



# TEAMWORK CHO RELEASE GUIDE

Version 5.22

## Table of Contents

Sales and OMS.....	3
OMS – Auto Process Function .....	3
Web-Based Wholesale Orders .....	10
Web-Based Wholesale Order – Import .....	19
Final Sale on Catalog and Sales Orders.....	21
Inventory .....	24
Availability .....	24
New Field Added to Inventory Catalog .....	26
Promo Group Types.....	27
Item-Detailed Invoices.....	30
Purchasing .....	31
Acknowledgment Status .....	31
Vendor Invoice Import .....	34
PO – Label for “Buyer” Field .....	36
Other Enhancements .....	37
Adyen Payment Integration.....	37
Adyen Support – Partial Capture .....	38
Map Web Order # in Adyen .....	39
Original Authorization for Partial Capture with Adyen .....	39
COGS Attribute to SR Export API .....	39
Reserve Order Import API.....	40
RMA Worksheet Import API.....	41
Attribute Value Aliases .....	42
Font Color Changed for Placeholder Text .....	42
Bug Fixes .....	43
Set Up Matrix Opening .....	43
Available Quantities .....	43
Kit Orders – Progress in KO List View .....	43
Kit Orders – Progress Column.....	43
Kit Orders – Release Button.....	43
Epilogue.....	44

# Sales and OMS

## OMS – Auto Process Function

Version 5.22 – TWD-12343

August 2018

We've added an auto process function to Return Worksheets. This allows for finalizing all returns on a worksheet that meet the following conditions:

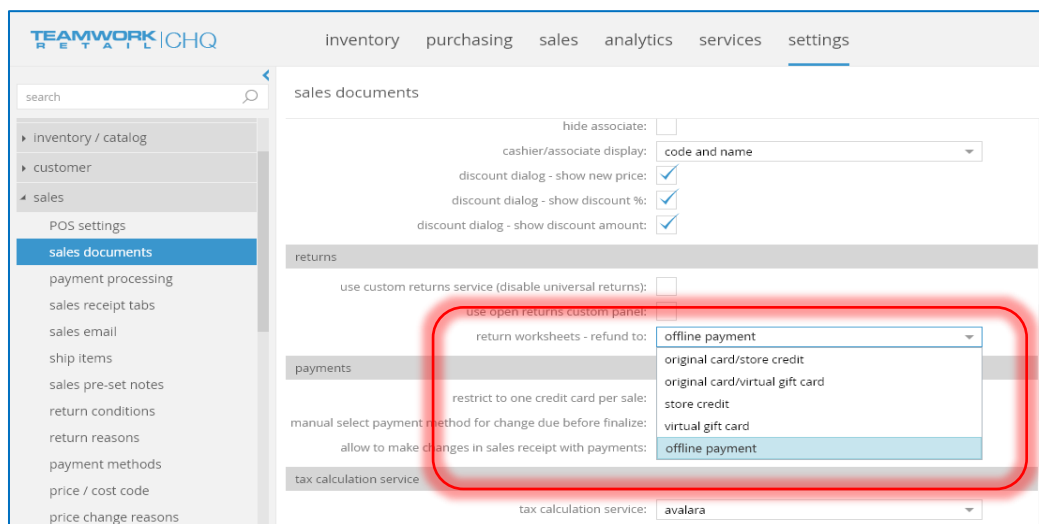
- Order Paid by Credit Card and PayPal
- The returnable amount is available for that transaction (earlier returns didn't use up the available return amount)
- The Order Line item was not marked by a CSR as NO Auto-Return

To allow for this, the following new fields have been added:

- "No Auto-Return" field on SO line level
- "No Auto-Return" field to Return Worksheet
  - This field is populated from the related SO line
- Auto Process is added to Return Worksheet
- An "Offline Payment" option is added to the Return Worksheets – Refund To setting.
  - If this is enabled in settings, selecting **Finalize Return** on the Return Worksheet will create a return sales receipt with an "offline payment" method.

### Settings

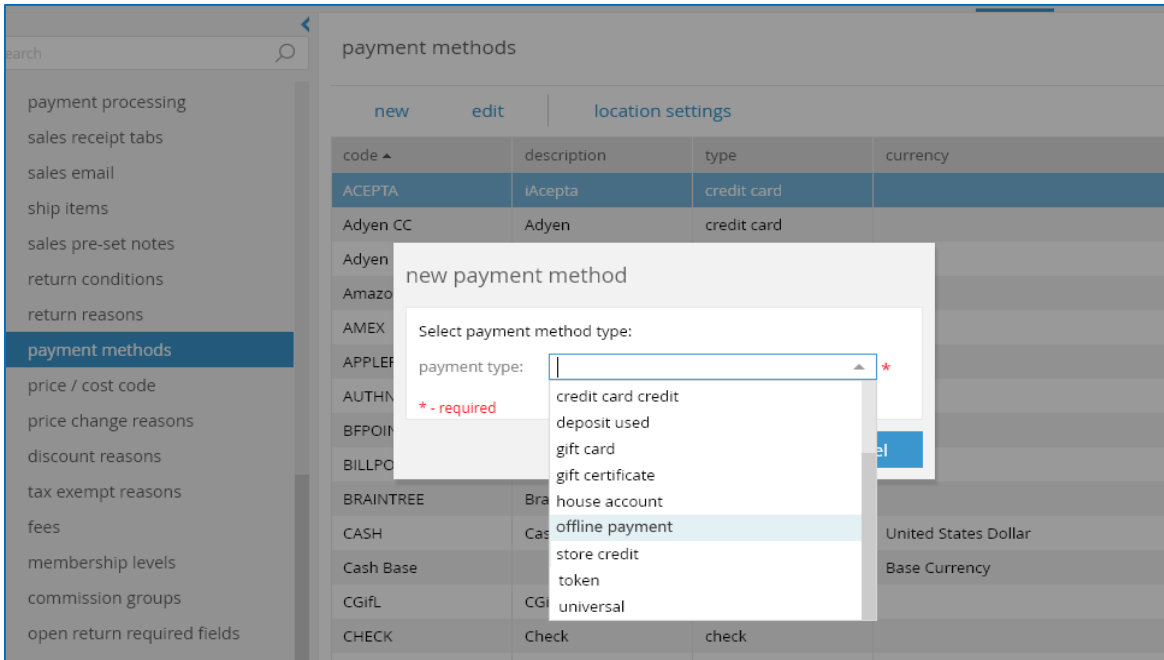
Under CHQ > Settings > Sales > Sales Documents > Returns, there is now an Offline Payment option, as shown below.



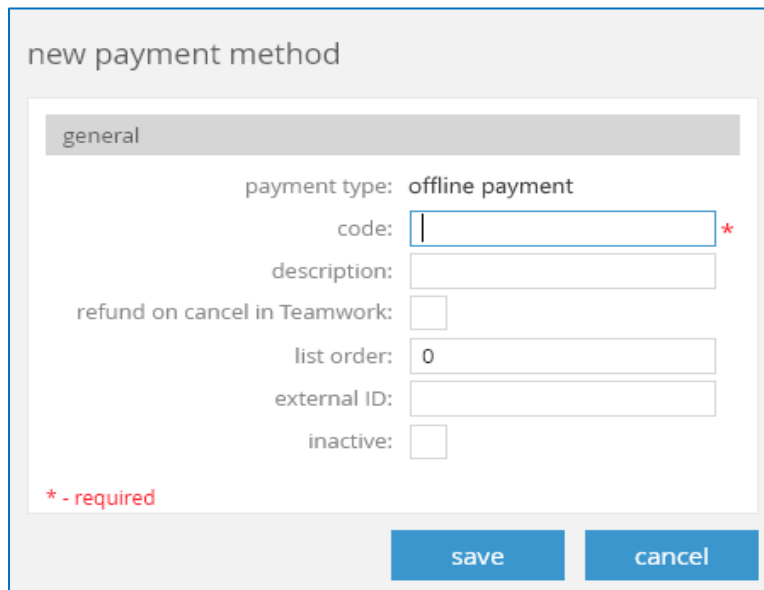
An Offline Payment type is also added to CHQ > Settings > Sales > Payment Methods. Selecting this allows for only one payment method with this type.

**NOTE**

Offline Payment can't be selected as the payment type in a New Payment Method dialog if there is already a payment (active or inactive) with an Offline Payment type.



If Offline Payment is selected, this brings up the New Payment Method dialog, as shown below.



### Sales Order – No Auto Return

There is a new *No Auto-Return* flag in the SO details dialog > General tab.

The screenshot shows the 'item - 516' dialog box with the 'general' tab selected. The 'no auto-return' checkbox is checked and highlighted with a red box. Other visible fields include 'status: held', 'pre-order', 'gift item', 'tax exempt', 'delivery pending qty', 'filled qty', 'qty due', 'item total', 'RMA code: E34TY1WQ', 'final sale', 'item custom date 1', 'item custom lookup 1', and 'item custom lookup 2'. There are 'save' and 'cancel' buttons at the bottom right.

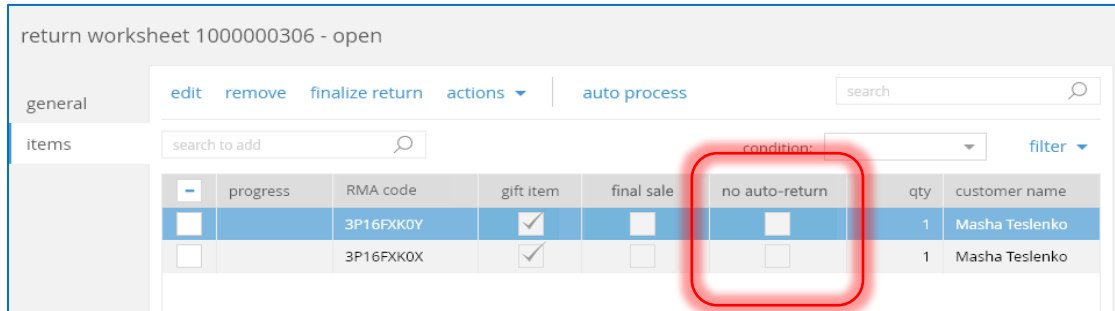
There is also a *No Auto-Return* column, as shown below.

The screenshot shows the 'sales order - send sale #1000001404 - held' dialog box. A table is displayed with the following columns: 'send on', 'giftee email status', 'final sale', 'no auto-return', 'RMA code', and 'RMA order #'. The 'no auto-return' column has a checked checkbox highlighted with a red box. The table has a blue header row and several data rows. There are also 'edit', 'remove', 'check qty', 'actions', and 'import' buttons at the top of the table area.

send on	giftee email status	final sale	no auto-return	RMA code	RMA order #
		<input type="checkbox"/>	<input checked="" type="checkbox"/>		
		<input type="checkbox"/>	<input type="checkbox"/>		
		<input type="checkbox"/>	<input type="checkbox"/>		

## Return Worksheet

The *No Auto-Return* column is also added to the Return Worksheet > Items tab. By default this column is not visible and disabled.

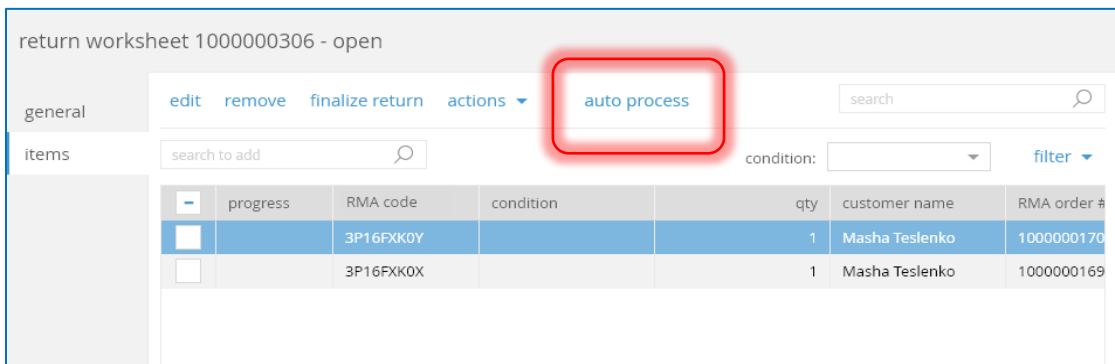


When a worksheet line is added, an RMA code is changed, or the page is refreshed:

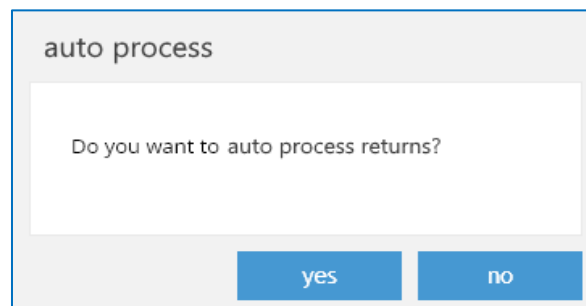
- If a SR line related to a SO is found, the *No Auto-Return* flag populates from the SO
- If a SR line related to a SO is not found, the *No Auto-Return* flag changes to false (disabled).

## Auto Process

There is a new Auto Process button on the CHQ > Sales > Return Worksheet > Edit > Items tab. This button is only enabled if the return worksheet has an "open" status.

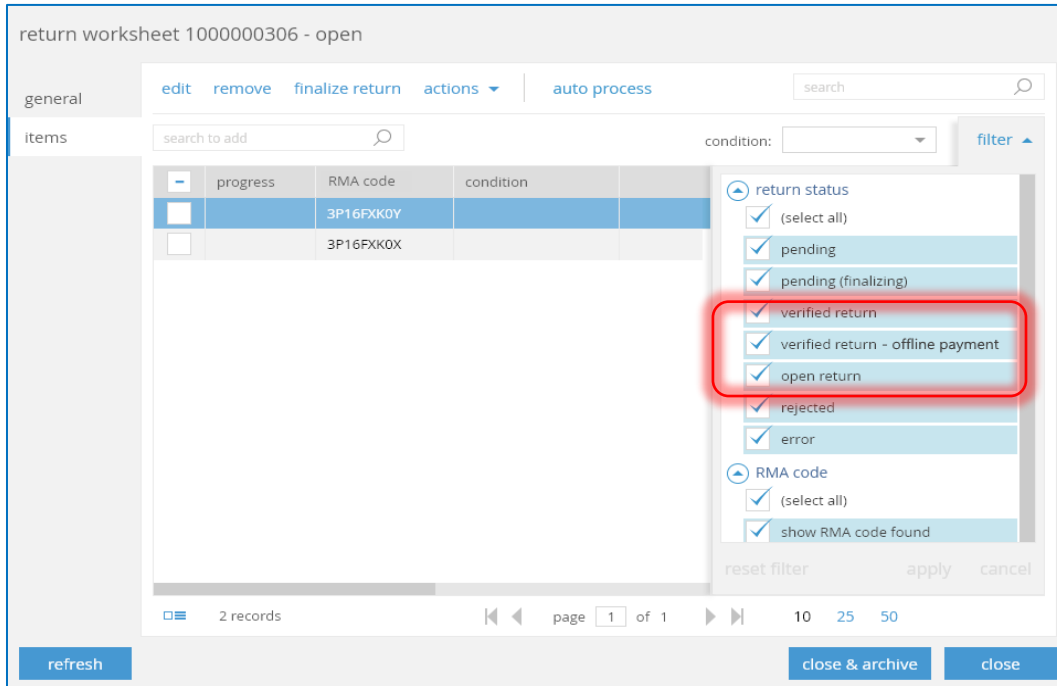


Selecting this brings up the following dialog. Clicking **Yes** runs the auto process for the worksheet, **No** does nothing and returns to the previous screen.

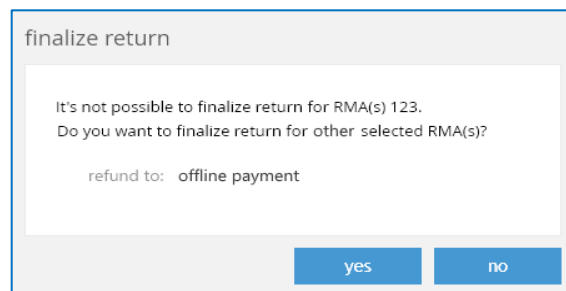
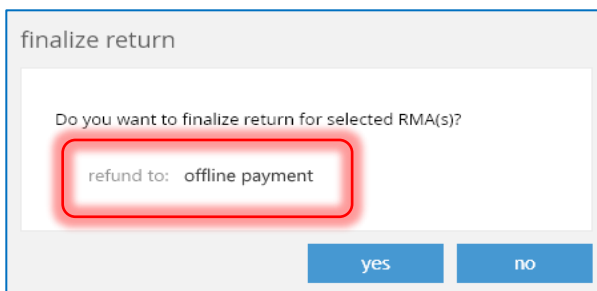


## Verified Return – Offline Payment

Under CHQ > Sales > Return Worksheets > Edit > Items tab, a *Verified Return – Offline Payment* option is now added to the Return Status area.

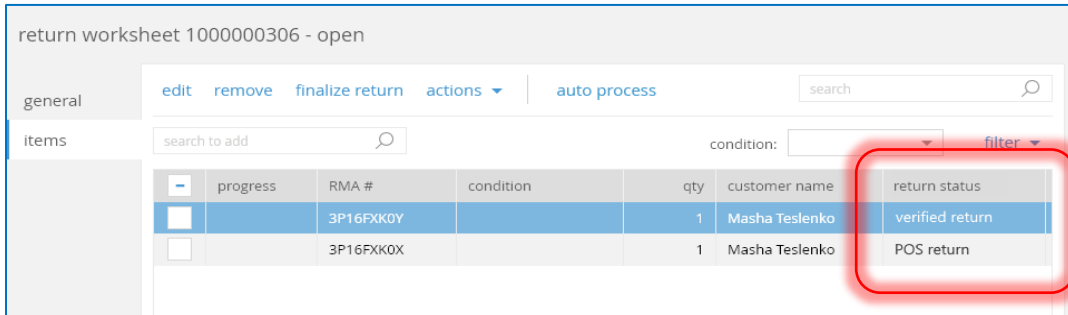


Clicking **Finalize Return** brings up a confirmation dialog that can be similar to the ones shown below. Note the new *Refund To* field that shows where the refund is going. This field populates from the value set in CHQ > Settings > Sales > Sales Documents > Returns > Return Worksheets – Refund To.

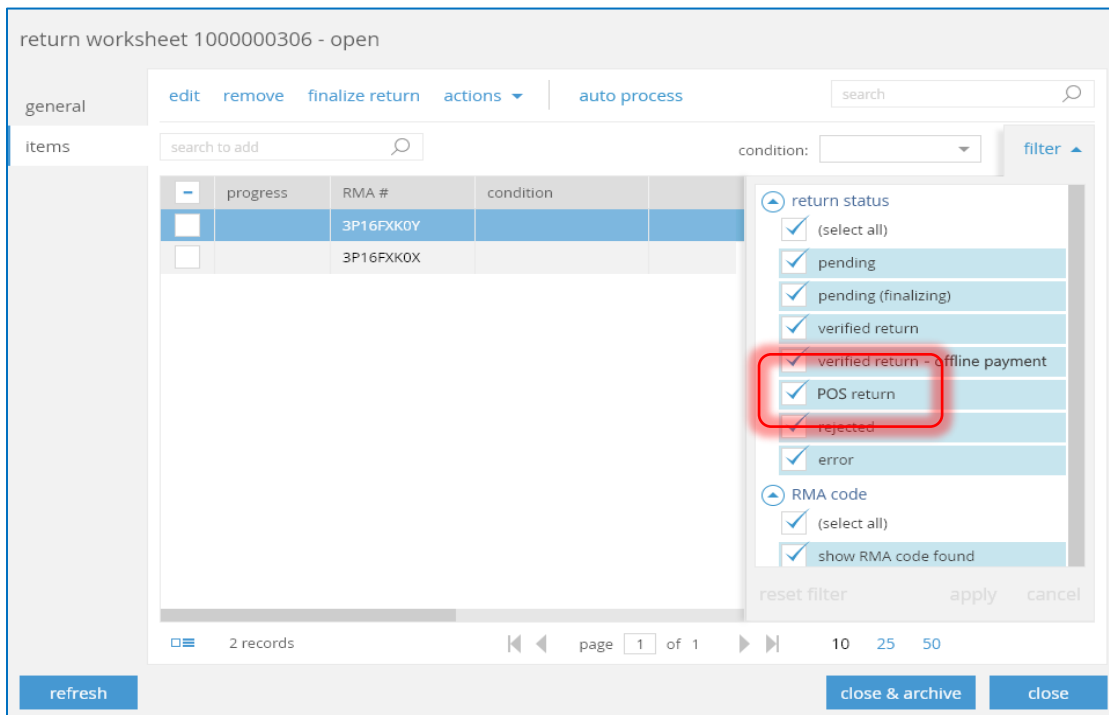


### POS Return

Under the *Return Status* column, the Open Return option has been renamed to say POS Return.

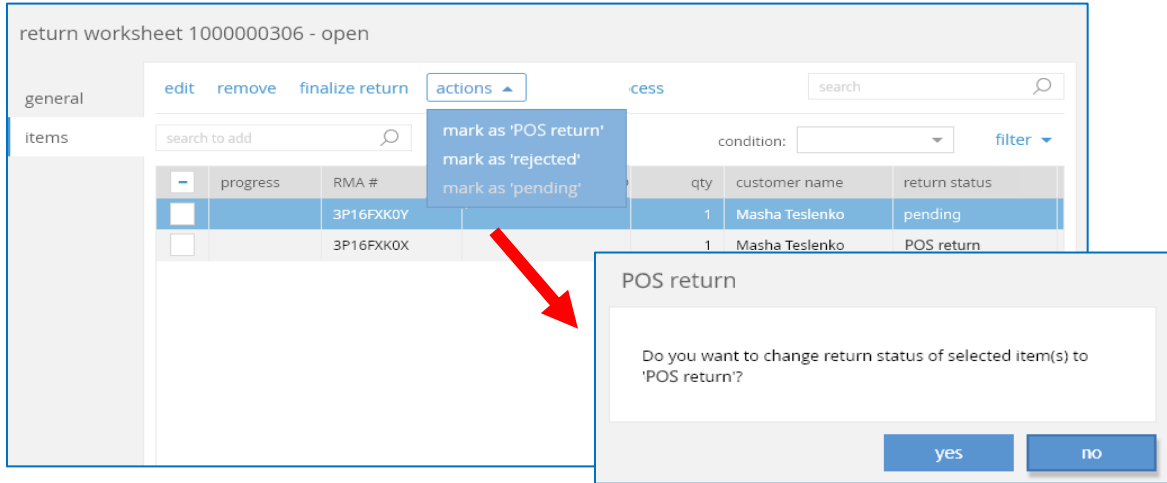


This change is also in the Return Status area.

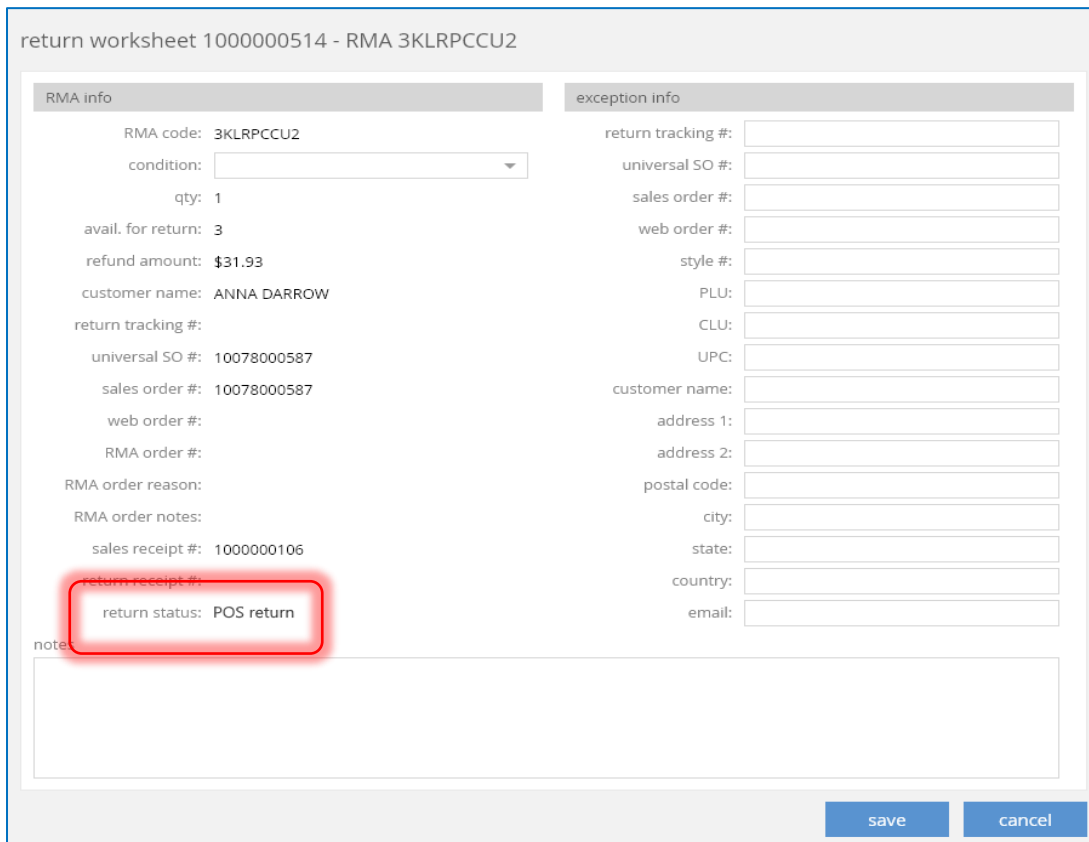




Clicking **Mark as 'POS Return'** under the **Actions** button brings up a confirmation dialog.



Under **CHQ > Sales > Return Worksheet > Edit > Items tab > Edit**, the *Return Status* field has been changed to POS Return.



## Web-Based Wholesale Orders

Version 5.22 – TWD-10036

August 2018

This feature is for users creating wholesale orders online.

For all Sales Order with a *Held* status, the workflow is as follows:

- A new Sales Order is created in CHQ with the status of *Held*
- Orders in a *Held* status are still able to be edited if no payments were added and the user has the appropriate security rights.
- Payment info can be added to the order, but the actual payment is not added until the user clicks **Place Order**.
- After the order is placed:
  - All payments that were added to the order are collected
  - The SO status changes to *In Review* or *Accepted*

The following changes have been made to Ship Memos

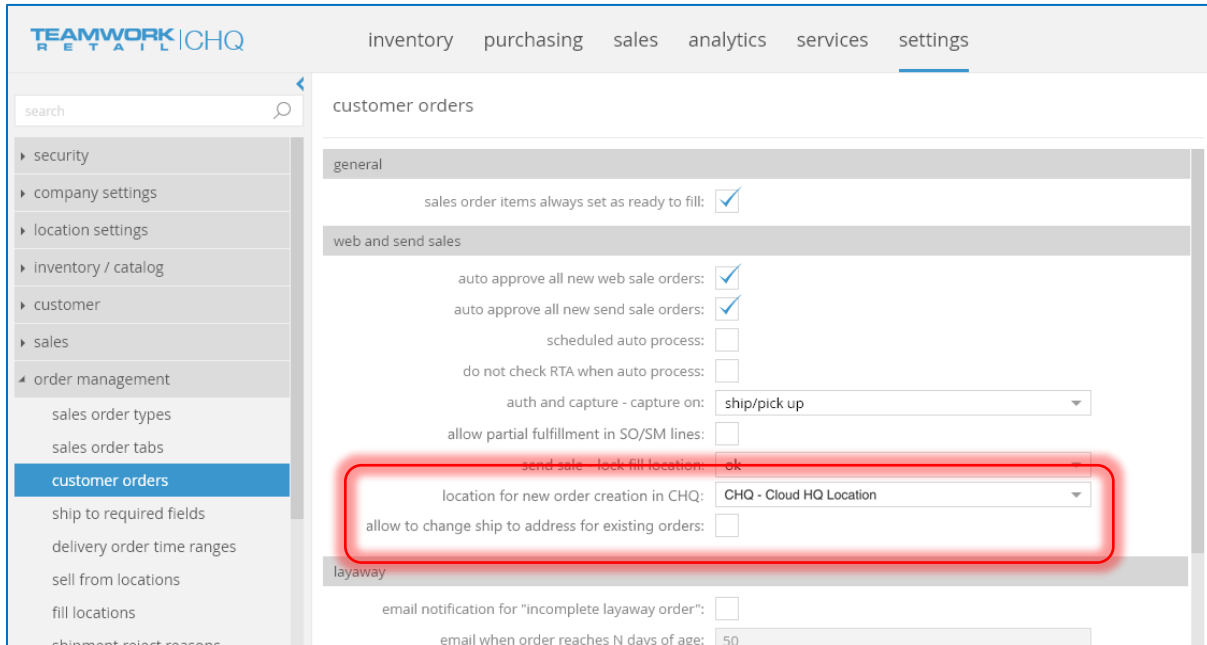
- Use Bill To button is removed from the Ship-To Address dialog

### New Security Rights

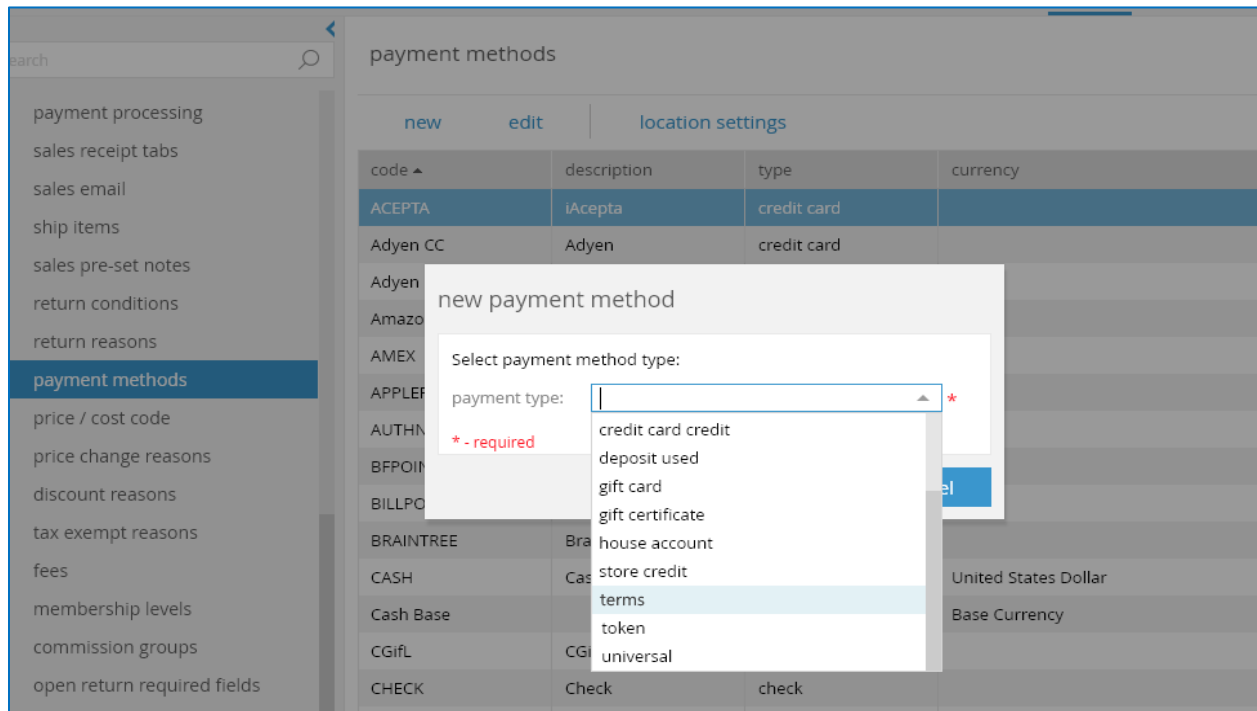
Name	Area	Description
Sales Orders – Add New	Sales Orders	Add new Sales Order
Sales Orders – Change Price/Description	Sales Orders	Change price level, item offer price, or discount on a new Sales Order

## New Settings

There are two new settings, *Location for new order creation in CHQ* (used as the “created at” location) and *Allow to change ship to address for existing orders*.



We’ve also added a new payment method called Terms. This works similar to a House Charge, but payment is not related to a customer account.



Selecting **Terms** as the payment method brings up the following dialog.

new payment method

general

payment type: **terms**

code:  \*

description:

refund on cancel in Teamwork:

list order:

external ID:

inactive:

\* - required

### Order Management

If *Location for new order creation in CHQ* is enabled (and user has security right Sales Orders – Add New), a New button displays under Sales > Order Management.

The screenshot shows the TEAMWORK RETAIL | CHQ interface. The top navigation bar includes 'inventory', 'purchasing', 'sales', 'analytics', 'services', and 'settings'. The 'sales' tab is active. On the left sidebar, 'order management' is selected. In the main content area, the 'new' button is highlighted with a red box. Below the navigation, there are buttons for 'list', 'import (0)', and 'to ship (38)'. A search bar is present. The main area displays a table of recent orders and a filter section.

recent			filter
110	John Deery web order	09/05/2017	universal order #
10606000044	Jeffrey David Stegall send sale	11/22/2017	order #
10870000031	Joy Lewis send sale	12/21/2017	web order #
131	John Deery web order	11/16/2017	RMA code
10870000030	Joy Lewis send sale	12/21/2017	item status

*Order Tab*

Clicking this brings up a Sales Order Details dialog for the new Sales Order. If this is a web order, the channel displays after the *Web Order #*.

web order - #1234567890123 - accepted

order	universal order #: 12345678901234	notes
customer	order #: 1000000055555	pre-set notes
items	web order #: 9876543210987 <i>Magento Store</i>	Crema froth, body, iced galão con panna in blue mountain robusta. Pumpkin spice acerbic, seasonal affogato blue mountain kopi-luwak sweet steamed coffee in froth. As, affogato turkish iced sugar galão organic sugar acerbic iced.
global discount	order date: 12/12/2017 12:35 PM	Shop frappuccino as sit milk barista seasonal espresso est macchiato black. Redeye, filter, crema latte cappuccino, lungo dark kopi-luwak et acerbic skinny aromatic.
global fees	associate: <i>Sergey</i>	total
CSR notes	tax exempt: <input type="checkbox"/>	order qty: 3
payments	delivery	filled qty: 0 0.00%
shipments	sell from location: 100 - Clearwater Store	qty due: 3
user info	default fill location: WH1 - Main Warehouse	item total: \$716.76
	lock fill location: <input type="checkbox"/>	discounts: \$0.00 0.00%
	ship method: UPS Ground	fees: \$0.00 proportional
	ship partial: <input type="checkbox"/>	tax: \$0.00
	international ID code: <input type="text"/>	<b>total: \$716.76</b>
	custom	deposit used: \$0.00
	order custom flag 1: <input type="checkbox"/>	deposit balance: \$0.00
	order custom text 1: <input type="text"/>	payment due: <b>\$716.76</b>
	order custom lookup 1: <input type="text"/>	cc authorized amount: \$0.00
	order custom flag 2: <input type="checkbox"/>	
	order custom text 2: <input type="text"/>	
	* - required	
	print	email
	pack slip	save
		cancel

*Customer Tab*

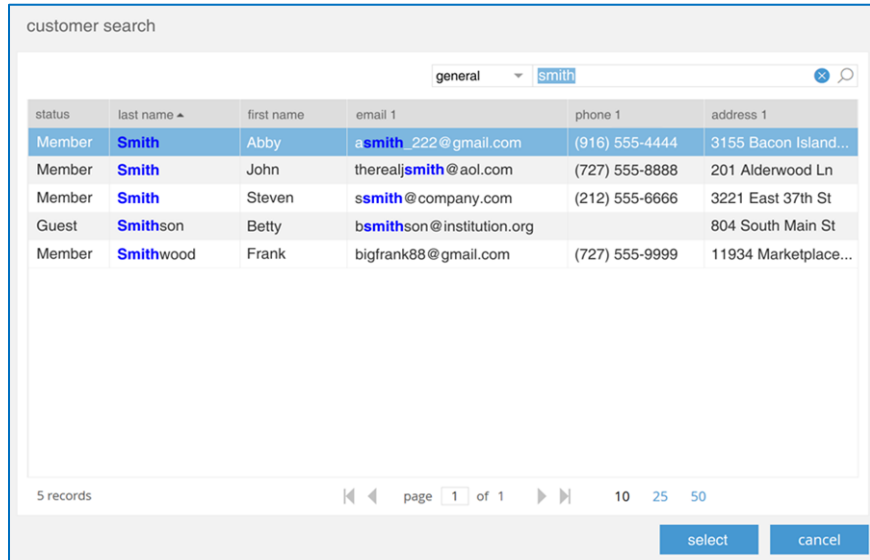
Under the Customer tab, the *Customer* area has been re-named to *Sell-To*.

send sale - #1234567890123 - held

order	sell to	ship to
customer	general search to add customer	
items		
global discount		
global fees		
CSR notes		
payments		
shipments		
user info		

If using the *Search to Add Customer* field, if there is only one customer match, this is automatically added.

If there are multiple matches, a dialog displays where you can select the correct one.

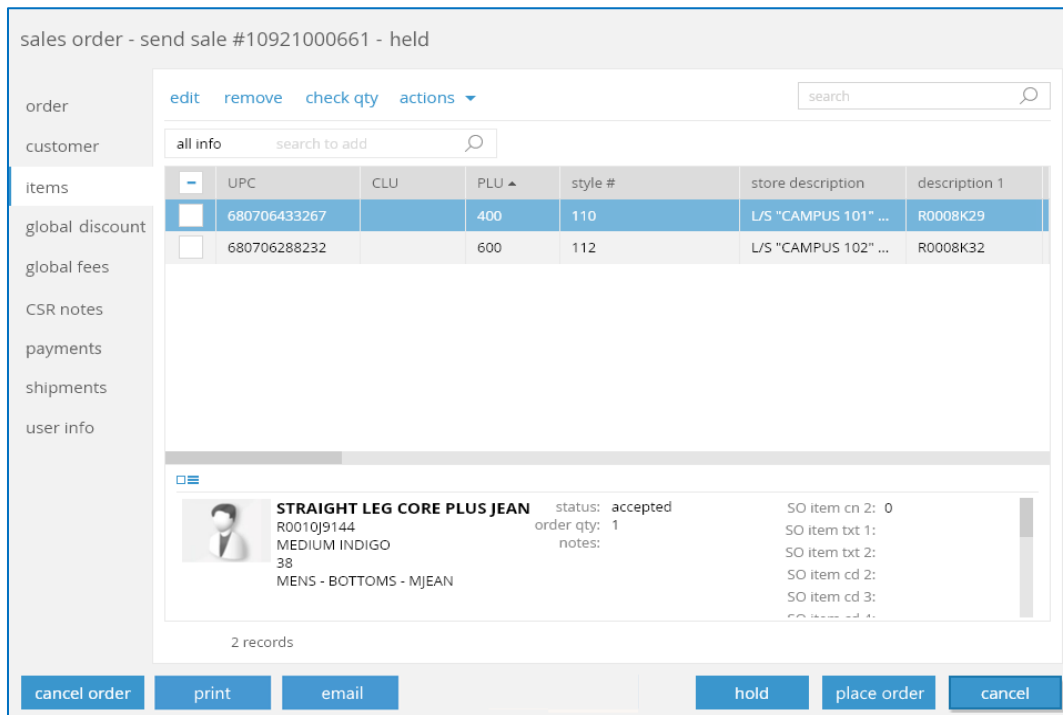


*Items Tab*

On the Items tab, if the order is Held and there is no customer on the order, this tab is disabled.

The following changes have been made to this tab:

- Fees column re-named to be Item Fees
- New Offer Price column added (the initial price before member, line, and global discount)
- New Global Fees with Tax column (part of the global fee amount with tax related to the SO line).



Under the **Actions** button, if **Change Deliver Method** is selected, the following dialog displays.

change delivery method

delivery method:  \*

\* - required

ok cancel

If **Change Ship To Address** is selected, the screen below displays where you can enter the new address.

ship to address

clear use order ship to

first name:  middle:

last name:

organization:

address 1:  \*

address 2:

address 3:

address 4:

address 5:

postal code:

city:

state / province:

country:

fiscal code:

phone no:

email:

customer addresses

- CWFirst Buyer primary
- 1 Main St San Jose, California 95131
- CWFirst Buyer address 3
- 1 Main St San Jose, California 95131
- CWFirst Buyer address 22
- 1 Main St San Jose, California 95131
- CWFirst Buyer address 37

\* - required

save cancel

When **Change Promise Date** is selected (the promise date of when the order will be delivered), the dialog below displays.

change promise date

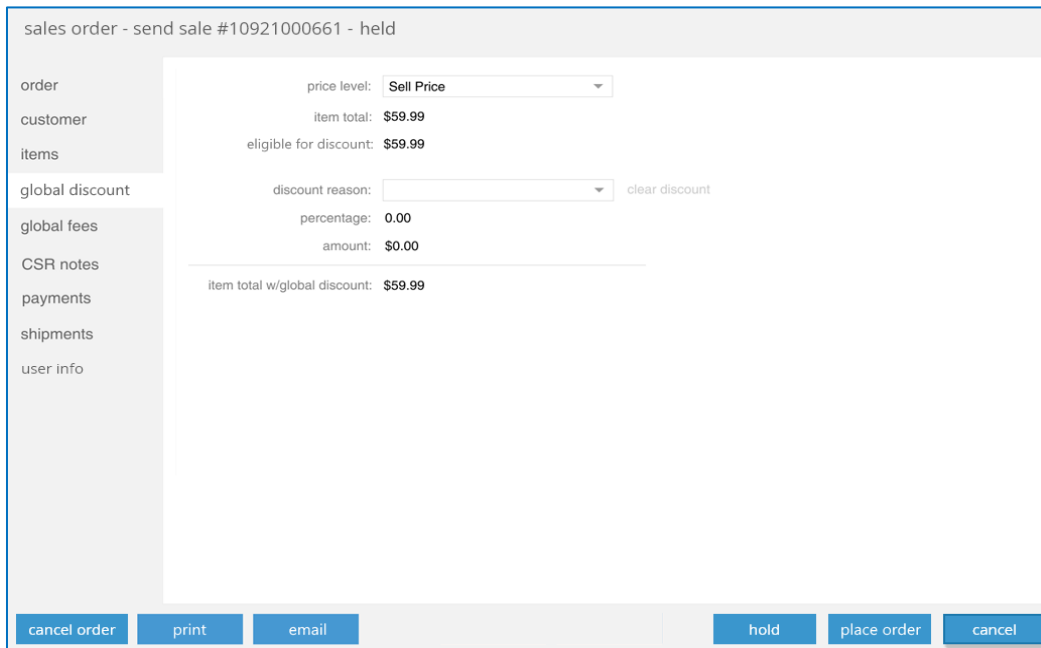
promise date:  \*

\* - required

ok cancel

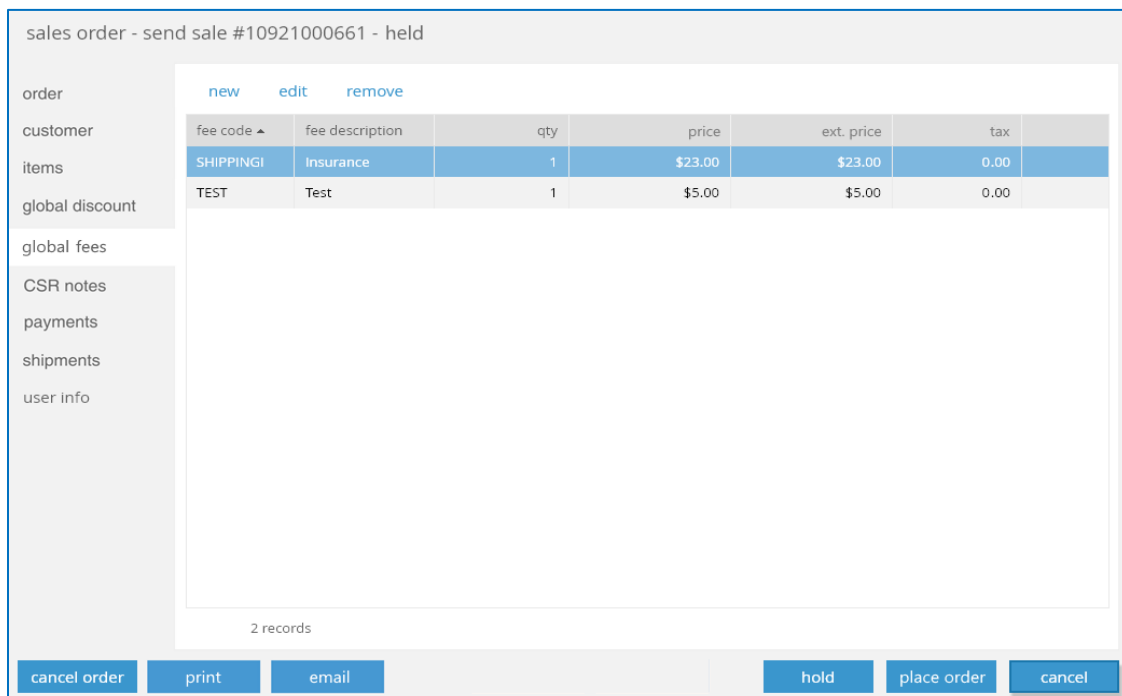
*Global Discount Tab*

On the Global Discount tab, if the order status is Held and there is no customer on the order, this tab is disabled.



*Global Fees Tab*

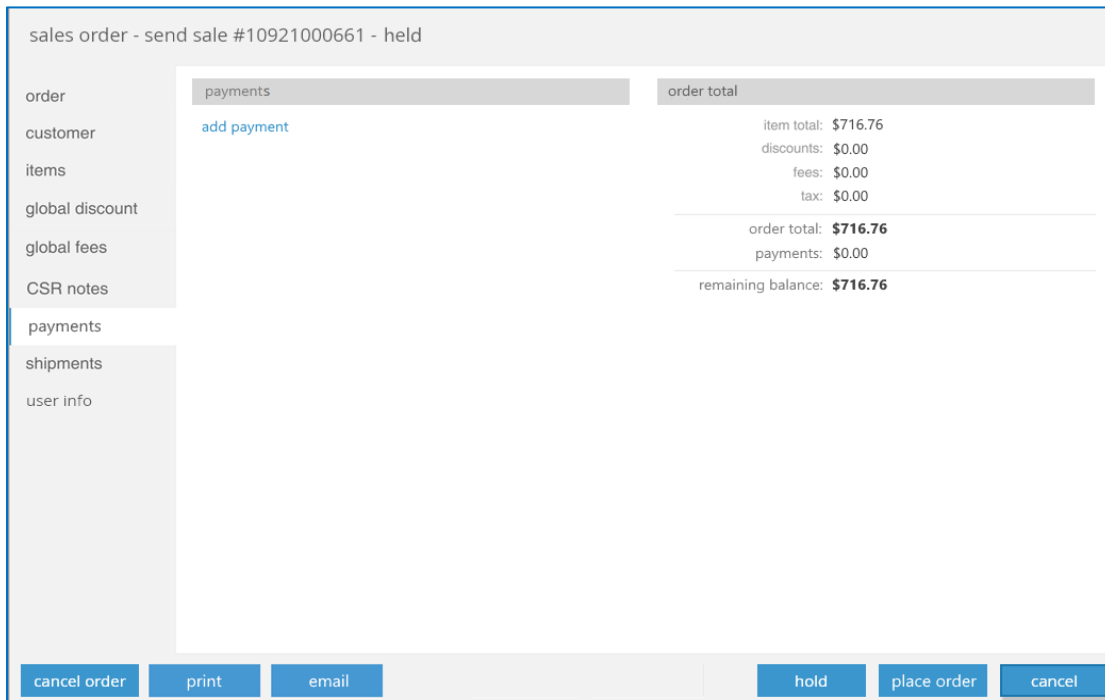
On the Global Fees tab, if the order status is Held and there is no customer on the order, this tab is disabled.



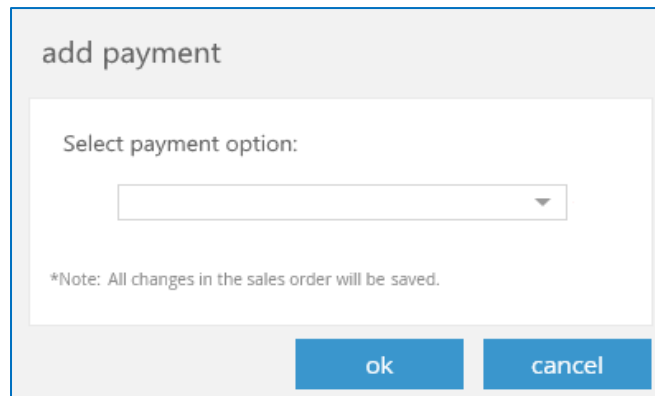


*Payments*

If the order is Held and there are no payments on the order, then this tab is disabled. Otherwise, this tab shows all payments that are added to the order.



If **Add Payment** is selected, the following dialog displays for entering payment options.



*Shipments*

If the order is Held, this tab is not visible. If there is more than one carton related to the Ship Memo line, then a **Multiple** link displays (instead of just the single carton).

Clicking Multiple brings up a dialog where you can see all the cartons.

ship memo 510 - plu 70703 - cartons

carton	shipping method	tracking #	receipt#	return tracking #	
carton # 1	DHL	Z454151551	<a href="#">112540000069</a>		
carton # 2	FedEx	USGHF765437	<a href="#">112540000070</a>		

1 record      << < page 1 of 1 > >>      10 25 50

close

*User Info*

This tab is read-only and shows all user info on the order.

sales order - web sale #989 - accepted

order	created at location: 12344 - Franklin Mills
customer	created date: 04/09/2018 9:04 AM
	created by: AUTOMAT
items	last modified date: 04/09/2018 4:16 PM
global discount	last modified by: root root
global fees	"place order" date: 04/09/2018 9:04 AM
CSR notes	"place order" by: AUTOMAT
payments	
shipments	
user info	

print    pack slip    save    cancel

## Refund Deposit

Changes to the Refund Unused Deposit workflow are as follows:

- If one of the original payments is Terms, then the unused SO deposit is refunded to that method.
- The total refund should not exceed the original payment amount.
- If more than one payment is related to unused SO deposits, then the payments are next refunded in the following order:
  - Original credit card
  - Original gift card
  - Store credit
  - Terms

## Web-Based Wholesale Order – Import

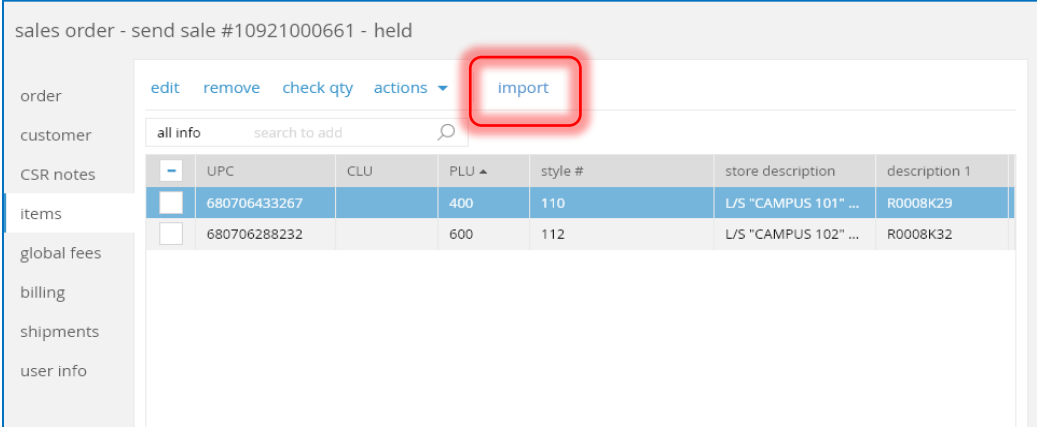
Version 5.22 – TWD-11114

August 2018

This feature adds the capability to import lines in a held Sales Order by the following:

- Import by PLU, CLU, or UPC
- Import qty
- Import price (optional)

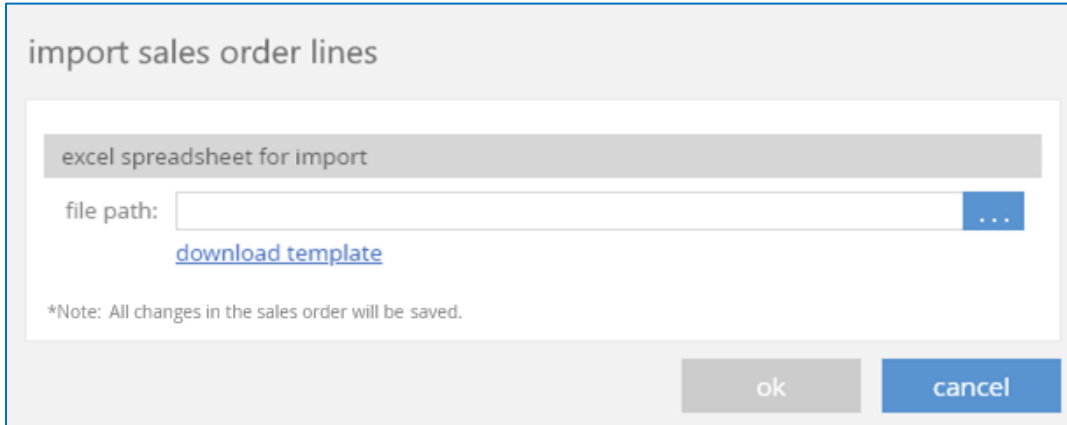
To do this, click the **Import** button in the SO items list view.



The screenshot shows a web-based interface for a sales order. The title bar reads "sales order - send sale #10921000661 - held". On the left, there is a sidebar with menu items: "order", "customer", "CSR notes", "items", "global fees", "billing", "shipments", and "user info". The "items" menu item is selected. The main content area displays a table of items with columns: "UPC", "CLU", "PLU", "style #", "store description", and "description 1". Two items are listed in the table. Above the table, there are action buttons: "edit", "remove", "check qty", "actions", and "import". The "import" button is highlighted with a red rectangular box.

	UPC	CLU	PLU	style #	store description	description 1
<input type="checkbox"/>	680706433267		400	110	L/S "CAMPUS 101" ...	R0008K29
<input type="checkbox"/>	680706288232		600	112	L/S "CAMPUS 102" ...	R0008K32

This brings up the following dialog to adding the import template.



import sales order lines

excel spreadsheet for import

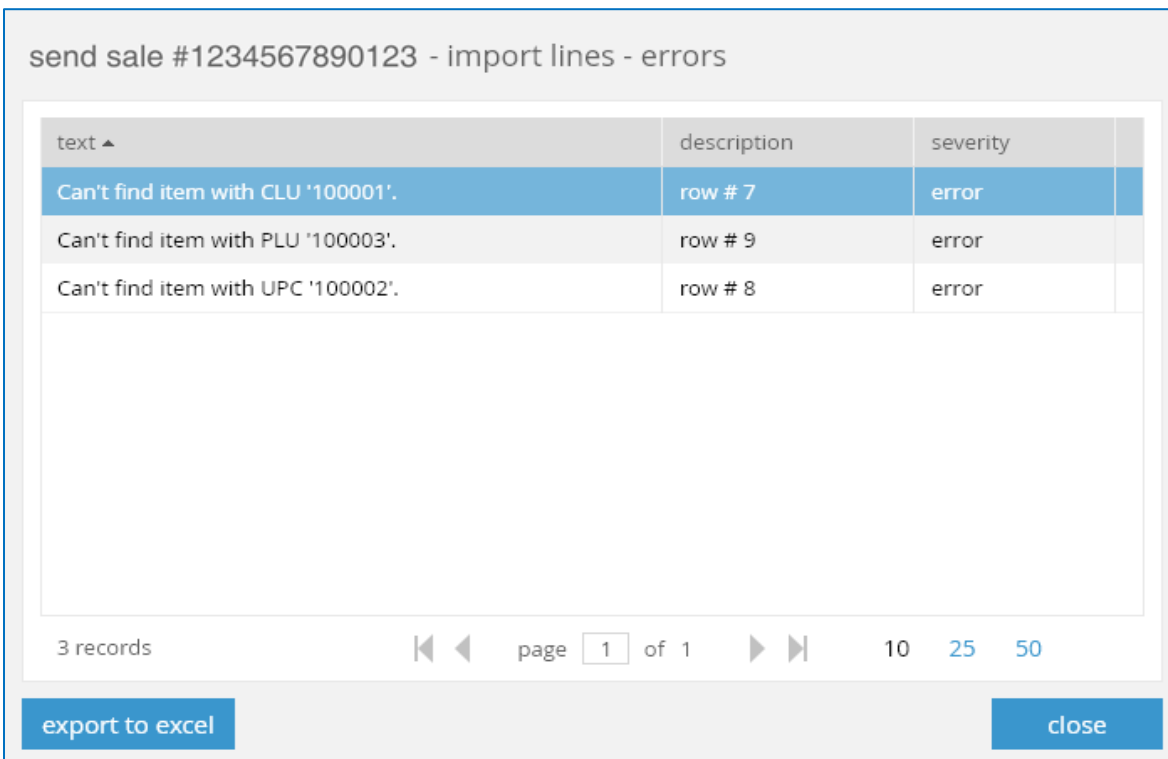
file path:  ...

[download template](#)

\*Note: All changes in the sales order will be saved.

ok cancel

If there are any errors, these show up in a separate dialog.



send sale #1234567890123 - import lines - errors

text ▲	description	severity
Can't find item with CLU '100001'.	row # 7	error
Can't find item with PLU '100003'.	row # 9	error
Can't find item with UPC '100002'.	row # 8	error

3 records

page 1 of 1

10 25 50

export to excel close

## Final Sale on Catalog and Sales Orders

Version 5.22 – TWD-12375

August 2018

There is a new Final Sale field/flag on Catalog and Sales Order items.

The screenshot displays the 'style/model' dialog for item 234234. The interface is divided into several sections:

- Left Panel:** A sidebar with navigation options: general, items, custom, pricing, vendors, custom 1, channels, categories, common fields, Katya - don't touch, Anya's test, and model stock.
- Table:** A table with columns 'PLU' and 'DRUM'. It contains two rows: (234234, ttr) and (123124124, ttr). Below the table, it indicates '2 records'.
- Item 234234 details:**
  - attributes:** DRUM: ttr, CONDITION: Used, genius: super.
  - control & usage:** trade: , inactive: , SO availability: available, SO deposit %: 0, trade discount: , member discount: , eligible for discount: , ship from vendor: never, never charge shipping: . A red box highlights the 'discontinued: , final sale: , and digital asset:  options.
  - product IDs:** PLU: 234234, primary UPC: <none>, CLU: , external ID: 997879889324234, UPCs: .
  - availability:** sell method: available, pre-order start: <mm/dd/yyyy hh:mm>, pre-order end: <mm/dd/yyyy hh:mm>, pre-order max ...
  - item custom fields:** custom text 1: , custom text 2: , item custom text 4: , custom date 1: <mm/dd/yyyy>.
- Bottom Bar:** Buttons for 'check qty', 'digital assets', 'product flash', 'save', and 'cancel'.

This has been added in the following areas:

- Final Sale flag on the item level
- Final Sale field added to CHQ > Settings > Inventory/Catalog > Styles & Items designer to the following tabs:
  - General single item
  - General service item
- Final Sale flag added to the Edit Style/Item dialog in the Styles & Items designer
- Final Sale flag added to the Control & Usage section in CHQ > Inventory > Styles & Items > Open Style/Model dialog for a style that contains items (as shown above).
- Final Sale field added to Inventory Import, import items list view, and import inventory item dialog.
- Final Sale field added to Inventory Export report.
- Final Sale field added to Inventory Catalog import and export APIs.

On a Sales Order Details dialog, this flag is only editable with the security rights Sales Orders – Add New (if SO status is Held) or PROCSALEORD (if SO status is other than Held).

The screenshot shows the 'item - 516' dialog with several tabs: 'general', 'discount', 'fees', 'associates', 'delivery', 'notes', 'gift message', and 'returns'. The 'general' tab is active, displaying fields for 'status: held', 'pre-order', 'gift item' (checked), and 'tax exempt'. Delivery quantities are shown as 0. The 'item total' section includes 'qty: 2', 'price: \$22.26', 'line discount: \$1.00 (manufacturer coupon)', and 'global discount: \$0.20 (coupon)'. The 'returns' section shows 'RMA code: E34TY1WQ', 'final sale' (checked), and 'no auto-return' (checked).

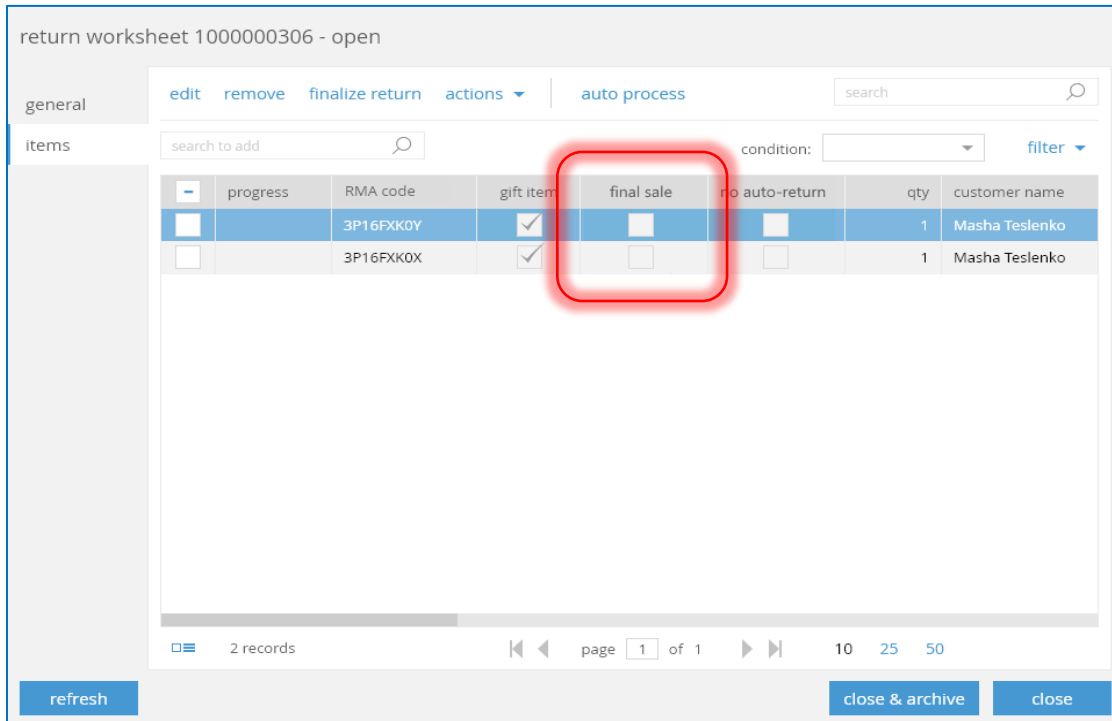
On the Items tab for a SO details dialog, the Final Sale column is shown below.

The screenshot shows the 'sales order - send sale #1000001404 - held' dialog. The 'items' tab is active, displaying a table with columns: 'send on', 'giftee email status', 'final sale', 'no auto-return', 'RMA code', and 'RMA order #'. The 'final sale' column contains three checkboxes, with the top one highlighted by a red box. The table also includes rows for 'global discount' and 'global fees'. At the bottom, there are buttons for 'cancel order', 'print', 'email', 'hold', 'place order', and 'cancel'. A status bar at the bottom indicates '3 records'.

send on	giftee email status	final sale	no auto-return	RMA code	RMA order #
		<input checked="" type="checkbox"/>	<input type="checkbox"/>		
		<input type="checkbox"/>	<input type="checkbox"/>		
		<input type="checkbox"/>	<input type="checkbox"/>		

For a Return Worksheet when a worksheet line is added, an RMA code is changed, or the pages is refreshed:

- If a SR line related to a SO is found, the *Final Sale* flag populates from the SO
- If a SR line related to a SO is not found, the *Final Sale* flag changes to false (disabled).



# Inventory

## Availability

Version 5.22 – TWD-7354

August 2018

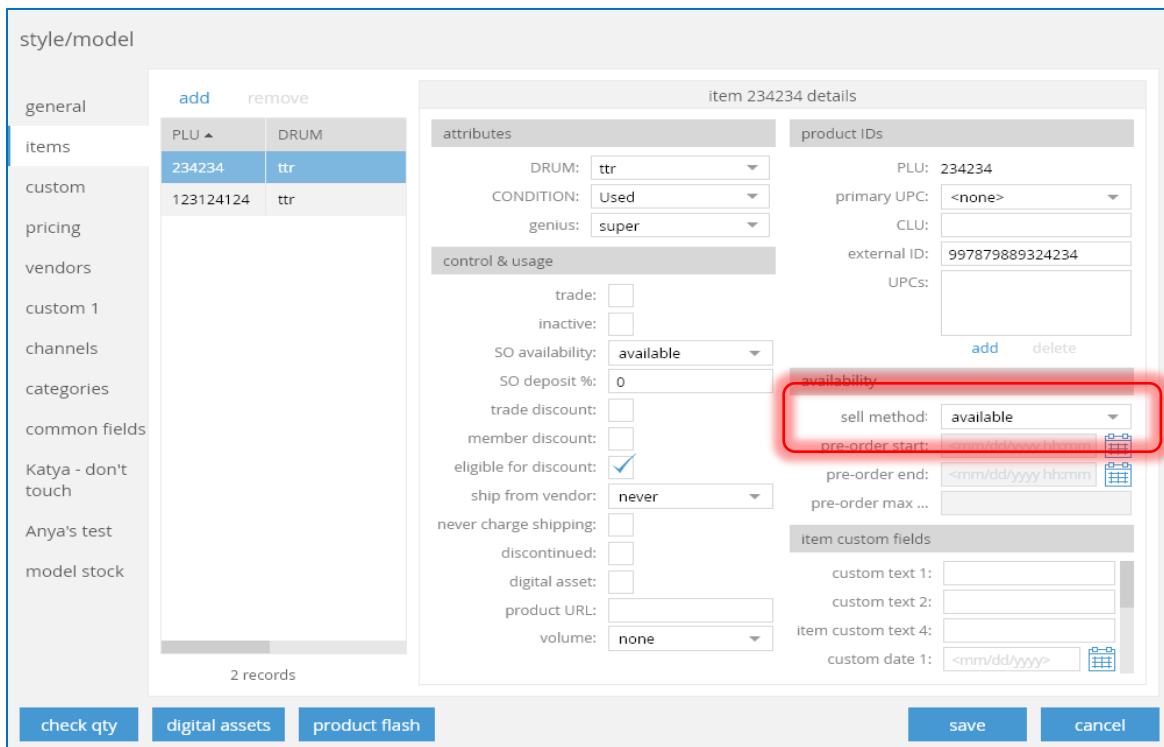
The *Sell Method* field has been added to the Item tab with the following options:

- Available
- Backorder
- Pre-order
- Perpetual

This field is also added to the Styles & Items designer under CHQ > Settings > Inventory/Catalog > Styles & Items Designer under the following tabs:

- General Single Item
- General Service Item

The *Backorder* field has been removed from the Styles & Items designer.





Under CHQ > Inventory > Styles & Items > Open Style/Model dialog for style that contains more than one item, the following changes have been made:

- The *Pre-Order* section has been renamed to *Availability*.
- A *Sell Method* field has been added to Availability > Items tab.
- The *Backorder* field has been removed from the Style/Model dialog > Items tab.

Under CHQ > Inventory > Styles & Items > Import, there is now the capability to assign sell method when importing. This means the following changes have been made:

- *Sell Method* column (not editable) is now on the Import Items list view (CHQ > Inventory > Styles & Items > Imports > Edit > Inventory Catalog Import dialog > Items tab).
- *Sell Method* field is now on the Import Item edit dialog (CHQ > Inventory > Styles & Items > Imports > Edit > Inventory Catalog Import dialog > Items tab > Edit > Inventory).
  - This field is editable
  - The options for selection are:
    - Available
    - Backorder
    - Pre-order
    - Perpetual
    - Do not change
  - When importing a new item, Do not change is selected, then the items are marked as Available.

### Styles & Items – Check Quantity

For a single item or style/model dialog, after selecting the **Check Qty** button, the following screen appears. This shows the new *Sell Method* column.

PLU	sell method	available for pre-order	available for backorder	next date available
123124124	available			
234234	backorder			

2 records

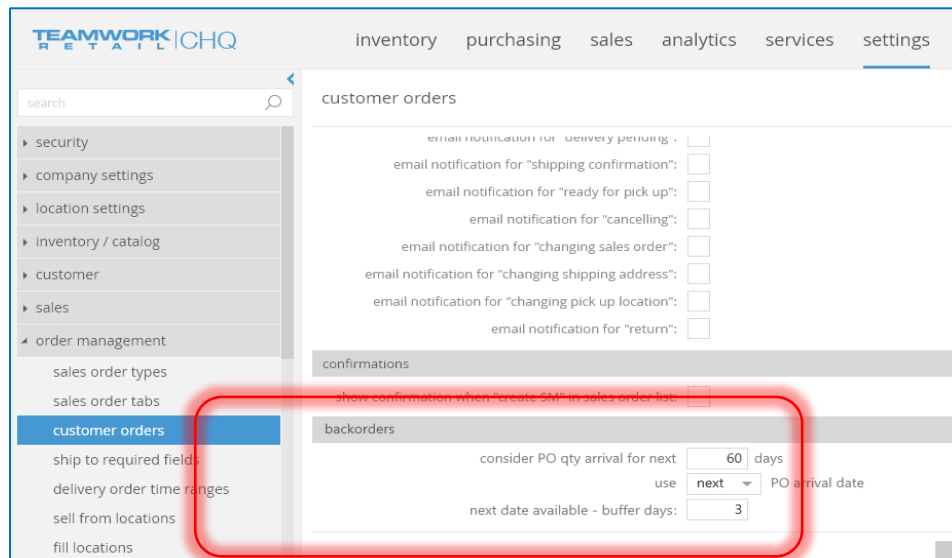
location availability - item 123124124

code	name	on hand	committed	available	incoming	available for backorder	next date available	phone
1	one	n/a		n/a				
2	two	n/a		n/a				
2525	UpdateNew...	n/a		n/a				+380995554422
2652	ALDO	n/a		n/a				806.788.1591

## Settings

There is a new Backorder section under CHQ > Settings > Order Management > Customer Orders with the following new settings:

- Consider PO Qty arrival for next ... days
  - The number entered must be a positive integer from 0 to 999999
  - The default set is 60
- Use ... PO arrival date
  - The available options for selection are Next or Last.
  - The default is Next
  - Only selection from the list is allowed
- Next date available – buffer days
  - The number entered must be a positive integer from 0 to 999999
  - The default set is 3



## New Field Added to Inventory Catalog

Version 5.22 – TWD-10045

August 2018

A new field has been added to the Inventory catalog called *Item Classification*.

## Promo Group Types

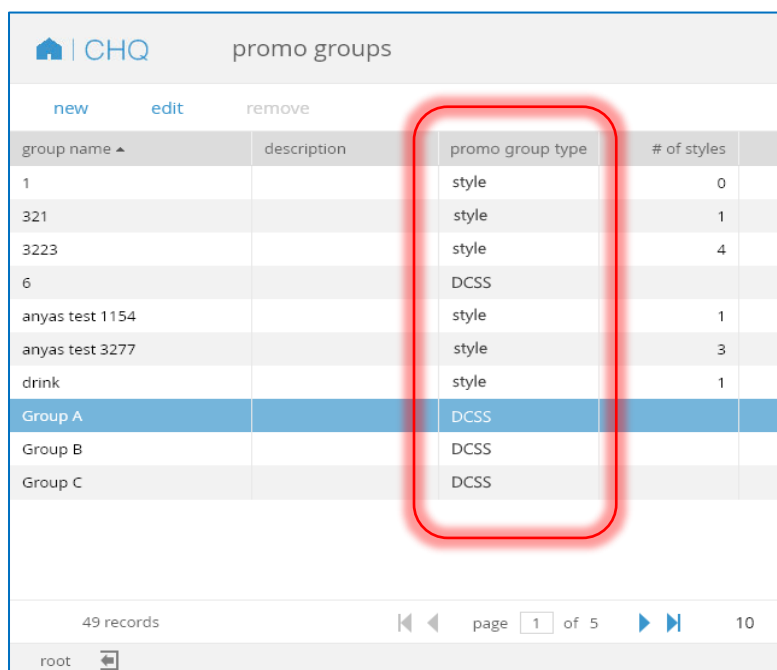
Version 5.22 – TWD-11725

August 2018

This adds the capability to define promo groups by DCSS (Department, Class, Subclass 1, Subclass 2). The also allows for defining a list of excluded styles.

There is a new *Promo Group Type* for a promo group with the following values:

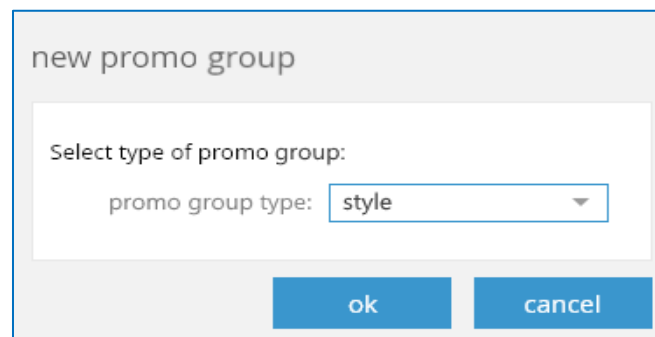
- Style
- DCSS



group name ▲	description	promo group type	# of styles
1		style	0
321		style	1
3223		style	4
6		DCSS	
anyas test 1154		style	1
anyas test 3277		style	3
drink		style	1
Group A		DCSS	
Group B		DCSS	
Group C		DCSS	

If the type is DCSS then the *# of Styles* column is empty.

Clicking **New** brings up the following dialog where you can select the promo group style.



new promo group

Select type of promo group:

promo group type: style

ok cancel

If **Style** is selected, the screen below displays. This functions the same as it currently does.

new promo group

general

promo group type: style

group name:  \*

description:

inactive:

promotional items

remove

style #

style #	store description	description 1	DCSS code	brand	manufact
---------	-------------------	---------------	-----------	-------	----------

0 records

page 1 of 1

10 25 50

close

The screen below is for editing an existing style.

Group A

general

promo group type: style

group name:  \*

description:

inactive:

promotional items

remove

style #

style #	store description	description 1	DCSS code	brand	manufact
1818	LRP Eligible	LRP Eligible	ACCBELNON		Tanya's
4050	Jeans		1112223334		10 GRAIN
102	S/S STRIPE POLO ///////////!	R0007K01 ///////////!	PUPKINCODE	Men's Shirts	Colors in C

3 records

page 1 of 1

10 25 50

close

If **DCSS** is selected, the screen below displays. Here you can also set any items to be excluded using the fields in the bottom half of the screen.

new promo group

general

promo group type: DCSS

group name:  \*

description:

inactive:

promotional items

DCSS code:  [edit](#)

excluded items

remove  search

style #  search to add

style #	store description	description 1	DCSS code	brand	manufact
0 records					

page 1 of 1 10 25 50

[close](#)

Clicking **Edit** by the *DCSS Code* field brings up the following dialog.

select DCSS

[select all](#) [unselect all](#)  search

DCSS code ▲	selected
ACCHATBBF	<input checked="" type="checkbox"/>
ACCHATBEA	<input type="checkbox"/>
ACCHATBOM	<input type="checkbox"/>
ACCHATFED	<input type="checkbox"/>
ACCHATIVY	<input type="checkbox"/>
ACCHATTRI	<input type="checkbox"/>
ACCHOSCRE	<input type="checkbox"/>
ACCHOSLOW	<input type="checkbox"/>
ACCHOSQTR	<input type="checkbox"/>
ACCKNIMTE	<input type="checkbox"/>

92 records

page 1 of 10 10 25 50

[select](#) [cancel](#)

The screen below is for editing an existing DCSS.

new promo group

general

promo group type: DCSS

group name:  \*

description:

inactive:

promotional items

DCSS code:  [edit](#)

excluded items

remove

style #

style #	store description	description 1	DCSS code	brand	manufact
1818	LRP Eligible	LRP Eligible	ACCBELNON		Tanya's
4050	Jeans		1112223334		10 GRAIN
102	S/S STRIPE POLO ///////////!	R0007K01 ///////////!	PUPKINCODE	Men's Shirts	Colors in C

3 records

page 1 of 1

10 25 50

[close](#)

A DCSS Code column has also been added to the import template.

## Item-Detailed Invoices

Version 5.22 – TWD-11358 & 12461

August 2018

We've added a Vendor Invoice Import API to import vendor invoices with item details.

There is now an Items tab on the Vendor Invoice edit dialog that displays the items on the order. This is a read-only tab.

vendor invoice - 271

general

PLU	qty	unit cost	ext. cost
103	50	\$22.26	\$1,113.00
101	50	\$22.26	\$1,113.00
105	50	\$22.26	\$1,113.00
102	50	\$22.26	\$1,113.00

items

billing

user info

# Purchasing

## Acknowledgment Status

Version 5.22 – TWD-11724

August 2018

This feature shows acknowledgement statuses for POs. The new column added is *ACK Status* (Acknowledgement abbreviated to ACK).

CHQ purchase orders							
<a href="#">new</a> <a href="#">edit</a> <a href="#">remove</a> <a href="#">archive</a> <a href="#">print</a> <a href="#">email PO</a> <a href="#">history</a>							
order #	universal order #	order date	status	vendor name	ACK status	distributi	
<a href="#">DS1</a>	1100000384	06/03/2018	released	Rocawear	<a href="#">sent</a>	multi loca	
2531	1000002539	04/27/2018	released	110	<a href="#">sent</a>	single loc	
<a href="#">2720</a>	1000002729	04/27/2018	released	Rocawear	<a href="#">sent</a>	single loc	
2598	1000002607	04/26/2018	held	10 GRAIN	not sent	single loc	
2718	1000002727	04/25/2018	held	10 GRAIN	not sent	single loc	
2717	1000002726	04/25/2018	released	10 GRAIN	<a href="#">accepted</a>	single loc	
2716	1000002725	04/25/2018	held	10 GRAIN	not sent	single loc	
2715	1000002724	04/25/2018	released	10 GRAIN	<a href="#">accepted with changes</a>	single loc	
2714	1000002723	04/25/2018	released	10 GRAIN	<a href="#">rejected</a>	single loc	
2713	1000002722	04/24/2018	released	new era	<a href="#">rejected</a>	single loc	

2445 records   page 1 of 245   10 25 50

The options for this column are:

- Not sent
- Sent
- Accepted
- Accepted with changes
- Rejected

This column is not editable and hidden by default. All new orders automatically have a “not sent” Ack Status.

POs with a status of Sent, Accepted, Accepted with Changes, or Rejected display as a link. Clicking this link brings up the Purchase Order – Acknowledgement History dialog for the order, as shown below.

purchase order - 2531 - acknowledgment history

control #	ACK date ▼	ACK status
123624526-726452635-376254319	04/17/2018 10:32 AM	accepted with change
836240656-543712653-725494729	03/16/2018 1:55 PM	accepted with change
908643218-836539283-727246251	03/16/2018 1:55 PM	sent

3 records

close

### PO Details Dialog – General Tab

Changes to this tab include a new *Ack Status* field which is not editable. Clicking the link here also brings up the Purchase Order – Acknowledgement History dialog.

Also, the *Notes* field has been moved to the bottom right side of the dialog.

purchase order - 2531 - released

general

items

global fees

billing

user info

**general**

universal order #: 1000002539

order #: 2531

status: released archived:

vendor ref. #:

contract PO #:

buyer code: 0000002 \*

exclude from backorder:

**vendor**

vendor: 110

shipping method: United Parcel Service

ACK status: [accepted with changes](#)

**ship-to:**

distribution type: single location

ship-to location: 046535 - GFMG - FEIRA SO MARCAS

\* - required

**dates**

order date: 04/27/2018 5:00 PM \*

lead time days: 0

ship date: 04/27/2018 \*

arrival date: 04/29/2018 \*

cancel date: 05/26/2018 \*

**custom**

Purchase dec 1:

Purchase text 1:

Purchase text 2:

**totals**

qty ordered: 6

qty received: 0

total amt: \$0.00

**notes**

print

email PO

spread global fees

history

re-release

cancel



## PO Details Dialog – Items Tab

This tab has the following new columns added:

- ACK Status
- Backorder Qty
- Backorder Unit Cost
- BackOrder Date

The security right PO-ADDEDIT is needed to edit the Backorder Qty, Backorder Unit Cost, and Backorder Date fields.

For allocation POs, the new columns mentioned above are empty on the item/allocation level.

For multi-location POs, the new columns mentioned above are read-only on the item-level.

- If the ACK Status is the same for all locations, then the status displays
- If the ACK Status is different for all or some locations, then *Multiple* displays
- If the Backorder Unit Cost is the same for all locations, then the status displays
- If the Backorder Unit Cost is different for all or some locations, then *Multiple* displays
- If the Backorder Date is the same for all locations, then the status displays
- If the Backorder Date is different for all or some locations, then *Multiple* displays

purchase order - 2531 - released

general [edit](#) [remove](#) [archive](#)

items

PLU	ship to	qty	order cost	ext. cost incl. fee	ACK status	backorder qty	backorder unit cost	backorder date
605	046535	1	\$0.00	\$0.00	accepted	1	\$0.00	04/19/2018
606	046535	1	\$0.00	\$0.00	rejected	2	\$0.00	04/18/2018
97563	046535	2	\$0.00	\$0.00	backordered	2	\$0.00	04/18/2018
97563	046535	2	\$0.00	\$0.00	not sent	0	\$0.00	04/18/2018

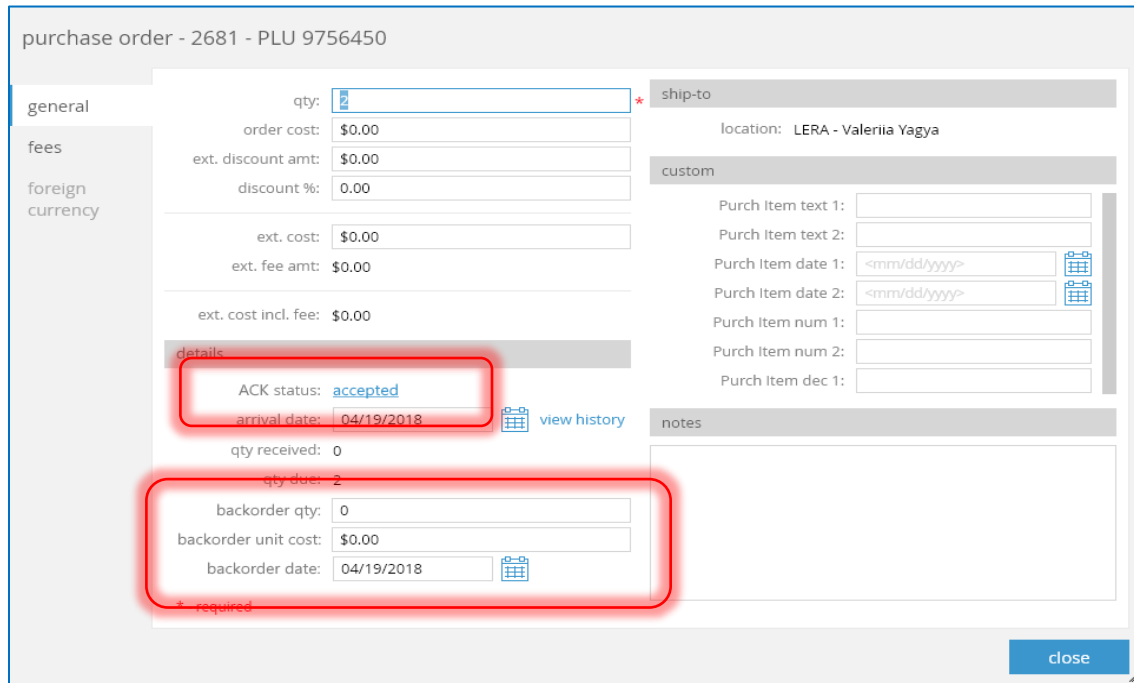
4 records

page 1 of 1 10 25 50

[print](#) [email PO](#) [spread global fees](#) [history](#) [re-release](#) [cancel](#)

PO Details Dialog – Items Tab > Edit Item

These new fields are also added to the Edit Item screen, as shown below.



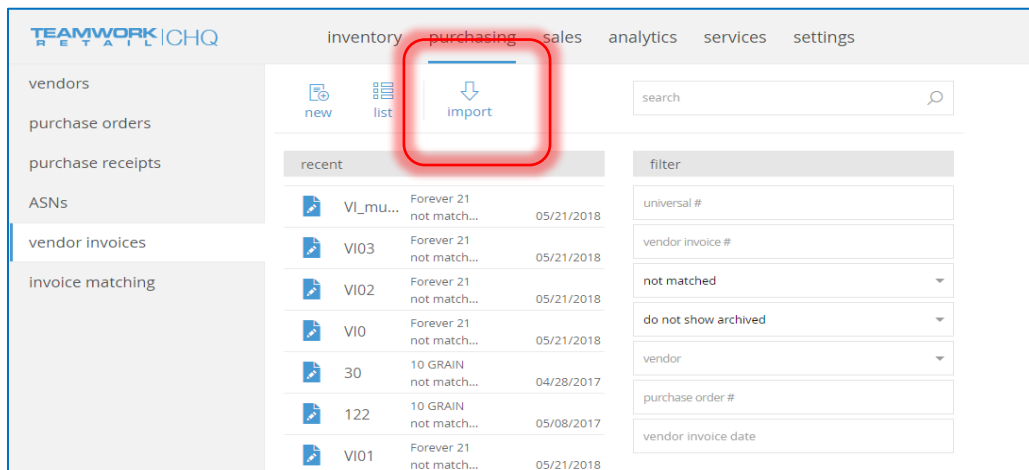
## Vendor Invoice Import

Version 5.22 – TWD-12714

August 2018

This feature is for importing vendor invoices with item details in CHQ.

Under CHQ > Purchasing > Vendor Invoices, there is a new Import button. This is only visible with the Vendor Invoice Imports – Access security right.



The List view shows import information at a quick glance. Clicking **New** creates a new import, **View** opens details on an existing import, or **Archive/Unarchive** will make the selected document archived (if not already) or unarchived (if already archived).

no	status	progress	description	created date	archived
1	error			03/24/2017 8:15 AM	<input type="checkbox"/>
2	error			03/24/2017 8:15 AM	<input type="checkbox"/>
3	error			03/24/2017 8:15 AM	<input type="checkbox"/>
4	error			03/24/2017 8:31 AM	<input type="checkbox"/>
5	error			03/24/2017 8:31 AM	<input type="checkbox"/>
6	error			03/24/2017 8:31 AM	<input type="checkbox"/>
7	error			03/24/2017 8:50 AM	<input type="checkbox"/>
8	imported			03/24/2017 9:16 AM	<input type="checkbox"/>
9	imported			03/27/2017 8:37 AM	<input type="checkbox"/>
10	imported			03/27/2017 9:05 AM	<input type="checkbox"/>

If **New** is selected, the following dialog displays. The dialog is similar to existing import dialogs. Clicking the blue box with three dots opens up the import template.

**new vendor invoice import**

---

**excel spreadsheet for import**

file name:  ...

[download template](#)

---

**import process**

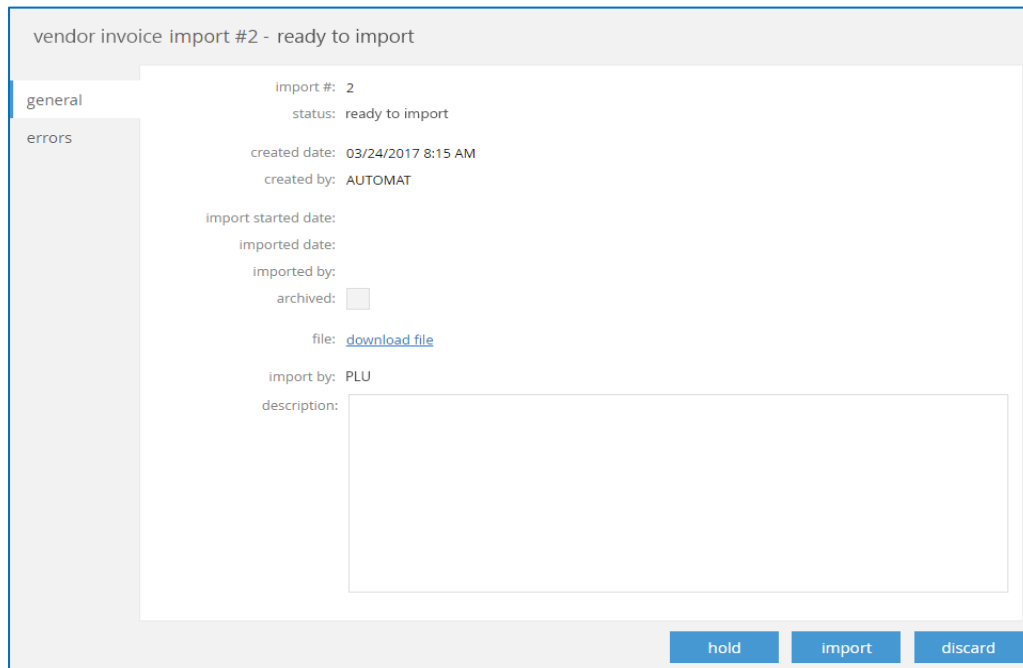
import description:

import by:

---

review only
import
cancel

Details on an existing import looks similar to the screen below.



### Security Rights

The following new security rights have been added to support this.

Area	Name	Description
Purchasing	Vendor Invoice Imports – Access	Allows user to access Vendor Invoice Imports list and view import details.
Purchasing	Vendor Invoice Imports – Add/Edit	Allows user to create, edit, and delete a Vendor Invoice Import.

### PO – Label for “Buyer” Field

Version 5.22 – TWD-11647

August 2018

The label for the “buyer code” filter has been changed to “buyer” in the following areas:

- PO interaction view (CHQ > Purchasing > Purchase Orders)
- PO dialog, General tab (CHQ > Purchasing > Purchase Orders > New/View/Edit)

## Other Enhancements

### Adyen Payment Integration

Version 5.22 – TWD-12063

August 2018

We've added support for Adyen Payment Processor in all OMS payment processing workflows.

We've also added a new field to Sales Orders called Recurring Token.

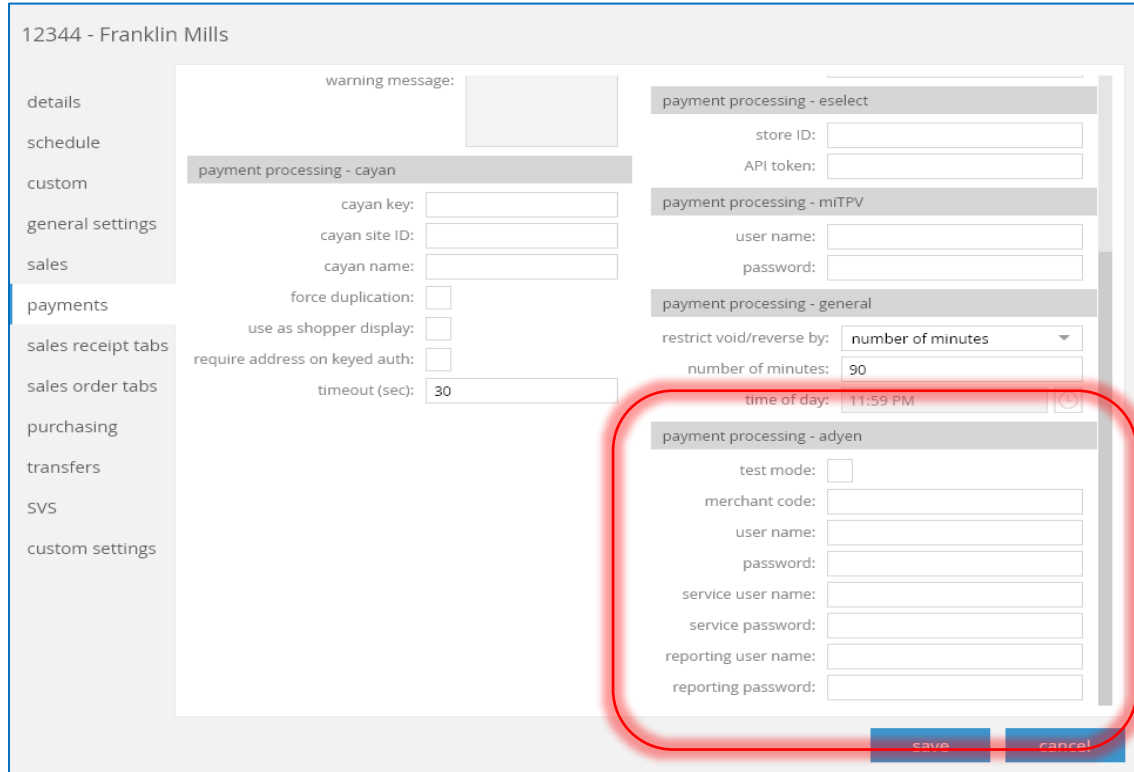
- This information is populated from the web.
- The field is added to SO Import APIs

### Settings

There is a new Adyen section under Settings > Sales > Payment Processing.

The screenshot displays the TEAMWORK RETAIL CHQ settings interface. The navigation menu on the left includes 'location settings', 'inventory / catalog', 'customer', 'sales', 'POS settings', 'sales documents', 'payment processing' (highlighted), 'sales receipt tabs', 'sales email', 'ship items', 'sales pre-set notes', 'return conditions', 'return reasons', 'payment methods', 'price / cost code', 'price change reasons', 'discount reasons', 'tax exempt reasons', and 'fees'. The main content area is titled 'payment processing' and contains three sections: 'brain tree', 'authorize .net', and 'adyen'. The 'adyen' section is highlighted with a red box and includes the following fields: 'test mode' (checkbox), 'merchant code', 'service user name', 'service password', 'reporting user name', and 'reporting password'. Below the 'adyen' section is the 'paypal' section. At the bottom right, there are 'save' and 'cancel' buttons. The footer shows 'root', 'English (US)', and 'version 5.22.24.0'.

A section for Adyen has also been added on a company level (similar to location settings).



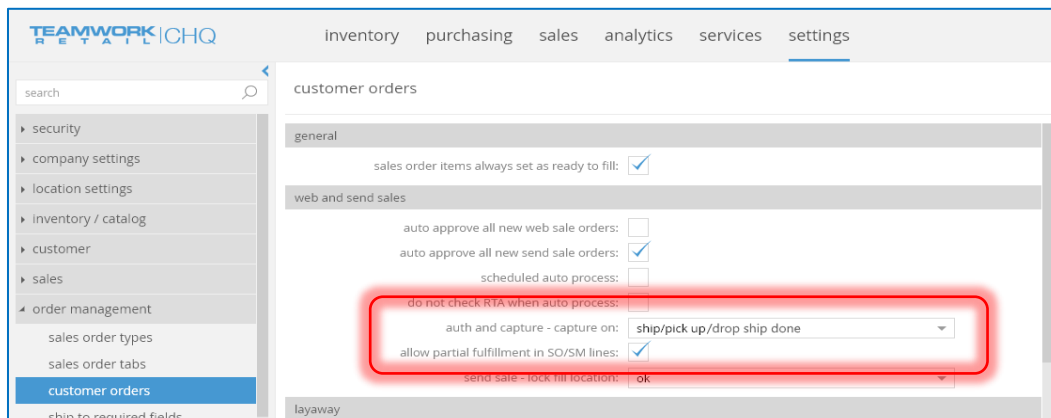
## Adyen Support – Partial Capture

Version 5.22 – TWD-12312

August 2018

This feature adds the option for multiple (or partial) payment through Adyen.

Under CHQ > Settings > Order Management > Customer Orders, the *Auth and Capture – Capture On* drop-down has been renamed from “ship/pick up” to “ship/pick up/drop ship done.”



To enable the multiple capture feature, go to CHQ > Settings > Sales > Payment Processing > Adyen area.

The screenshot shows the CHQ Settings interface for the Adyen payment processor. The left sidebar contains a navigation menu with 'payment processing' selected. The main content area is titled 'payment processing' and contains configuration fields for three providers: 'brain tree', 'authorize .net', and 'adyen'. The 'adyen' section includes fields for 'test mode', 'merchant code', 'service user name', 'service password', 'reporting user name', 'reporting password', and 'multiple capture'. The 'multiple capture' checkbox is checked and highlighted with a red rectangular box. At the bottom right of the form are 'save' and 'cancel' buttons. The footer of the interface shows 'English (US)' and 'version 5.22.24.0'.

## Map Web Order # in Adyen

Version 5.22 – TWD-12966

August 2018

The Web Order # is mapped as a merchant reference on an Adyen transaction.

## Original Authorization for Partial Capture with Adyen

Version 5.22 – TWD-13006

August 2018

For partial payment capture in OMS integration with Adyen, the original authorization is used instead of making an additional one.

## COGS Attribute to SR Export API

Version 5.22 – TWD-13132

August 2018

We've added a COGS attribute to JSON-based Sales Receipt Export API in a way that it is in XML-based API.

## Reserve Order Import API

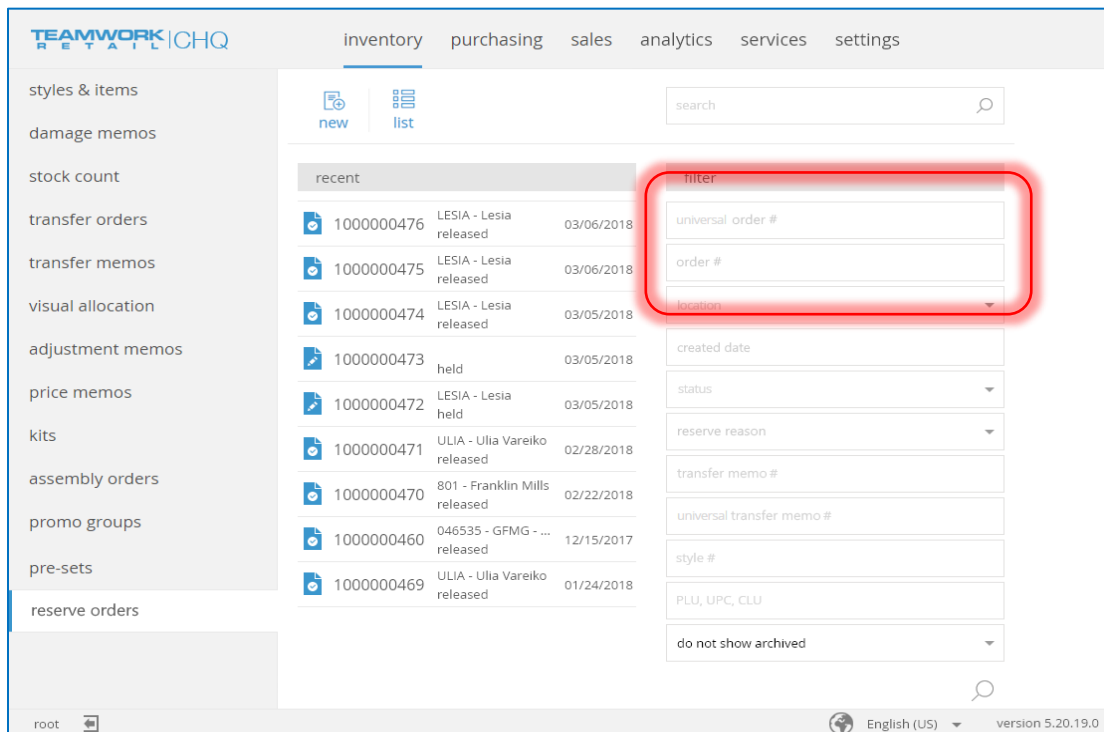
Version 5.22 – TWD-12408 & 12409

August 2018

We've added the capability to import/archive reserve orders via API.

Under CHQ > Inventory > Reserve Orders, the following changes have been made:

- The existing *Order #* field is renamed to *Universal Order #*
- Then there is a new *Order #* field added to a reserve order which auto-populates sequentially for a new order.





These changes are also visible on the List view, as shown below.

universal order #	order #	created date	status	location	reserve reason	order qty	reserved qty	archived
1000001609	1009	03/06/2018 1:02 PM	released	ULIA - Ulla Vareiko	Stock Hold	4	4	<input type="checkbox"/>
1000001340	1040	10/10/2017 11:52AM	held	801 - Franklin Mills	Damaged	2	2	<input type="checkbox"/>
1000001248	1048	02/22/2018 7:52 AM	released	VIKTOR - Viktor Lutsyk	Cleaning	14	14	<input type="checkbox"/>
1000001639	1039	01/24/2018 12:00 PM	held	802 - Vacaville CA	Damaged	1	1	<input type="checkbox"/>
1000000936	1036	01/22/2018 5:04 AM	held					<input type="checkbox"/>
1000001392	1092	01/10/2018 11:31 AM	released	VIKTOR - Viktor Lutsyk	Damaged	1	1	<input type="checkbox"/>
1000001716	1016	01/10/2018 11:31 AM	released	VIKTOR - Viktor Lutsyk	Cleaning	9	9	<input type="checkbox"/>
1000000479	1079	12/19/2017 10:52 AM	held	801 - Franklin Mills	Damaged	1	1	<input type="checkbox"/>
1000001428	1028	12/15/2017 12:24 PM	released	VIKTOR - Viktor Lutsyk	Cleaning	9	9	<input type="checkbox"/>
1000001179	1079	12/15/2017 11:08 AM	held					<input type="checkbox"/>

On the Reserve Order details dialog, the *Universal Order #* is unable to be edited, but the *Order #* can be changed if needed.

reserve order - 1000000477 - held

general

universal order #: 1000000477

order #: 1077 \*

status: held

location: \*

reserve reason: \*

archived:

totals

order qty: 0

reserved qty: 0

notes

## RMA Worksheet Import API

Version 5.22 – TWD-12373 & 12302

August 2018

This adds the capability to create a new RMA worksheet using a location, web order numbers, and UPCs. All other fields (including RMA code) have to be auto-populated.

## Attribute Value Aliases

Version 5.22 – TWD-12207

August 2018

We've updated the Inventory Export API to include information for Alias 1 and Alias 2 for attribute values.

## Font Color Changed for Placeholder Text

Version 5.22 – TWD-8836

August 2018

The font color has been changed on placeholder text in CHQ in the following areas:

- Filters (interaction views)
- Search Fields
- Date and datetime fields

## Bug Fixes

### Set Up Matrix Opening

Version 5.22 – TWD-12627

August 2018

We've fixed a bug that was preventing the set up matrix from successfully opening despite the number of records.

### Available Quantities

Version 5.22 – TWD-13125

August 2018

We've fixed a bug that was displaying incorrect values for Available quantities in CHQ.

### Kit Orders – Progress in KO List View

Version 5.22 – TWD-11989

August 2018

We've fixed a bug that was incorrectly showing the progress in Kit Order list view.

### Kit Orders – Progress Column

Version 5.22 – TWD-11990

August 2018

We've fixed a bug that was causing the Progress column in Kit Orders to sort incorrectly.

### Kit Orders – Release Button

Version 5.22 – TWD-11795

August 2018

A bug preventing orders from being released is now fixed.

## Epilogue

This manual was published on 29 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](mailto: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](mailto:support@teamworkretail.com).

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