TEAMWORK RETAIL

a product of Retail Cloud Technologies

TEAMWORK CHQ RELEASE GUIDE

Version 5.14

Table of Contents

Sales and OMS

OMS Sales Order Fields

Version 5.14 – TWD-6398

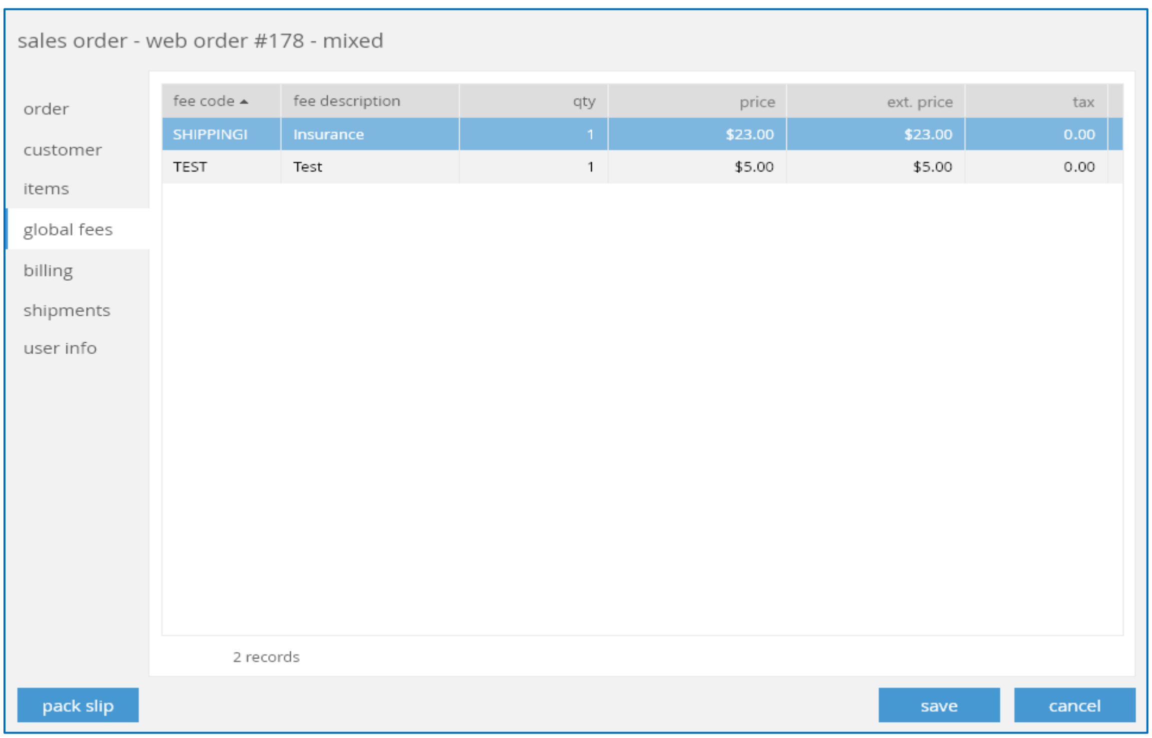
November 2017

Certain companies need more information to display on the Sales Order detail screens. With these changes enabled, there are three new tabs added:

- Global Fees
- Billing
- User Info

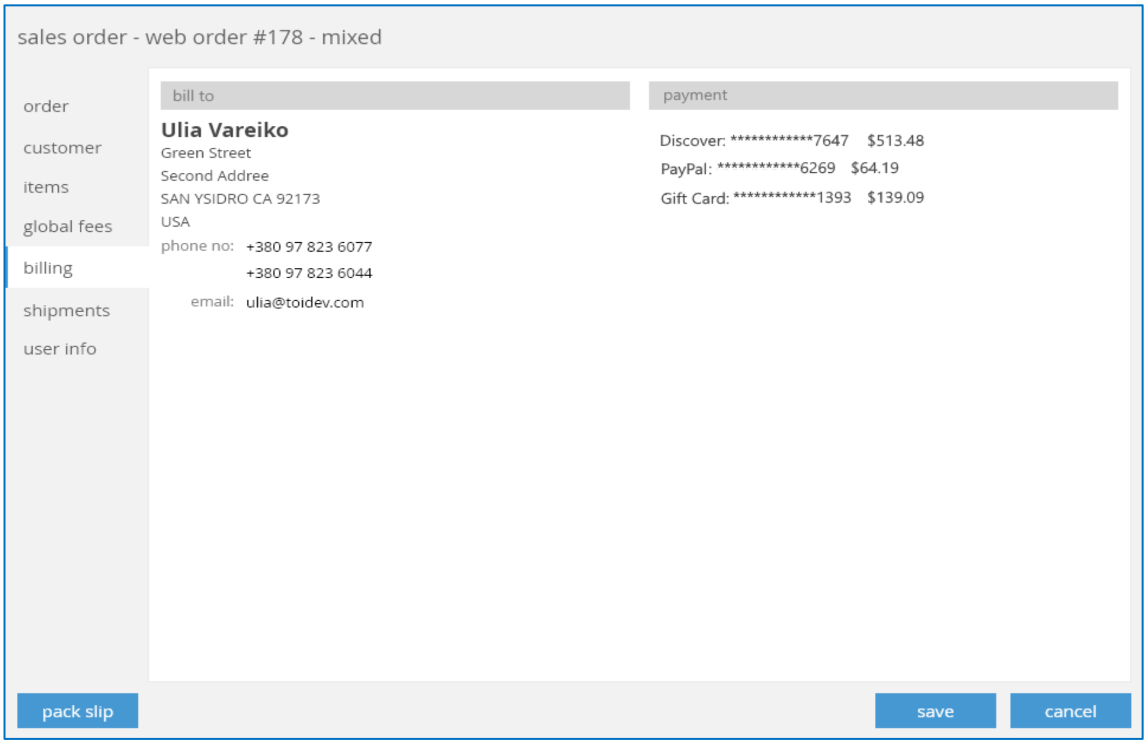
Global Fees Tab

Under Order Management > Edit order > Global Fees tab, here any global fees on the order display, such as a shipping fee.



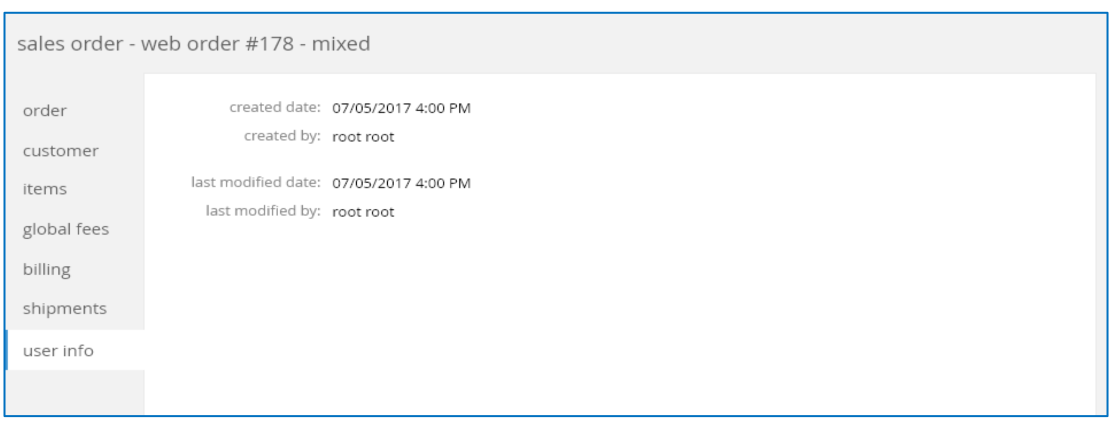
Billing Tab

Under Order Management > Edit order > Billing tab, this screen shows information for the customer this order is billed to (may be different from the shipping information), and the payment information for the order.



User Info Tab

Under Order Management > Edit order > User Info tab, information for the user that created the order displays.



Sales Order CSR Notes

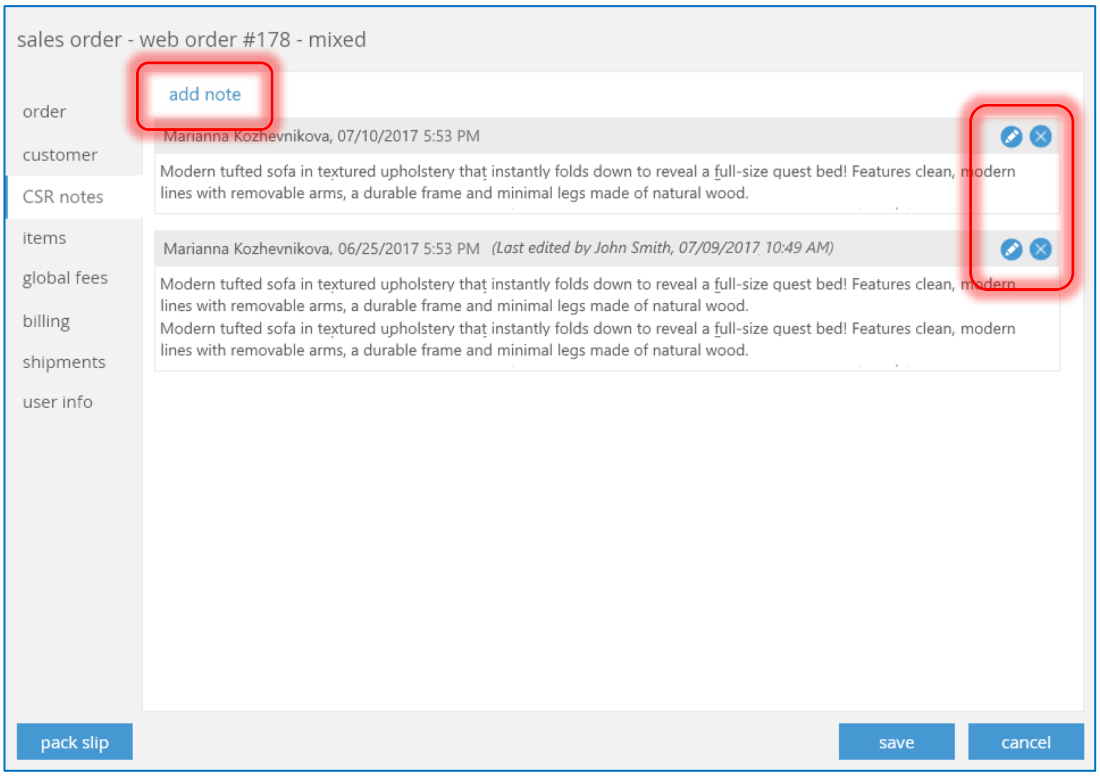
Version 5.14 – TWD-6399

November 2017

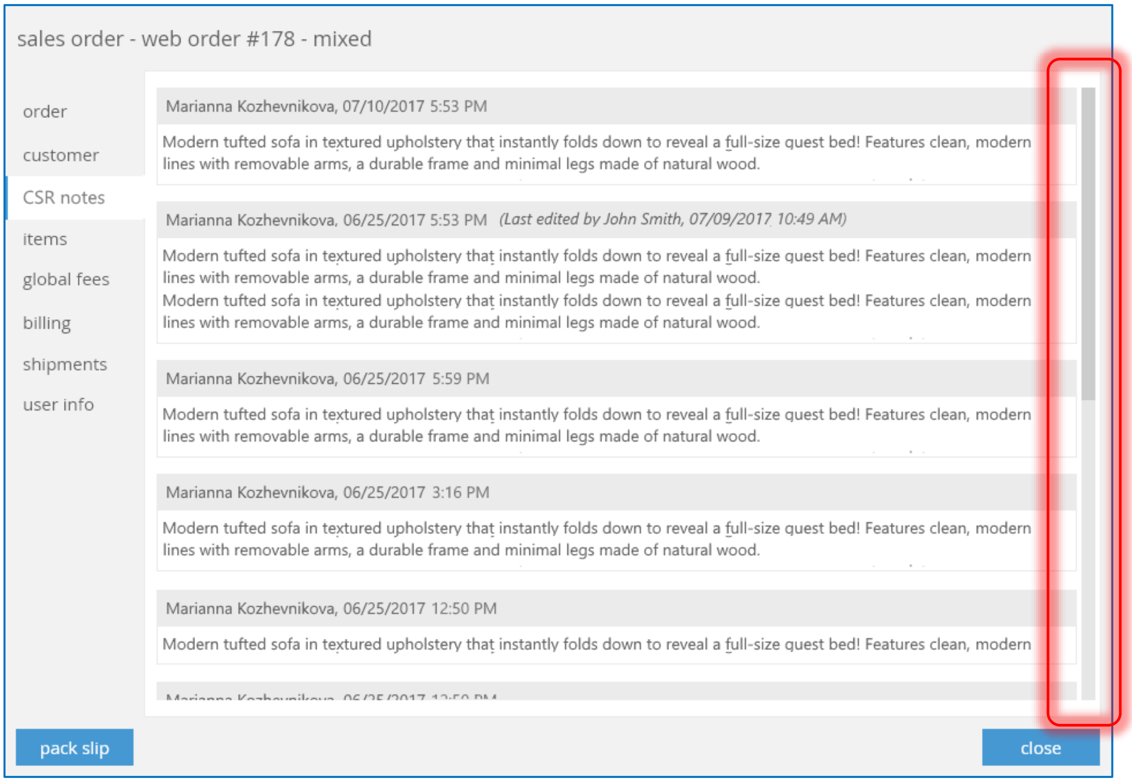
Under CHQ > Sales > Order Management >View SO, we've added a new CSR Notes tab. CSR stands for Customer Service Representative.

Here you can add a new note (by clicking **Add Note**), edit existing notes (by clicking the **blue pencil icon**), or delete a note (by clicking the **blue X icon**).

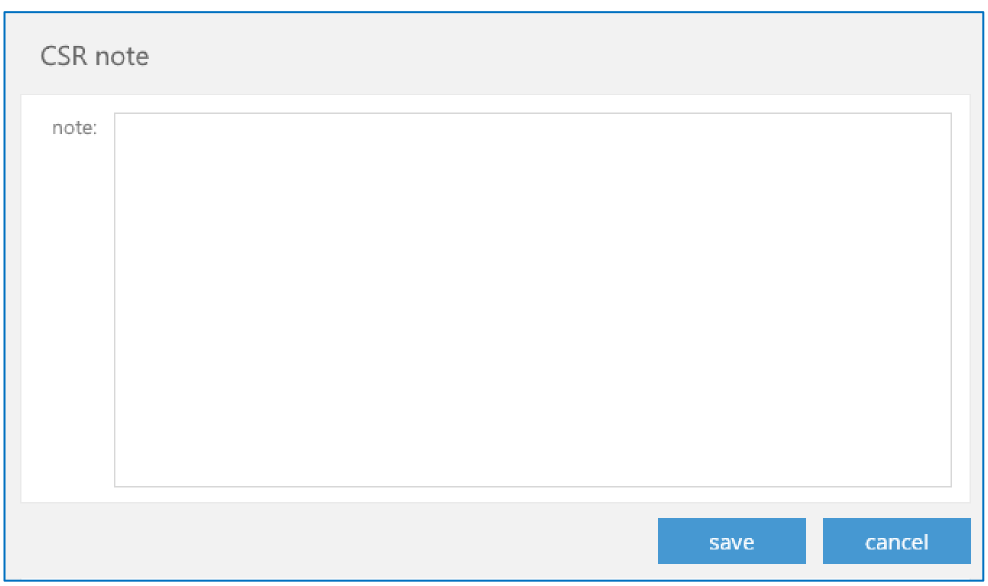
The screen displays all CSR notes related to the order, sorted by the last modified note.



If there are more notes than what displays on the screen, use the scroll bar to view more.



After clicking **Add Note** (or when editing an existing note), a separate dialog displays. When finished, select **Save** to update, or **Cancel** to close the dialog without saving.



When finished, select **Save** to save and update changes, or **Cancel** to close the dialog without saving.

OMS Payment Capture on Create Drop Ship PO

Version 5.14 – TWD-7172

November 2017

This feature is for capturing payment or checking authorization when creating a drop ship Purchase Order in OMS.

When creating a drop ship PO:

- If [payment due] > 0 and [payment due] < = [cc authorized amt], then:
  - If [auth and capture – capture on] = "create ship memo," then payment is captured
- If [payment due] < = 0, it processes to the next step of the drop ship PO workflow.
  - If [auth and capture – capture on] = "ship/pick," then payment authorization is checked
  - If the CC authorization is valid:
    - It processes to the next step of the drop ship PO workflow.

  NOTE

  If a user is creating POs from the Create PO functionality in the Sales Order Items view, then the error: "Purchase Order cannot be created because of credit card authorization error" displays.

- [payment due] = [order total (for not cancelled itemso] – [total paid for complete items] – [total unused deposits]

Brazil – Transfer NFe Support for Taxes

Version 5.14 – TWD-4650

November 2017

For stores in Brazil, when a Transfer Out document is finalized, the NFe document gets printed (this document is A4 format).

In Brazil, Transfer documents contain taxes. We've added support for the tax calculation on a transfer document.

Taxes are calculated only by the Shipments app, not in CHQ. This functionality would be enabled by the Brazil flag.

Inventory

Model Stock – Upload Multiple Locations at Once

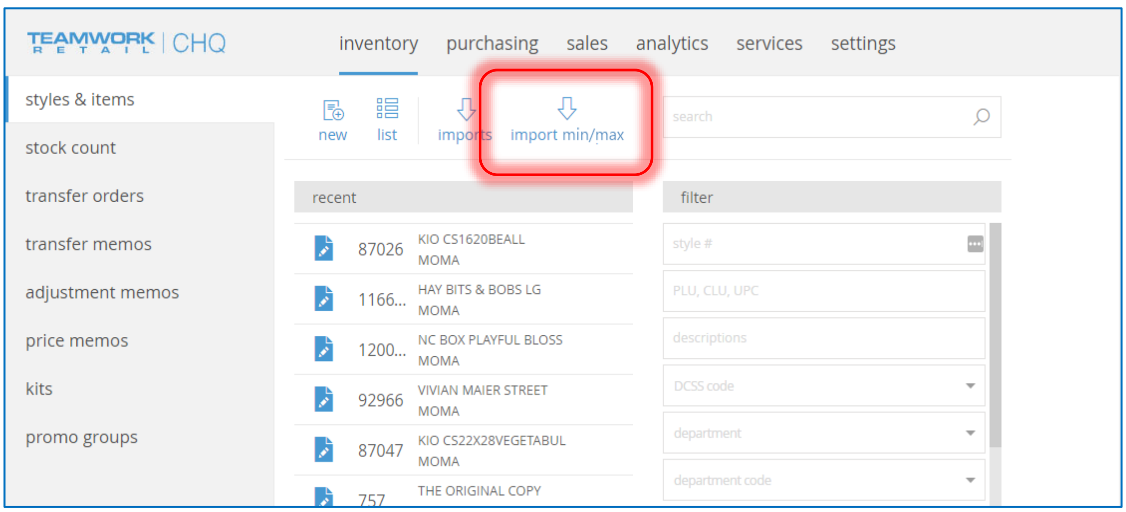
Version 5.14 – TWD-7205

November 2017

This functionality allows for setting the Minimum/Maximum values in CHQ, so multiple locations can be uploaded at once.

Min/Max values can be used for Allocation Worksheet, Purchase Worksheet, and Replenishment Worksheet reports.

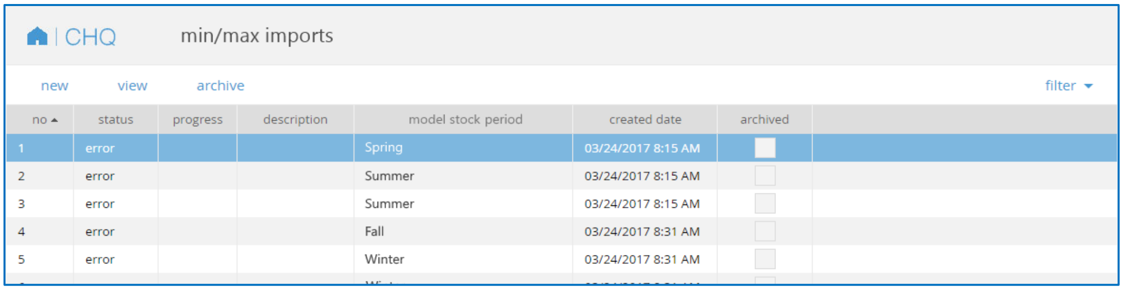
Click the **Import Min/Max** button under CHQ > Inventory > Styles & Items to use this function.



NOTE

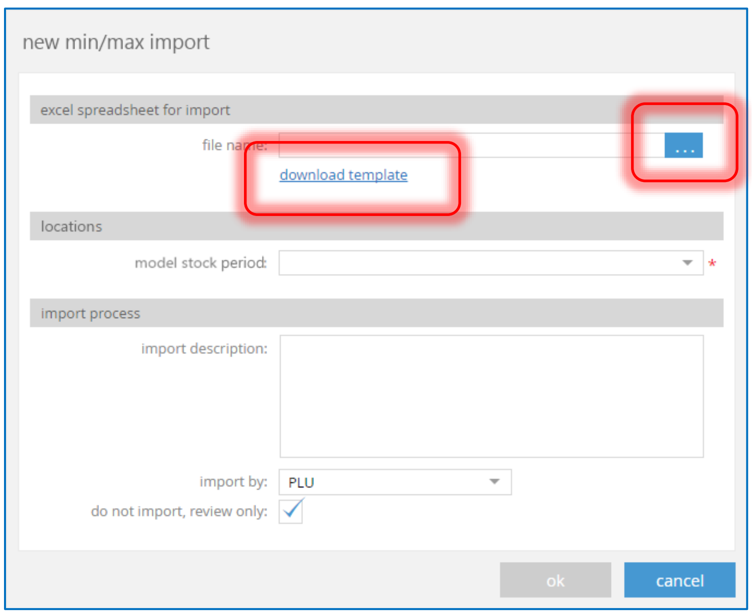
The Import Min/Max button is only visible if the user has the appropriate security rights listed below.

Clicking **Import Min/Max** opens the Min/Max Imports list view, as shown below. Here you can **View** or **Archive** existing imports, or click **New** to open the Min/Max Import request form.



On the new import screen, if you already have an import screenshot to upload, click the blue box with three dots. This brings up a file selection dialog where you can select the document from your computer.

Or, click the **Download Template** link to download a Min/Max Import template.



Next select a *Model Stock Period* from the drop-down. Or, typing directly into the field will bring up the value you're looking for. Please note that this is a required field.

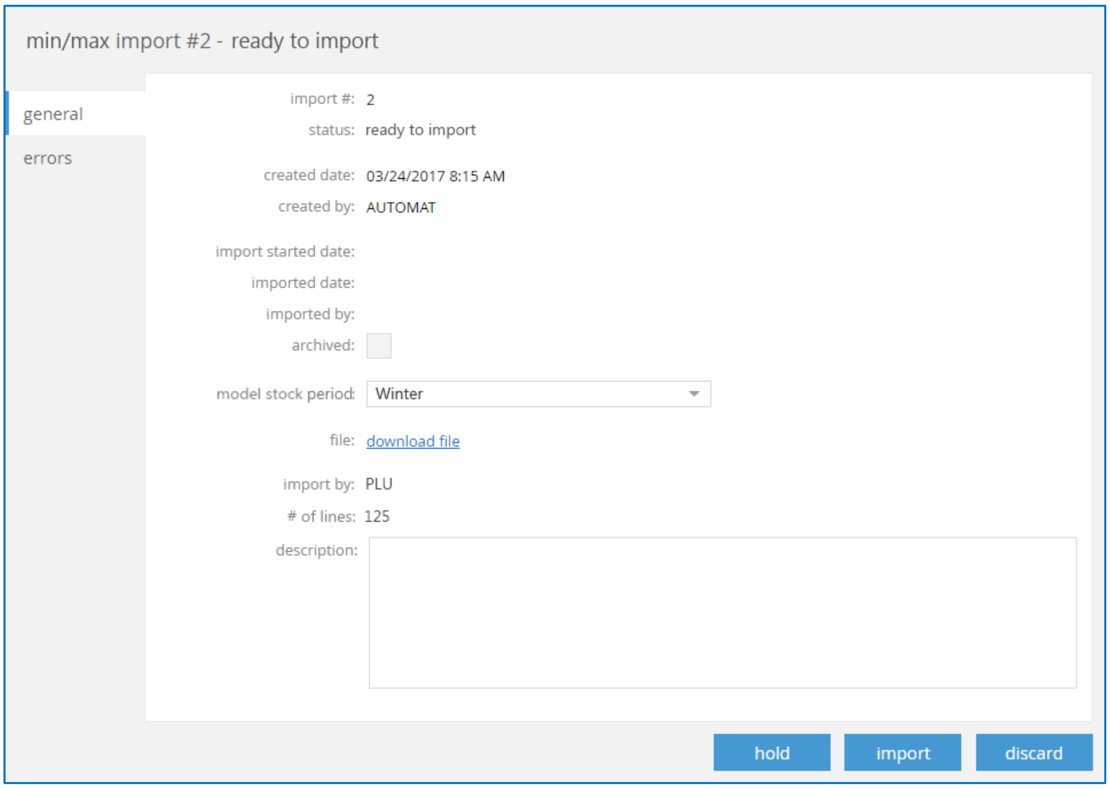
Under the Import Process heading, you have the option to include an *Import Description* and what you want to *Import By* (PLU, CLU, etc.).

Finally, select or deselect the *Do Not Import, Review Only* box according to your preference.

When finished uploading and inputting everything, click **Ok** to process the import or **Cancel** to close without importing.

After reviewing the import is complete, the import status changes to one of the following, and an information dialog displays:

- Ready to Import: If there are no errors that have been found during review and "Do not import, review only" is enabled.
- Import: If all values have been imported.
- Error: If at least one error has been found during the review process.
- Import Error: If there are errors during the import.

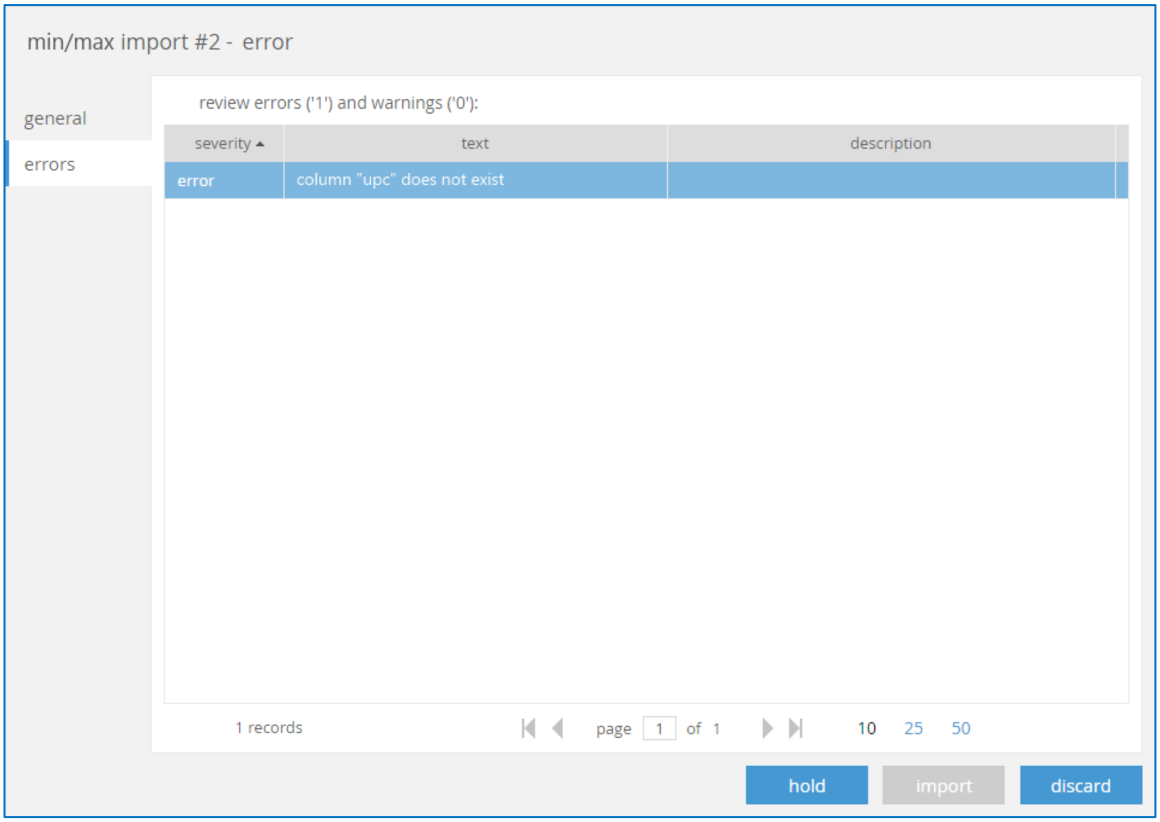


The **Hold** button closes this dialog and **Discard** deletes the import document. A **Close** button displays if the status is:

- Reviewing
- Importing
- Imported
- Import Error
- Or if the user doesn't have the "Min/Max Imports – Add/Edit" right

Click the **Import** button to finish processing the import (this button is only enabled if the status is "Ready to Import").

If there are any errors, these display in the Errors tab.



New Settings

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

Other Enhancements

Virtual Gift Cards Sales

Version 5.14 – TWD-8507

November 2017

We now allow selling of a “virtual gift card” type of item IF the following is TRUE:

- Settings > Sales > Ship Item > *Create send sale order for ship items*

If this setting is false, there are no changes to POS. If this is TRUE, then the sale of virtual gift card items is allowed.

When the virtual gift card item is added to the receipt, the ship item flag for that item is automatically added to the receipt (as if the user had manually selected the ship item button in the UI).

The price of the virtual gift card item will be the amount of the virtual gift card created in CHQ.

When the receipt is finalized and the send sale is created on CHQ for the virtual gift card item, the PRICE of the item on the receipt is copied to the Sales Order item field *VirtualGiftCardAmount*.

Additionally, the email field defined for the Ship To address on the sales receipt will be copied to the Sales Order as the recipient of the virtual gift card email.

Purchase Orders – CHQ Data

Version 5.14 – TWD-4658

November 2017

For Purchase Orders, in case there is a bad connection to CHQ and information can’t be retrieved, a message dialog displays with two options:

- Retry (to manually send the same request again)
- Cancel (to interrupt the business workflow and return to the previous screen)

In the event that the request was to finalize the document and the request is re-sent, Teamwork double checks the server to make sure the document was not already finalized.

Cayan Credit Card Downloader

Version 5.14 – TWD-8326

November 2017

We've added a new table with the exact structure as the Zeus RTW Credit Card Transaction table.

There's also a new process that populates this table the same way the CayanCreditCardWebDownloader RTW server process in 4.83 does.

Settings

Quick Add

Version 5.14 – TWD-5630

November 2017

We've added new settings in CHQ to support including the new Quick Add tab to the customer edit/add form in POS.

The customer quick add form is a feature implemented in POS. It adds a new tab to the Customer New/Edit form for quickly adding customer information.

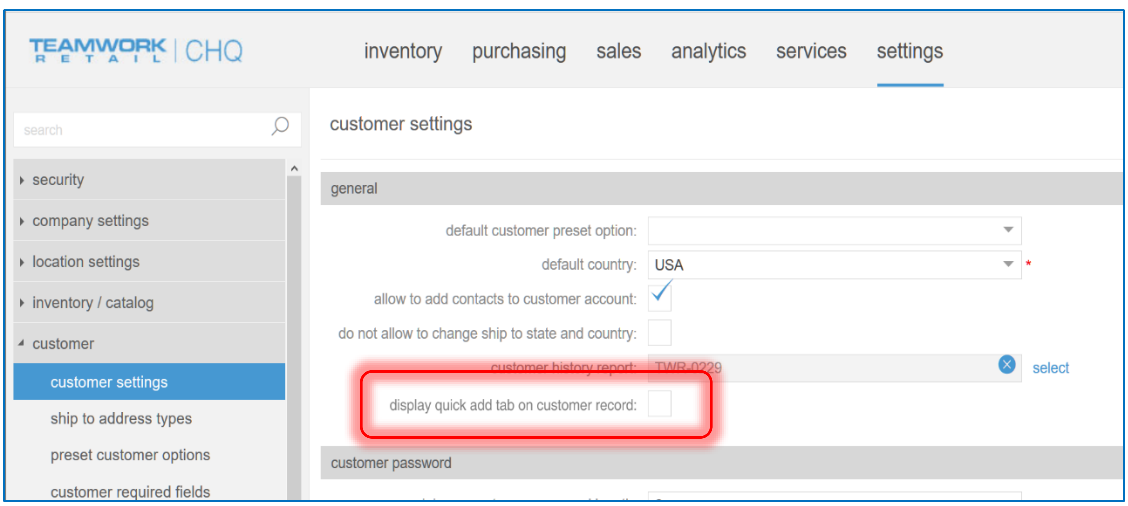
Customer Quick Add

The Customer Quick Add setting allows you to define which fields for a customer you want to be able to quickly add.

This way, instead of going through and looking at, or filling out, all the potential customer fields, you can set a quick add tab to display just a few key fields, such as first and last name, email address and phone number.

This allows for faster data entry of *key* customer information with less navigation.

To enable this tab, go to Settings > Customer > Customer Settings.



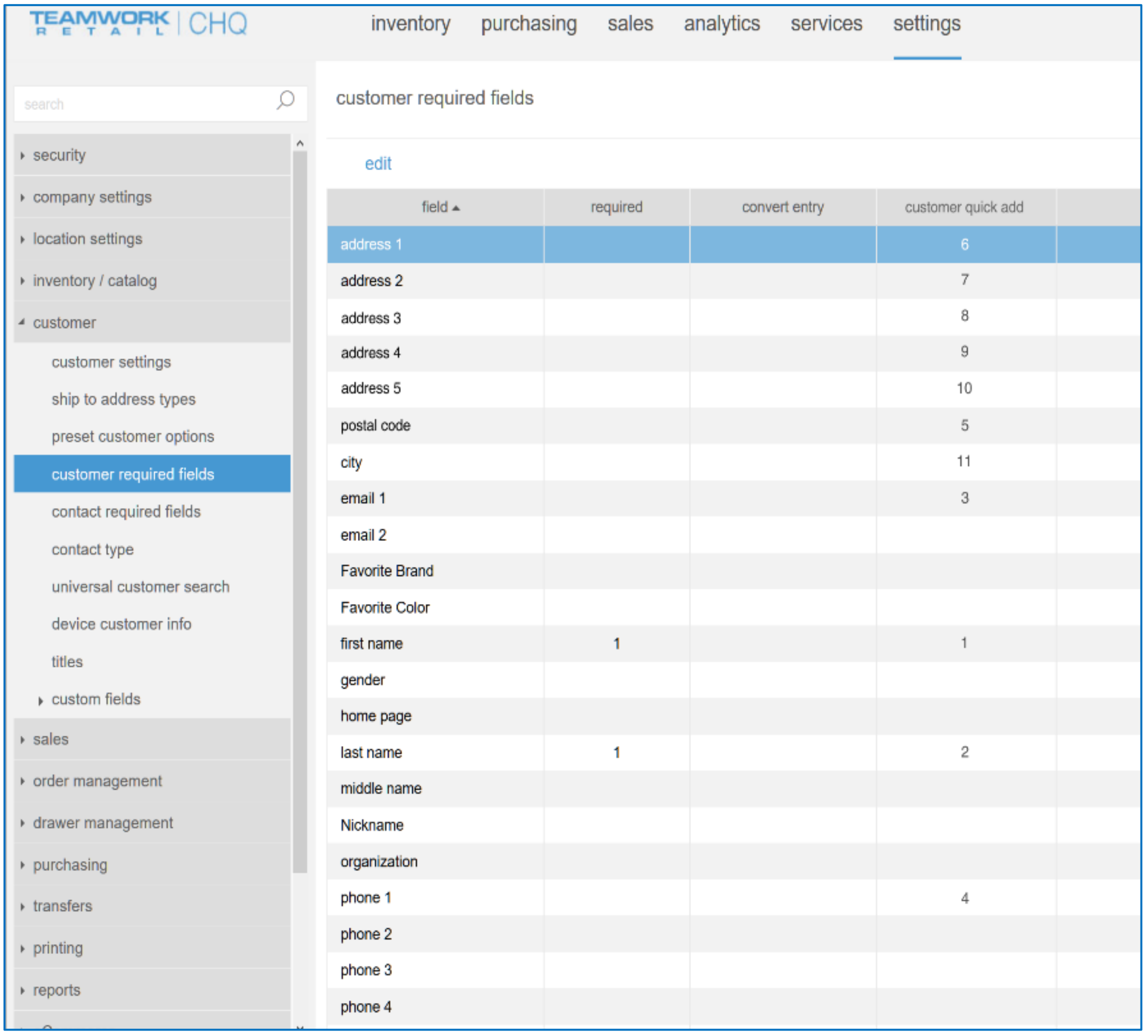
The Required Fields column are the required columns in CHQ Settings. The Quick Add Fields column is the list of available fields that can be included on the Quick Add tab.

In the List view, the following fields display:

Required Fields	**Quick Add Fields**
Address 1	Address 1
Address 2	Address 2
Address 3	Address 3
Address 4	Address 4
Address 5	Address 5
	Allow Charge (from House account)
Anniversary	Anniversary
Birthday	Birthday
City	City
Country	Country
	Credit Limit (from House account)
Custom Fields (any defined customer custom field)	Custom Fields (any defined customer custom field)
Customer #	Customer #
Customer Status	Customer Status
Email 1	Email 1
Email 1	Email 1
Employee	Employee
First Name	First Name
Fiscal Code	Fiscal Code
Gender	Gender
Home Page	Home Page

Required Fields	**Quick Add Fields**
Last Name	Last Name
	Member Code
	Membership Expires
	Membership Level
Middle Initial	Middle Initial
Organization	Organization
Person/Company	Person/Company
Phone 1	Phone 1
Phone 2	Phone 2
Phone 3	Phone 3
Phone 4	Phone 4
Postal Code	Postal Code
Preferred Associate	Preferred Associate
	Price Level
State/Province	State/Province
	Status
Suffix	Suffix
Title	Title
	Trading Partner
	Trading Partner ID
	VAT Registration #
	Wholesale Customer

These fields all display under Settings > Customer > Customer Required Fields.



Settings for Tokens Expiration

Version 5.14 – TWD-5769

November 2017

As loyalty reward points are earned, the value of the points can be converted to Tokens, which are redeemable as payment. Loyalty points earned can be instantly converted to Tokens and linked to the customer record.

When enabled, this modification to the process allows for tokens earned to be transferred over, for companies using a different system than Teamwork.

To allow for this, we've added a new setting in CHQ and CRM.

CHQ

In CHQ Settings under Company Settings > Stored Value Services > Token Settings and under Company Settings > Stored Value Services > SVS Location Groups > SVS Location Group > Tokens under *Enable Tokens* setting, we've added the new setting below:

- Expiration policy: This is a drop-down with options for *No Expiration* and *Period*
  - If *No Expiration* is selected, tokens will never expire
  - If *Period* is selected, tokens will expire after the defined number of days
  - The default to *No Expiration*
- When *Period* is selected, an *Expiration Period (days)* text field appears for users to set the expiration period
  - Must be a number, no letters
  - Set to 365 by default
  - Cannot be zero or negative
  - Cannot be blank

CRM

Same settings as described above for CHQ is added to CRM > Settings > Tokens.

New Security Right Allows/Prevents Making a Transfer Document for Another Location

Version 5.14 – TWD-7130

November 2017

We've added a new security right to allow/prevent a user from making a transfer document for another location.

Area	Name	Description
Transfers	Allow Transfer for Another Location	Allow user to create Transfer Out & Transfer In documents for other locations.

By default this is unchecked when installed, as often associates are not allowed to perform this action.

New Sales Order Fields in Email Settings

Version 5.14 – TWD-8150

November 2017

We've added the following fields to the list of item fields available in all OMS email notifications:

- "RMA code" field (from SO item)
- "Gift item" flag (from SO item)
- "Gift message" field (from SO item)

Settings for Bomgar Removed

Version 5.14 – TWD-8331

November 2017

Bomgar is no longer supported in POS, therefore, we've removed all related settings.

In CHQ > Settings > Company Settings > General Settings:

- The *Support sessions functionality* section is renamed to *Support communication*
- From *Support sessions functionality* (now *Support Communication)*, we removed the following settings:
    - Enable support sessions functionality
    - Company ID
    - Site address

Epilogue

This manual was published on 18 December 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.