



TEAMWORK CHO RELEASE GUIDE

Version 5.25

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Sales and OMS

Membership Program by Location

Version 5.25 – TWD-12454

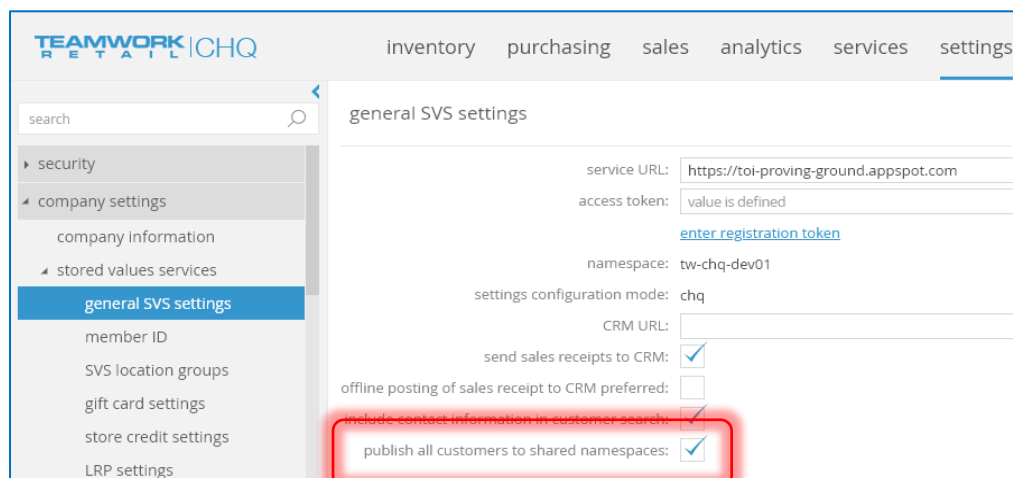
October 2018

This feature adds membership settings to SVS Location Groups.

Under CHQ > Settings > Company Settings > Stored Values Services > General SVS Settings, there is a setting called *Publish All Customer to Shared Namespaces*.

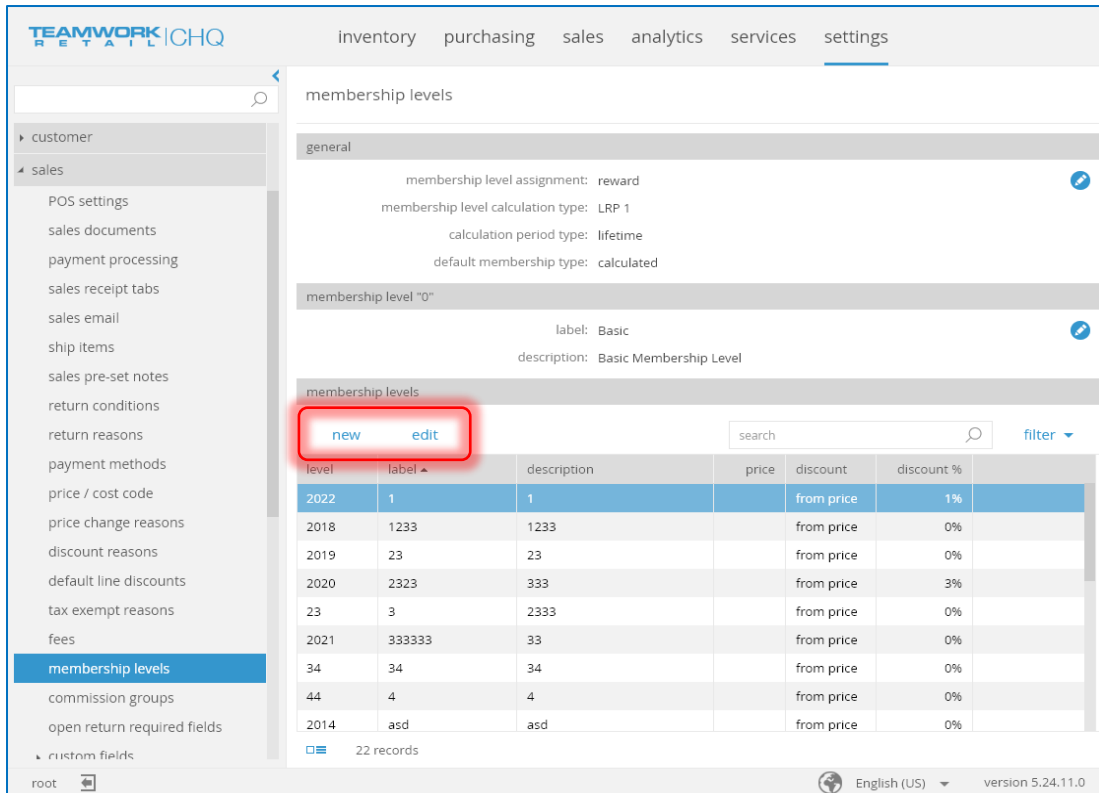
If this is enabled, upon saving, a confirmation dialog displays. Clicking **Yes** will update membership settings in all SVS location groups, as well as add all active membership levels (which are not already added) to all SVS location groups.

Clicking **No** cancels without saving.



Under CHQ > Settings > Sales > Membership Levels, if the previous setting is enabled (*Publish All Customers to Shared Namespaces*), the following occurs:

- When a new membership level is being created (upon saving in a New Membership Dialog), this new membership is automatically added to all SVS Location Groups.
- If an inactive membership level is becoming active again (the inactive flag is unselected) in an Edit Membership Level dialog, then this membership level is also added to all SVS Location Groups.



Membership Tab

There is a new Membership tab added to the SVS Location Group dialog in CHQ > Settings > Company Settings > Stored Values Services > SVS Location Groups > New/Edit.

SVS location group

general

membership level assignment: reward

membership level calculation type: LRP 1

calculation period type: period

period (days): *

default membership type: calculated

membership level "0"

label: Basic *

description: Basic Membership Level

membership levels

select membership levels

level	label	description	price	discount	discount %
1	Bronze	Bronze level 1% - 1 day		from price	1%
2	Silver	Silver level 2.5 % - 1 year		from price	2.5%
3	Gold	Gold level 5% 5% - 10 days		from price	5%
11	Family Membership	MoMA Family Membership		from price	20%
2000	Platinum	Platinum level 10 % - 400 d...		from price	10%

10 records

page 1 of 1

10 25 50

save cancel

General Area

- **Membership Level Assignment:** The type of membership level assignment (either **Sold** or **Reward**).
- **Membership Level Calculation Type:** The type of LRP calculation (either **LRP1** or **LRP2**). This field is only visible if the *Membership Level Assignment* (just above) is set to **Reward**.
- **Calculation Period Type:** This is the rule for calculating (either **Lifetime** or **Period**). This field is only visible if the *Membership Level Assignment* (above) is set to **Reward**.
- **Period (days):** This is the number of days for calculation. Any integer between 1 and 999999 is accepted. This field is only visible if the *Membership Level Assignment* is **Reward** and *Calculation Period Type* is **Period**. In that case, this is a required field.
- **Default Membership Type:** Defines what type is set for the customer's membership if the membership was manually assigned (can be **Permanent**, **Calculated**, or **No Change**).

NOTE

These fields are all only able to be edited if *Publish All Customers to Shared Namespaces* (in the General SVS Settings tab) is disabled.

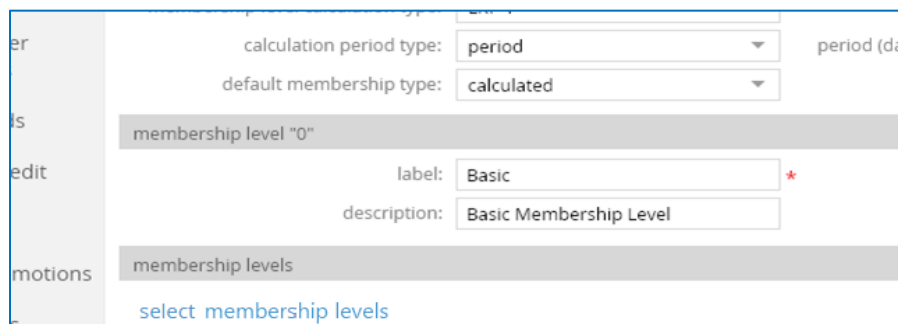
Membership Level "0"

The *Label* drop-down is the label set for this membership level. Any characters can be entered in this text field, with the maximum length of 255 characters.

If *Publish All Customers to Shared Namespaces* (in the General SVS Settings tab) is disabled, the default for this field is **Basic**. If it's enabled, then this field is populated with the corresponding company level setting (under CHQ > Settings > Sales > Membership Levels > Membership Level "0" > Label).

The *Description* field is where you can enter a description of this membership level. Any characters can be entered in this text field, with the maximum length of 255 characters.

If *Publish All Customers to Shared Namespaces* (in the General SVS Settings tab) is disabled, the default for this field is **Basic Membership Level**. If it's enabled, then this field is populated with the corresponding company level setting (under CHQ > Settings > Sales > Membership Levels > Membership Level "0" > Description).

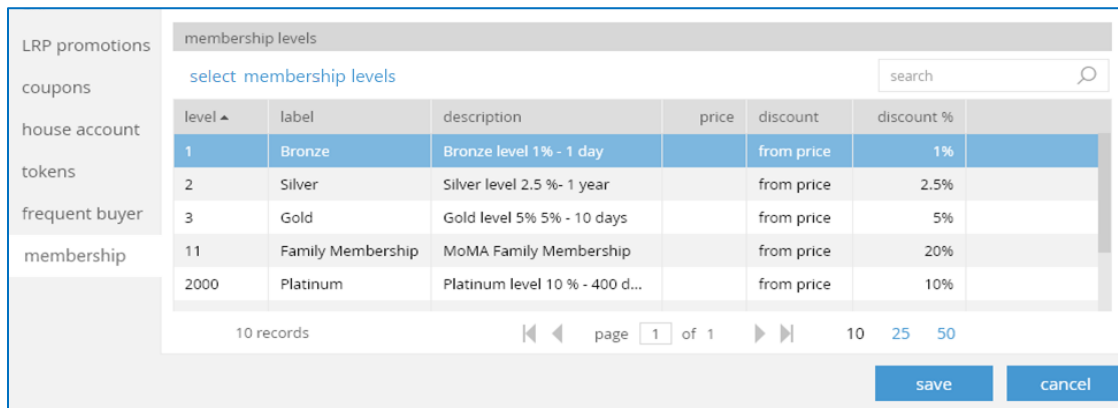


The screenshot shows a configuration interface for membership levels. At the top, there are two dropdown menus: "calculation period type:" with "period" selected, and "default membership type:" with "calculated" selected. Below these is a section titled "membership level '0'". Inside this section, there are two text input fields: "label:" containing "Basic" with a red asterisk to its right, and "description:" containing "Basic Membership Level". Below the "membership level '0'" section is a "membership levels" section with a blue link that says "select membership levels".

Membership Levels

This area shows all membership levels selected for this SVS location group. These are the same columns shown in the Membership Level grid under CHQ > Settings > Sales > Membership Levels. The available columns are:

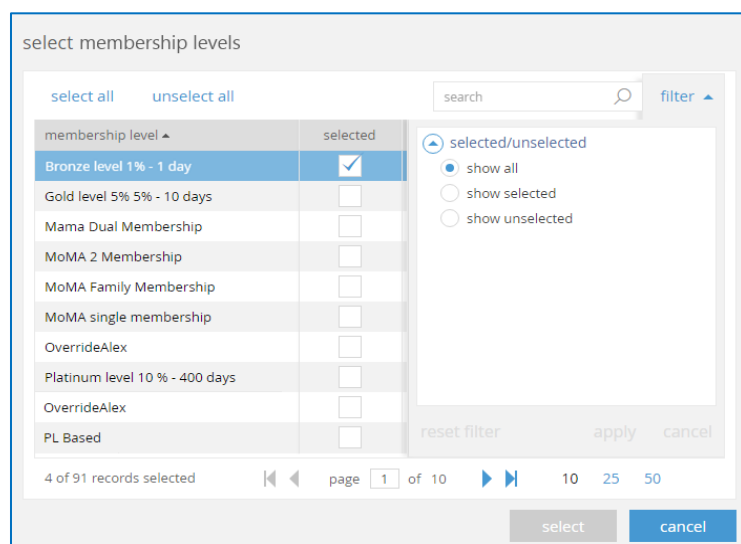
- Level
- Label
- Description
- Day Length When Sold (blank if *Membership Level Assignment* is **Reward**).
- Day Length When Rewarded (blank if *Membership Level Assignment* is **Sold**). Not visible by default.
- Price (blank if *Membership Level Assignment* is **Reward**).
- Needed Amount (blank if *Membership Level Assignment* is **Sold**). Not visible by default.
- Discount: Type of membership level, either **From Price** or **Price Level**.
- Discount %
- Inactive (not visible by default)



Clicking the **Select Membership Levels** button brings up the dialog below. This button is only visible if the *Publish All Customers to Shared Namespaces* setting is enabled.

This dialog displays all membership levels including active and inactive.

Select the membership levels you want to include and then click **Select** to save changes.



For membership levels for LRP Promotions, the dialog below displays.

select membership levels

Select membership levels eligible for promotion

any membership level

no membership level

selected membership levels

Eligible for promotion when there is no membership

select all unselect all search filter

membership level	selected
Bronze level 1% - 1 day	<input checked="" type="checkbox"/>
Gold level 5% 5% - 10 days	<input checked="" type="checkbox"/>
Mama Dual Membership	<input checked="" type="checkbox"/>
MoMA 2 Membership	<input checked="" type="checkbox"/>
MoMA Family Membership	<input checked="" type="checkbox"/>
MoMA single membership	<input checked="" type="checkbox"/>
OverrideAlex	<input checked="" type="checkbox"/>
Platinum level 10 % - 400 days	<input checked="" type="checkbox"/>

10 of 10 records selected page 1 of 1 10 25 50

select cancel

This dialog shows all membership levels selected for the SVS location group (selected in the SVS Location Group dialog under the Membership tab).

If making changes to Frequent Buyer program, the dialog below displays.

edit frequent buyer program

general

program name: 123 *

description:

credits for award: 2 *

discount %: 1.00 *

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

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

discount reason: 5OFF%GL *

prompt for offers:

archived:

* - required

membership

membership required:

select all unselect all search

membership level	selected
Bronze	<input type="checkbox"/>
Silver	<input type="checkbox"/>
Gold	<input type="checkbox"/>
Family Membership	<input type="checkbox"/>
Platinum	<input type="checkbox"/>
Dual Membership	<input type="checkbox"/>

save cancel

This dialog shows all membership levels selected for the SVS location group (selected in the SVS Location Group dialog under the Membership tab).

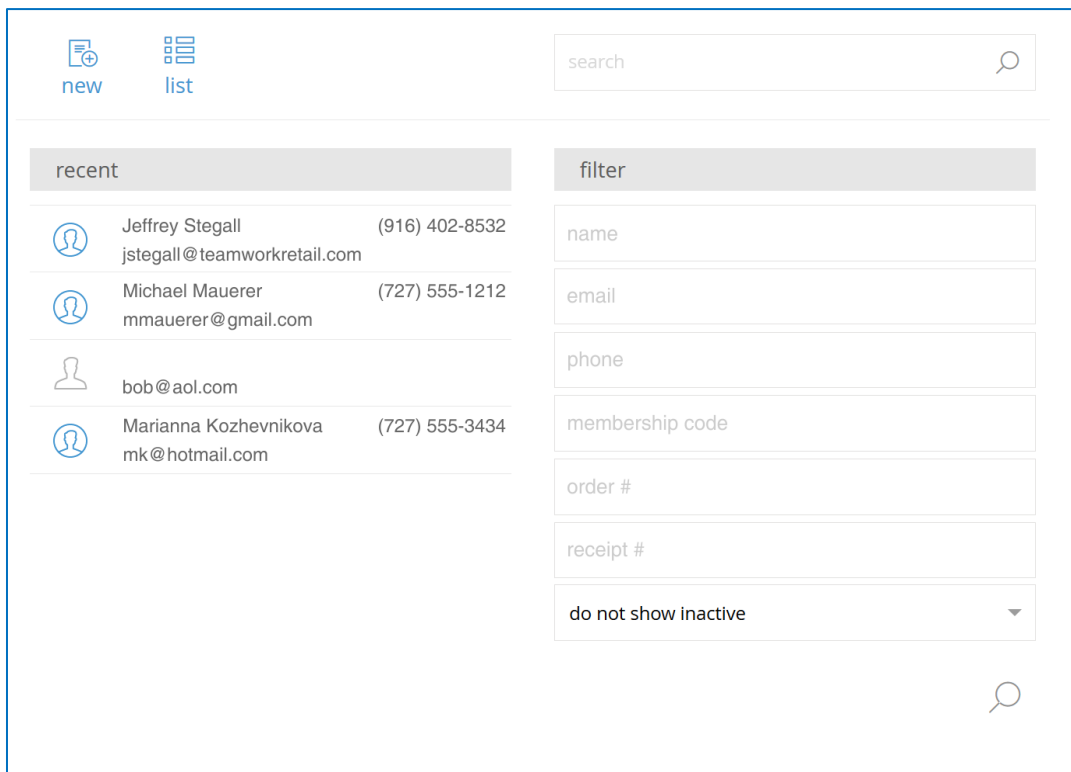
New Customer Area in CHQ

Version 5.25 – TWD-11226

October 2018

If the customer record is a “member” record it displays as a blue icon. If this is a “guest” record, then a gray icon displays.

When using the *Search* field, if additional results are found, a Customer List View displays with all records.



Catalog and Price Feed to Secondary CHQ

Version 5.25 – TWD-14220

October 2018

This update allows for sending catalog and prices from one CHQ to a secondary CHQ.

Sales Receipt – Create Credit Memo Dialog

Version 5.25 – TWD-14208

October 2018

This feature adds a "refund amount" to the Create Credit Memo dialog.

The purpose for this is so that if an associate is the phone with a customer, the total amount is visible (including tax) that will be returned (to a credit card, gift card, etc.) before finalizing a Credit Memo receipt.

The *Refund Amount* field shows this. This field is unable to be edited but automatically recalculates if the amount changes, such as **Clear Discount** is selected, or any of the other amount fields are changed.

create credit memo

item discount

item(s) total: \$100.00

discount reason: [clear discount](#)

discount percentage:

discount amount:

new item(s) total: \$85.00

fee discount

fee total: \$10.00

discount percentage:

discount amount:

new fee total: \$5.00

refund

refund amount: \$21.80

refund to:

notes

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

Purchasing

Edit Custom Fields in Posted Purchase Receipt

Version 5.25 – TWD-14314

October 2018

This feature adds the capability to edit Purchase Receipt header custom fields in a Posted Purchase Receipt dialog.

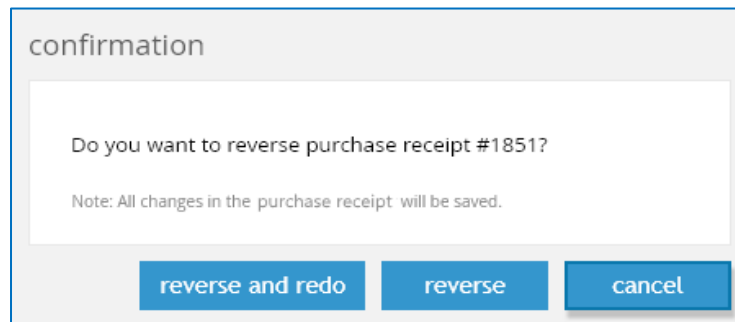
Under CHQ > Purchasing > Purchase Receipts > List > View/Edit, if the PR is posted, the fields shown below are still able to be edited.

NOTE

Users must have the security right CHQPURCHRPT-ADD in order to do this.

The screenshot shows a web interface for a purchase receipt titled "purchase receipt - 1835 - posted". The interface is divided into several sections: "general", "location", "purchase order", "ASN", "totals", "vendor", and "custom". The "custom" section, located at the bottom left of the main content area, contains four text input fields labeled "custom text 1", "custom text 2", "custom text 3", and "custom text 4". These fields are highlighted with a red rectangular box. The "general" section includes fields for "universal #", "receipt #", "status", "receipt date", "posting date", and "type". The "location" section includes "location". The "purchase order" section includes "purchase order #" and "contract PO #". The "ASN" section includes "ASN #", "delivery #", and "ASN tracking #". The "totals" section includes "received qty", "PO difference qty", "back difference qty", "total cost", "total fee", and "total amt incl. fee". The "vendor" section includes "vendor", "vendor ref. #", "vendor order #", and "vendor invoice #". At the bottom of the form, there are buttons for "print", "print tags", "reverse", "save", and "cancel".

To update, click **Save** and then make your selection on the confirmation dialog to finalize the changes.



Purchase Receipts – Custom Header Field

Version 5.25 – TWD-14258

October 2018

A custom field is now included in the List view for Purchase Receipts. This is not visible in the default layout, only with the column chooser.

Other Enhancements

Read-Only Mode for Settings Area

Version 5.25 – TWD-13704

October 2018

A read-only mode has been added to the Settings area. To control this mode, users need to have the appropriate security rights.

When in read-only mode, any “new” or “edit” buttons are replaced with only a “view” button.

Moneris Heading Updated

Version 5.25 – TWD-14262

October 2018

We’ve renamed the *Payment Processing – eSelect* area to say *Payment Processing – Moneris*.

Here you can select the type of Moneris processing, either eSelect or Cloud Solution.

CHQ Portal Synchronization

Version 5.25 – TWD-13715

October 2018

We’ve made updates to allow for synchronizing between two or more CHQ portals.

Store Credit

Version 5.25 – TWD-14066

October 2018

We’ve now moved all customer store credit from CRM to CHQ.

CRM/SVS API Implemented

Version 5.25 – TWD-13567

October 2018

This feature implements API functionality of CRM/SVS on the CHQ side.

Under CHQ > Settings > General SVS Settings, before the *Service URL*, there is a new field with two options:

- External: The default. When selected, settings such as *Offline Posting of Sales Receipts to CRM Preferred*, and *Send Sales Receipts to CRM* are enabled.
- Internal: When enabled, settings only save in CHQ, they do not send to SVS. Additionally, synchronization between CHQ and SVS is disabled.

Control Tables and API

Version 5.25 – TWD-13989

October 2018

The purpose of Control Tables is to provide a data repository in the CHQ data structure to record key elements or key events that someone wants to record.

A typical usage is to register inbound and outbound documents in integrations, or to store a control files that come from 3rd-party system to validate receiving or sending of documents.

A JSON-based API to be provided both for export and import. Export filters include: RecCreated range, RecModified range, Type, DocumentId, and ExternalId.

Epilogue

This manual was published on 7 November 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](tel:(727)210-1700) and [select 1](#) to leave a message that will immediately be dispatched to an on-call tech.