CHQ RELEASE GUIDE

Version 6.10

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Sales and OMS

Add Sales Order Custom Fields
TWD-22062

The following fields have been added to the Sales Order Header Custom Fields:
- Custom Date 5 -8
- Custom Decimal 5 – 8
- Custom Flag 5 – 8
- Custom Text 5 – 8
- Custom Number 5 - 8

The following fields have been added to the Sales Order Line Custom Fields:
- Custom Date 5 -8
- Custom Decimal 3 – 8
- Custom Flag 3 – 8
- Custom Text 3 – 8
- Custom Number 3 – 8
- Custom Lookup 5 – 8

The user interface has been updated appropriately to display these new fields.

All sales order import and export APIs have been updated to reflect these new fields.

These new custom fields have been added to the following email notification types:
- Order Confirmation – Send Sale
- Order Confirmation – Web Order
- Delivery Pending
- Shipping Confirmation
- Ship From Vendor Confirmation
- Virtual Gift Card Delivery
- Ready For Pickup
- Cancelling
- Changing Sales Order
- Changing Shipping Address
- Changing Pickup Location
- Backorder

Auto-Process Returns

TWD-22030

The "Return Worksheet Auto Process" job has been added which will run in the "Auto Process" function for all open, not archived, worksheets.

The *EnabledForScheduled* flag should be FALSE by default.

> ### Note
>
> The "auto process" functionality is already implemented for the **auto process** button in the *Items* tab of the *Return Worksheets* dialog (accessed via *chq > Sales > Return Worksheets > **new*** or select item in list).

Backorder Email Notification – Quantity To Ship

TWD-22160

The value of the *QtyToShip* field will now appear in a Backorder Email Notification instead of calculating a value.

Record Version/Build Info On Sales Receipt

TWD-22323

For troubleshooting purposes, the CHQ database will now store the version and build identifiers of both CHQ and POS with each Sales Receipt. This allows support to know which version/build created the sales receipt. This information can be useful in tracking issues and questions and in determining whether the issue has been resolved in a more recent software release.

In the case of the mobile app version/build, the information will be taken from the device used for the transaction (in case different devices have different versions/builds).

Return Worksheet - Exchange

TWD-21607

<u>Settings</u>

The *return worksheets – auto process exchanges* setting has been added to the *chq > settings > sales > sales documents* tab. Its default value is FALSE. It is editable if the user has the right to edit sales.

RMA Order Dialog Box

The *exchange PLU* field has been added. The **select** button will be shown if the exchange PLU is not populated. Selecting this button will open the *Item Search* dialog box (see below).

If the exchange PLU has been populated, the selected PLU will be visible. If the returned quantity is less than the order quantity, the **remove** button will be shown. Selecting the **remove** button will remove the PLU from the RMA order.

When selecting the **save** button with the exchange PLU populated, the exchange item will be saved in the RMA order.

Create RMA Order Dialog Box

The *exchange PLU* field has been added. The **select** button will be shown if the exchange PLU is not populated. Selecting this button will open the *Item Search* dialog box (see below).

If the exchange PLU has been populated, both the selected PLU and the **remove** button will be shown. Selecting the **remove** button will remove the PLU from the RMA order.

When selecting the **yes** button with the exchange PLU populated, the exchange item will be saved in the RMA order.

Item Search Dialog Box

This dialog box will function similar to the *Item Search* dialog box opened from the "kit" dialog box).

The list shown will be filtered by:
1. *inactive* = FALSE
2. Item type is "style" or "single item".

Selecting the **ok** button will:
1. Close the dialog box.
2. Populate the *exchange PLU* field in the *Create RMA Order* dialog box.
3. Return the user to the *Create RMA Order* dialog box.

Selecting the **cancel** button will:
1. Close the dialog box.
2. Return the user to the *Create RMA Order* dialog box.

Return Worksheet - Items

The *exchange PLU*, *exchange order #*, and *exchange order status* columns have been added.

The *exchange PLU* column will show the *ExchangePLU* value from the RMA Order if the worksheet line is linked to an RMA Order (I.E., that the *RMA order #* is populated in the worksheet line). It is not editable. It is not visible by default. The list can be sorted by this column.

The *exchange order #* column will show the sales order number of the exchange order if "exchange order" is populated in the worksheet line. It is not editable. It is not visible by default.

The *exchange order status* column will show the current order status of the exchange order if "exchange order" is populated in the worksheet line. It is not editable. It is not visible by default.

The *verified return – exchange* option has been added to the return status filter.

Return Worksheet – Item Details

The *exchange PLU* field has been added. It is not editable. It will be visible if the worksheet is linked to an RMA Order and that order has the *ExchangePLU* value populated.

The *exchange order #* and *exchange order status* fields have been added. These fields are not editable. They will be visible if the "exchange order" value is populated in the worksheet line.

Return Worksheet – Finalize Return

The processing of the **finalize return** button has been upgraded. A new 'note' message has been added to the confirmation dialog box(es).

This new note message will be displayed if one or more worksheet lines are linked to an RMA Order and have the *ExchangePLU* value populated in that RMA Order.

The finalize return logic has been upgraded to process exchanges in an RMA Order.

APIs

The RMA Order Import and Export APIs have been upgraded to process the "exchange PLU" value.

Return Worksheet Export API has been upgraded to process the "exchange PLU", "exchange order", and "exchange order status" values.

Services

Import Location Printer Definitions

TWD-22060

This CHQ change provides support for both existent POS V4 apps and new POS Professional (V6) apps.

> ### Important Note
> For settings to stream between POS and CHQ, the POS version must be 4.93 or greater.

While POS Professional (V6) does not use the existent print server technology, support for such technology will continue in order to support existent POS V4 apps. This being the case, the printer definitions will only apply to POS V4, not to POS Professional (V6).

This change will allow users to define printer definitions in CHQ and have them streamed to POS V4 devices so that the user does not have to define the settings in POS on each device.

Location Printers Tab
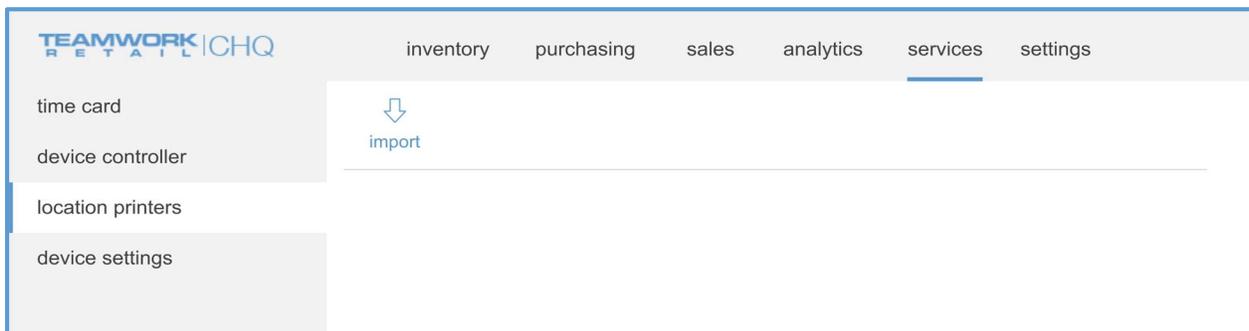
The *chq > services > location printers* tab has been added. Initially, this tab will be empty until the desired device settings are imported. Currently these settings can only be defined via import, there is no way to manually define the settings.

Location Printers Import

The columns in the Excel import spreadsheet are:

Last Edit
Date/Time of last edit in CHQ. This column is ignored for an import.

Last Edit By
The use who made the last edit in CHQ. This column is ignored for an import.

Location Code

Required.

Printer

The printer number. Required.

Type

The printer type. Valid values are "Network/IP" or "Bluetooth". Required.

Model

The printer's model number. Required.

Name

The printer's name. Required.

IP Address

The printer's IP address. Required for a printer whose **Type** is "Network/IP".

MAC Address

The printer's MAC address. Required for a printer whose **Type** is "Bluetooth".

Paper Width

The printer's paper width. Valid values are "2.26 in (58mm)" or "3.13 in (80mm)". Required.

Cash Drawer

An indicator as to whether the printer is associated with a cash drawer or not. Valid values are "YES" or "NO". Required for a printer whose **Type** is "Network/IP".

Opening Method

The printer's opening method. Valid values are the digits 1 – 5. Required if **Cash Drawer** is "YES".

Location Printers Report

A report has been created to export the location printer information into an Excel spreadsheet. Updates/additions/deletions can be made in this spreadsheet and then be imported back into CHQ to update the printers.

Device Agent App

Previously, the only method for defining printers was to use the **Device Agent** app on the iPad. The devices defined in this app on that iPad would then be synced to CHQ. This resulted in the need for defining printers an each iPad using that iPad's **Device Agent** app.

The **Device Agent** app will not be supported in POS Professional (V6); therefore, clients on POS Professional (V6) will only be able to define printers in the manner described above.

Clients on POS V4 can either use the new, centralized, method for defining printers in CHQ (described above) or can continue to use the **Device Agent** app to define printers on each iPad.

Key Local Device Services Settings And Import

TWD-22065

This CHQ change provides support for both existent POS V4 apps and new POS Professional (V6) apps.

While POS Professional (V6) does not use the existent print server technology, support for such technology will continue in order to support existent POS V4 apps. This being the case, the settings for PRINT SERVER will only apply to POS V4, not to POS Professional (V6).

This change will allow users to define various settings in CHQ and have them streamed to POS V4 devices so that the user does not have to define the settings in POS on each device.

Device Controller Tab
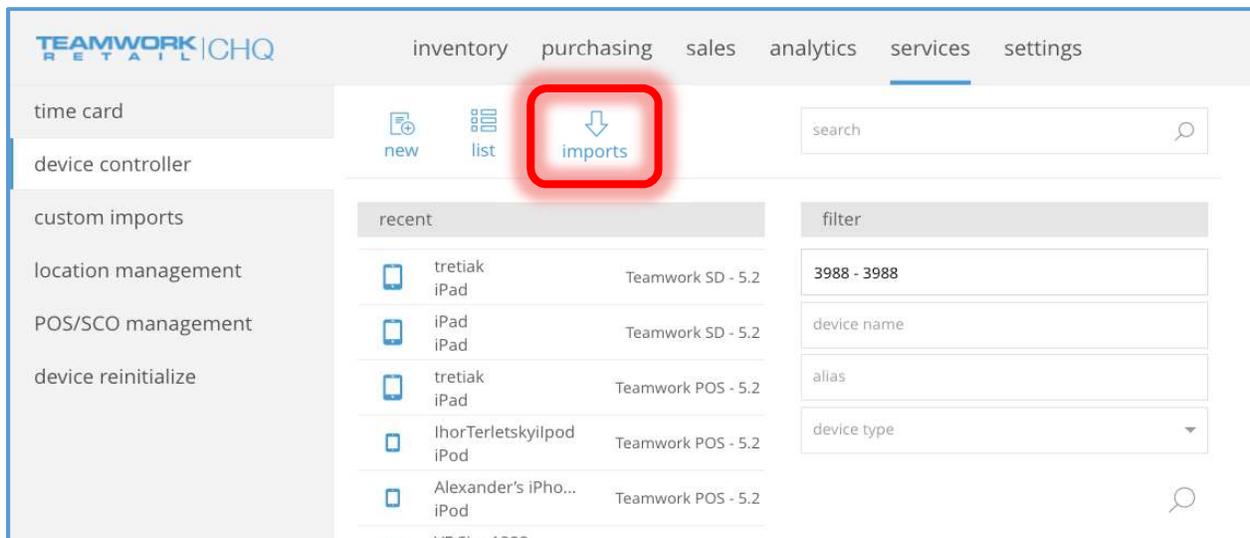
The **imports** button has been added to the *chq > services > device controller* tab. Selecting this button will cause a list of import records to be displayed.

Selecting the **view** button will display import results in a manner similar to the custom import area.

Selecting the **new** button will display the *New Import* dialog box.
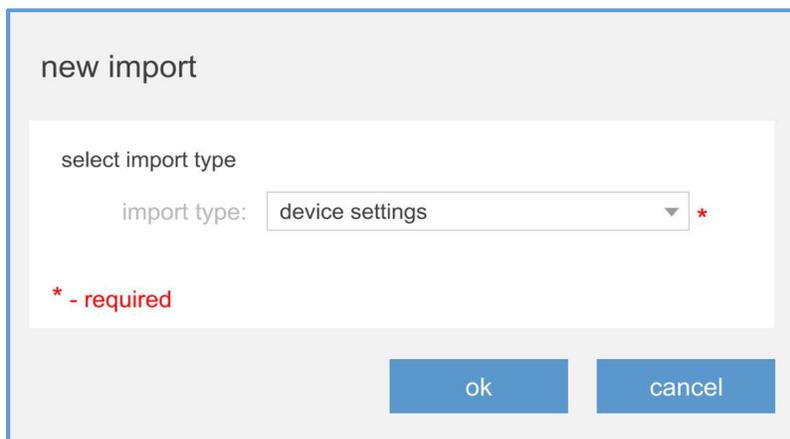
Initially the *New Import* dialog will require the user to select the type of import desired using the *import type* field. Once the import type is selected and the **ok** button has been selected the *New Import* dialog will allow the user to select file desired import file.

This dialog will function similarly to how the *Custom Import* dialog does currently.

The *file name* is selected by selecting the **…** button which will display a standard file name selection dialog as is used in many areas of CHQ.

Selecting the **download template** button allows for the selection of a blank template appropriate for the *import type* selected above.

Currently, the only supported *file format* is Excel.

The *import description* allows for notes about the import.

Device Settings Tab
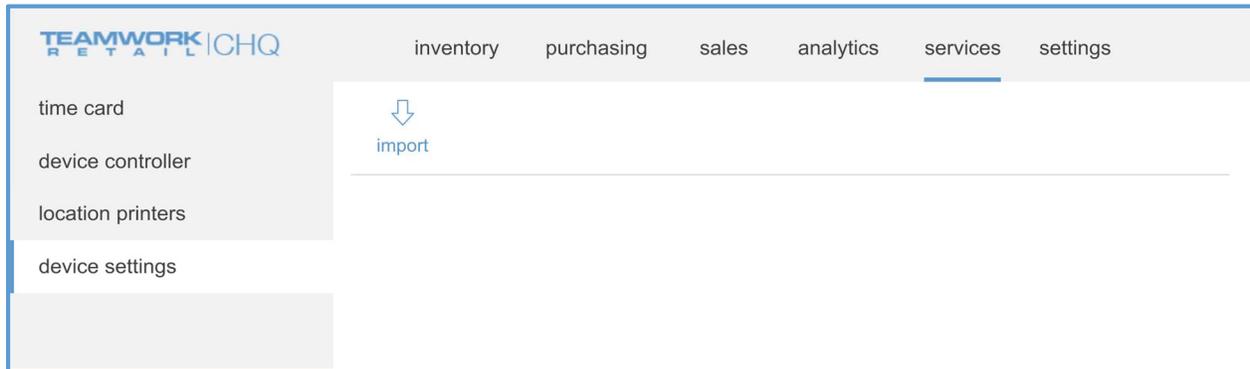
The *chq > services > device settings* tab has been added. Initially, this tab will be empty until the desired device settings are imported. Currently these settings can only be defined via import, there is no way to manually define the settings.

Device Settings Import

The columns in the Excel import spreadsheet are:

> **Last Edit**
>> Date/Time of last edit in CHQ. This column is ignored for an import.
>
> **Last Edit By**
>> The use who made the last edit in CHQ. This column is ignored for an import.
>
> **Location Code**
>> Required.
>
> **Device Name**
>> The device name (from iPad's *settings > general > about > name*). Required.
>
> **POS.ADM.ADN**
>> Adyen Terminal IP Address.
>
> **POS.INT.WKS**
>> Device Workstation ID. Required.
>
> **POS.PRN.SR.POE.PRN**
>> Sales Receipt print or email option. Valid values are: "PRINT", "EMAIL", "PRINT AND EMAIL", "NO PRINT". Required.
>
> **POS.PRN.SR.SLPR.PTR**
>> Sales Receipt printer name. Required.
>
> **POS.PRN.SR.SLPR.PRV**
>> Sales Receipt print preview flag. Valid values are "TRUE" or "FALSE". Required.

POS.PRN.SR.ADL.CPS

> Sales Receipt. Number of copies. Valid values should be numerics in the range 1 – 9,999. Required.

POS.PRN.SR.ADL.DGN

> Sales Receipt document design file name. Required.

POS.PRN.STR.POE.PRN

> Store Receipt print or email option. Valid values are: "PRINT", "EMAIL", "PRINT AND EMAIL", "NO PRINT". Required.

POS.PRN.STR.SLPR.PTR

> Store Receipt printer name. Required.

POS.PRN.STR.SLPR.PRV

> Store Receipt print preview flag. Valid values are "TRUE" or "FALSE". Required.

POS.PRN.STR.ADL.CPS

> Store Receipt. Number of copies. Valid values should be numerics in the range 1 – 9,999. Required.

POS.PRN.STR.ADL.DGN

> Store Receipt document design file name. Required.

Device Settings Report

A report has been created to export the device settings into an Excel spreadsheet. Updates/additions/deletions can be made in this spreadsheet and then be imported back into CHQ to update the device settings.

Settings

Add Search By Titles In Settings

TWD-21475

The ability to search by a title has been added to the *search* field in the *settings* screen.

Entering the literal text "title:" followed by additional text will search for all titles which match the additional text. For example, entering "title: desiredtitle" will show all titles that match 'desiredtitle'.

Block Return Emails For Gift Items Setting

TWD-21998
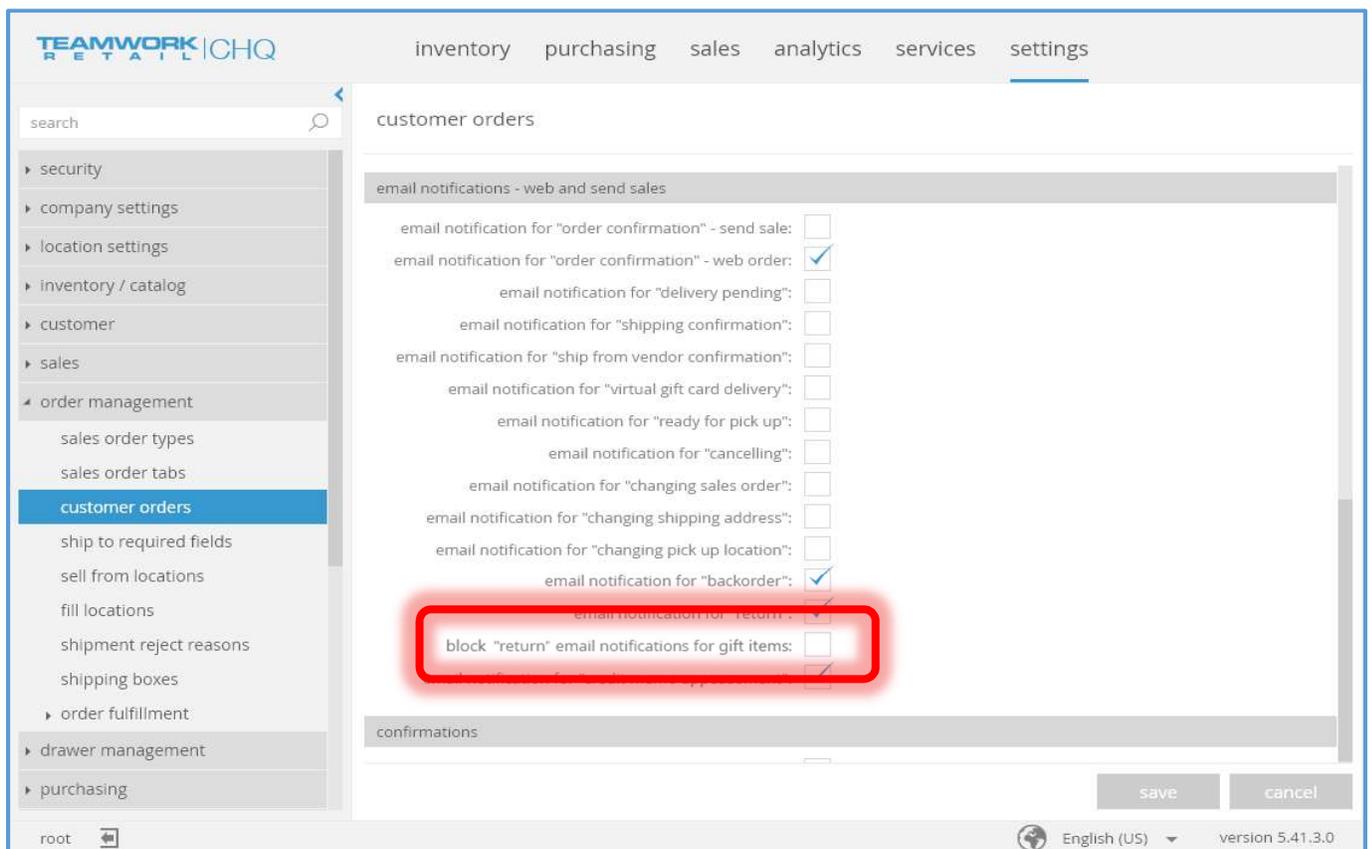
The *block "return" email notifications for gift items* setting has been added to the *chq > settings > order management > customer orders* tab.

The default for this setting is FALSE.

This setting can be modified if the user has the right to edit order management settings and the *email notification for "return"* setting has been set to TRUE.

When set to TRUE, an email notification with the type "return" will not be sent.

Card On File Settings

TWD-20115
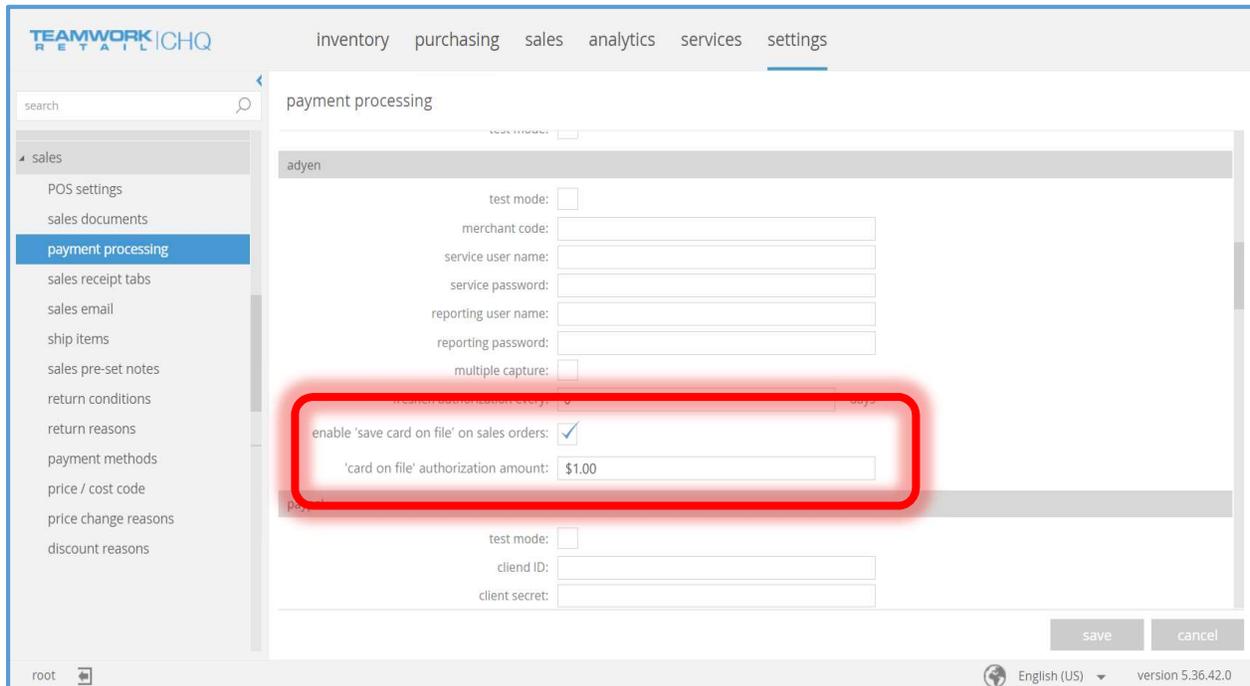
The *enable 'save card on file' on sales orders* and *'card of file' authorization amount* setting have been added to the *Adyen* section of the *chq > setting > sales > payment processing* tab.

The default value for *enable 'save card on file' on sales orders* is TRUE.

'card of file' authorization amount will be disabled when *'save card on file' on sales orders* is set to FALSE. When enabled, it must be a number in currency format in the range 0.01 through 999. The default value is 1.

Hold Reasons Settings

TWD-21433, TWD-21433
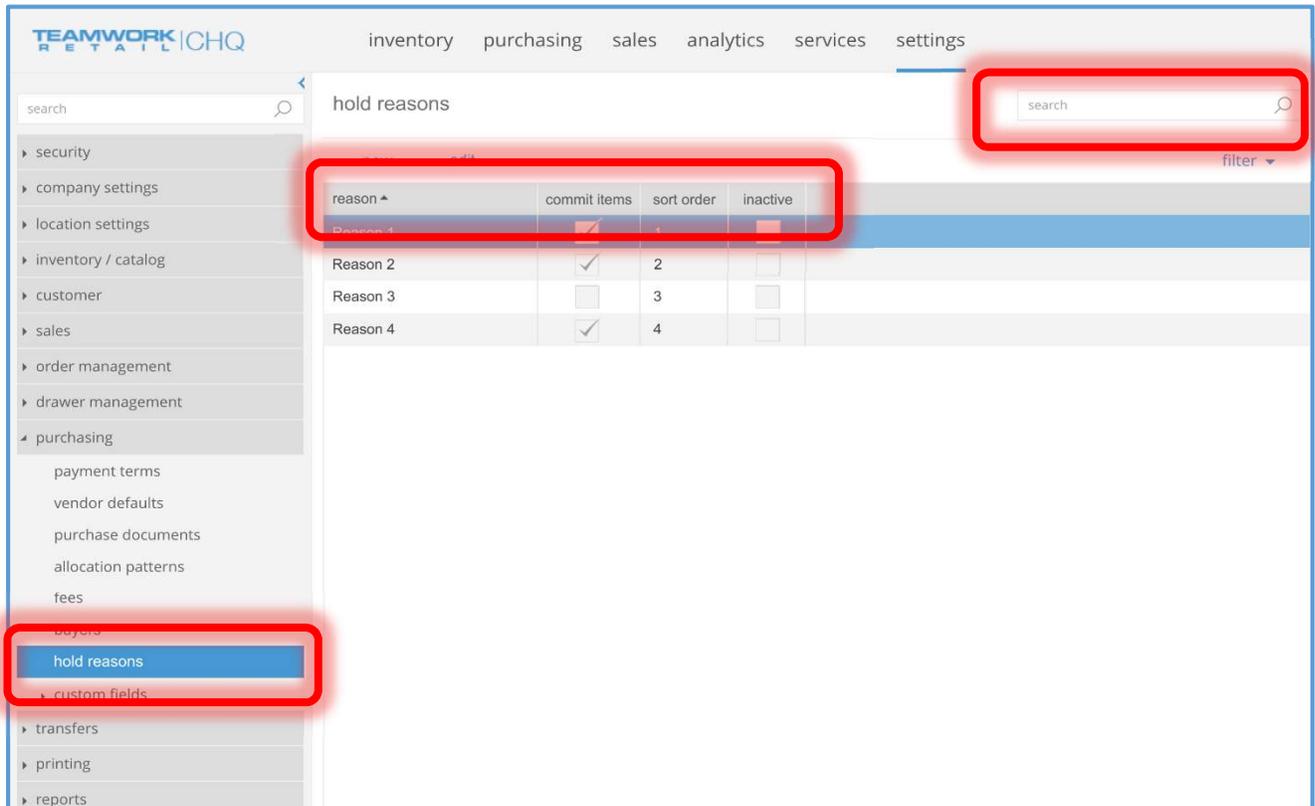
The *hold reasons* tab has been added to *chq > settings > purchasing* and *chq > settings > transfers*.

The reasons entered in the *chq > settings > purchasing > hold reasons* tab will be used for Purchase Receipts, Purchase Orders, Return Receipts, and ASNs.

The reasons entered in the *chq > settings > transfers > hold reasons* tab will be used for Transfers In, Transfers Out, and Transfer Orders.

The *reason* field is the reason's text. It is required and may not be blank. It may not duplicate an existing reason regardless of whether the existing reason is active or not. Its maximum length is 255 characters. Its value must be alphanumeric.

The *commit items* field is a flag which indicates whether the item quantities in the document should be committed when the document is held. Its default value is FALSE.

The *sort order* and *inactive* fields are similar to other areas.

search will search the *reason* field for the matching text string.

The *filter* will allow for filtering for active or inactive records.

Show/Hide Promotion Settings

TWD-21386

The visibility of various promotion settings or promotion types will now depend on which version of POS the client is using. Some settings/types (for example, 'Buy More, Get More') do not apply to POS V4 or POS Professional (V6) and, therefore, will not be visible in CHQ if the client is using those POS versions.

Other Enhancements

Add Fields To Sales Order History API

TWD-22400, TWD-22655

The Sales Order History API has had the following fields added to it:
1. *DeviceTransactionNumber*
2. *StatusRMAOrder*
3. *ExchangeItemId*
4. *RMACode*

Valid values for *StatusRMAOrder* are "Not Filled", "Partially Filled", or "Filled".

ExchangeItemId will contain the item identifier which was selected as the exchanged item in the order. If an RMA Order does not exist or the exchange item is not defined, *ExchangeItemId* will be null.

Add RecModified To RTA Line Item

TWD-22055

The information shown for a real time availability line item will now include the *RecModified* value.

Cloud Transaction Service

The Cloud Transaction Service (CTS) allows various support functions to be performed centrally on the CHQ server and then be sent to the appropriate device(s).

Some of the actions which can be performed centrally are:
- Backup Upload
- Update Device Statistics
- Create Drawer Memo
- Update Password

Identity Service

This is a security service which helps to identify devices which can connect to the CHQ server.

Init/Sync (RDT) For Fast Initialize/Sync Across Unlimited Devices

This will allow the initialization/syncing of devices to proceed quicker than in the past.

This initialization/syncing consists of creating special binary files which are then sent to mobile devices.

In the past, a given binary file would be generated each time a request for an initialization/sync was made.

Now, the binary file will be generated the first time the request is made and then stored. The already generated file will then be sent for each subsequent request greatly reducing the response time needed for each such request.

Promo Engine And Promo Group Import/Export API Automation
TWD-21501

The import/export process for promotion engine and promotion group information can now be executed automatically rather than through the traditional manual email process.

URL Mapper Service

The URL mapper service associates a code/name with a given URL. This will allow the client's associates to enter a short code/name when configuring a POS device rather than the full URL.

Issue Resolutions

PayPal Reauthorize Does Not Work For SSO Control Flow

TWD-22586

Issue:

PayPal reauthorize is not being invoked if a transaction has expired.

Resolution:

PayPal Reauthorize will be done when a Ship Memo is marked as "shipped" within SSO control flow when the setting "when capture money" is set to "capture on ship".

Price Memo Warning Eliminates Import Function

DS-192

Issue:

In certain situations when a warning is shown for a Price Memo, the **import** button was unavailable when it should be available.

Resolution:

The **import** button will now be available in these situations.

Appendix 1: Theory-Only Features

Backorder Quantity Import And Populate External Receiving Qty

TWD-21997

(1) Custom Backorder Quantity Import functionality has been added and **(2)** the population of the *ExternalReceivingQty* value for a purchase order item has been added.

Backorder Quantity Import

The template to be used for the backorder quantity import Excel spreadsheet should contain the following columns:

> **UPC**
>> Required.
>
> **Backorder Qty**
>> Ignored if **Remove** is "1", "TRUE", "Y", or "YES"; otherwise, it is required.
>
> **Promise Date**
>> Ignored if **Remove** is "1", "TRUE", "Y", or "YES"; otherwise, it is required.
>
> **Preorder YES**
>> If "1", "TRUE", "Y", or "YES", then the item custom flag *Preorder* will be set to TRUE.
>
> **Remove**
>> If not "1", "TRUE", "Y", or "YES", and **Backorder Qty** is less than or equal to zero, then an error will be returned.
>>
>> If not "1", "TRUE", "Y", or "YES", and **Promise Date** is empty or not in the proper date format, then an error will be returned.
>
> **Backorder Start Date**
>> Optional. If empty it will be populated with today's date.
>
> **Location Code**
>> Required.

External Receiving Quantity Population

The *ExternalReceivingQty* value for purchase order items will be populated for each location under certain conditions. The batch job to perform this will be scheduled to run at 3:00AM every day.

Epilogue

This guide was published on 18 October, 2019 by Teamwork Commerce.

CHQ is accessed online through a browser and client specific web site. This guide 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 Commerce, 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 guide, or you have some comments or feedback about our guide, please contact us at: support@teamworkretail.com.

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