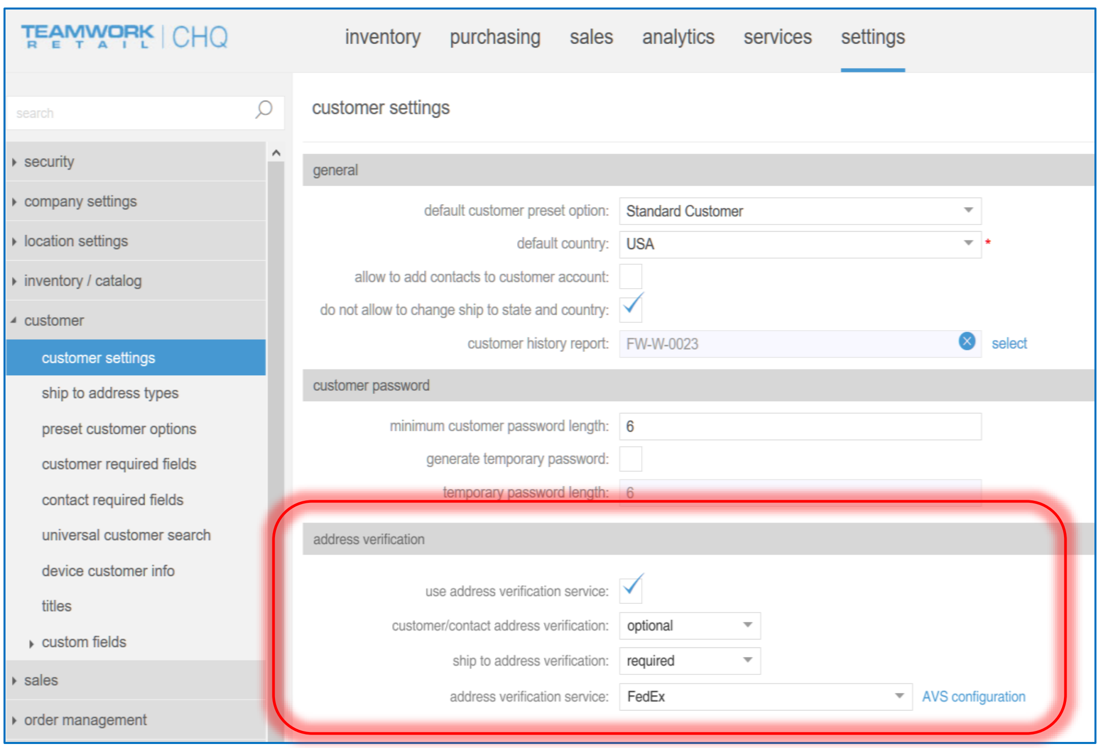
This feature adds the capability to use FedEx service for address verification in POS.

Retailers must create a FedEx account to use the address verification service (AVS). After signing up with FedEx, the retailer receives credentials to enter into CHQ to enable the service.

When sending a request to FedEx for AVS, all the following fields are required to be populated:

Address 1
City
State/Province
Postal Code
Country

Go to Settings > Customer > Customer Settings > Address Verification field to enable AVS and enter your credentials.



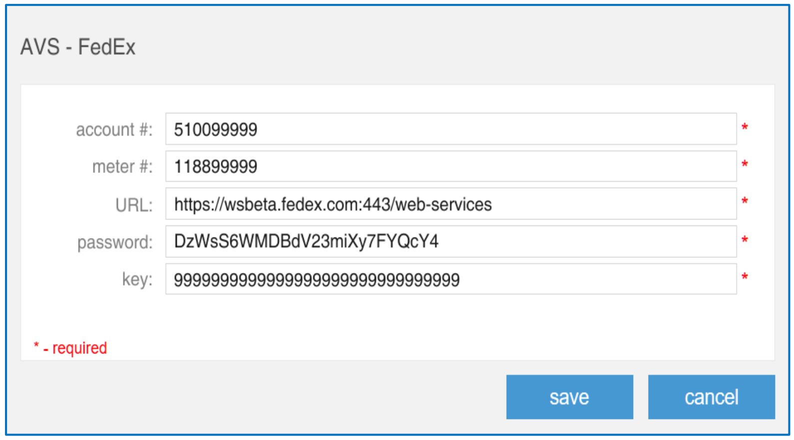
Customer/Contact Address Verification field indicates whether to use the AVS service when saving a customer, customer Ship To record, or contact record.

Ship to Address Verification indicates if the AVS service will be used when defining a Ship To address on a document.

Address Verification Service is where you can select the shipping service to use. At this time, only FedEx is available.

Click **AVS Configuration** to enter your FedEx credentials into CHQ.

All fields are required on this dialog.



Vendor Contact Emails added to Email PO

Version 5.12 – TWD-5489

August 2017

We've added Vendor Contact Emails to the Email PO function in the following areas:

- Purchasing > Purchase Orders > List view > Select a Released PO > Email PO
- Purchasing > Purchase Orders > Open a Released PO > Email PO

Additionally, the default for *Send Email To* box is now:

1. Email from vendor record/PO (as currently happens)

PLUS

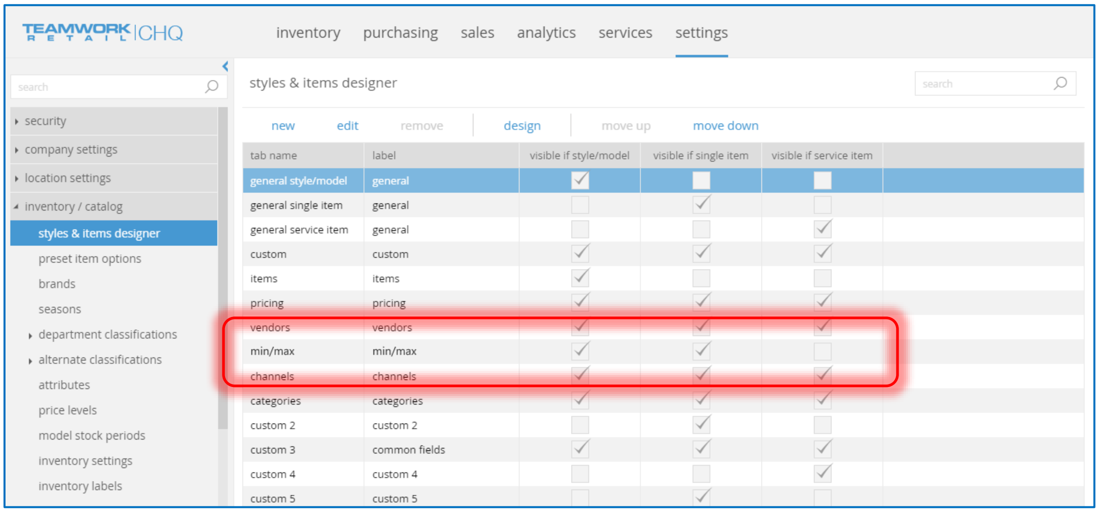
2. All emails for all vendor contacts (POs from vendor) from the Email 1 and Email 2 fields on the Vendor Contact record.

Style Item Dialog for Min/Max

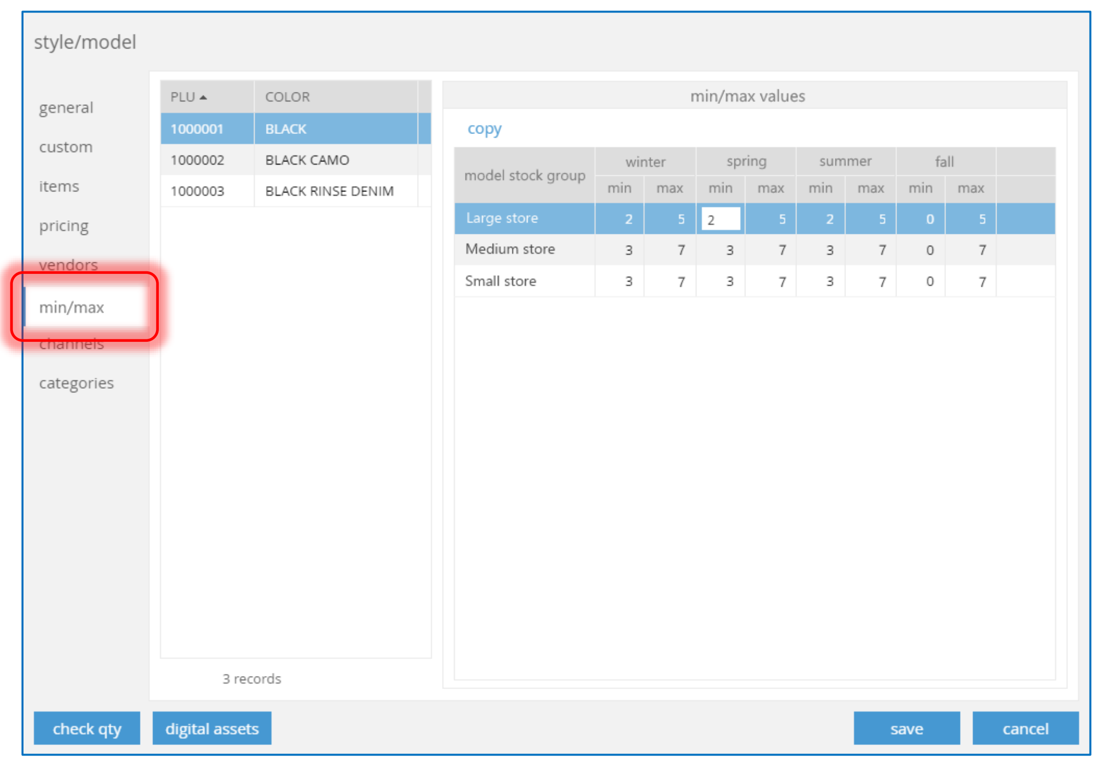
Version 5.12 – TWD-4905

August 2017

This feature adds the capability to set Min/Max values in the Style/Item dialog.



On a New or Edit Style/Model dialog, there is also a new Min/Max tab. This dialog is where you'll set the minimum and maximum values for the selected style or model.



Serial Number Management – Sales and Returns

Version 5.12 – TWD-4907

August 2017

We've made some updates to the way serial numbers are handled in POS and CHQ.

When a serial number is sold at POS and comes to CHQ

- The status of the serial number changes to Inactive
- This makes the serial number unusable

When a serial number is returned at POS and comes to CHQ

- The status of the serial number changes to Active
- This makes the serial number useable again

Additionally, if an item is put on hold the serial number is verified before the Sales Receipt can be finalized. If the serial number is invalid, an error message displays.

CRM – Identity GC

Version 5.10 – TWD-2652

August 2017

We've added a new type of gift card called Identity (current gift card types are Purchased or Non-Purchased).

This type of gift card has all the same features as the current gift cards and works the same as a Purchased-type card, with the exception that it cannot be re-assigned to another customer.

Identity-type cards can still be deactivated and it can have value added/removed through transactions.

Weeks of Supply Removed from DCSS Settings

Version 5.12 – TWD-5459

August 2017

Weeks of Supply is now removed from DCSS settings in the following areas:

- Settings > Inventory/Catalog > Department Classifications
- Settings > Inventory/Catalog > Department Classifications > New Or Edit

Rename Min/Max to Model Stock

Version 5.12 – TWD-5458

August 2017

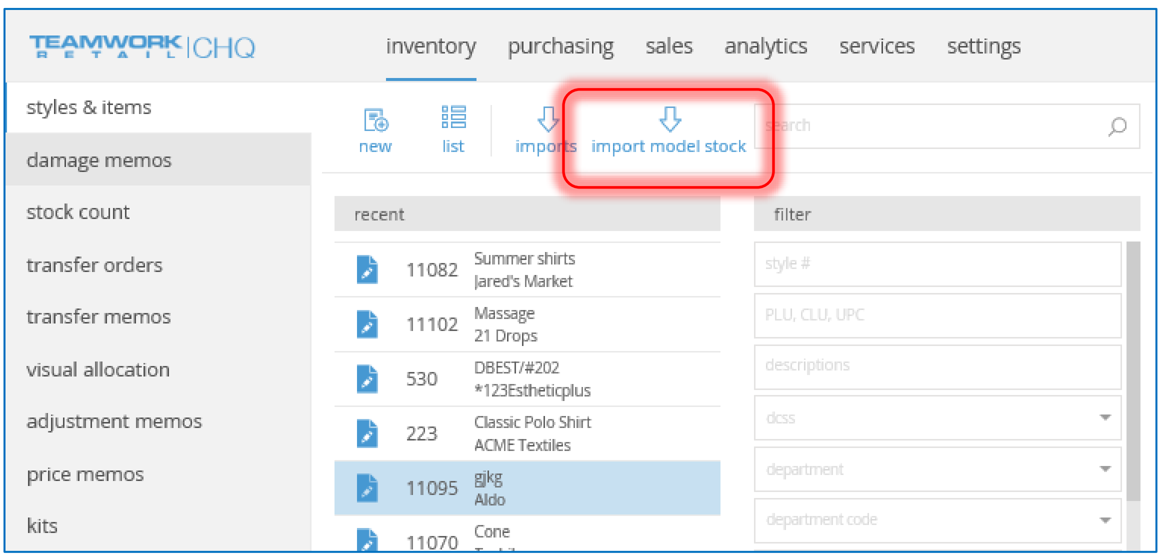
Min/Max fields have been renamed to Model Stock.

NOTE

This feature is related to Min/Max Import feature above.

Model Stock is an advanced engine for managing stock levels for all similar locations, for any season. Using the principles of minimum and maximum inventory, this engine can auto-replenish stores using any desired replenishment cycle.

Sell-through volume can be segregated into five levels: very low, low, medium, high and very high, for improved focus and management. This feature, coupled with Visual Allocation, provides a comprehensive merchandising tool to optimize stock levels for maximum sell-through.



Changes can be seen in the following areas:

- Rename *Min/Max* tab to *Model Stock* in Styles & Items designer, and change default label of the tab to *Model Stock*
- Change caption *Min/Max Values* to *Model Stock Values* in Style/Model and Single Item dialog, *Model Stock* tab.
- Change confirmation message for Copy button in Style/Model dialog, *Model Stock* tab. Title: Copy Model Stock Values. Message: Do you want to copy model stock values to all items in the style?

- Change name of *Min/Max Imports – Access* right to *Model Stock Imports – Access*
- Change name of *Min/Max Imports – Add/Edit* right to *Model Stock Imports – Add/Edit*
- Change label of *Import Min/Max* button to *Import Model Stock* in Styles & Items interaction view.
- Change label for *Min/Max Imports* list view to *Model Stock Imports*
- Change label for *New Min/Max Import* dialog (request form) to *New Model Stock Import*
- Change label for *Min/Max Import* details dialog to *Model Stock Import* #<import #> – <status>.
- Change confirmation message for Import button in Min/Max Import Details dialog. Title: Model Stock Import. Message: Do you want to import model stock values?

Price Export API

Version 5.12 – TWD-5572

August 2017

There's a new Price Export API that returns a price ledger with the following fields:

- ItemID
- Price Level
- Price
- Start Date
- End Date

Order History API

Version 5.12 – TWD-5555

August 2017

We've made changes for Teamwork services to work with Order History Echo Service.

Send All Sales Receipts to Avalara

Version 5.12 – TWD-4904

August 2017

To provide monthly tax reporting so that retailers don't have to do complex tax forms for each state where a sale was made, ALL sales receipts for a period are sent to Avalara by CHQ.

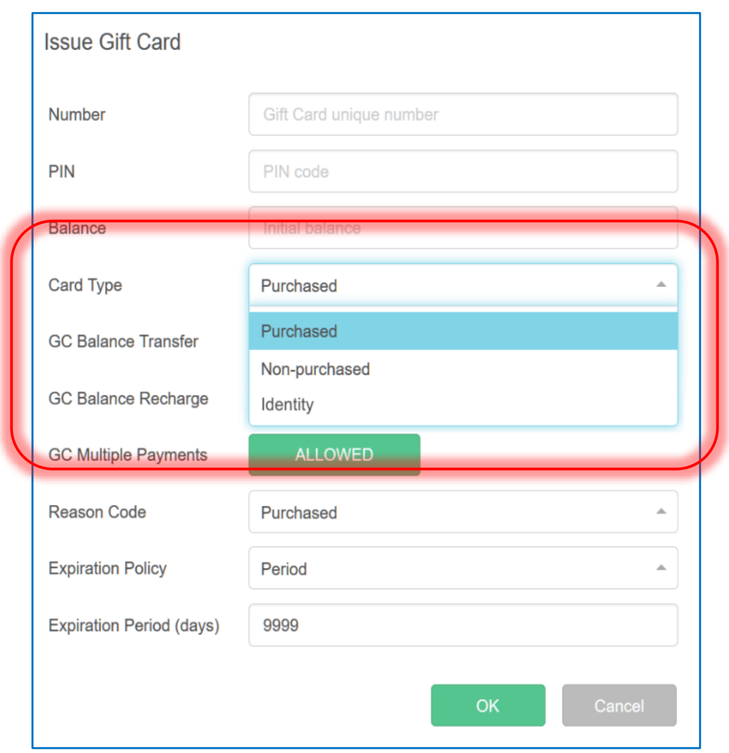
This includes receipts that used Avalara and receipts where the tax was calculated by Teamwork Tax Settings.

With all Sales Receipts for a given month, Avalara can create the monthly sales tax report form for each state.

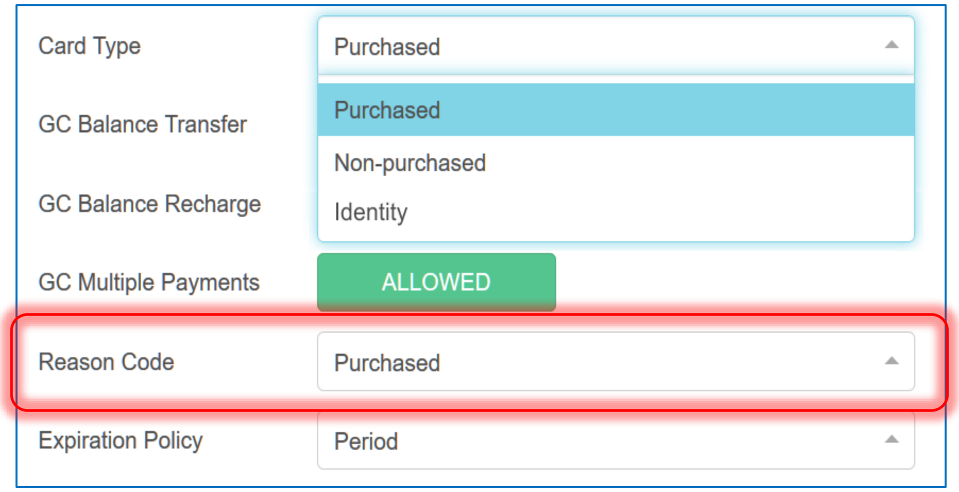
Avalara then tells the retailer exactly how much is owed to each state for that month, and accuracy is guaranteed because Avalara actually recalculates the sales tax for the Sales Receipts made with Teamwork Tax Settings as well.

Sales tax reporting is monthly so all the receipts needs to be on the Avalara server by end of month or very soon after.

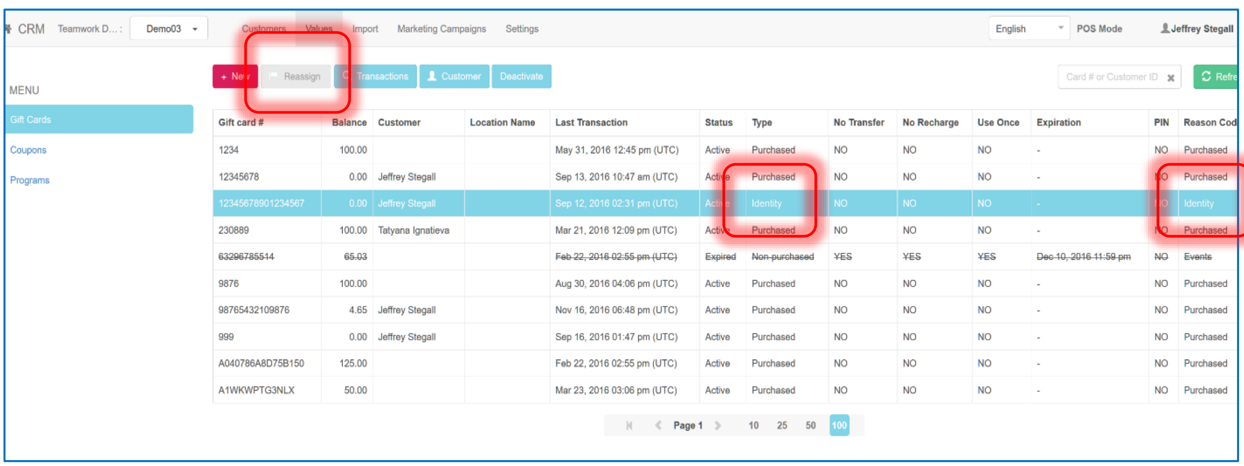
Sales receipts can be posted in two ways from CHQ, to recalculate or not recalculate when posted to Avalara service.



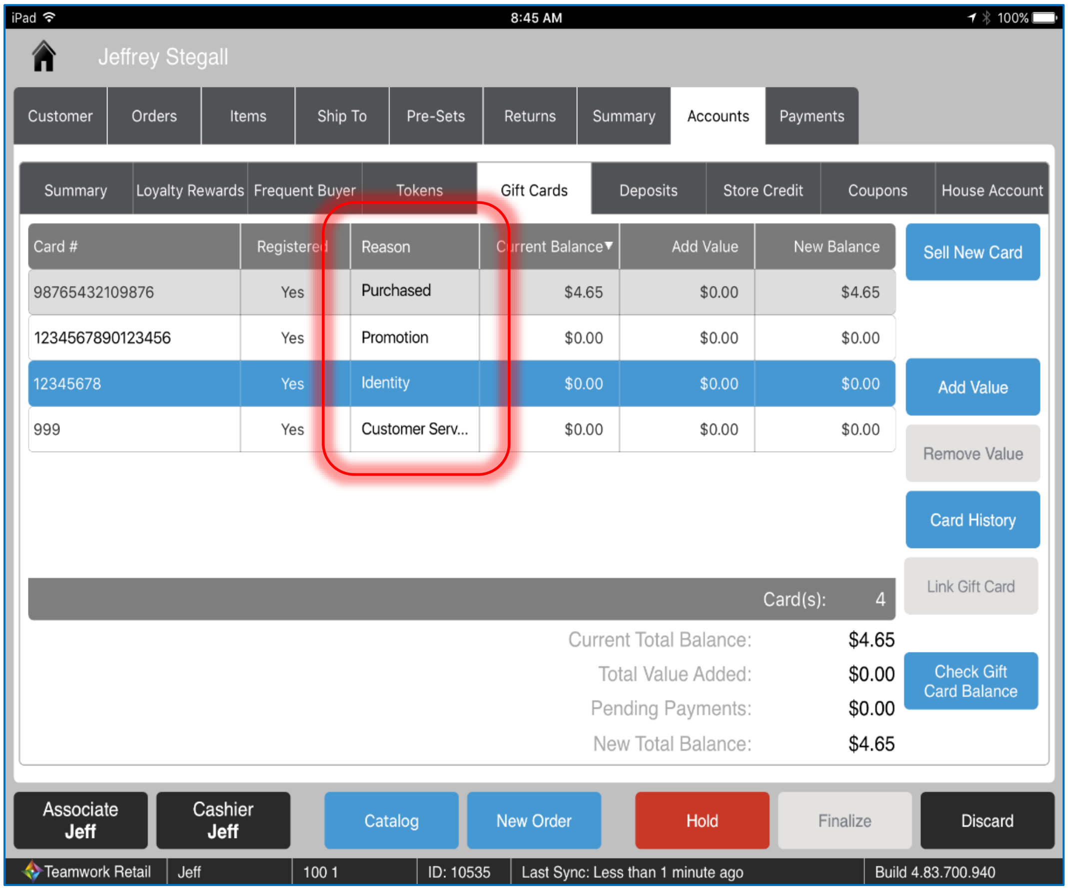
This new gift card type also displays under the *Reason Code*.



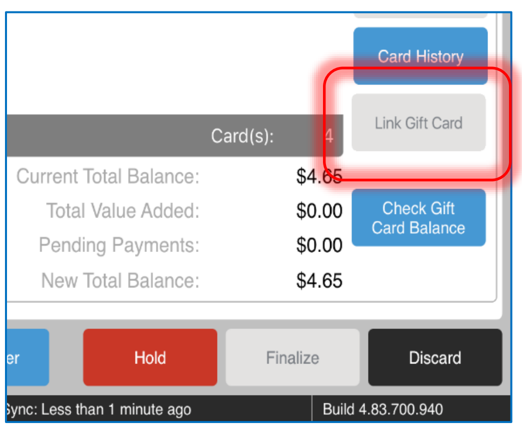
If the gift card type is Identity, the Reassign button is disabled (Identity-type cards are unable to be reassigned).



In POS, under Accounts > Gift Cards, there's a new *Reason* column.



For all Identity-type cards, the *Link Gift Card* button is disabled.



Epilogue

This manual was published on 11 October 2017 by Teamwork Retail.

CHQ is accessed via the app store, Meraki, or otherwise provided by a Teamwork representative. This manual 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 Retail, email us at: training@teamworkretail.com.

If you need technical support, have a question about whether or not you have the current version of the manual, or you have some comments or feedback about our manual, please contact us at: support@teamworkretail.com.

For emergency support call the Teamwork Main Line (727) 210-1700 and select 1 to leave a message that will immediately be dispatched to an on-call tech.