TEAMWORK
RETAIL
a product of Retail Cloud Technologies

TEAMWORK CHQ RELEASE GUIDE

Version 5.38

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Sales and OMS

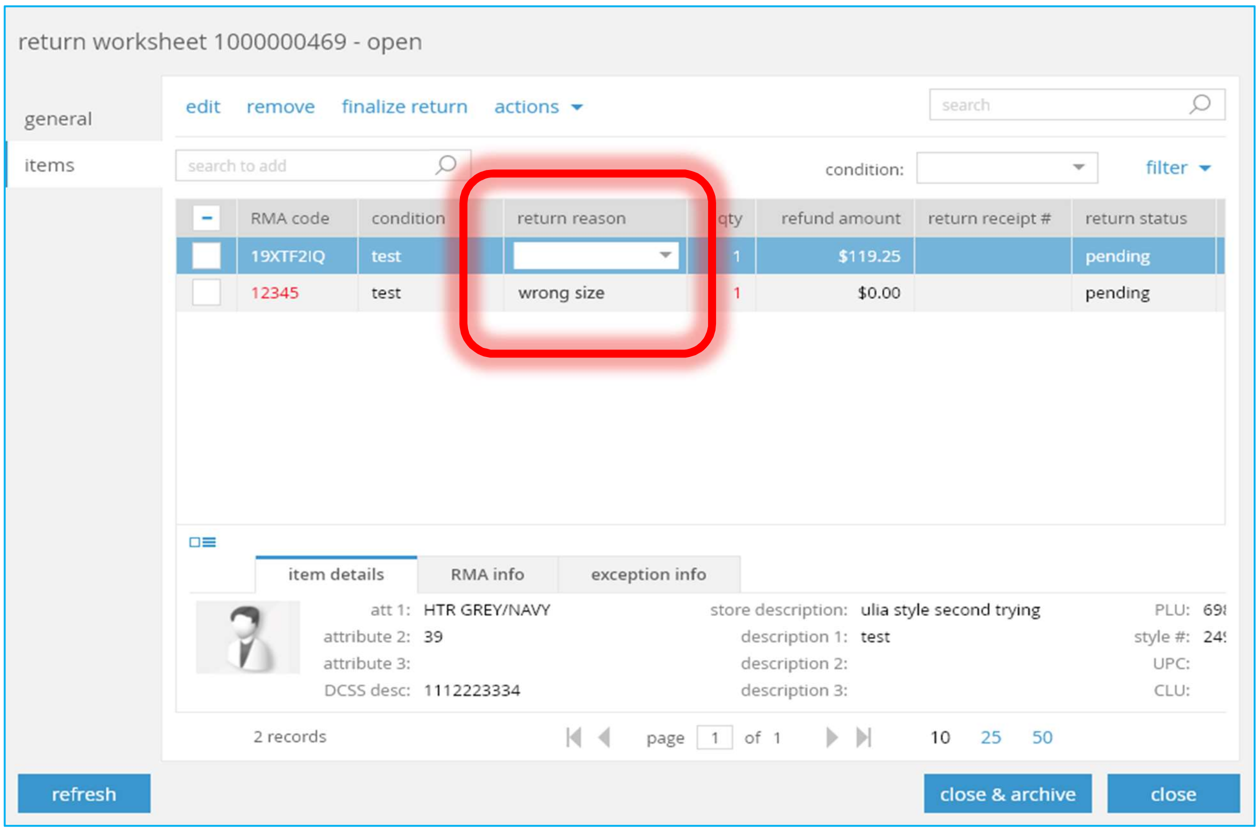
Return Worksheet – Return Reason

Version 5.38 – TWD-13628

June 2019

When using Return Worksheet to process returns for a set of orders/items, we have now added the capability to import a Return Reason at the item level. This allows for the capture of return reasons for later analysis.

Return Worksheet Dialog Box



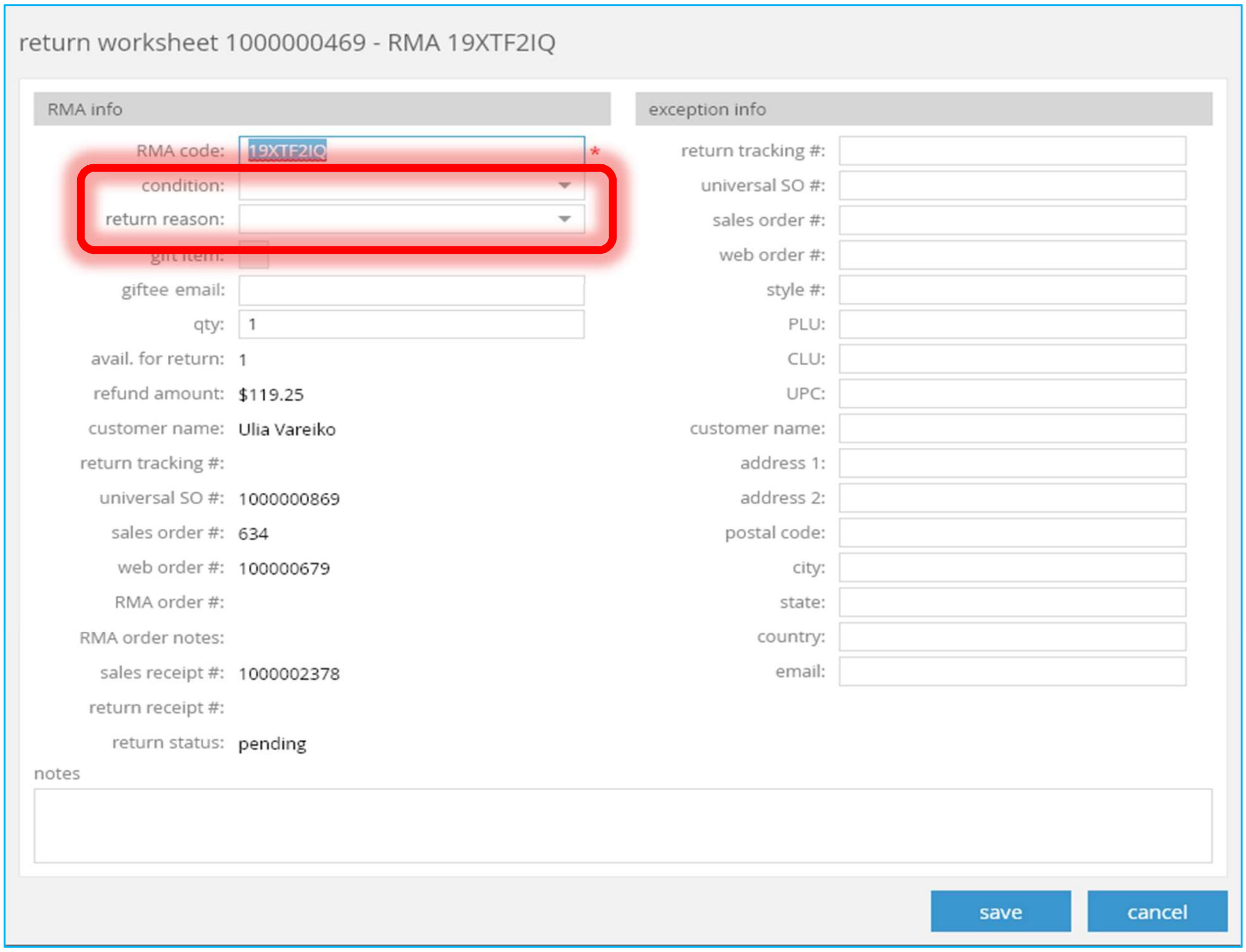
This dialog box is accessed via *chq* > *sales* > *return worksheets* > **new** or (select a list-item).

The *RMA order reason* column has been removed.

The *return reason* column has been added. This column will be editable if the user has the RMA-ADDEDIT right and the *return status* value is "pending". The value for this column will be selected from the lookup list and can be empty.

When adding a new line to the worksheet, if the RMA order has been found by RMA Number and the *return reason* in the RMA Order is not empty, then the worksheet line's *return reason* will be populated with the RMA Order's *return reason* value.

Return Worksheet – Edit Item Dialog Box



This dialog box is accessed via *chq* > *sales* > *return worksheets* > (select a list-item) > *items* tab > (select a list-item) > **edit**.

The *RMA order reason* field has been removed.

The *return reason* field has been added. This field will be editable if the user has the RMA-ADDEDIT right and the *return status* value is "pending". The value for this field will be selected from the lookup list and can be empty.

When changing an RMA code, if the RMA Order has been found by RMA number and the *return reason* in the return worksheet is empty and *return reason* in the RMA Order is not empty, then the *return reason* in the return worksheet will be populated with the RMA Order's *return reason* value.

APIs

The Return Worksheet Export API has had the *return reason* field added.

The Return Worksheet Import API has had the *return reason* field added. It is not required. When populated its value must be one of the values from the Return Reasons dictionary. If the *return reason* field has not been populated during an import and the RMA Order has been found by RMA number and the *return reason* in the RMA Order is not empty, the API's *return reason* field will be populated with the RMA Order's *return reason* value.

Support Refund For Web Orders From External Systems

Version 5.38 – TWD-18344

June 2019

When a sales order is being imported with *captured* = true, then the "payment processing" field will be populated in the sales order deposit payment record with the value from the corresponding "payment method/location" setting for the sales order "created at location".

Transfer Damaged Items When Returned

Version 5.38 – TWD-18840

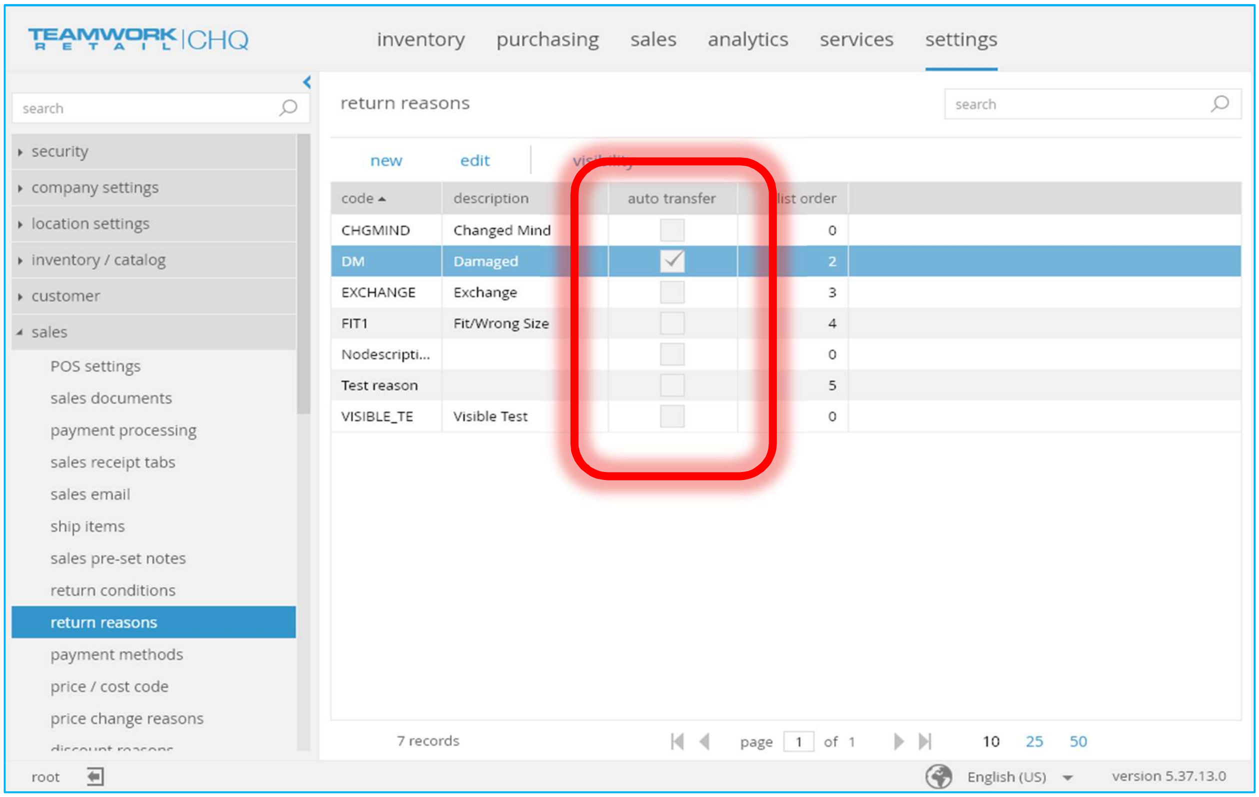
June 2019

This feature exists to reduce steps by the Retailer (or retail location) when accepting a return that is damaged.

Some Retailers, when accepting returns due to 'damage', desire to inspect the merchandise, and then manually transfer that merchandise to a physical or virtual location for further processing.

This feature is for those Retailers who always destroy or transfer damaged merchandise when returned. If the *auto transfer* flag is set to yes for any return reason, then an auto transfer will be created to transfer merchandise to the location defined for this purpose.

Return Reason List View

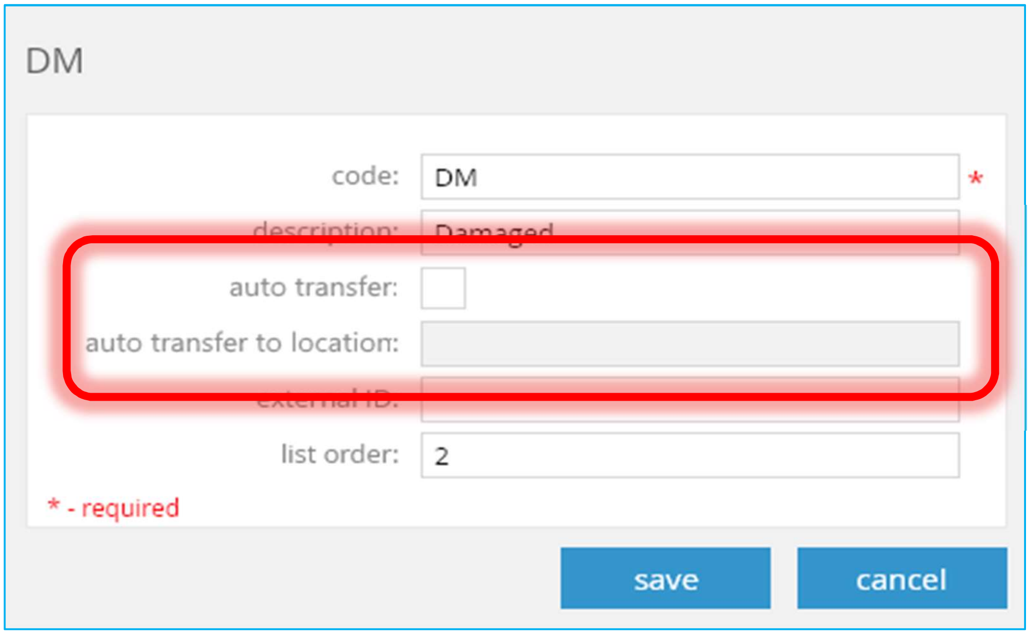


Two new columns have been added to the *Return Reasons List View*, *auto transfer* and *auto transfer to location*.

auto transfer is a flag which is not editable.

auto transfer to location is not editable and is not visible by default. When visible it will show the "*location code – location name*" of the damaged location defined for the return reason.

Return Reason New/Edit Dialog Box



This dialog box is accessed via *chq* > *settings* > *sales* > *return reasons* > **new** or **edit**.

Two new fields have been added, *auto transfer* and *auto transfer to location*.

auto transfer is a flag which is editable if the user has the right to edit sales settings. Its default value is unselected (false).

auto transfer to location is not editable and will be empty if *auto transfer* is unselected (false). The locations in the list will be all of the currently active locations.

Import Transfer Orders By UPC, CLU, Or ExternalId

Version 5.38 – TWD-19372

June 2019

Previously, the import of Transfer Orders could only be accomplished using the Teamwork PLU item identifier. Many retailers use other item identifiers as the primary item identifier in their business, so the import capability has been extended.

The Transfer Order Import Excel spreadsheet has had “upc”, “clu”, and “eid” fields added.

One of the “plu”, “upc”, “clu”, or “eid” fields must be populated.

The process to find the item will be:

1. Search for "plu".
2. If "plu" is not populated or not found, then search by "clu".
3. If "clu" is not populated or not found, search by "upc". If multiple items are found by "upc" the item with the most recent *RecModified* value (from the *InvenItemIdentifier* table) will be selected.
4. If "upc" is not populated or not found, then search by "eid".

The Transfer Order Import API has also been updated to support this change.

CHQ - Search For A Customer By Membership Code When Importing

Version 5.38 – TWD-19396

June 2019

An ability to search for a customer by membership code has been added when importing to CHQ.

A new setting has been added to the import API to indicate whether the customer search should be done by membership code then email then phone number.

CRM - Search For A Customer By Membership Code When Importing

Version 5.38 – TWD-19397

June 2019

An ability to search for a customer by membership code has been added to CRM.

Limit Schedule Selection to 365 Days

Version 5.38 – TWD-19398

June 2019

Upon initialization, the Teamwork Scheduler App would pull all scheduled appointments for the entire history for that location. This has now be re-set in CHQ so that the initial data retrieval will be limited to those records which have not changed in the last 365 days.

Settings

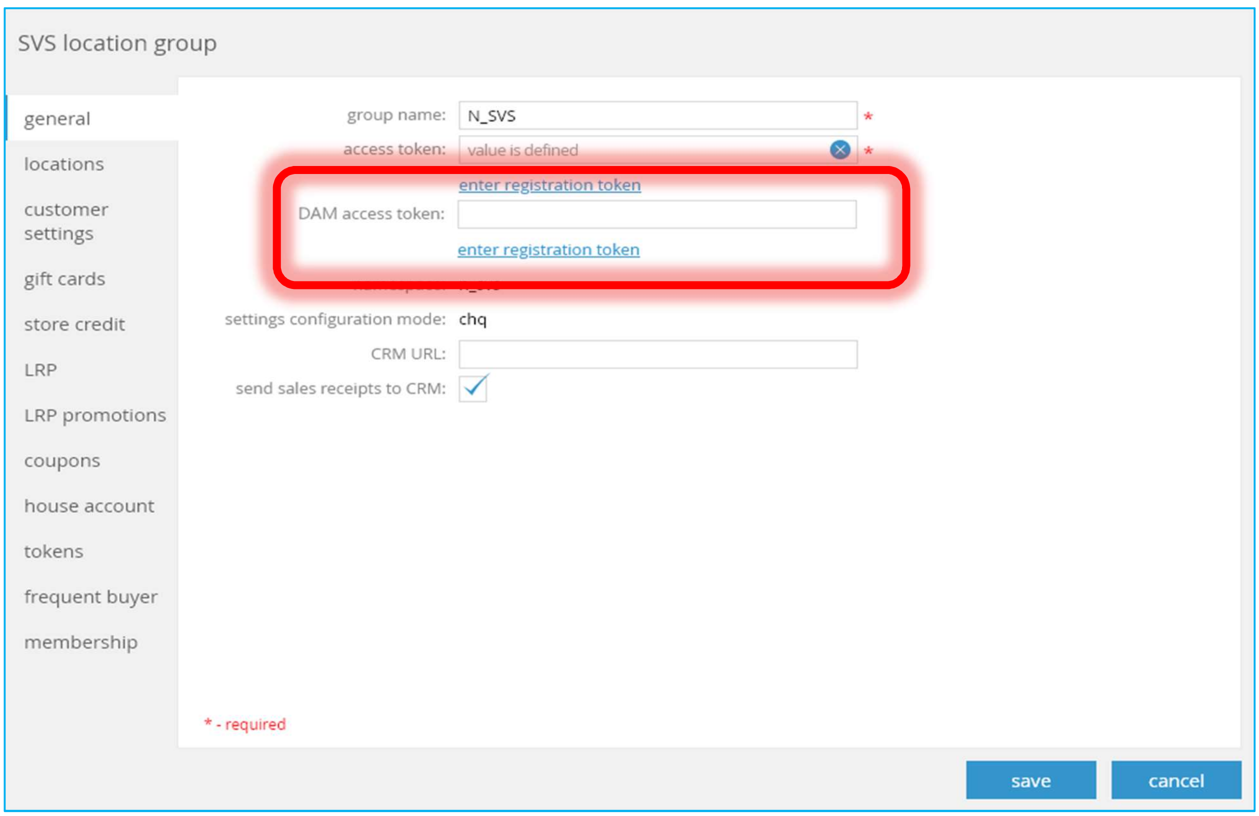
Separate Setting For DAM and CRM

Version 5.38 – TWD-18834

June 2019

Teamwork supports multiple brands within the same CHQ. A customer can be segmented into the various brands that they support through multiple CRM Namespaces. This feature was extended due to DAM (Digital Asset Manager) also being associated with the CRM Namespace. Consequently, it was important to have different access tokens so that Digital Assets could be shared amongst the brands while customers and loyalty could be separated.

SVS Location Group Dialog Box



This dialog box is accessed via *chq* > *settings* > *company settings* > *stored values services* > *SVS location groups* > **new** or **edit**.

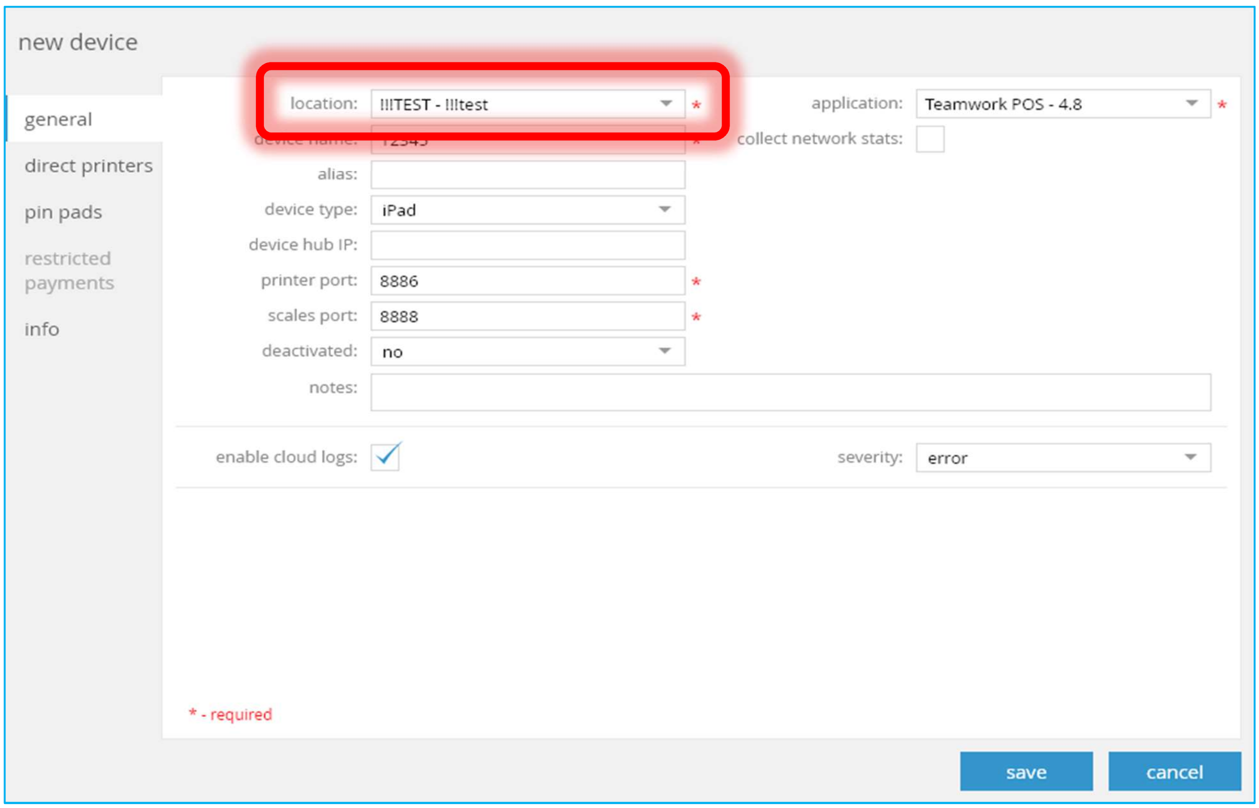
The *DAM access token* field and the **enter registration token** button have been added. The functionality of the new field and button are similar to the functionality of the *access token* field and its related **enter registration token** button.

The *DAM access token* field defaults to empty and is not required.

The **enter registration token** button will be activated if the user has the right to edit company settings.

When being changed or populated a "DAM authorization token" will be generated based upon the value of the *DAM access token* field for all POS devices in all locations which are included in the current SVS Location Group.

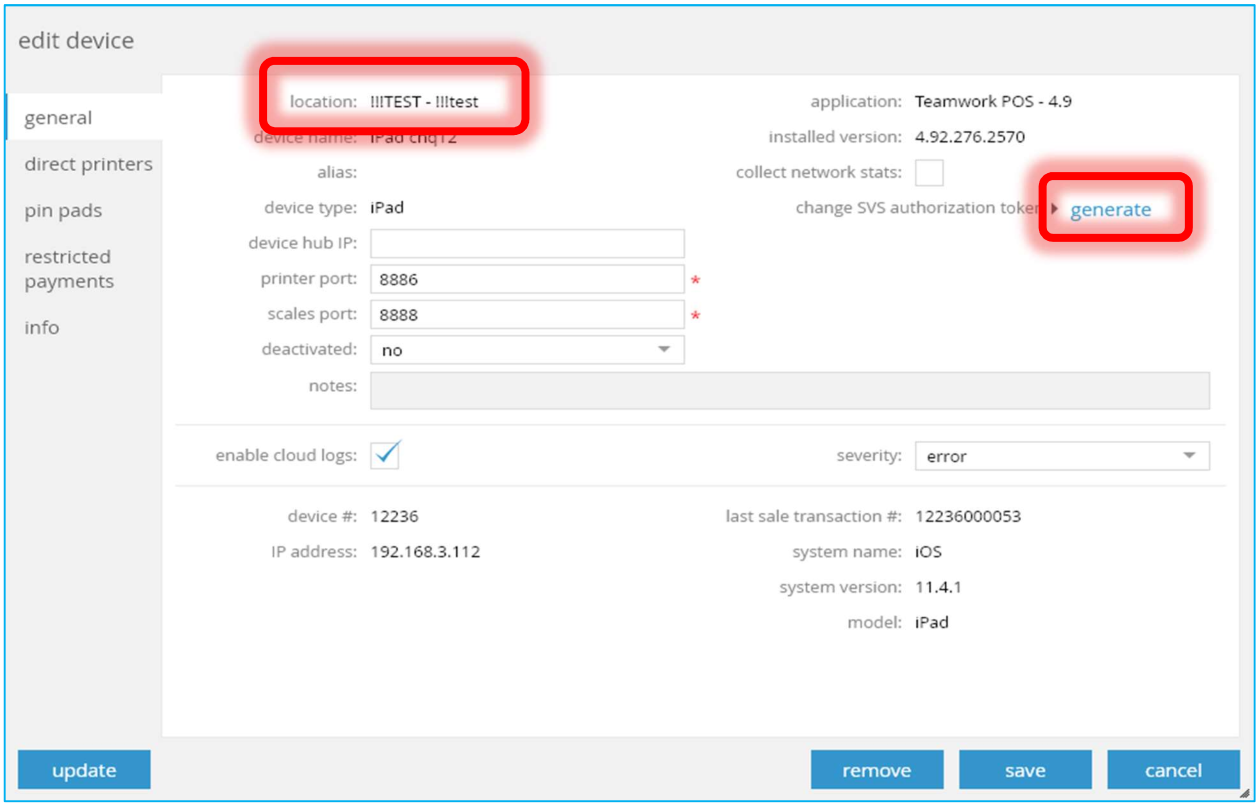
New Device Dialog Box



This dialog box is accessed via *chq* > *services* > *device controller* > **new**.

If the new device's *location* belongs to an SVS Location Group and the *DAM access token* field in the *SVS Location Group* dialog box (see above) is populated, a DAM Authorization Token will be generated based upon the *DAM access token* field in the *SVS Location Group* dialog box.

Edit Device Dialog Box



This dialog box is accessed via *chq* > *services* > *device controller* > (select a device from the list).

Functionality has been added to the **generate** button.

If the device's *location* belongs to an SVS Location Group and the *DAM access token* field in the *SVS Location Group* dialog box (see above) is populated, a DAM Authorization Token will be generated based upon the *DAM access token* field in the *SVS Location Group* dialog box.

If the device's *location* belongs to an SVS Location Group and the *DAM access token* field in the *SVS Location Group* dialog box (see above) is not populated, then the DAM Authorization Token will be cleared.

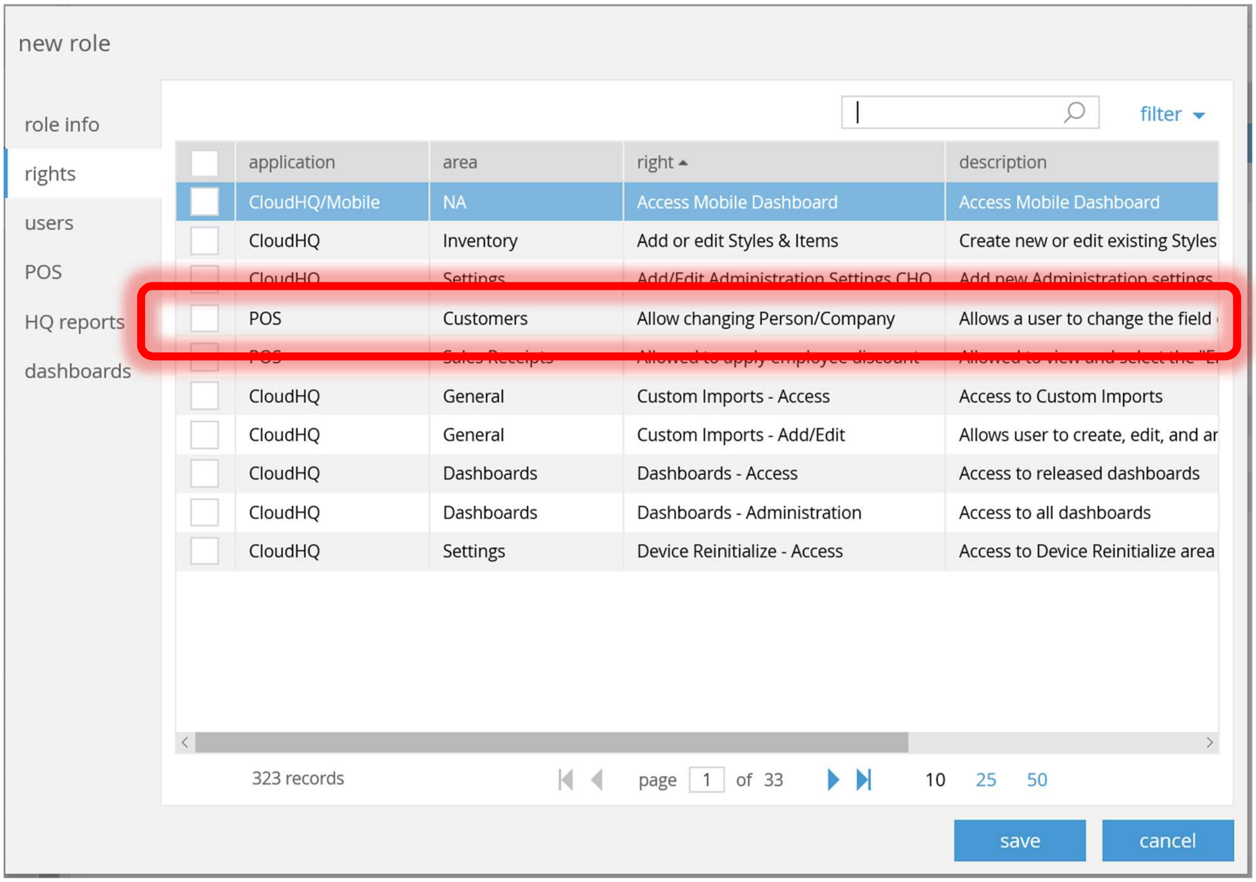
New Security Right

Version 5.38 – TWD-19013

June 2019

A new security right has been created to deny the ability to change the Person/Company field on the customer record.

This setting will appear in the list in the *rights* tab of the *New/Edit* dialog box (accessed via *chq* > *settings* > *security* > *roles* > **new** or **edit**).



The values for the list columns for this right are:

- Application: POS
- Area: Customer
- Right: Allow changing Person/Company
- Description: Allows a user to change the field of Person/Company on customer record.

On a new installation this setting will default to being unchecked (false).

In all current installations, any user can change this field with no restriction.

A script will have to be run to assign this right for all roles.

Because we only allow an "allow" type right and not a “prevent” type right, we need to enable this right for all current users roles. Then those clients who wish to prevent it, will have to manually remove this right for the desired roles.

Other Enhancements

CRM - Change House Charge Account Limit

Version 5.38 – TWD-17704

June 2019

The house charge limit has been changed from 999,999 to 792,281,625.

Import Secondary Vendors Via Catalog Import JSON API

Version 5.38 – TWD-18839

June 2019

The JSON Catalog Import API has been updated to allow for the import of information for secondary (non-primary) vendors.

New Separate API Methods To Authorize Or Capture Transactions

Version 5.38

June 2019

New API methods have been added to "authorize" or "capture" credit card and store credit transactions.

Issue Resolutions

Backorder

Version 5.38

June 2019

Issue:

The date calculation logic for backorders allows for purchase orders with dates in the past to be included. Such purchase orders should be filtered out.

Resolution:

The data calculation logic has been updated to filter out purchase orders with dates in the past.

CHQ – General - Phone Number Validation Library Update

Version 5.38 – TWD-18969

June 2019

Issue:

Records are being rejected when phone numbers are entered in certain formats.

Resolution:

The Phone number validation library has been updated to allow additional phone number formats.

CRM – General - Phone Number Validation Library Update

Version 5.38 – TWD-18751

June 2019

Issue:

Records are being rejected when phone numbers are entered in certain formats.

Resolution:

As with the change in CHQ, the phone number validation library has been updated to allow additional phone number formats.

CRM API – Membership Level Doesn't Change To Basic

Version 5.38

June 2019

Issue:

Attempts to associate members with their original "basic" membership fail.

"basic" is a name applied to empty membership levels; therefore, attempting to set a member to "basic" was really resetting the membership level for the customer. This being the case, SVS can not reset a membership level by name, only assign another membership level.

Resolution:

This has been corrected to allow a member level to be reset back to its original "basic" level.

Customer Create Or Update Internal Error When Using ExternalId

Version 5.38

June 2019

Issue:

Attempts to use an external id when creating or updating a customer were failing with an internal error.

Resolution:

This has been corrected to allow the use of external id.

RMA – Auto-Process – Tries To Return All to Credit Card

Version 5.38

June 2019

Issue:

For an order that has multiple payment types (Credit Card and Gift Card), when auto-process is performed the Return Worksheet returns the full amount to the credit card.

Resolution:

The auto-process logic has been modified to not process returns for an order that has multiple payment types. This will leave the order the pending state until someone manually processes the return(s) with multiple payment types.

Note that in the future this logic will be upgraded to automatically apply the return values to each payment type used.

Epilogue

This manual was published on 18 June 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.