

TEAMWORK CHQ RELEASE GUIDE

Version 5.34

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Sales and OMS

Order Fill Logic Ship Once

Version 5.34 - TWD-17385

This update allows for specific sales orders to be shipped only once.

If any part of the order is shipped, the Order Management System will no longer attempt to automatically fill any unfilled products. The unfulfilled items on the order will simply remain in an accepted status for manual handling.

NOTE:

The "Ship Once" feature will be used by OFL and will not affect manual creation of a ship memo.

The *ship once* check box is available in the *delivery* tab when creating or editing a sales order. By default, the *ship once* check box is unchecked.

sales order -	web sale #1443 - accepte	d	
order customer delivery items global discount global fees CSR notes payments shipments	sell from location: default fill location: lock fill location: ship method: ship partial: ship once: international ID code:	801 - Franklin Mills 801 - Franklin Mills Nova Poshta	
print	pack slip email		save cancel

The *ship once* column is also added to the *Order Management List View*. The column contains the information on whether the *ship once* option is enabled for a corresponding sales order. The *ship once* column is not visible by default.

Block Email Notifications

Version 5.34 - TWD-17386

This update allows the user to block sending any email notifications to the customer for specific sales orders in the Order Management System.

To block email notification, the *block email notifications* check box must be selected in the *order* tab when creating or editing a sales order.

sales order - web sale #1443 - accepted						
order	universal order #: order #:	1000003150 1443		notes pre-set notes		
customer	web order #:	100001345 magento				
delivery	order date:	02/25/2019 11:56 AM				
items	fraud status:	unknown				
global discount	tax exempt:		î			
global fees	block email notifications.			total		
CSR notes	custom cht1:			order qty:	1	0%
payments	custom text 1:			qty med. qty due:	1	0.50
shipments	custom text 2:			item total:	\$25.00	
user info	custom text 3:			discounts:	\$9.25	37%
	custom text 4:			tax:	\$1.30	In stitem
	custom date 1:	<mm dd="" yyyy=""></mm>		total:	\$17.05	
	custom date 3:			deposit used:	\$0.00	
	custom date 4:	<mm dd="" yyyy=""></mm>		deposit balance:	\$0.00 \$17.05	
				payment due.	#47 oc	
print	pack slip emai				sav	e cancel

If the *block email notifications* check box is selected, the customer will not receive email notifications for the following:

- Email notification for "order confirmation"
- Email notification for "delivery pending"
- Email notification for "shipping confirmation"
- Email notification for "ship from vendor confirmation"
- Email notification for "virtual gift card delivery"
- Email notification for "ready for pickup"
- Email notification for "cancelling"
- Email notification for "changing sales order
- Email notification for "changing shipping address"
- Email notification for "changing pickup location"
- Email notification for "return"
- Email notification for "credit memo appeasement"

Global-E Orders

Version 5.34 - TWD-17471

April 2019

Global-E is an end-to-end cross border solution for ecommerce that enables a US retailer to process and accept orders from other countries.

Global-E Payment Method

When creating a new payment method under *CHQ* > *settings* > *sales* > *payment methods*, the new *global-e* payment type is now available for selection in the *payment type* drop-down menu.

TEAMWORKICHQ		inver	ntory	purcha	sing sale	es analytics	services	settings
search	*	payment methods						
▶ security		new	edit		location set	tings		
 company settings 		code		descript	tion	type 🔺	currency	
 location settings 		Cash Base			an a the a d			es Dollar
 inventory / catalog 		UAH	new pa	yment	method			lrivna
▶ customer		EURO	Select pa	ayment m	ethod type:			Jro
∡ sales		CASH	payme	ent type:			*	ncy
POS settings		CASHM	* - requir	ed	gift card		_	es Dollar
sales documents		CASHM1		(gift certificate			es Dollar
payment processing		TRAVCHECK			bouse account			
sales receipt tabs		CHECK		Check	store credit			
sales email		COUPON		Coupon	terms		- 18	
ship items		AUTHNET		Authrize	token universal		- 18	
sales pre-set notes		LeraZ test!		cayan	universal cred	it		
return conditions		BRAINTREE		Braintre	e	credit card		
retain conditions		CONF		Card on	File	credit card		
return reasons		PAYWORKS		Paywor	ks Payment	credit card		
payment methods		Offline Payn	nent	Offline	Credit Card	credit card		

Once the *global-e* payment type is selected, on clicking **ok**, the *new payment method* dialog with the Global-E payment type will open.

new payment method	
general	
payment type: global-e code: description: list order: external ID: inactive:	*
* - required	

In the *new payment method* dialog, it is required to specify the code for your new payment method. This is how the name will be displayed on the POS button.

Also, it is possible to:

- add description
- set the list order depending on the payment method usage frequency (1 for the most used). That may be helpful to speed up the check out process
- specify the external ID
- make the payment method inactive

Click **save** to create the payment method.

Once a payment method with the *global-e* payment type is selected under *CHQ* > *settings* > *sales* > *payment methods*, the *location settings* button becomes inactive.

TEAMWORK	inventory	purchasing sale	es analytics	services
>	payment metho	ds		
▶ security	new edi	t location set	ttings	
 company settings 	code	description	type 🔺	currency
 location settings 	GLOBAL-E	Global-E	global-e	
 inventory / catalog 	offline payment-ter	offline payment-ter	terms	

Order External ID and Line External ID Fields for Sales Orders

Adding the *order external ID* and *line external ID* fields for Sales Orders (SO) is required by Global-E to make refunds.

Searching and Filtering

It is now possible to search for sales orders by order external ID.

Also, it is now possible to filter sales orders by order external ID.

TEAMWORKICHQ	inventory	purchasing s	ales analytics services setti	ngs
order management		八 ⁽⁹⁹⁺⁾	(99+)	0
ship memos	new list	import to sh	hip to review	
RMA orders	recent		filter	
return worksheets	1000003327	ANNA DARROW send sale 03.	universal order # /07/2019	
sales receipts	1000003326	ANNA DARROW send sale 03.	order #	
promotion engine	1000003325	ANNA DARROW send sale 03.	web order #	
forecasting	1000003324	ANNA DARROW send sale 03.	order external ID /07/2019	
customers	1000003323	ANNA DARROW send sale 03.	RMA code /07/2019	
	1000003322	ANNA DARROW send sale 03.	order status	·
	000003321	ANNA DARROW send sale 03	items /07/2019	· ·
	olimitation 1000003320	ANNA DARROW send sale 03.	ship memo rejected	· ·
	olimited 1000003319	ANNA DARROW send sale 03.	/07/2019 order date	· ·
			order date	Q
root 🗲			(English (US) 👻 version 5.34.1.0

Sales Order Details Dialog

The order external ID field is available in the order tab during SO creation and editing.

order	universal order #:	1000003150		notes		
ustomer	order #: web order #:	1443 100001345 mager	nto	pre-set notes		
elivery	order date:	02/25/2019 11:56 AM				
ems	fraud status:	unknown				
	associate:	AUTOMAT	* *			
iscount	tax exempt:					
lobal fees	block transactional emails: order external ID:			total		
SR notes	custom			order qty	: 1	
ayments	cht1:			qty filled qty due	: 1	0%
nipments	custom text 2:			item total	\$25.00	
	custom text 3:			discounts	\$9.25	37%
ser into	custom text 4:			fees	\$0.00	first item
	custom date 1:	<mm dd="" yyyy=""></mm>	Ê	tax	\$1.30	
	custom date 2:	<mm dd="" yyyy=""></mm>	<u></u>	total	\$17.05	
	custom date 4:	<mm dd="" yyyy=""></mm>	Ê	deposit balance	\$0.00	
	Factura Number:			payment due	\$17.05	

On the Sales Order Items level, we've added the *line external ID* field to the *general* tab of the *item* – <*PLU*> dialog.

	sales order -	send sale #1000003728 - ac	cepte item - 7370		
order manager ship memos RMA orders return workshe sales receipts promotion eng forecasting customers	order customer delivery items global discount global fees CSR notes payments shipments user info	View create SM ship from UPC PLU 6960 885399430734 7370 885399471041 2038	discount fees associates delivery	general status: accepted pre-order:	notes gift message returns RMA code: 19XTP922 final sale: no auto-return: custom custom custom custom text 1: custom text 2:
	print	D = 3 records		item total: \$49.50	custom date 1: mm/dd/yyyo" custom date 2: mm/dd/yyyo" custom date 3: mm/dd/yyyo" custom date 3: mm/dd/wave custom date 3: custom date 3: custom date 3:

IMPORTANT NOTE:

If there is an authorized but not captured payment for an order with the *global-e* payment type and that order or item is canceled, then there will be a sales receipt that offsets that unused "deposit" and it will have the payment type "global-e."

This cancellation will not refund the customer through Global-E.

Other Enhancements

Updated Integration with Authorize.Net

Version 5.34 – TWD-17519

April 2019

We've added support of Authorize.Net 2.0

Epilogue

This manual was published on 15 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: <u>training@teamworkretail.com</u>.

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.