TEAMWORK
RETAIL
a product of Retail Cloud Technologies

TEAMWORK CHQ RELEASE GUIDE

Version 5.31

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Sales and OMS

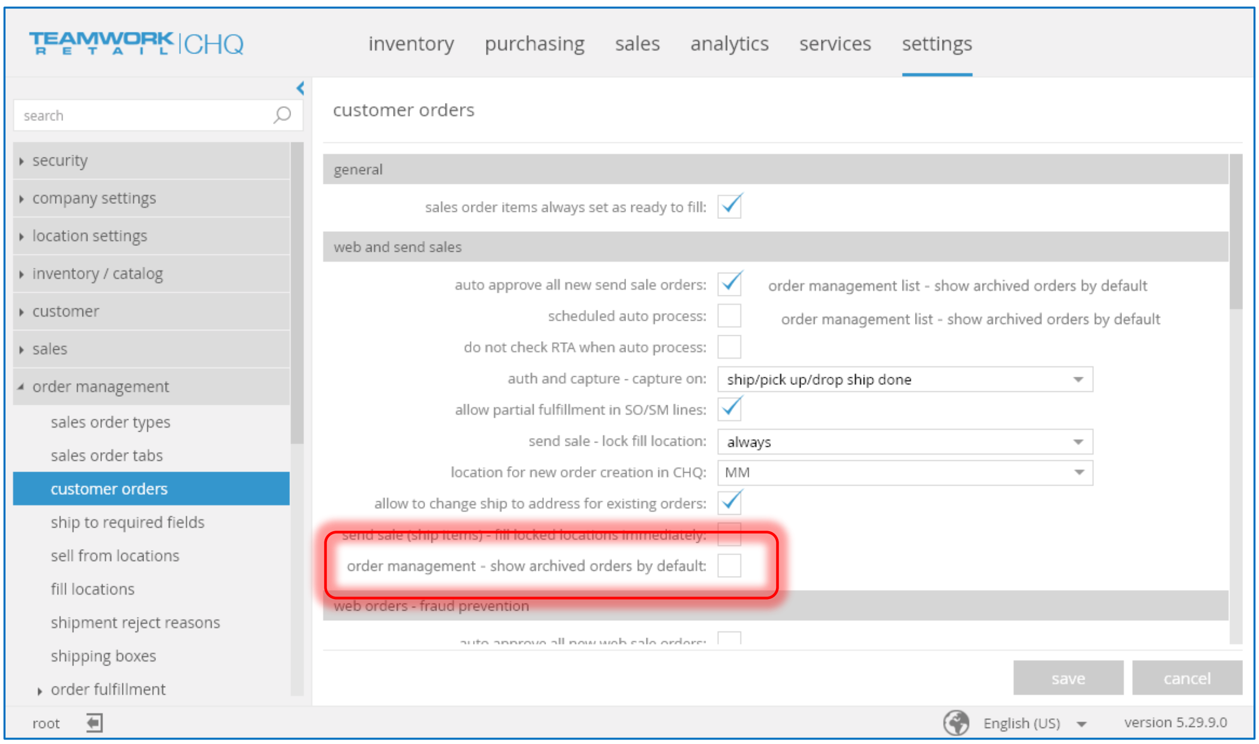
Archived Sales Orders Shown by Default

Version 5.31 – TWD-15820

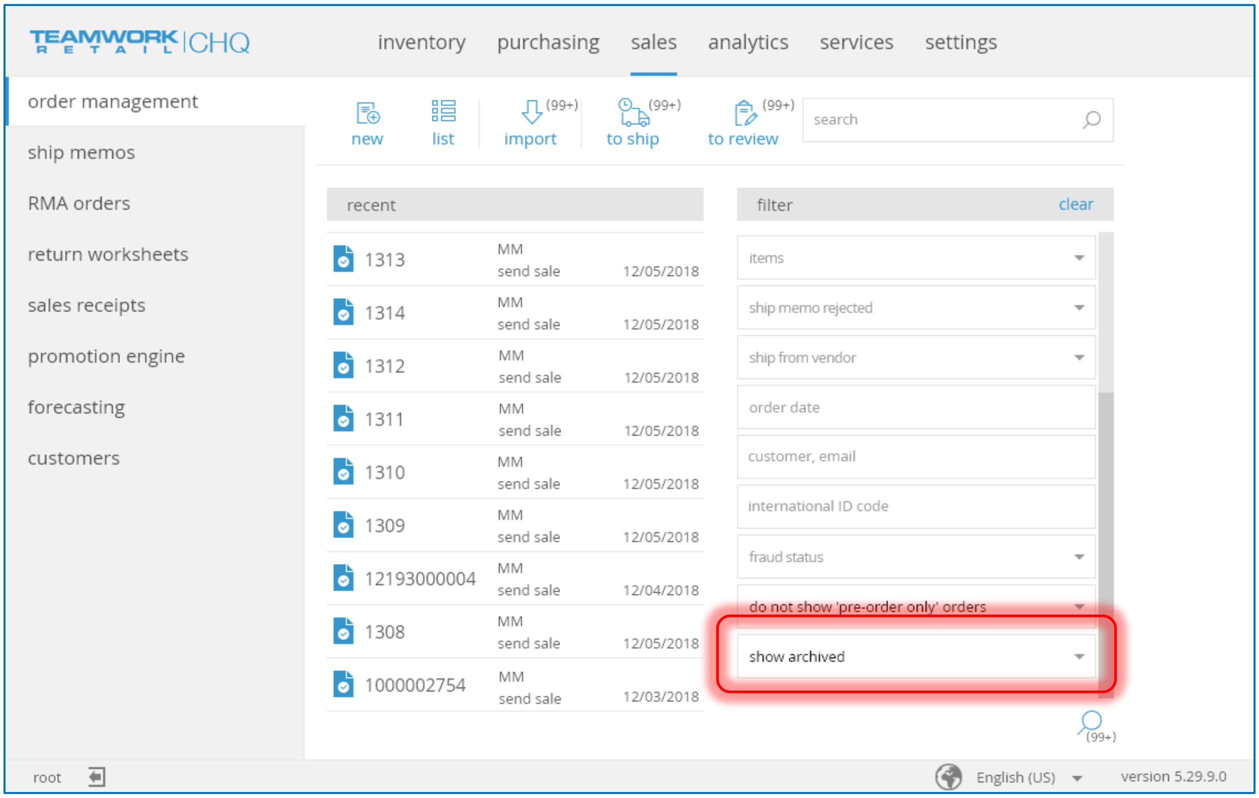
January 2019

The update allows for showing archived sales orders by default under *CHQ* > *sales* > *order management*.

To display archived sales orders by default, a new *order management – show archived orders by default* option must be selected in the *web and send sales* section under *CHQ* > *settings* > *order management* > *customer orders*.



If the *order management – show archived orders by default* option is selected, then the *archived status* filter in *CHQ > sales > order management* is set to *show archived* by default.



Second Refund Option in Credit Memos

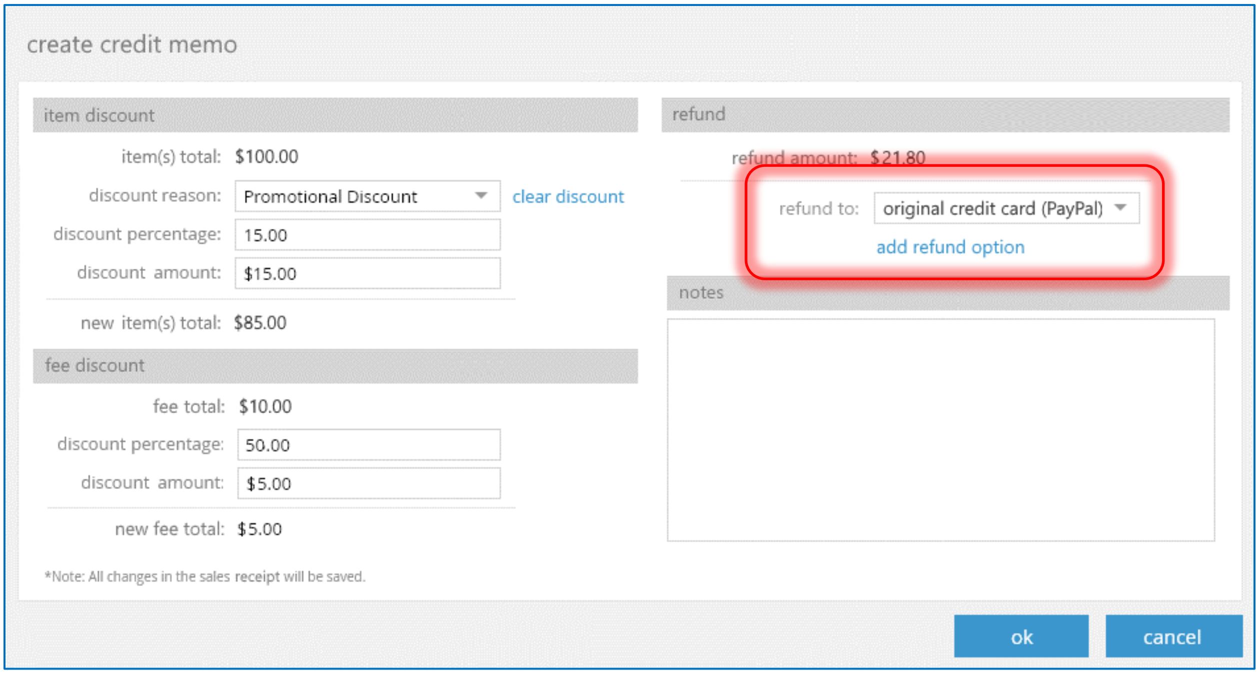
Version 5.31 – TWD-14624

January 2019

When creating a credit memo, it is now possible to add a second refund option. This allows for making refunds using two different payment methods simultaneously.

To add a second refund option, click the **add refund option** button in the *refund* section of the *create credit memo* dialog.

The **add refund option** button displays only if more than one payment method is available in the *refund to* field and the *original credit card (PayPal)* option is selected there.



Besides the *original credit card (Pay Pal)* option that is visible if the available for refund sum is greater than zero, the following options can be available:

- *original gift card*

  visible if the receipt was paid with a physical or virtual gift card, or the receipt is linked to an order that was paid with a physical or virtual gift card and the gift card functionality is turned on in *Settings*

- *new virtual gift card*

  visible if the gift card functionality as well as email notification for credit memo appeasement are turned on in *Settings*. The sales receipt must be linked to a send sale or web order

- *store credit*

  visible if the store credit functionality is turned on in *Settings* and a customer is defined on the sales receipt. The customer must not be *Anonymous Guest* or *Guest*

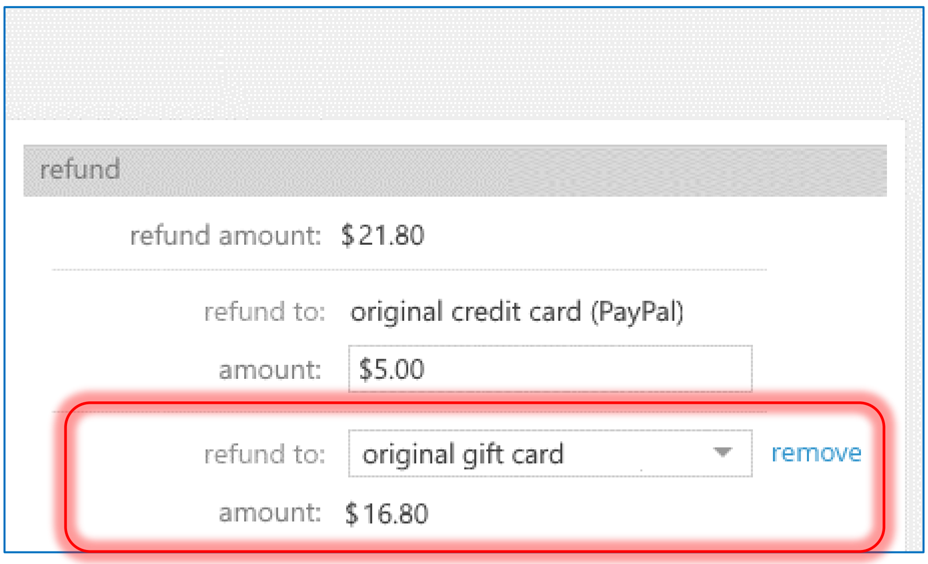
- *offline payment*

  visible if there is a payment method with the *Offline Payment* type

Once the **add refund option** button is clicked:

a) a second refund option is added

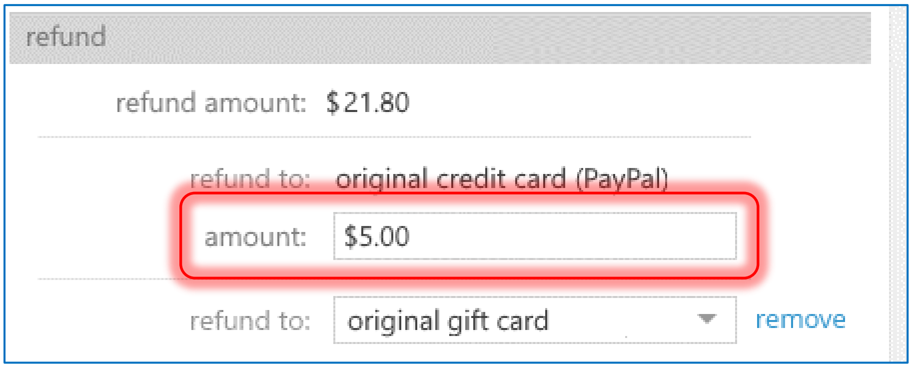
   The option includes the editable *refund to* field and the *amount* field. The latter is not editable.



In the editable *refund to* field, it is possible to choose among the following options:

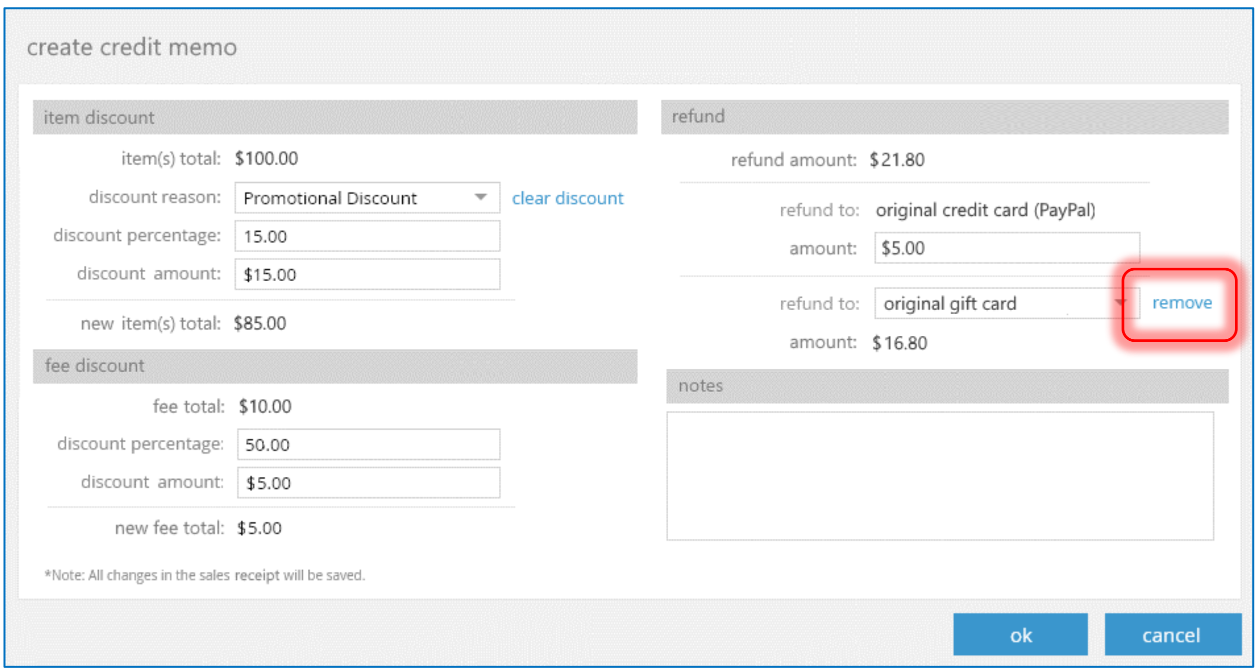
- original gift card
- new virtual gift card
- store credit
- offline payment

b) the editable *amount* field displays under the first *refund to* field



When the refund amount is changed in the first (editable) *amount* field, the value in the second *amount* field is recalculated, so that their total equals the refund amount.

The second refund option can be removed. To do so, click the **remove** button, located to the right of the second *refund to* field.



On clicking **ok** in the *create credit memo* dialog, if the refund amount of the second refund option is greater than zero, both the refund options will participate in the refund workflow.

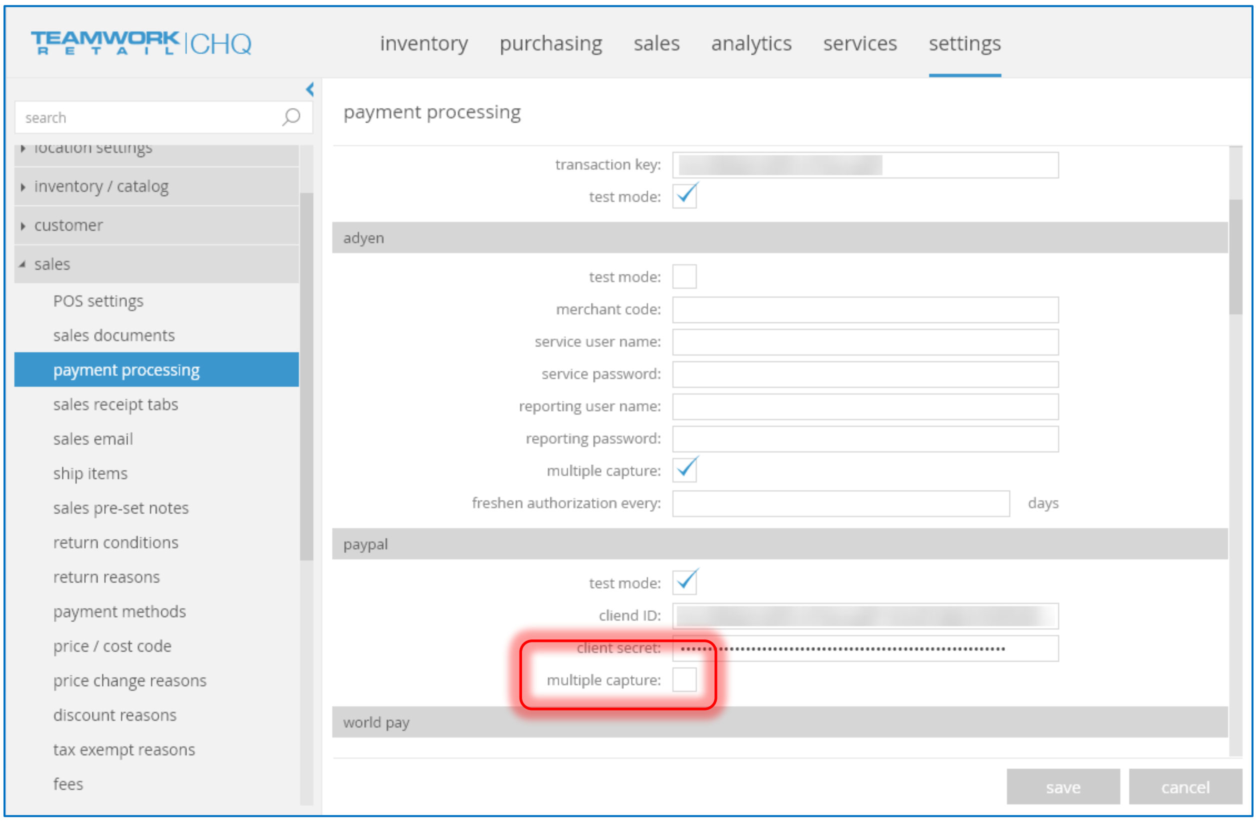
Multiple Capture for PayPal

Version 5.31 – TWD-15952

January 2019

We've added a new option called *multiple capture* for PayPal. When the *multiple capture* option is enabled, in case of partial shipment, it is possible to take an order payment in parts.

The *multiple capture* option is available in the *PayPal* section under *CHQ > settings > sales > payment processing*.



"Created By" Filter for Ship Memos

Version 5.31 – TWD-16603

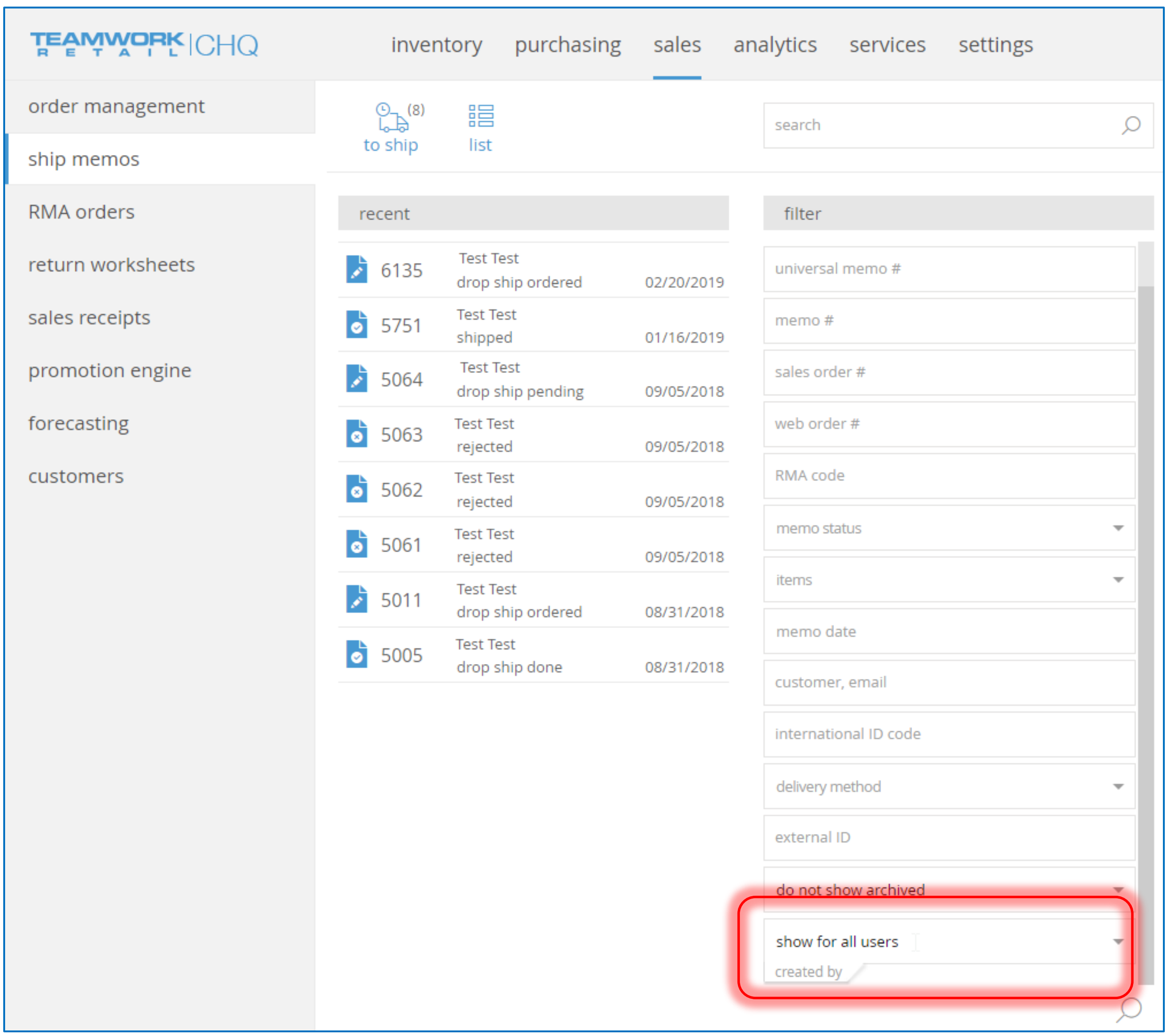
January 2019

The new "Created By" filter is now available in the filter section under *CHQ* > *sales* > *ship memos.*

The following options are available for selection in the filter:

- *show for all users*: to display ship memos created by each and every user
- *show for current user*: to display ship memos created by the currently logged in user

The *show for all users* option is selected by default.



Inventory

Attribute Alias in Check Quantity Dialog

Version 5.31 – TWD-15819

January 2019

We have added three new columns to the items grid in the *check qty* dialog:

- *attr 1 – alias 1*: displays after the *attribute 1* column, not visible by default, and not editable
- *attr 2 – alias 1:* displays after *attribute 2* column, not visible by default, and not editable
- *attr 3 – alias 1*: displays after *attribute 3* column, not visible by default, and not editable

If there is no *alias 1* defined for an attribute, the field remains blank.

NOTE:

An alias can be added to any attribute value as another way to refer to that value. This is done to improve usability. For example, your attribute value may be BL, GRN, RD, but for users it will be easier to see the alias of Blue, Green, Red.

The *check qty* dialog opens on clicking the **check qty** button available under *style/item edit* dialog (click a style or item icon in *CHQ > inventory > styles&items) or styles&items list view (*click the **list** button in *CHQ > inventory > styles&items)*

Viewing Committed Quantity Details

Version 5.31 – TWD-15986

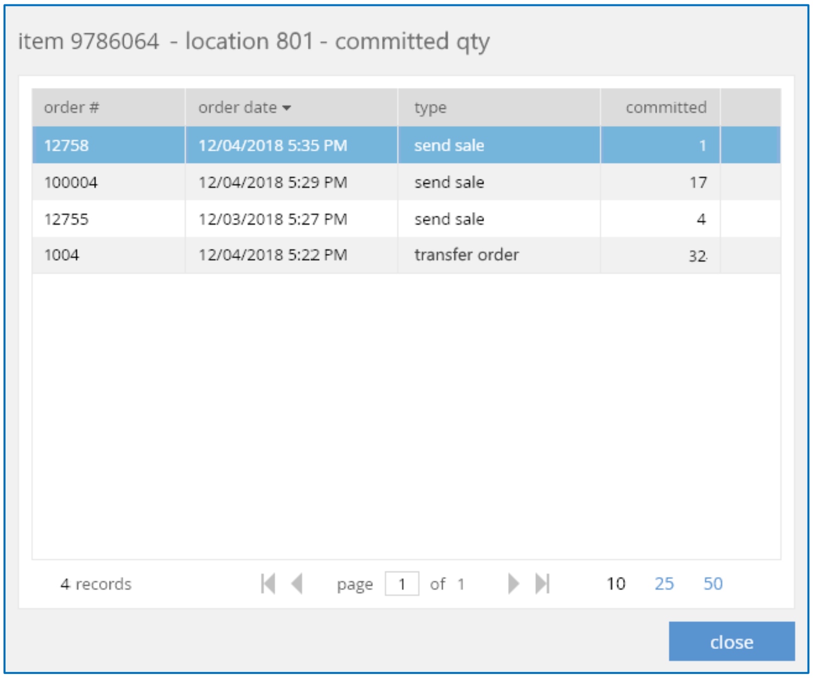
January 2019

This functionality allows viewing committed quantity details for styles and items within a certain location.

The information is available in the *committed qty* dialog and includes the following:

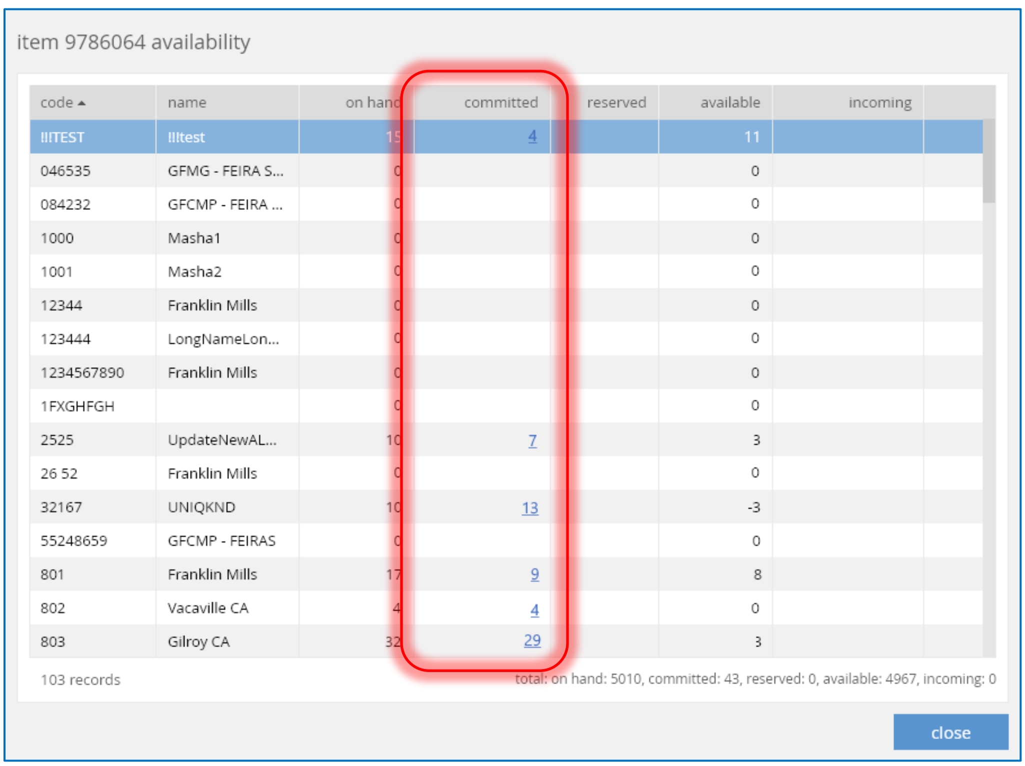
a) in the dialog caption:
    - item PLU
    - location code
b) in columns:
    - order #
    - universal order # (empty in case of external orders, not visible by default)
    - web order # (shown for web sales only, not visible by default)
    - order date
    - type (for example, *send sale*)

- committed – quantity of the specified item committed in a particular order



order #	order date	type	committed
12758	12/04/2018 5:35 PM	send sale	1
100004	12/04/2018 5:29 PM	send sale	17
12755	12/03/2018 5:27 PM	send sale	4
1004	12/04/2018 5:22 PM	transfer order	32

The *committed qty* dialog is accessed by clicking a link in the *committed* column of the *check qty* dialog:



code	name	on hand	committed	reserved	available	incoming
!!!TEST	!!!test	15	4		11	
046535	GFMG - FEIRA S...	0			0	
084232	GFCMP - FEIRA ...	0			0	
1000	Masha1	0			0	
1001	Masha2	0			0	
12344	Franklin Mills	0			0	
123444	LongNameLon...	0			0	
1234567890	Franklin Mills	0			0	
1FXGHFGH		0			0	
2525	UpdateNewAL...	10	7		3	
26 52	Franklin Mills	0			0	
32167	UNIQKND	10	13		-3	
55248659	GFCMP - FEIRAS	0			0	
801	Franklin Mills	17	9		8	
802	Vacaville CA	4	4		0	
803	Gilroy CA	32	29		3	

Other Enhancements

New Features for Avalara Integration

Version 5.31 – TWD-15987

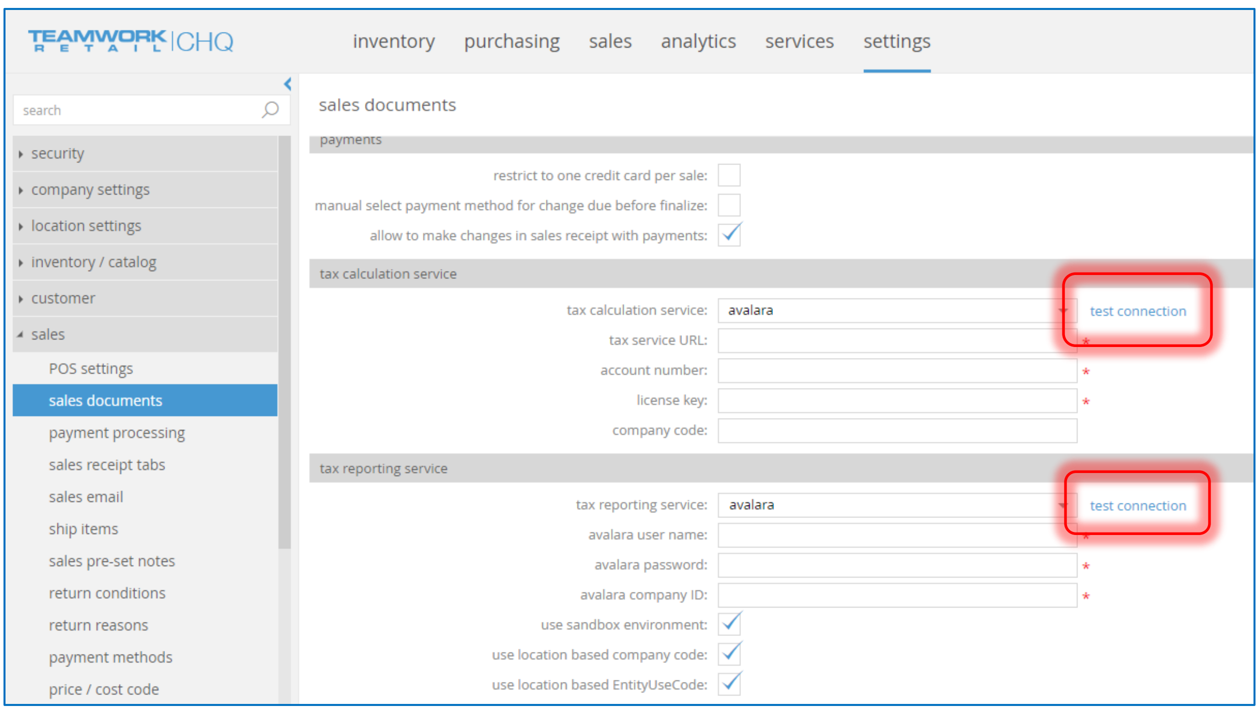
January 2019

We have added the following new features for Avalara integration:

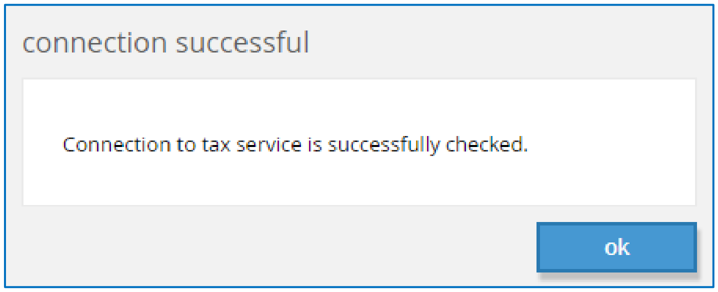
- testing connection to Avalara
- enabling logging for the *GetTax* and sending sales calls
- setting *SalesOrder* as a document type

Testing Connection to Avalara

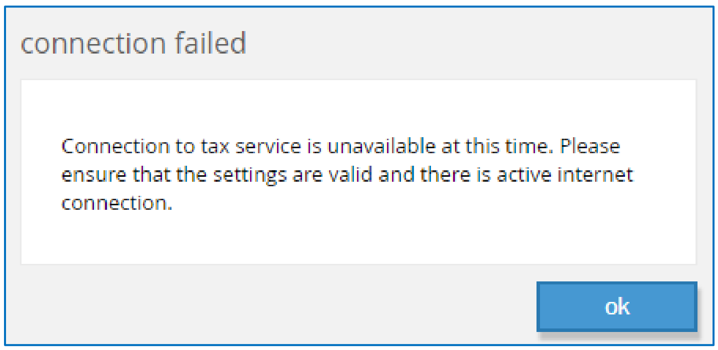
In *CHQ* > *Settings* > *Sales* > *Sales Documents*, when defining settings for a tax calculation or tax reporting service, it is now possible to test the connection to Avalara if the latter is selected in *tax calculation service* or *tax reporting service*.



If all the required fields are filled in with the correct information and the connection is successful, the *connection successful* dialog displays:



Otherwise, the *connection failed* dialog displays:



Logging Enabled for Two Types of Calls

Logging has been added for the *GetTax* call. The information on the type of the call, the time when the call is made, as well as request and response are stored.

Logging is also performed when the call to send sales to Avalara is made. In that case, the information on the type of the call, the time when the call is made, and the result (success or error) are stored.

"SalesOrder" Set as Document Type

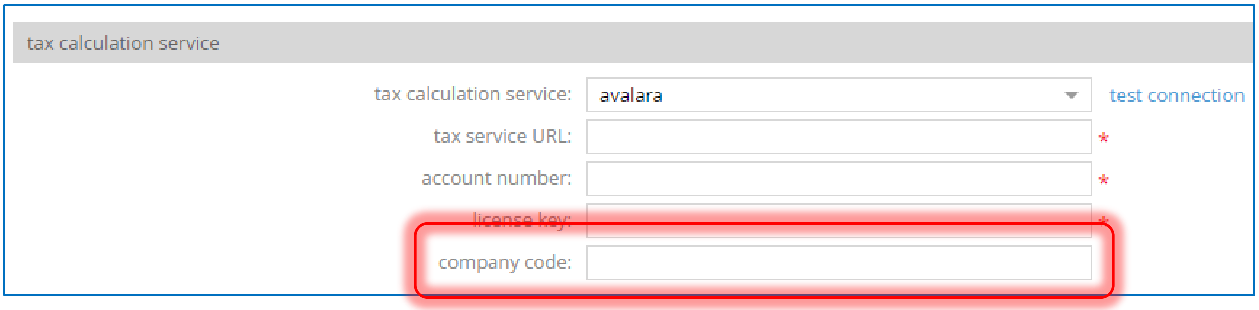
"SalesOrder" is now set as a document type when using the *GetTax* call for sales receipts.

Company Code for Avalara Tax Calculation Service

Version 5.31 – TWD-15988

December 2018

In the *tax calculation service* section under *CHQ > Settings > Sales > Sale Documents*, we have added a new field – *company code.* The field is shown only if *Avalara* is selected in the *tax calculation service* field of the same section.



If the field is filled in, the code is passed to Avalara as Company Code.

Creating Custom Export APIs

Version 5.31 – TWD-12368

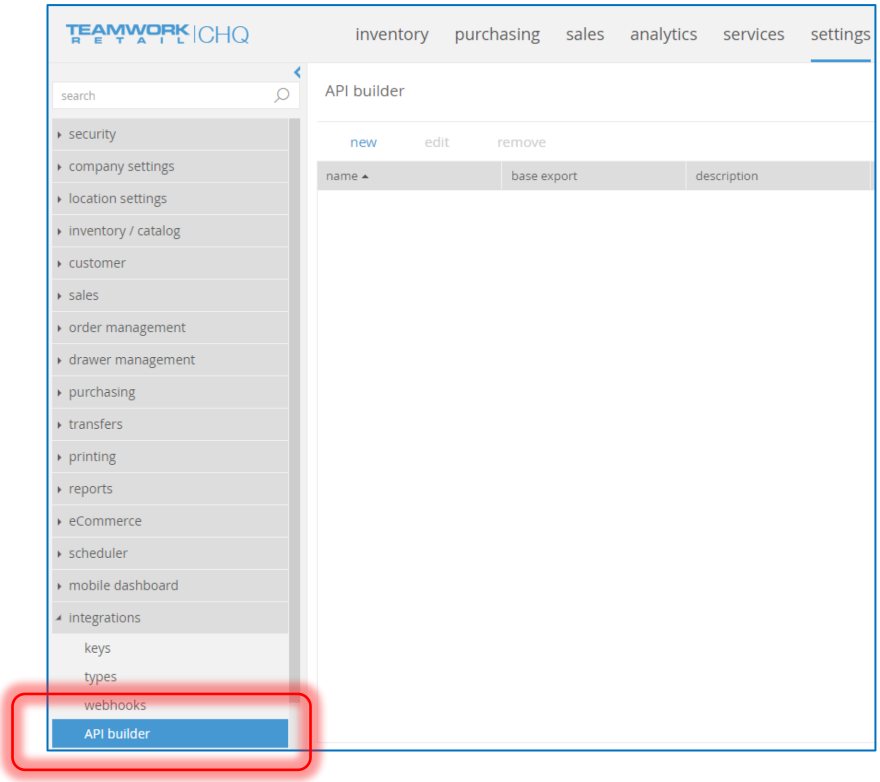
January 2019

We've added a new feature called API builder. The feature allows for creating new custom export APIs.

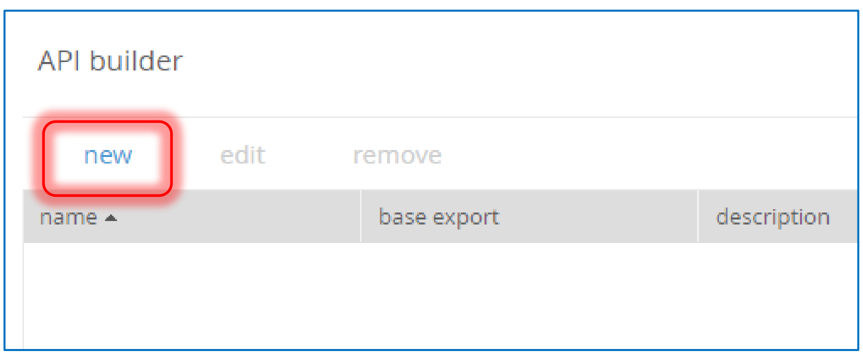
While creating a new custom export API, it is possible to select entity properties.

Once the created custom API is used for entity export, only the selected properties will be included into the output. Thus, the request output can be significantly reduced in size.

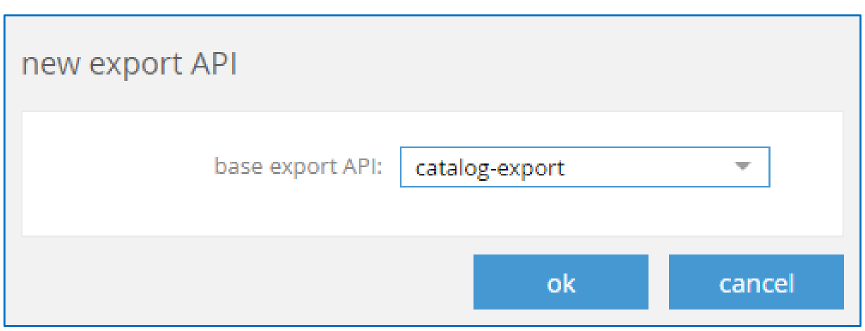
The API builder feature is available under *CHQ > settings > integrations.*



To create a new custom export API, in the *API builder* area, click **new**.



Clicking **new** will bring up the *new export API* dialog.

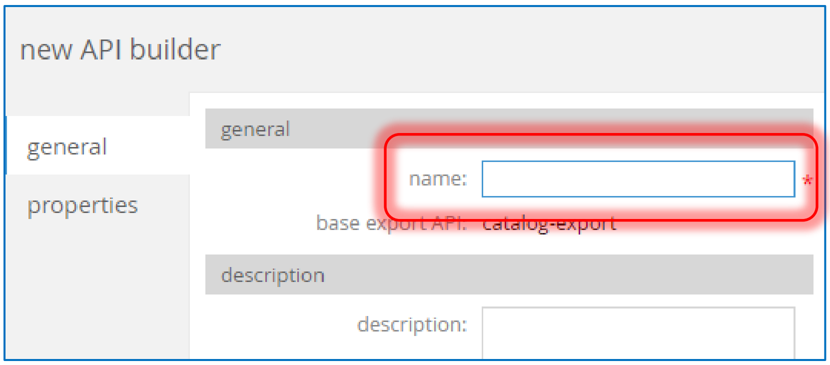


In *base export API*, it is necessary to select the required base export API type and click **OK**.

Note

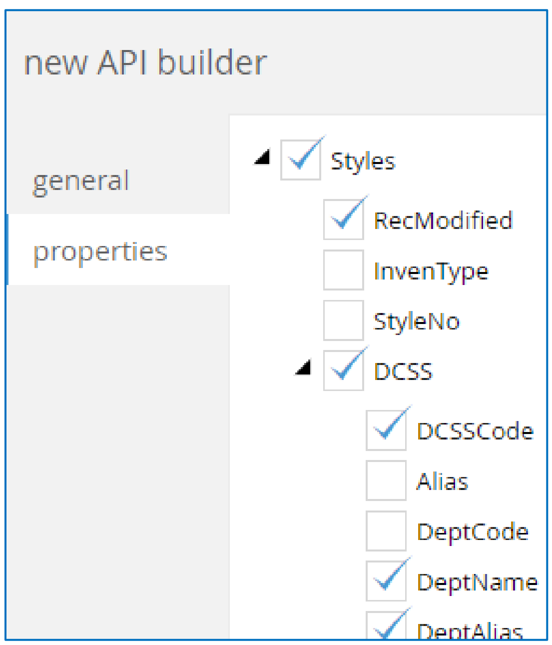
Once selected, the base export API type can't be changed. To apply a different base export API type, you will have to create a new export API.

In the *general* tab of the *new api builder* dialog, it is necessary to provide a unique name for your custom export API.



Then, in the *properties* tab, clear the checkboxes next to the names of properties that you **do not** want to be displayed in the output.

The properties you want to be included into the output must remain selected.



Click **save** to create a new custom export API.

Besides creating new, it is possible to edit or remove existing custom export APIs.

Reserving Items when Returning

Version 5.31 – TWD-15761

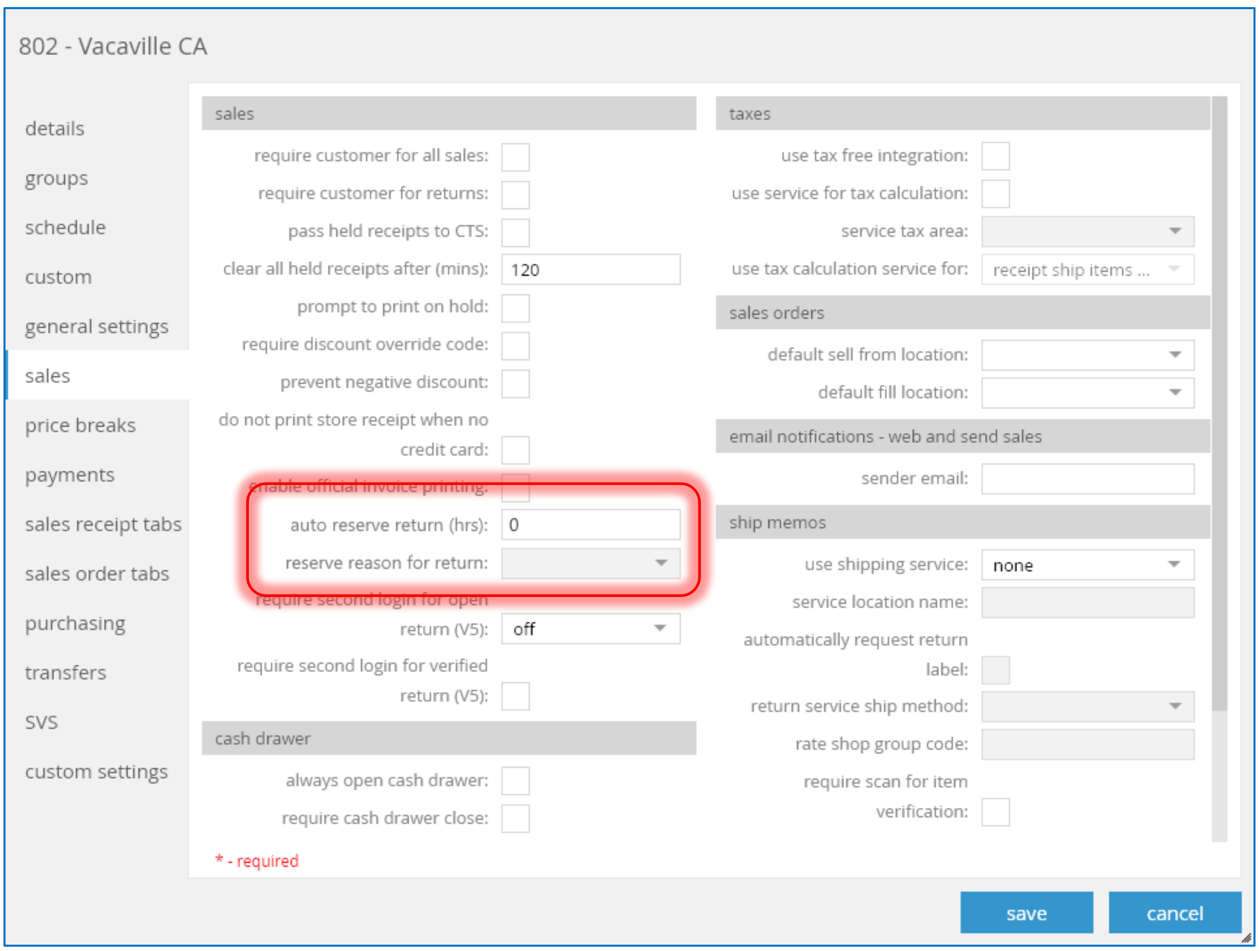
January 2019

When making a return, the returned quantity can now be automatically reserved for the required number of hours.

That may be helpful, for example, if some extra time is needed to inspect the quality of the returned merchandise prior to accepting it.

The number of hours as well as reserve reason can be specified in, correspondingly, the *auto reserve return (hrs)* and *reserve reason for return* fields.

To access the fields, navigate to *CHQ* > *settings* > *location settings* > *locations/location settings*, double-click the required location and open the *sales* tab.



The *reserve reason for return* field becomes active when the value in *the auto reserve return (hrs)* field is greater than zero.

If the auto-reserve return hours and reserve reason for return are specified, once a sales receipt with return is posted in CHQ, a reserve order for all returned regular (not service) items is created and released.

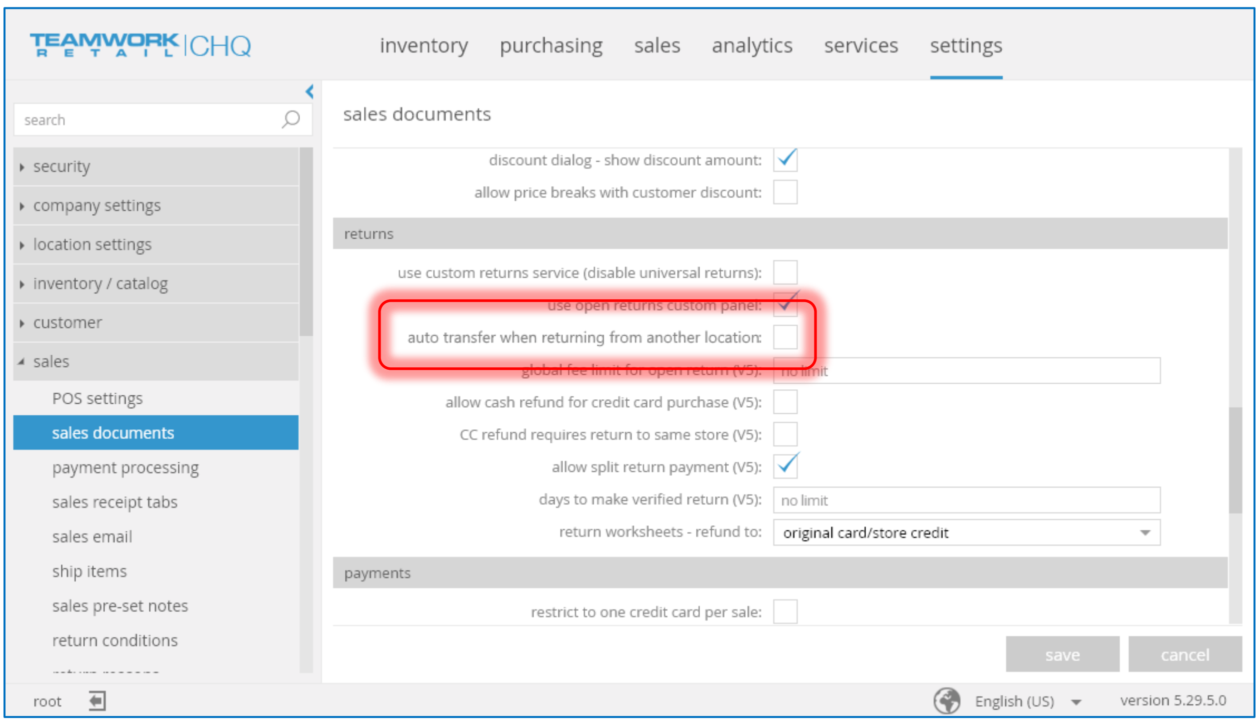
Auto-Transfer when Returning from Location Different form Initialized

Version 5.31 – TWD-15762

January 2019

We've added a new setting that is called *auto transfer when returning from another location.* The settings is located on the company level.

To access the setting, navigate to *CHQ* > *settings* > *sales* > *sales documents*



If the *auto transfer when returning from another location* option is selected, when making a return in POS from another location (different form the initialized location), the returned quantity is automatically transferred back to the initialized location.

IMPORTANT NOTE:

Make sure the merchandise is actually transferred to prevent quantities from being off.

At the same time, when a sales receipt with return is posted in CHQ from POS, a transfer memo is created and posted in/out for all the returned regular (not service) items.

In that case, the transfer memo "source location" is equal to the sales receipt "fill from location". The transfer memo "target location" equals to the sales receipt "created at location".

Partial Quantity in Ship Memo Control Flow API

Version 5.31 – TWD-12804

January 2019

We've added support of partial fulfillment in ship memos, meaning that only a part of item quantity indicated in a ship memo is shipped.

Also, Ship Memo Control Flow API is now available in JSON.

Updating Custom Fields of Posted Sales Receipts via API Requests

Version 5.31 – TWD-16057

January 2019

This new feature allows updating custom fields of posted sales receipts using API requests.

Custom fields can be updated on the Receipt and ReceiptItem levels only.

To link to *Receipt*, the following identifiers are used:

- ReceiptId
- DeviceTransactionNumber
- ReceiptNum
- ExternalId
- AltDeviceTransactionNumber

The following custom fields can be updated on the *Receipt* level:

- *CustomDate1-4*
- *CustomFlag1-4*
- *CustomNumber1-4*
- *CustomDecimal1-4*
- *CustomText1-8*
- *CustomGUID1-8*

To link to *ReceiptItem* the following identifiers are used:

- ReceiptItemid
- ItemId
- ItemPLU
- ItemUPC ItemEID
- ExternalId

The following custom fields can be updated on the *ReceiptItem* level:

- CustomDate1-4
- CustomFlag1-2
- CustomNumber1-2
- CustomDecimal1-2
- CustomText1-2
- CustomGUID1-4

Ledger Cost Calculation with and without Purchase Fees

Version 5.31 – TWD-15632

January 2019

This update allows for calculating costs both with and without purchase fees in Ledger.

To enable cost calculation both with and without purchase fees, the *Area: CostLedger.CalculateCostWithoutFee* setting must be turned on on the database level.

In that case, rules applied to cost calculation differ depending on the type of transaction:

- positive with indicated cost (for example, purchase receipts)
- positive with no cost indicated (for example, sales returns)
- negative (for example, negative adjustment memos)

NOTE:

If the *Area: CostLedger.CalculateCostWithoutFee* setting is turned off, only cost with fee is calculated.

Updated Integration with Authorize.Net

Version 5.31 – TWD-16305

January 2019

We've added support of Authorize.Net 1.9.7

Epilogue

This manual was published on 5 April 2019 by Teamwork Retail.

CHQ is accessed online through a browser and client specific web site. 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.