TEAMWORK
R E T A I L
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TEAMWORK CHQ RELEASE GUIDE

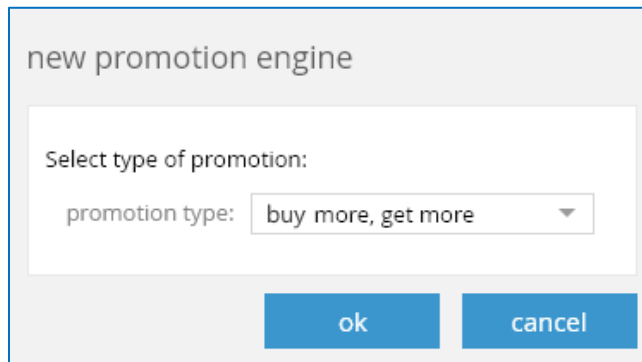Version 5.20

Table of Contents

Sales and OMS

Promo Settings – Buy More, Get More

Version 5.20 – TWD-9806

July 2018

This is a new promo type called Buy More, Get More.

When creating a new Promotion Engine, there are three discount types allowed for this promo:

- Fixed Price
- Percent %
- Amount $

See the screens on the following pages for each discount type.

Fixed Price

For *Fixed Price*, there is a set dollar amount the customer must purchase before accessing the promotion. The area circled in the screen below is where you can set the price parameters.

new promotion engine

general

promotion type: buy more, get more

promotion name: New Promo   *

description:

promotion rules

discount type: fixed price

add   edit   remove

buy	fixed price	additional items
3	$150.00	$50.00
5	$250.00	$50.00
7	$300.00	$40.00

for 'buy' items always use: most expensive

locations: any   edit

start date: <mm/dd/yyyy hh:mm a>

end date: <mm/dd/yyyy hh:mm a>

rank: 108   *

advanced options

☑ restricted promo groups

accepted promo groups: Group A, Group B   ⊗   edit

☑ allow to combine with other promotions

☑ promo returns

☑ allow to combine with line discount

applies to discount reasons: Competitive Discount, Customer Loyalty Discount   ⊗   edit ⓘ

☑ allow to combine with global discount

applies to discount reasons: Employee Discount, Friends & Family   ⊗   edit ⓘ

☑ allow to combine with coupon discount

☑ allow to combine with membership discount

applies to membership levels: Family Membership, Silver   ⊗   edit

☑ restricted payments

accepted payment methods: American Express, Visa or MasterCard   ⊗   edit

save   cancel

Clicking **Add** brings up the following dialog.

Under the *For "Buy" Items Always Use* heading, the default selection is **Most Expensive**, meaning the most expensive item must be purchased by the customer, and the discount applies to the other item. However, change this if needed.

The rest of the options on this screen are for modifying the promo, including restricted promo groups, if this can be combined with different discounts, etc.

Click **Save** when finished to create the promotion.

Percent %

For a Percent discount type, the options are the same except for the area for setting the discount parameters.

Clicking **Add** brings up the following dialog.

promotion rule

buy 3   items and get discount percent 10.00

additional items get discount percent 10.00

ok   cancel

Amount $

Similarly as above, For an Amount discount type, the options are the same except for the area for setting the discount parameters.

new promotion engine

general

promotion type: buy more, get more

promotion name: New Promo   *

description:

promotion rules

discount type: amount $

add   edit   remove

buy	get discount	additional items get discount
3	$10.00	$0.00
5	$15.00	$0.00
7	$20.00	$0.00

Clicking **Add** brings up the following dialog.

promotion rule

buy 3   items and get discount amount $10.00

additional items get discount amount $0.00

ok   cancel

When editing an existing promo, there is a *Promotion #*which assigns a unique sequential number when a new promo is saved.
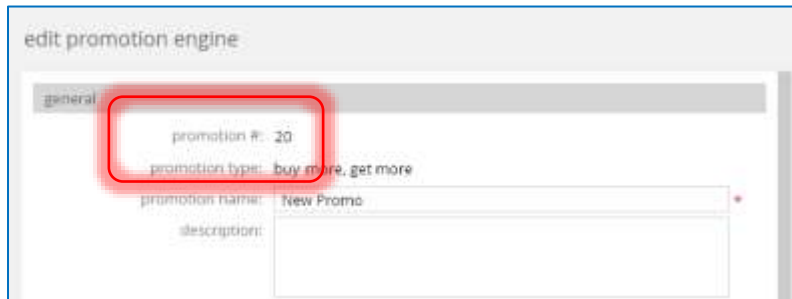
Users that don't have the "Add/Edit promotions" security right will see this screen as read-only.

Settings

There are new promotion settings to help rank different promotions under CHQ > Settings > Sales > Sales Documents.
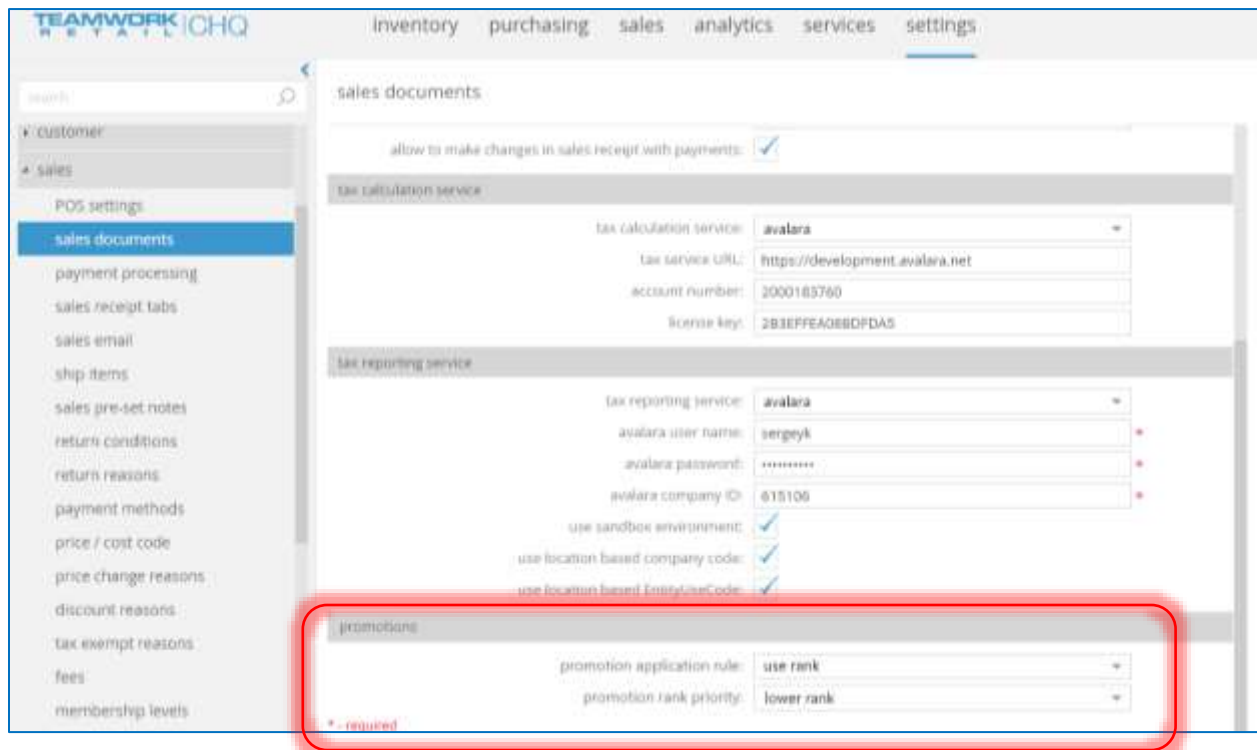
Set the *Promotion Application Rule* field as either **Use Rank** (promotions and used based on their ranking) or **Use Start Date, Then Rank** (promotions are applied first based on start date).

The two options under *Promotion Rank Priority* are **Lower Rank** and **Higher Rank**. If Lower Rank is set, and **Use Rank** is applied, then the promotion with the lower rank has higher priority (ranking of 1 vs 5).

Multiple Ship-To Addresses

Version 5.20 – TWD-4726 and TWD-9653

July 2018

We've added the capability to import a Sales Order with multiple Ship To addresses from the Web. We've also the capability to save a Sales Order with multiple Ship To addresses from POS.

Users can see and change Ship To addresses on an item level in CHQ.

NOTE

Multiple Ship Memos are created for a Sales Order with multiple Ship To addresses.

To accommodate this, each Sales Order has an *Order Shipping Address*, and an *Order Shipping Method*. By default, the address and method applies to all items on the order.

In item can also have an *Item Shipping Address*, and an *Item Shipping Method*. The address and method here would be specific to that item only.

Changing a Ship To Address

From the Sales Order details dialog > Items tab, click **Actions**.
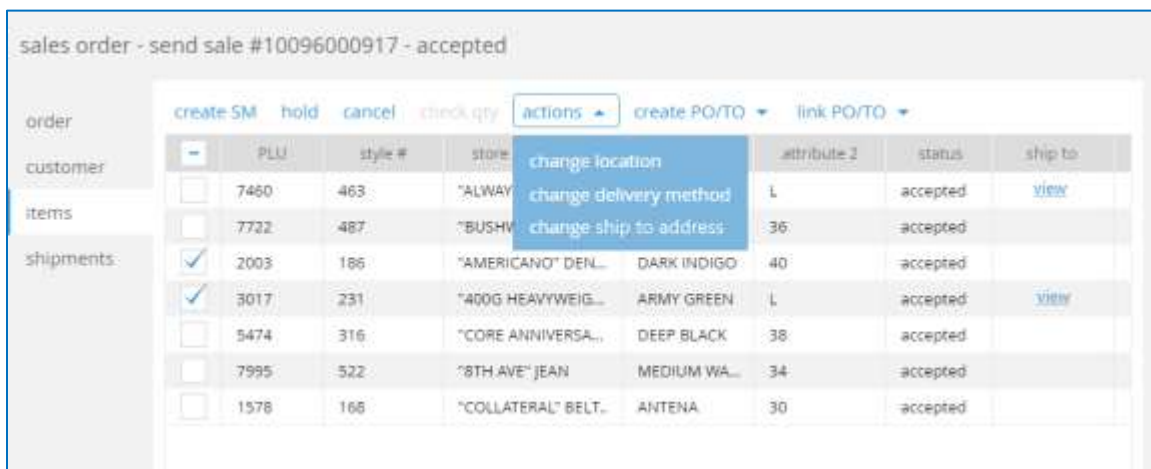
If **Change Ship To Address** is selected, the following dialog displays.

OMS – Partial Shipment

Version 5.20 – TWD-8975

July 2018

To allow for an order to be partially filled at a time on a Sales Order or Ship Memo the following new settings have been added under Settings > Order Management > Customer Orders > Web and Send Sales:

- *Allow Partial Fulfillment in SO/SM Lines* must be enabled
- *Send Sale – Lock Fill Location*: Can be set to Never, Ok, or Always.

Sales Orders

Order Tab

Changing the *Default Fill Location* brings up a confirmation dialog, depending on the settings for the order.

If all items have a delivery method of Ship, then the following dialog displays.

However, if one or more of the items on the order are set as Store Pick Up, then a different confirmation displays.

Items Tab

On a Sales Order, click the **Actions** button to display a drop-down with various options:
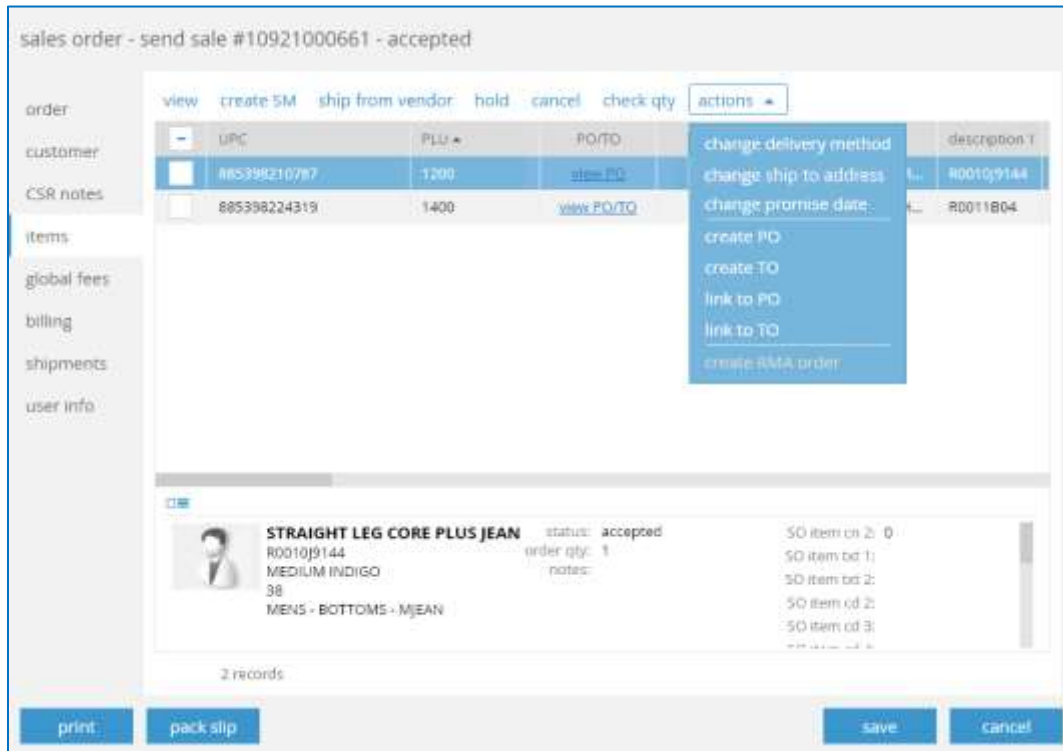
Change Delivery Method is disabled if order status is Delivery Pending, Completed, or Canceled. Selecting this brings up the following dialog. The available options are **Ship** or **Store Pick Up**.
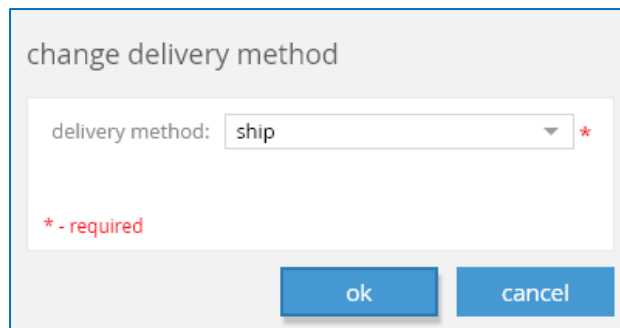
Change Ship To Address is only enabled if the order status is *In Review*, *Accepted*, or *Hold*. Clicking this brings up the following dialog.

Clicking the **Use Order Ship To** button will automatically populate with the address fields from the Sales Order header.

Clicking the **Use Bill To** button will automatically populate from the billing address.

Change Promise Date is enabled if the order status is *In Review*, *Accepted*, *Hold*, or *Delivery Pending.* Clicking this brings up the following dialog.

After saving (clicking **Ok**), and the promise date has been modified, when and who made the modification is recorded in the Promise Date History.

Back on the main screen, the Create PO button is disabled if the order is In Review, Delivery Pending, Completed, or Cancelled, or the user doesn't have the appropriate security rights.

If there are no errors, selecting this brings up the following dialog.
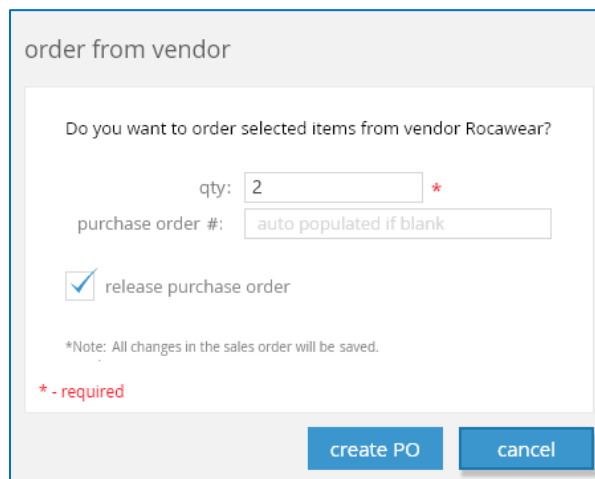
If more than one line is selected and <u>the selected items have the same primary vendor/fill location</u>, the following confirmation displays.
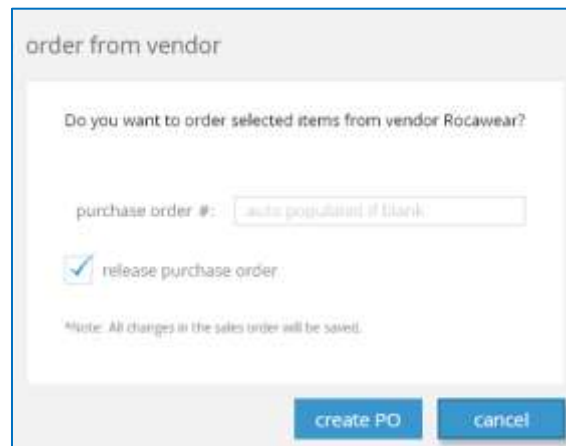
If the selected items have different primary vendors/fill locations, the following confirmation displays.

Similar dialogs displays for a Transfer Order.
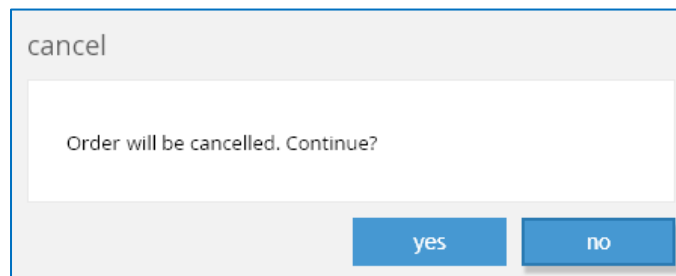
Clicking **Link to PO/TO** brings up the following dialog.

Settings

Under Settings > Sales > Payment Methods, there is a *Refund on Cancel in Teamwork* flag. When enabled, a refund is automatically processed when an order is canceled.
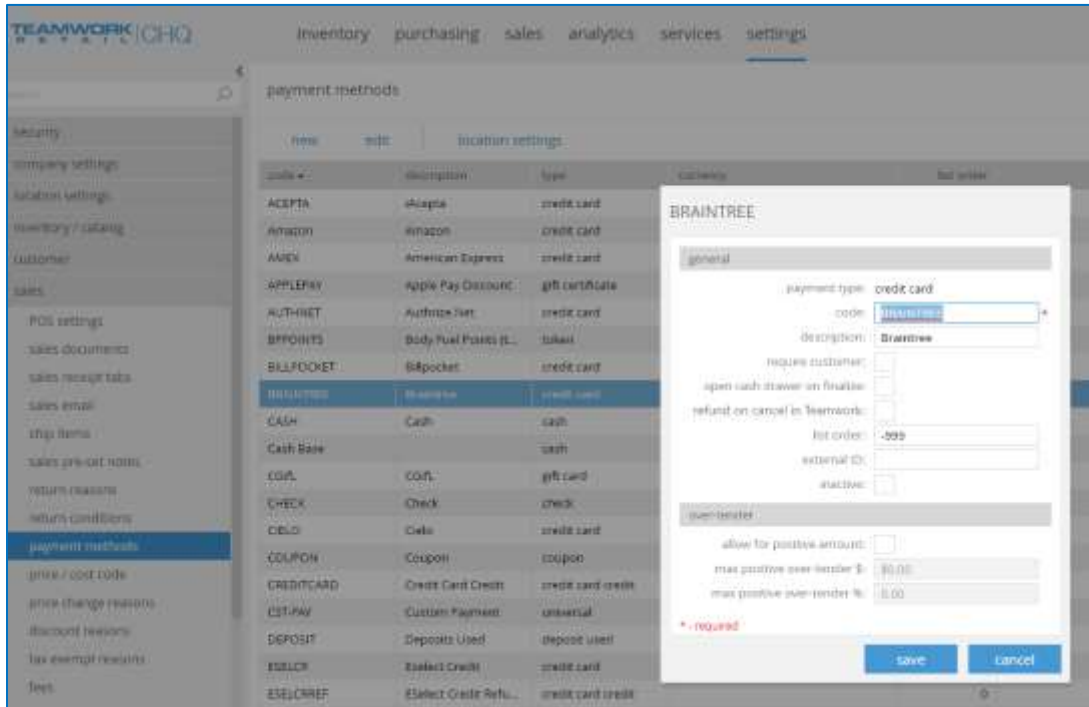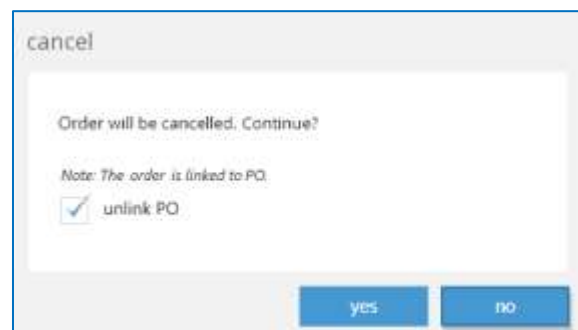

When an order is canceled, the typical confirmation dialog displays.

If the order is linked to a PO or TO, the following dialog displays.

If multiple items are selected on an order, then the Cancel button is disabled if the order is In Review, Delivery Pending, Completed, or Canceled.
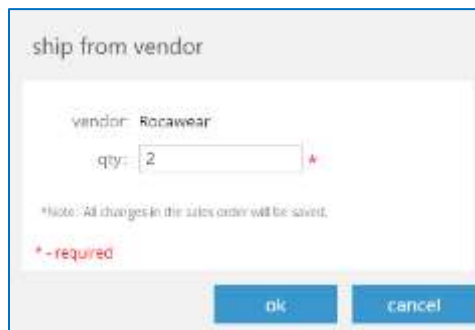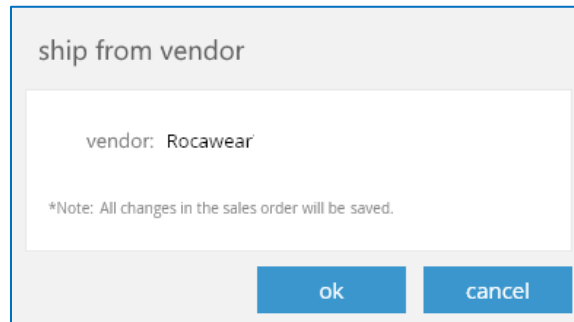
Ship From Vendor

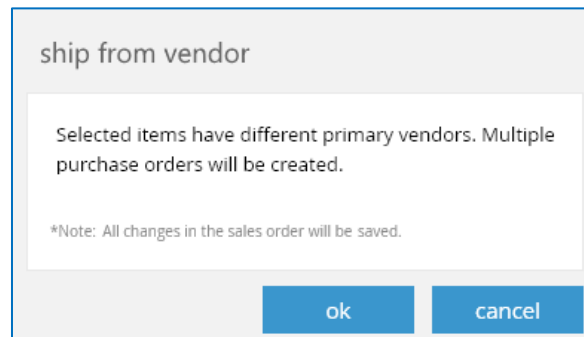Click **Ship From Vendor** if the selected item is shipping directly from the vendor.

This brings up the following dialog where you can see the vendor and can set the ship quantity.

If more than one item is selected, the dialog below displays.

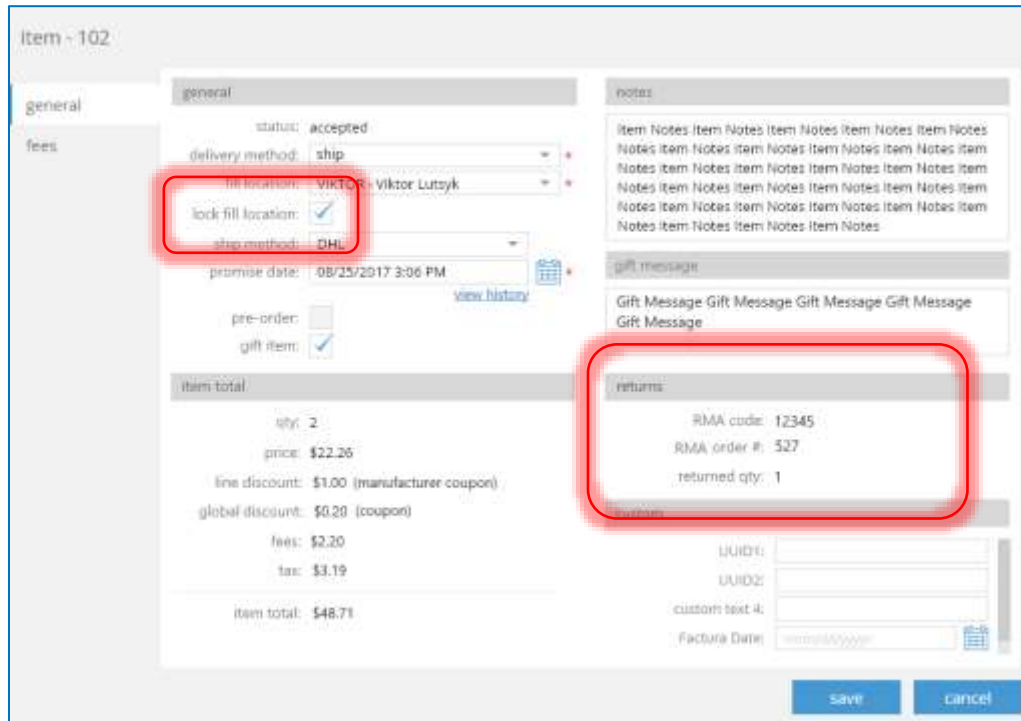Or, if there are multiple vendors listed, the dialog below displays.

Lock Fill Location

There are a couple changes made to the Items screen.

The Returns area has been moved, and there is a new *Lock Fill Location* flag added.

When enabled, *Lock Fill Location* prevents the Fill Location from being changed.

If multiple orders are selected and you click **Create SM**, if there are no errors, the following dialog displays where you can set the number of Ship Memos to create.
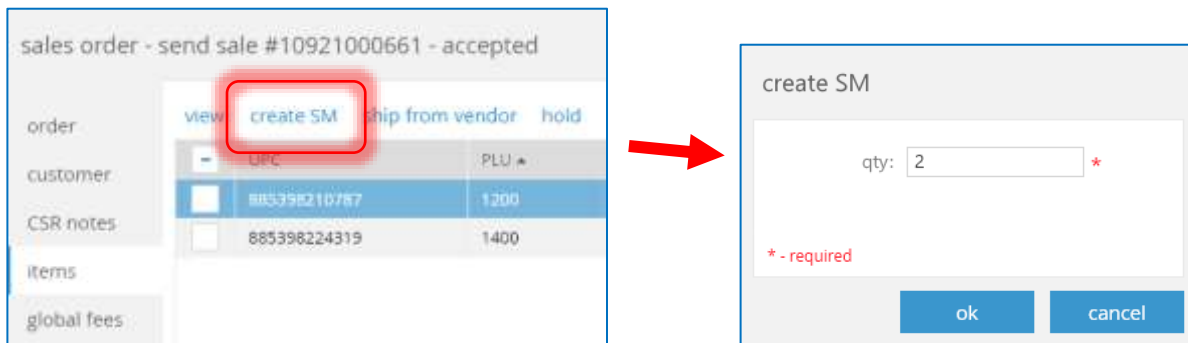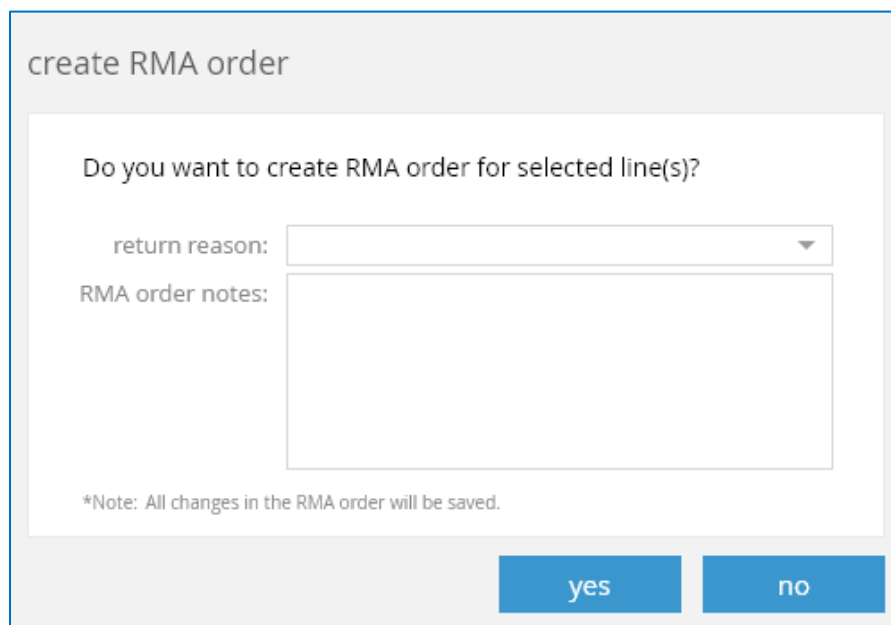
Create RMA

With the appropriate security rights, if the multi-select feature has been used to select orders, click **Create RMA Order**.
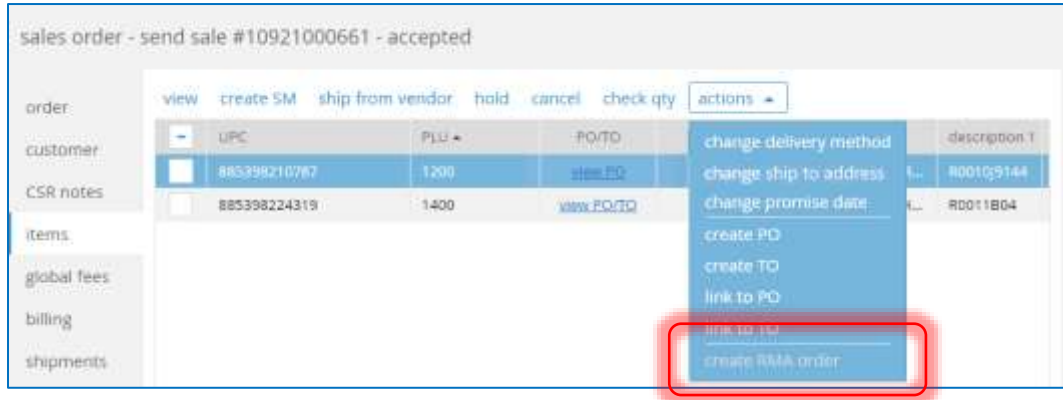
This brings up the following confirmation dialog.

Fill in the return reason and any necessary notes, then click **Yes** to create the order or **No** to close the screen without saving.

One RMA order is created per each selected line. If a Sales Order is already linked to an RMA order, then the existing order is updated, instead of creating a duplicate.

If any of the Sales Order lines have a fill quantity of zero, then the RMA order is not created for those lines.

Order Management List View

In the Order Management list view > PO/TO column:

- If the sales order is linked to a purchase order (or purchase orders) and is not linked to any transfer order, **View PO** displays
- If the sales order is linked to a transfer order (or transfer orders) and is not linked to any purchase order, **View TO** displays
- If the sales order is linked to a purchase order (or purchase orders) and a transfer order (or transfer orders), **View PO/TO** displays

Clicking any of those links brings up an information dialog. In this case, we selected **View PO/TO**.
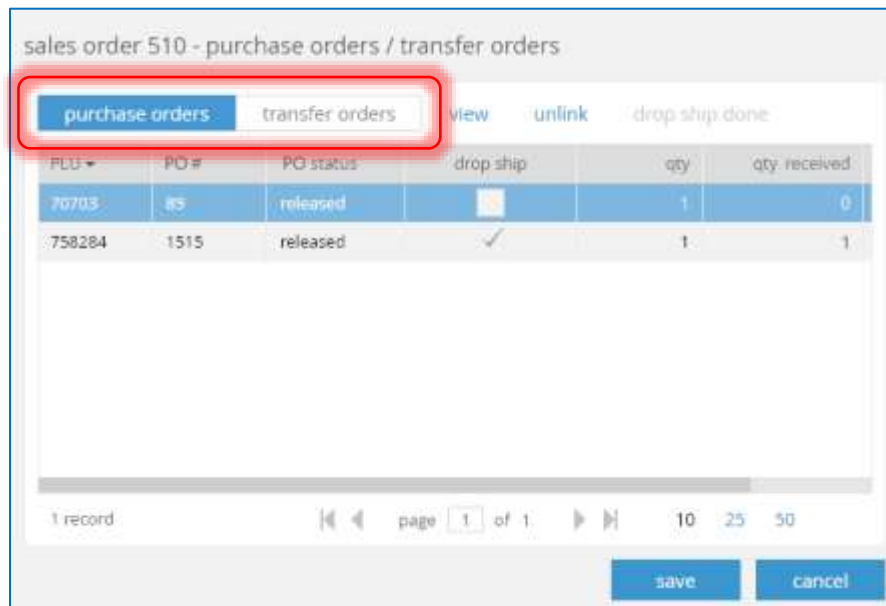
At the top of the dialog, you can toggle between viewing Purchase Orders or Transfer Orders by clicking each heading.

Click **View** to open a dialog to look at the Purchase Order details, or click **Unlink** to unlink the item from the order. This button is disabled for a drop ship order.

The options are the same under the Transfer Orders heading.
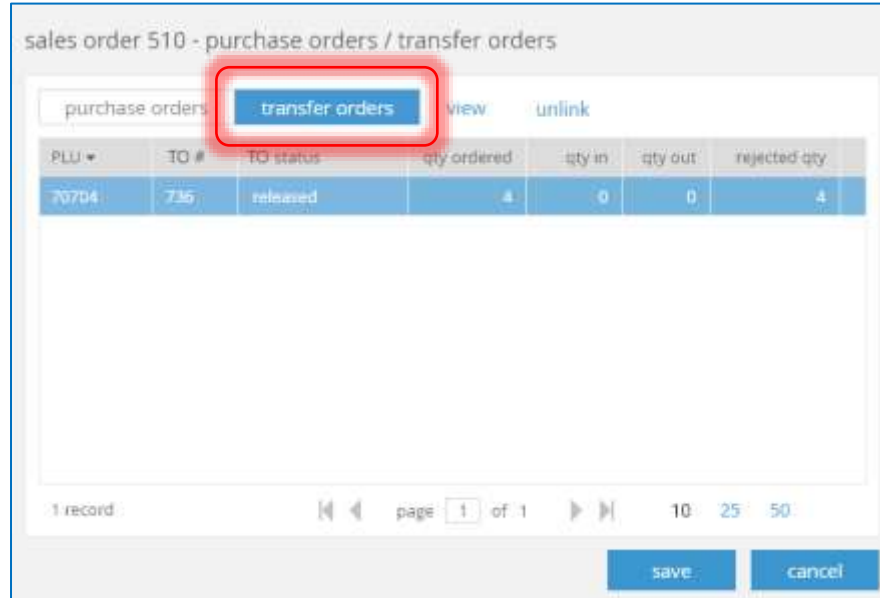
Partial Shipment in Order Fill Line

Version 5.20 – TWD-8977

July 2018

With the appropriate security rights enabled, this feature allows the Sales Order line to be partially shipped.

To allow this, the security right "Allow partial fulfillment in SO/SM lines" must be enabled. This can be found in CHQ > Settings > Order Management > Customer Orders > Web and Send Sales.

For example, if the SO line has a quantity to ship of 3, then a separate Ship Memo could be created for two of the items, and the third could remain unshipped.

Without this security right enabled, if the SO line has a quantity to ship of 3, then one Ship Memo with the quantity of 3 would be created.

Lock Fill Location

If the Lock Fill Location setting is enabled, then Ship Memos can't be created for locations other than the Fill Location.

Ship From Vendor Always

Ship from Vendor Always is a new step added after *Fill Items with Locked Fill Location* which is selected by default.

When enabled, it autocreates Ship memos and consumer drop ship POs for items with the following parameters:

- Delivery method is set to Ship
- Ship from Vendor is enabled
- Status is accepted.

When creating POs, if Sales Order items have a different primary vendor, ship to address, or shipping method, then multiple POs are created.

Settings

Under CHQ > Settings > Order Management > Order Fulfillment > Order fulfillment settings > General heading, there is a new *Delay for an Order in OFL (mins)* setting.

It often occurs that the customer wants to change the order after it has been placed. For example, if the customer forgot to apply a coupon or ordered the wrong size and wants to edit the order.

Once a Ship Memo is created, the order is no longer editable, so setting a time delay for the order allows for any potential customer changes while still being automated.

To edit this, click the blue edit circle. This brings up the following dialog where you can change the number of minutes the order is delayed.
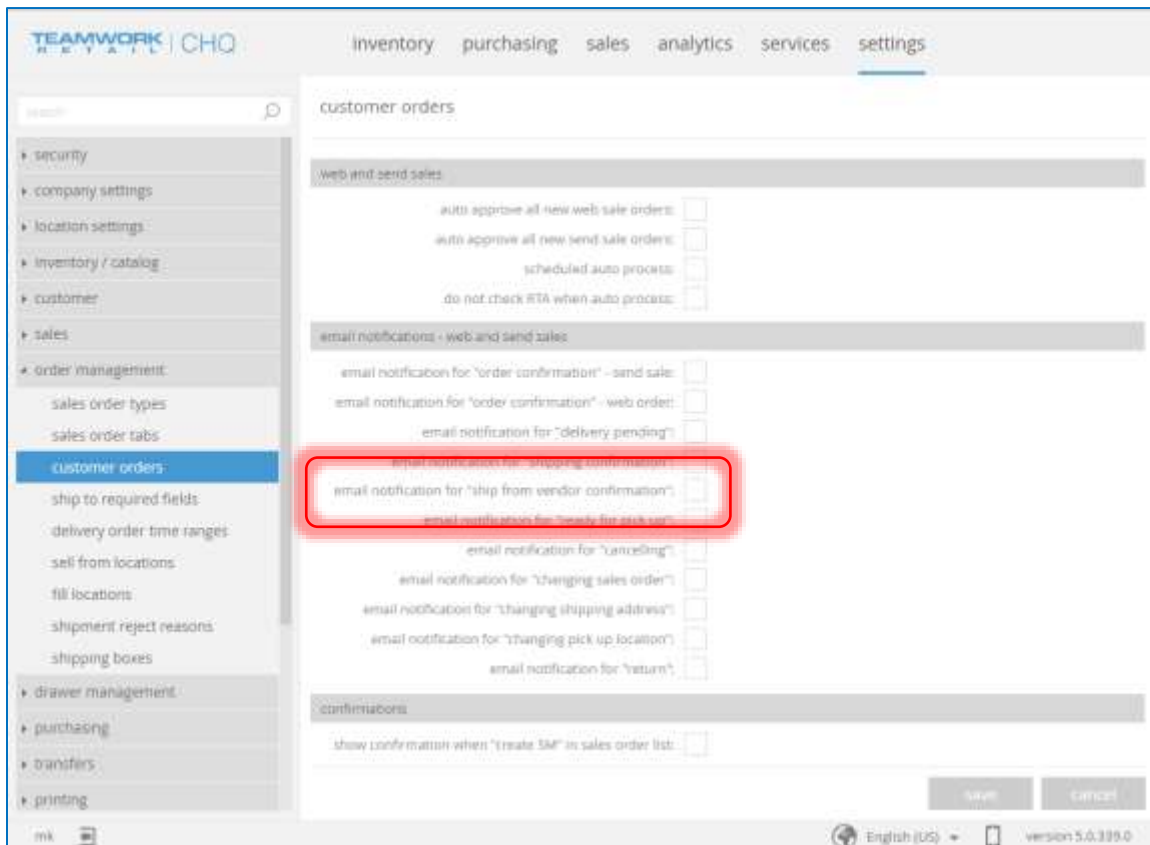

Changes in Email Notifications for Partial Shipments

Version 5.20 – TWD-10324

July 2018

In order to support the new partial shipments capability, we've made updates to OMS email notifications. This includes updating to support multiple shipping methods and shipping addresses, as well as adding a new field called *Ship from Vendor Confirmation*.

Virtual Gift Cards

Version 5.20 – TWD-10327

July 2018

We've added the following new fields for SO items which are virtual gift cards:

- Giftee email
- Giftee Name
- Send On (date)

If the *Send On* date is not filled in for a SO item that is a virtual gift card, then the gift card delivery email goes to the customer when the item is marked as completed.

If the *Send On* date IS filled in, then the gift card delivery email goes to the customer on or right after the *Send On* date.

If the email is scheduled, a **Cancel Email** button displays. Selecting this before the *Send On* date cancels the email from being sent out.
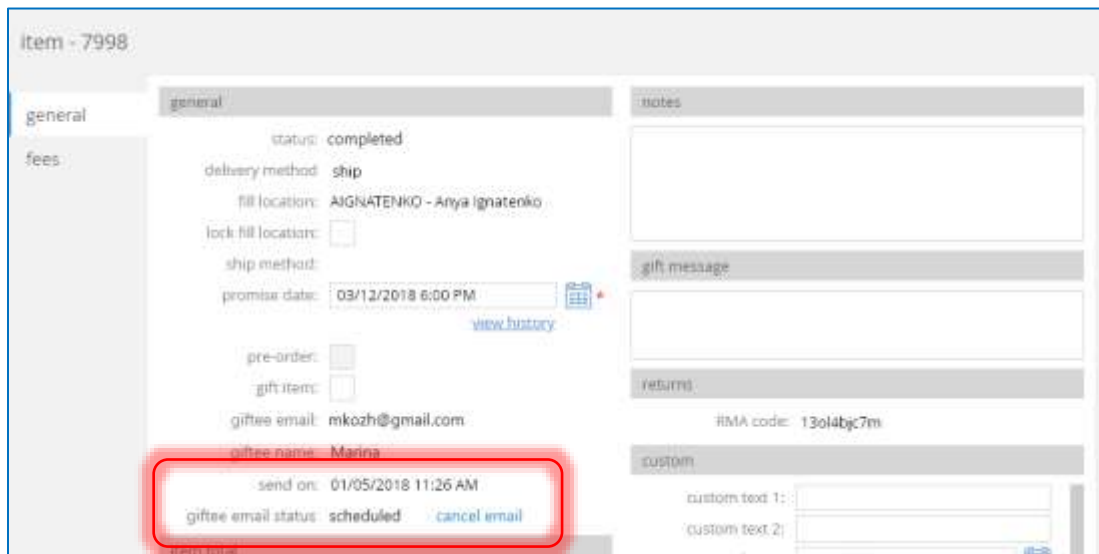
Style Description Extended to 64 Characters

Version 5.20 – TWD-7133

July 2018

Currently the Style description are limited to 50 (Description 3 and 4) and 30 (Description 1 and 2) characters.

We've extended the limit to 64 characters each in CHQ and Import APIs.

Customer Info in Store Pickup

Version 5.20 – TWD-9149

July 2018

For an OMS store pick up order, Ship-To info is not required. If the *Delivery Method* is Store Pick Up, information for an alternative pick up person displays instead of ship-to information.

Delivery Order Logic Removed

Version 5.20 – TWD-9165

July 2018

The Deliver Order type of Sales Order has been removed.

Purchasing

Consumer Drop Ship PO

Version 5.20 – TWD-9148

July 2018

There is a new PO type called **Consumer Drop Ship**. The following changes have also been made to this area:

- PO Distribution Type *Drop Shipments* has been renamed to *Multi Location*.
- If the PO type is *Consumer Drop Ship*, then a Ship To address is added.

When all items on an order are linked to the same Sales Order set to drop ship, the *Distribution Type* is automatically change to **Consumer Drop Ship**.
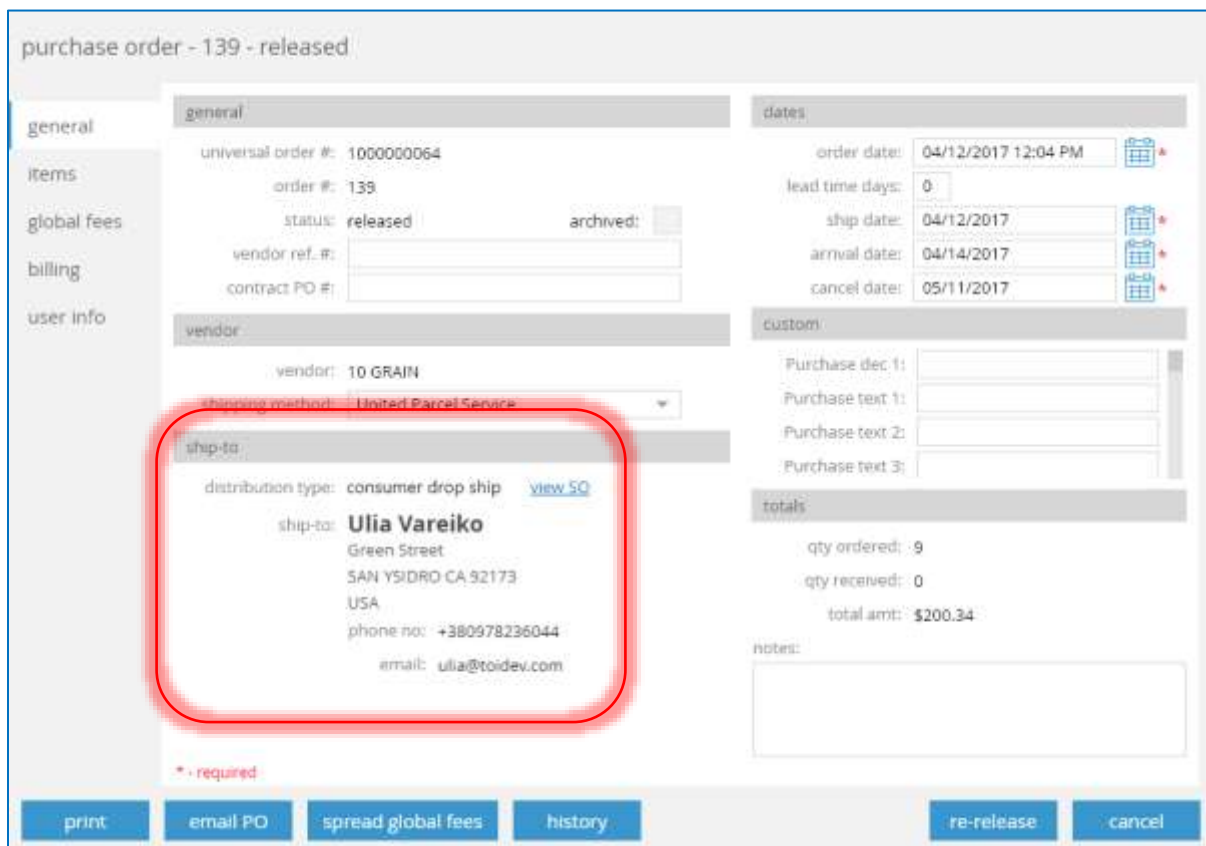

Clicking the blue **View** link in the *Ship To* column brings up the following dialog where you can see the ship to address and customer information.

If there are multiple ship to addresses, the following dialog displays.
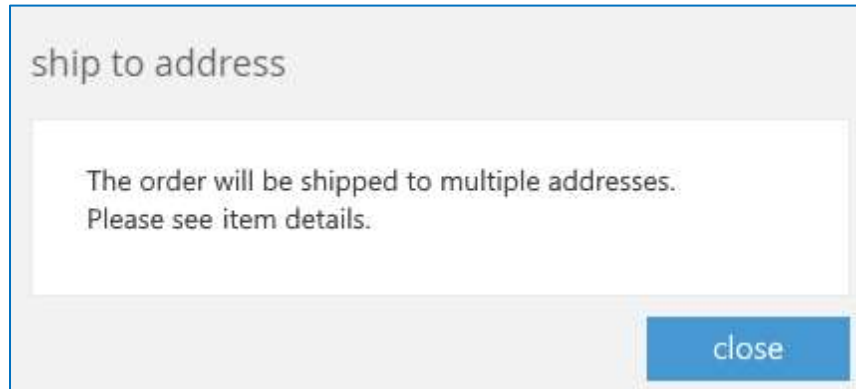
PO Details Dialog

On the Purchase Order details dialog, this same customer information can be viewed under the Ship To area. Information here includes the *Distribution Type* and *Ship-To address.*

For a Sales Order with multiple Ship-To addresses, the area looks like this:

Items Tab

Under the Items tab, if you want to view the Ship To information, click the blue **View** link.

This brings up the same information dialog as on the General tab.

With the appropriate security rights enabled (PROCSALEORD), the Archive button may be visible with the right order parameters. Clicking **Archive** brings up the following dialog.

If visible, the **Drop Ship Done** button brings up the following dialog. Here you can edit the shipping information on the order.

If the quantity set is less than the PO quantity, then a confirmation dialog displays.
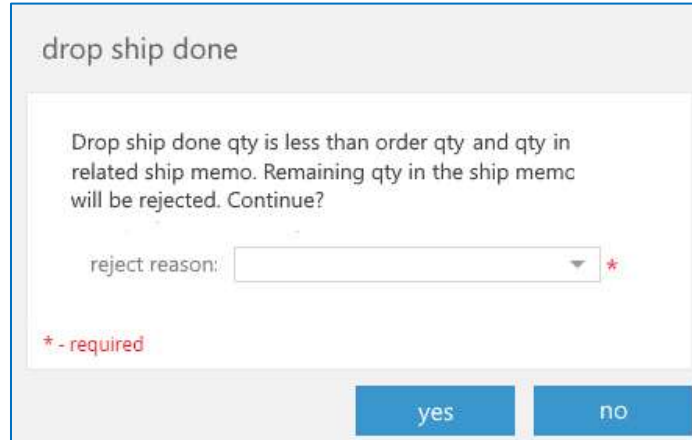
A *Reject Reason* MUST be selected before saving the dialog.

Purchase Order Import

On a new purchase order import screen, it now says *Multi Location* instead of *Drop Shipments.*

This has also been changed on the import template (after clicking the **Download Template** link).

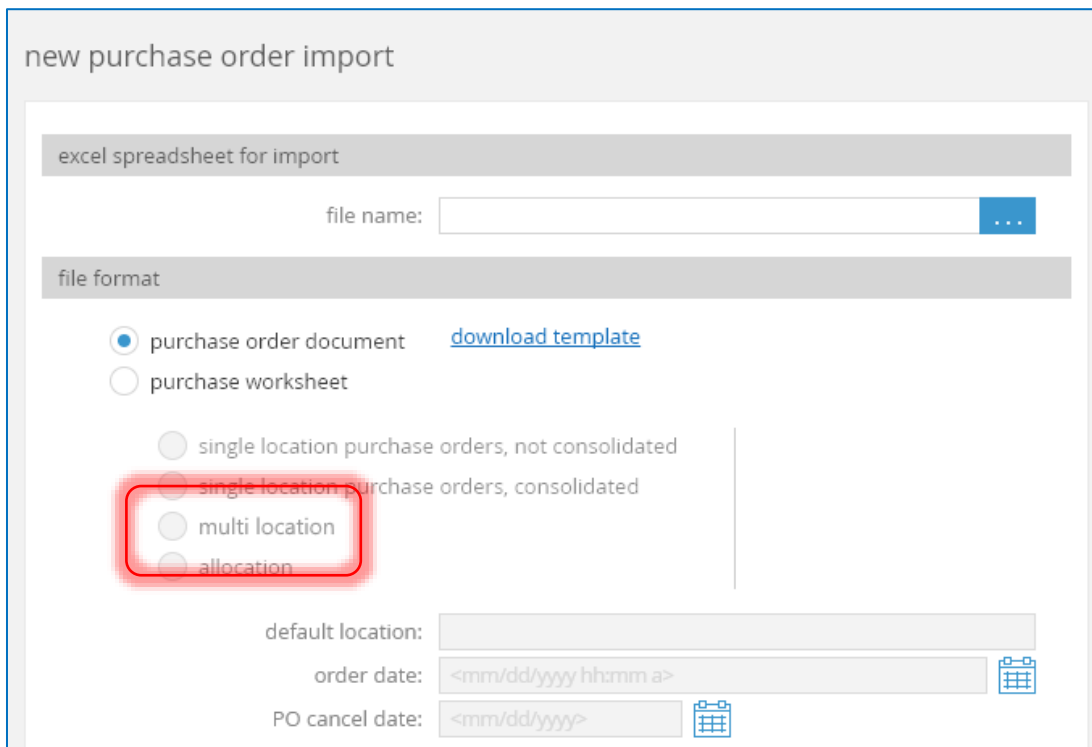|	I	J	K	L	M	N	
al	Optional: will be populated with TODAY date	Optional: it will be calculated based on order date and lead time from vendor	Optional: it will be calculated based on ship date and shipping method from vendor	Optional: it will be calculated based on Order Date	Required. Possible values: single location, multi location, allocation, consumer drop ship.	Required	Required if type is "c
ef. #	order date	ship date	arrival date	cancel date	distribution type	ship-to location code	allocation l

Buyer Field

Version 5.20 – TWD-7016 & TWD-11091

July 2018

We've added a new Buyer Field to Purchase Orders. This shows who the buyer is, and also allows for filtering records by Buyer Code.

Under Settings > Purchasing > Buyers, you can now add new and edit existing buyers.
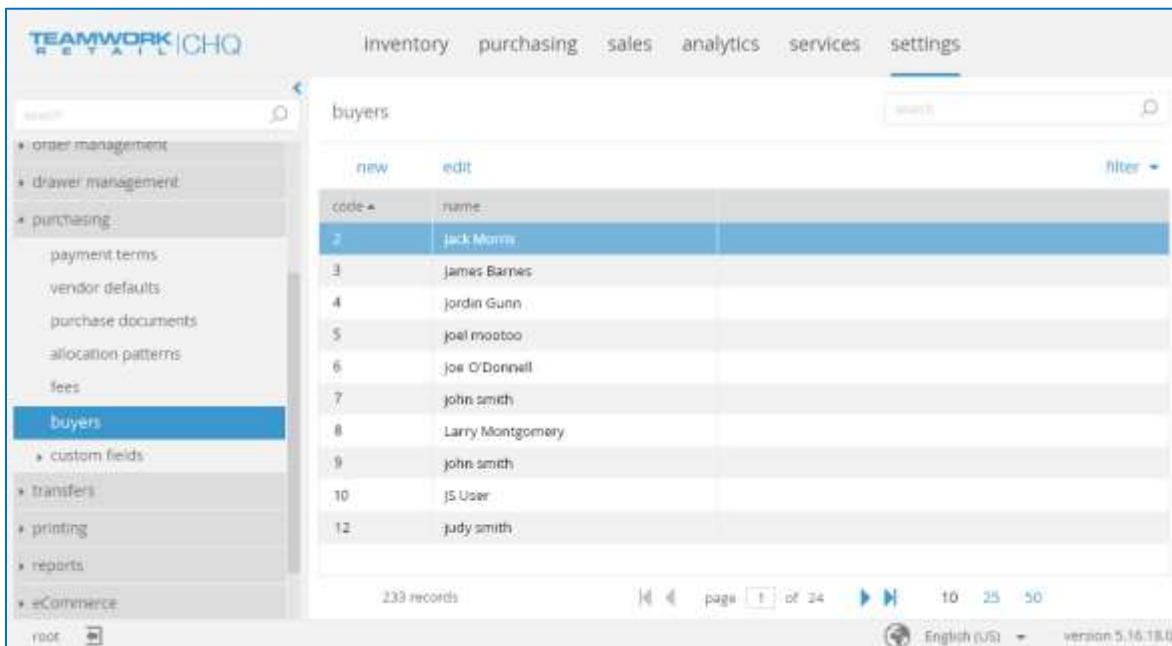
Select **New** to create a new Buyer.

The *Code* is the order the buyer will display in. For example, here the *Code* is **3,** so two other buyers will display ahead of this one.

Select **Edit** to edit an existing buyer.

In a Purchase Order, the *Buyer Code* field displays. The options in the drop-down pull directly from the buyers created in Settings > Purchasing > Buyers (shown above).

Under Purchasing > Purchase Orders, you can filter by the Buyer Code.
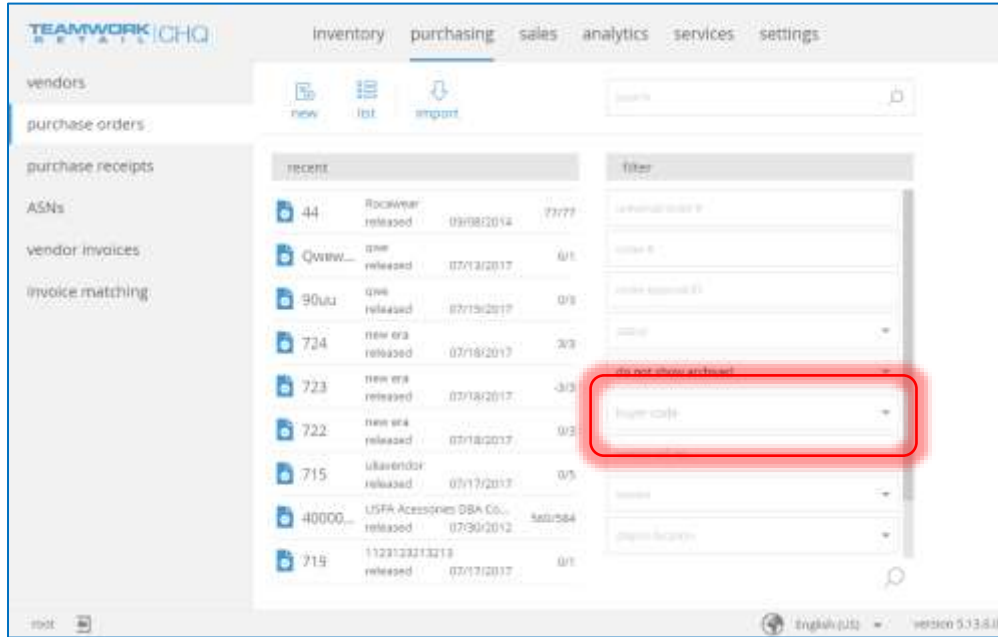
PO Document Import

A buyer can be assigned on the order level when importing POs.

On the import template, the *Buyer Code* column displays after the *Vendor Ref. #* column.

Arrival Date

Version 5.20 – TWD-7353
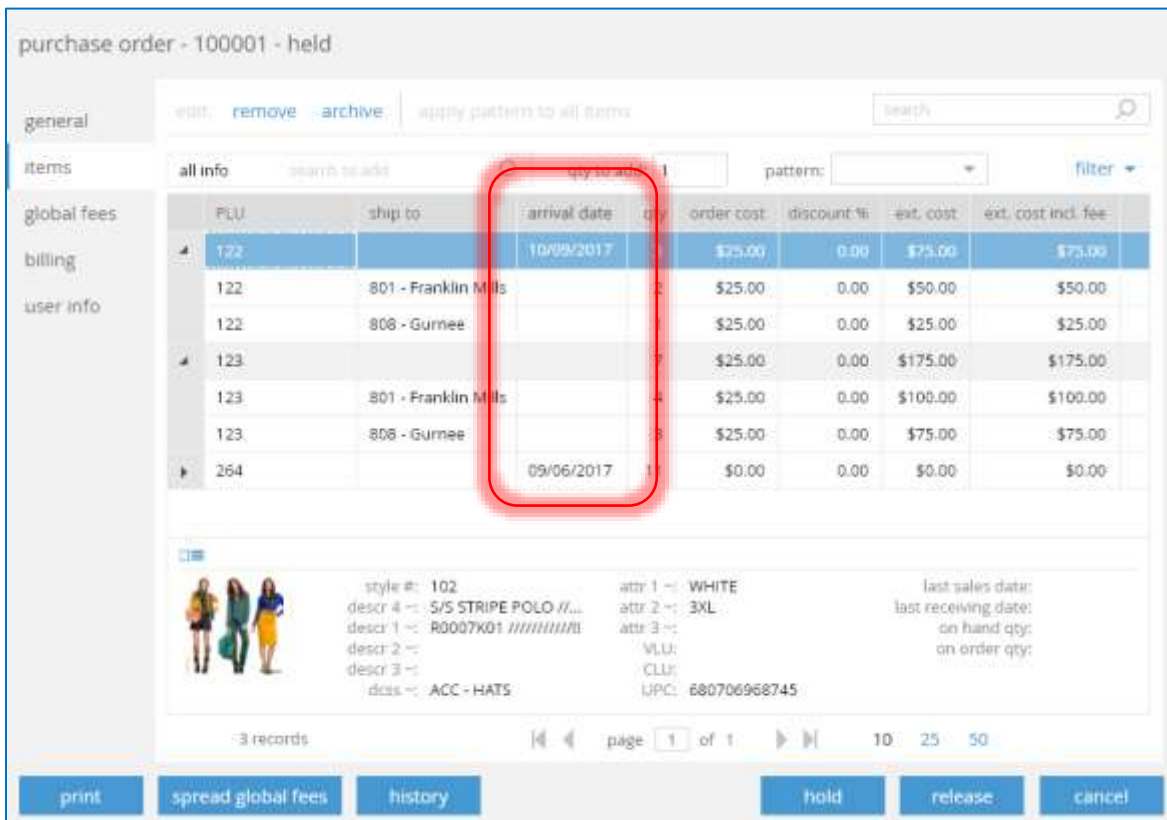
July 2018

In order to be able to change the arrival date on an item level in CHQ, we've added an *Arrival Date* to the Purchase Order item level.

The *Arrival Date* column has the following parameters:

- Can be edited at the item level
- Can't be edited in read-only mode
- Can't be earlier than the Order Ship date
- By default is empty for a new PO line
- Value is empty/unable to be edited for multi-location and allocation POs
- An Arrival Date is not required to save the PO
- By default, is not visible unless set to display

When editing a PO, the *Arrival Date* displays under the Ship-To area.
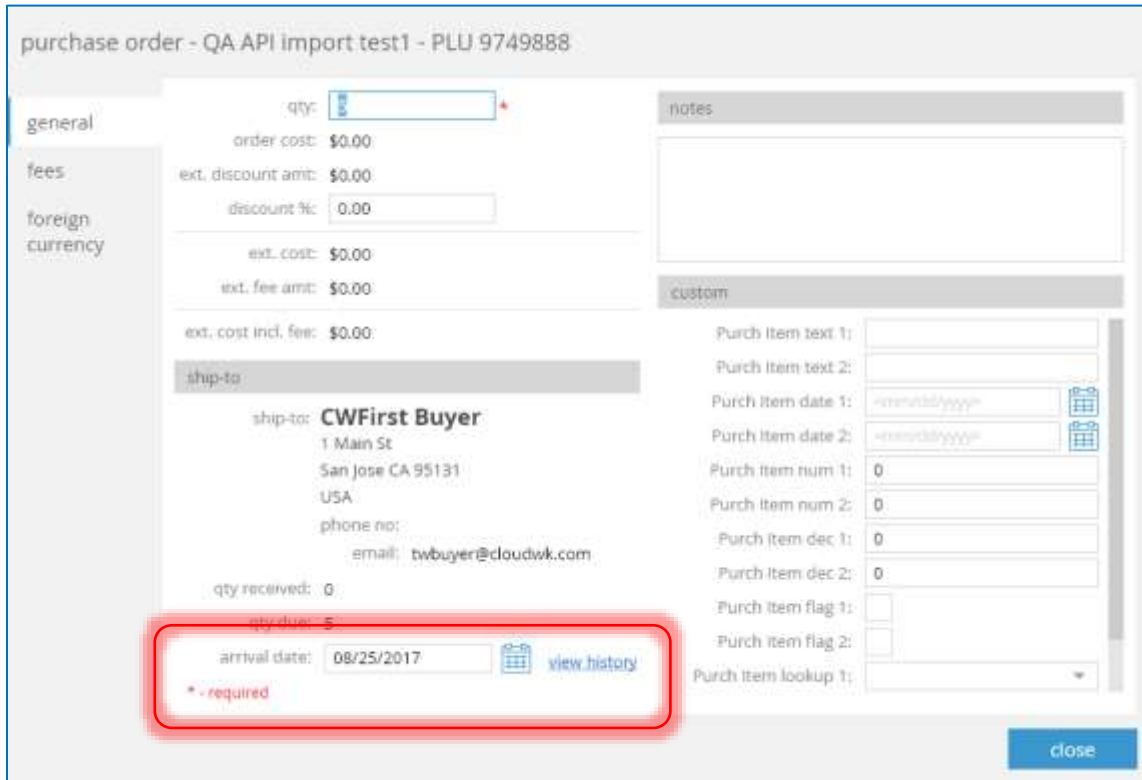
Clicking **View History** brings up the Arrival Date History dialog.

If enabled, the Arrival Date column also displays when viewing the Purchase Order history.

Inventory

Reserve Orders

Version 5.20 – TWD-10151

July 2018

The purpose of this feature is to create reasons for restricting inventory as a fulfillment resource and, optionally, restricting it from "Available to Sell" calculations.

Settings

Go to Settings > Inventory/Catalog > Reserve Reasons.
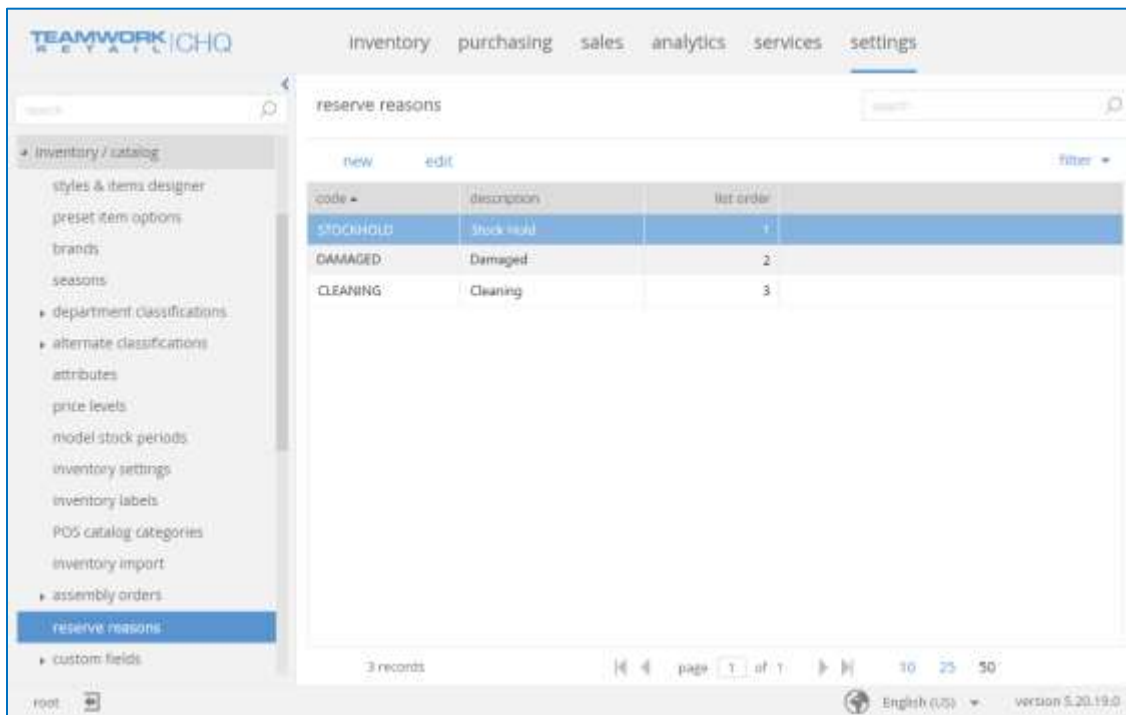
Click **New** to create a new reserve reason.

The *Code* determines the order the reason is displayed in.

New Security Rights

Right Name	Area	Description
Reserve Orders – Access	Reserve Orders	Access to Reserve Orders
Reserve Orders – Add/Edit	Reserve Orders	Add a new Reserve Order or edit existing Reserve Orders
Reserve Orders – Discard changes	Reserve Orders	Reserve Order – Discard another user's unsaved changes

Reserve Orders

There is a new Reserve Orders tab under Inventory. Here you can create new Reserve Orders, or edit existing ones.
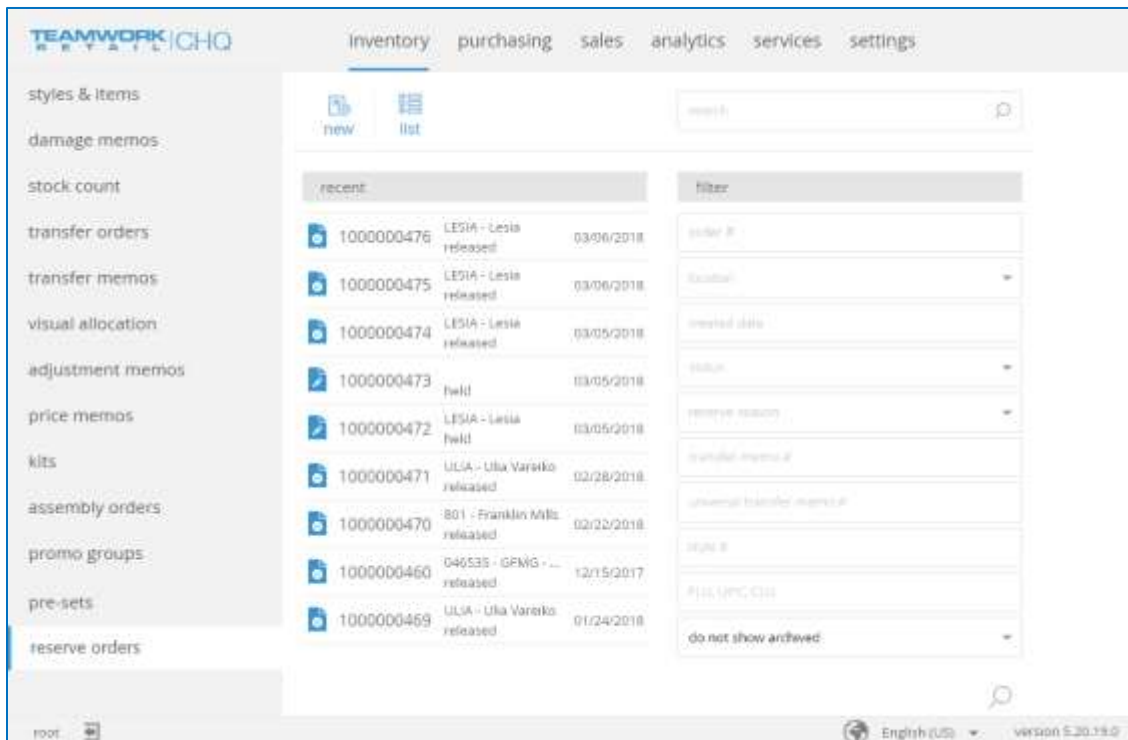
Clicking the **List** view displays the orders like this:

Related Items

Version 5.20 – TWD-9010

July 2018

In the Inventory Item Style/Model form, there is a new tab called *Related*. This shows any products that are related to the item (similar items or cross-sells, etc.)

This tab is available to view for item, style, and service type items.

The available options for the related item are:

- Related: A similar item. For example, other t-shirts of a similar style.
- Up-Sells: An item that is more expensive than the current item. For example, a regular pair of sneakers vs a limited-edition pair.
- Cross-Sells: A related item of a different type. For example, the item is a tent and the cross-sell is a sleeping bag.

For example, if searching to add **shirts,** an item search dialog displays. Here you can click to add items to the related list.
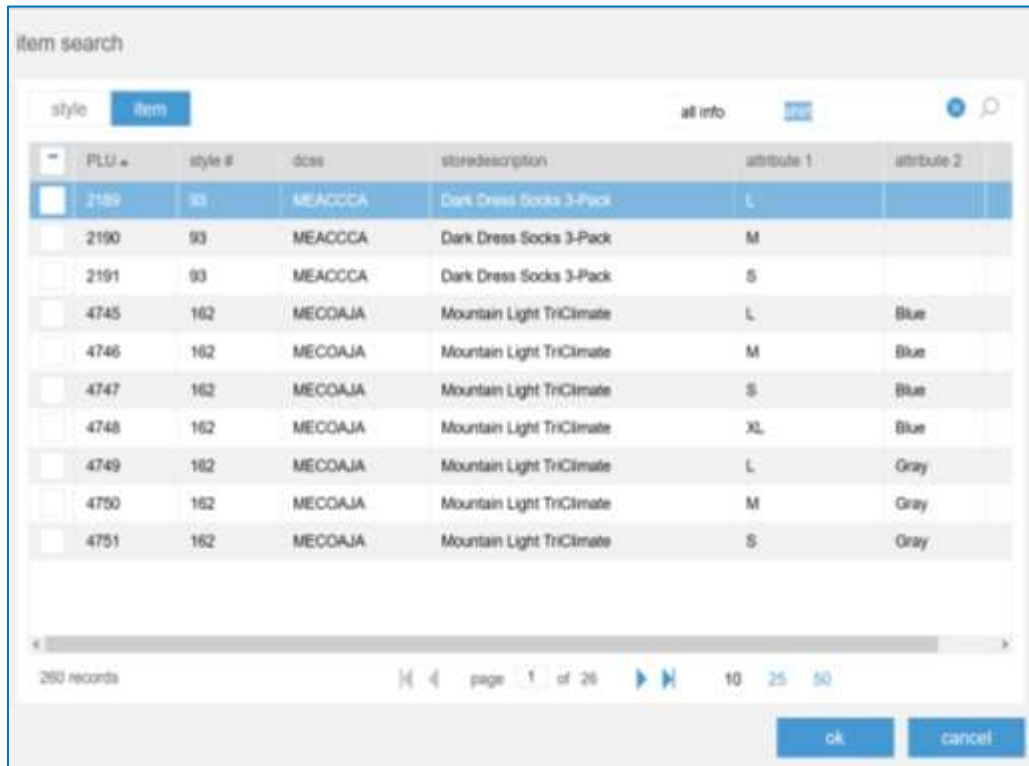
There are three ways to relate product to each other:

- Relating Styles to Items
- Relating Items to Items
- Relating Items to Styles

Below is an example of relating Styles to Items. Select items to include from the row on the right side of the screen.
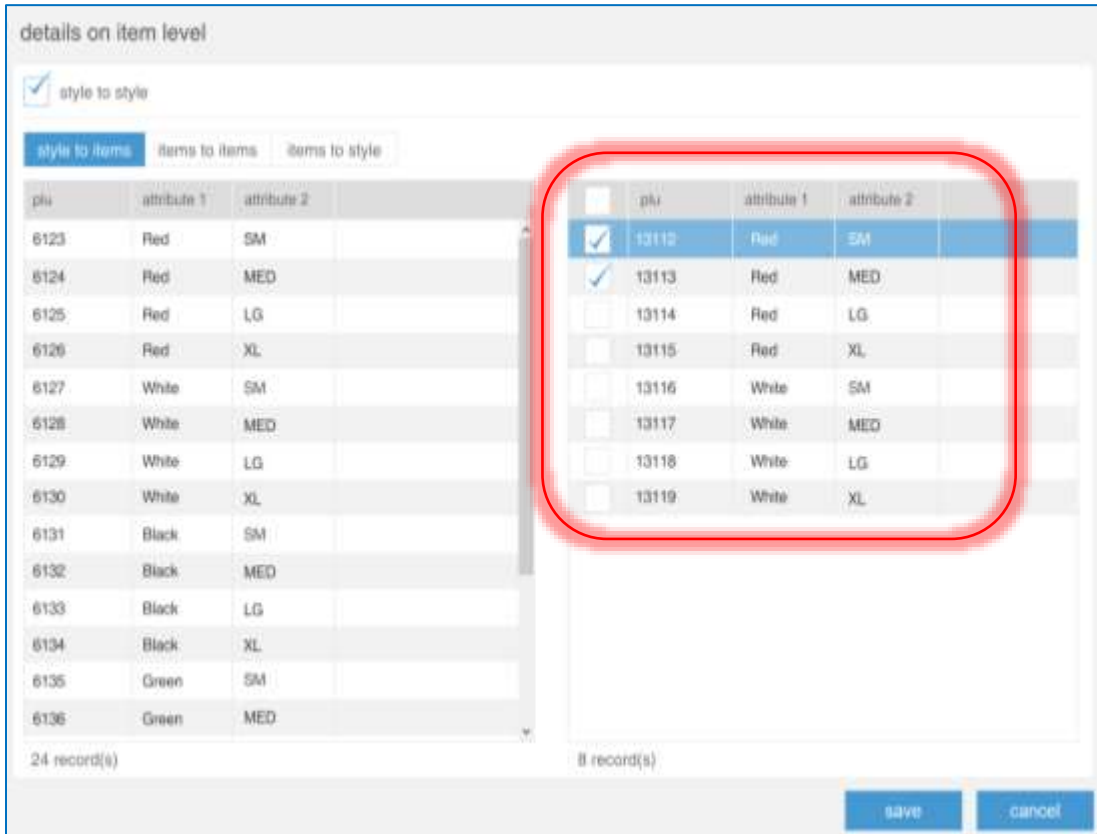
For Items to Items, select a row from the column on the left (read-only), and then select the related item in the column on the right.
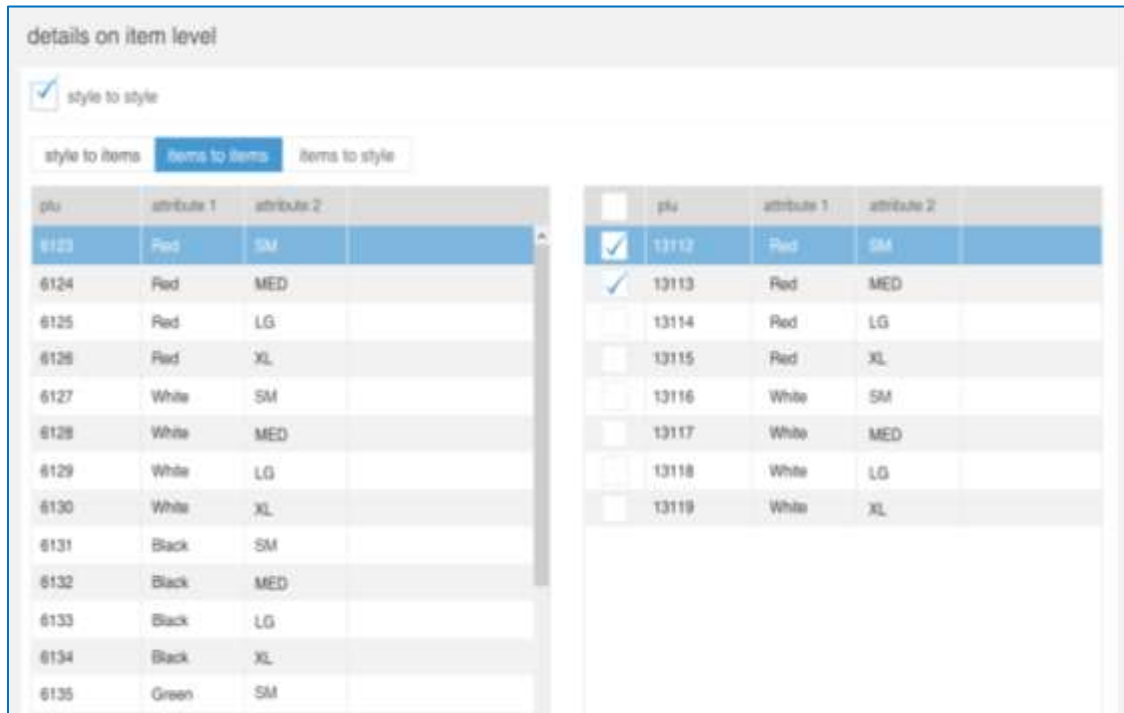
For Items to Style, select items in the left column to include (the right column is read-only).
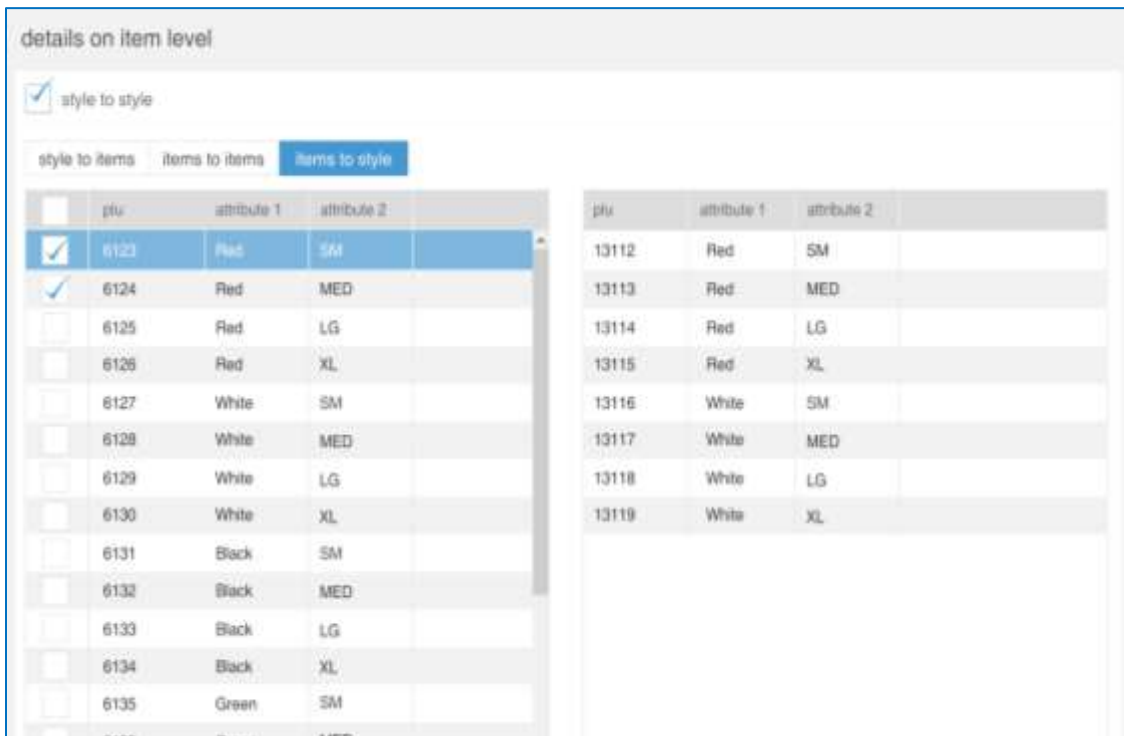
Kit Order Corrections (Formerly Assembly Order)

Version 5.20 – TWD-9940

July 2018

Assembly Orders have been renamed to be Kit Orders. There have also been other changes to the workflows.

Security Rights

Area	Right	Description
Inventory	Allow to edit kit with quantity on-hand.	Allow editing of a kit definition with quantity on-hand.

Settings

Go to Settings > Inventory/Catalog > Kit Orders > General to set up a scrap location. This one location will be used for the scrap location for any location that creates kit orders.
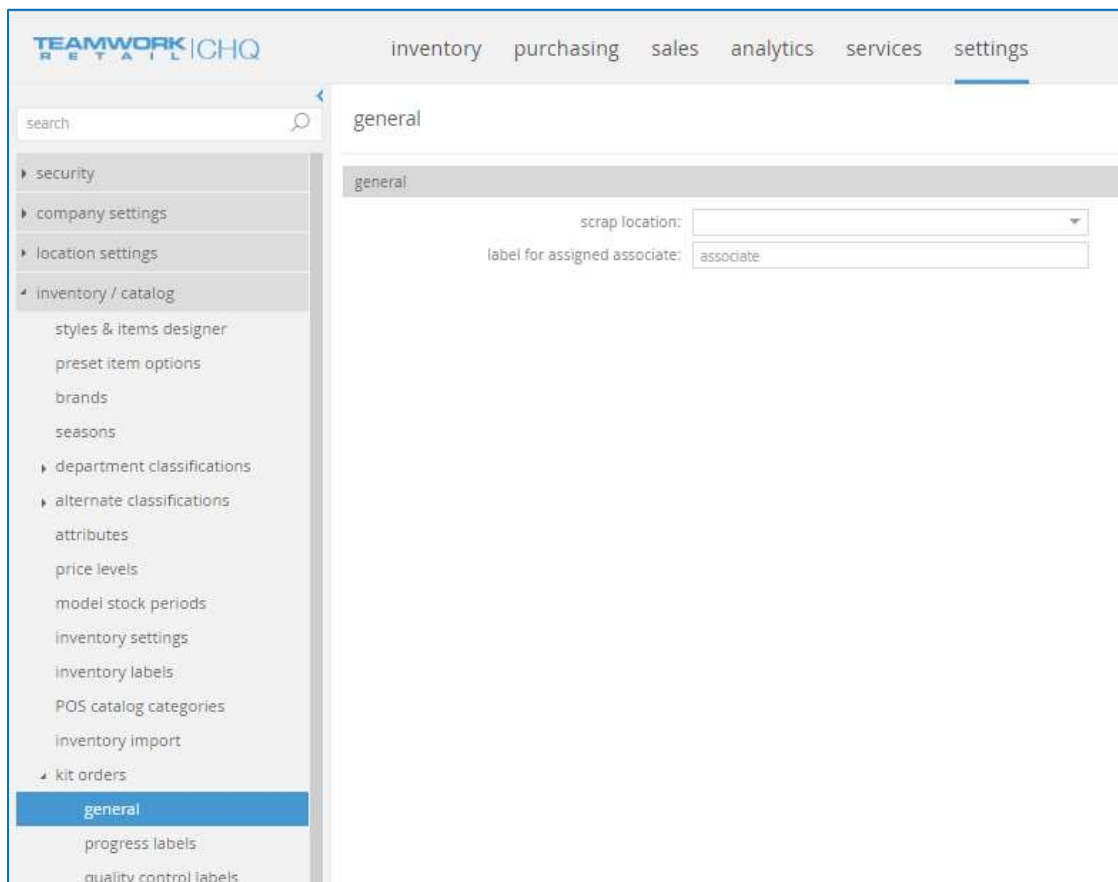
Kit Definitions

Kit definitions are updated to now reference one or two different items in inventory. On Kit Orders, the user will select if they are assembling for a finished good or prep batch, or using a prep batch to create the finished good.

- Finished Good: An item in inventory that, when the kit is assembled, the component items are used to create the item in inventory.
- Prep Batch: A different item in inventory that refers to component items that have been gathered up and put in bags ready for assembly. When creating a prep batch on a Kit Order (KO), the component items listed are removed and one prep batch item is added.

When the **Assemble** button is selected, the following dialog displays.

There are three possible selections from the drop-down:

- Finished good from raw material: Indicates the finished good item will be created for the component items listed on the kit.
- Prep batch from raw material: Indicates the prep batch item will be created for the component items listed on the kit.
- Finished good from prep batch: Indicates that a finished good item will be created and a prep batch item will be deducted from inventory.

Workflows for Extra, Missing, or Defective Items

a. If one or more components are missing in a prep batch (error in physically pulling from stock):
   i. Go to the raw material shelf and take one
   ii. There is no system change needed as the deduction was already recorded (but not physically taken)
b. If there is an extra component in the prep batch (user accidentally pulled more than recorded):
   i. Go to the raw material shelf and put the extra component back
   ii. There is no system change needed as no deduction was recorded (but was physically taken, just can be returned)
c. If there is a defective component in the prep batch:
   i. Option 1:
      1. Go to raw material shelf and take a non-defective component from stock
      2. Manually transfer the defective item from raw materials to scrap locations
      3. Build all finished goods on the order as originally defined
   ii. Option 2:
      1. Return one prep batch to stock and reduce the quantity to build by one on the kit order
      2. Manually disassemble one prep batch
      3. Manually transfer defective item to the scrap location
      4. Build all finished goods on the order as originally defined, minus the one defective prep batch
      5. Optionally, make a new order for one missing finished good.

Other Enhancements

App Theme Designer
Version 5.20 – TWD-6926

July 2018

We've added a new setting in CHQ to define the layout of fields in various areas. This settings is under Company Settings > App Theme.

Here you can create a "theme" that will be used by all devices at all locations.
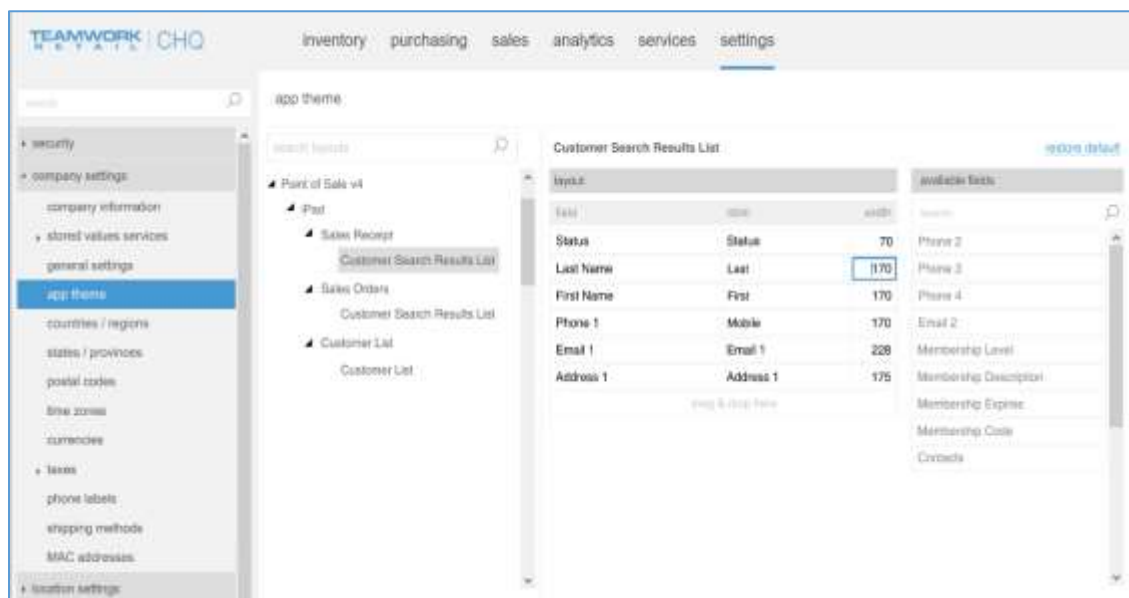
The left side of the dialog shows the apps/devices/areas supported by the designer. You can also use the search field to look for something specific, such as Point of Sale.

Under the *Layout* column, the number of fields defined here may be different for iPad vs. iPhone/iPod.

Each of the listed fields can be dragged up or down to define the display order. Fields can also be dragged and dropped from the *Available Fields* column on the right (to add a field) or moved from left to right (to remove a field).

To drag and drop, simply long click on that field and wait until becomes moveable, and then place where you want.

At any time after you've made changes, select **Restore Default** to reset everything back to the standard settings.

Assign Import

Version 5.20 – TWD-9510

July 2018

This is a number assigned by the Mexican government to items purchased by a retailer for sale at their stores. This number is assigned when products are shipped and received by the retailer, so it is typically not available for entry on the PO typically.

It is entered when creating a Purchase Receipt and is typically the same code per receiving document, but may have several different per receiving if receiving multiple shipments at once.

Because of this, we have added a new *Import #* field in the following areas:

- Sales Receipts
- Purchase Receipts
- Adjustment Memos

Example:

Date	Qty	Import #
12/12/2017	5	11 04 6328 0004781
12/15/2017	20	10 47 3807 8003832
12/17/2017	10	11 06 6658 0228414

As sales receipts are received by CHQ, the Import # would be assigned to the line item from the oldest record first.

In the above example, as the first 5 items are sold, the Import # for the first receiving would be assigned to items in sales receipts. Once those first 5 are sold, then the Import # from the second receiving instance would be used, and so on.

Epilogue

This manual was published on 1 October 2018 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.