



# CHQ RELEASE GUIDE

Version 6.12.62

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# Inventory

## CHQ: Exclude location from member discount

TWD-25754

The ability to manage membership programs by location has been added.

The locations which can participate in the membership program is indicated by the **allow membership discount** setting.

Membership discounts are set on the item, not location, level and locations will need to have the ability to not participate in these discounts.

### **location dialog: sales tab**

The screenshot shows a software interface for configuring a location. On the left is a sidebar with a list of settings categories: details, groups, schedule, custom, general settings, sales (highlighted), price breaks, payments, sales receipt tabs, sales order tabs, purchasing, transfers, SVS, and custom settings. The main area displays settings for a location named '!!!TEST - !!!test'. The 'sales' tab is active, showing various options. Under the 'membership' section, the 'allow membership discount' checkbox is checked and highlighted with a red rectangle. Other settings include 'prevent negative discount' (unchecked), 'do not print store receipt when no credit card' (unchecked), 'enable official invoice printing' (checked), 'require second login for open return (V5)' (on), 'require second login for verified return (V5)' (on), 'enable pay in store action' (unchecked), 'cash drawer' settings (always open, require close, use location based, warning threshold at \$0.00), and 'ship memos' settings (use shipping service: shipit, service location name: test, automatically request return label: checked, return service ship method: DHL, rate shop group code, require scan for item verification: unchecked). At the bottom right are 'save' and 'cancel' buttons.

The **allow membership discount** checkbox has been added to the **sales** tab of the **location** dialog box (accessed via **chq > settings > location settings > location/location settings > new or edit**).

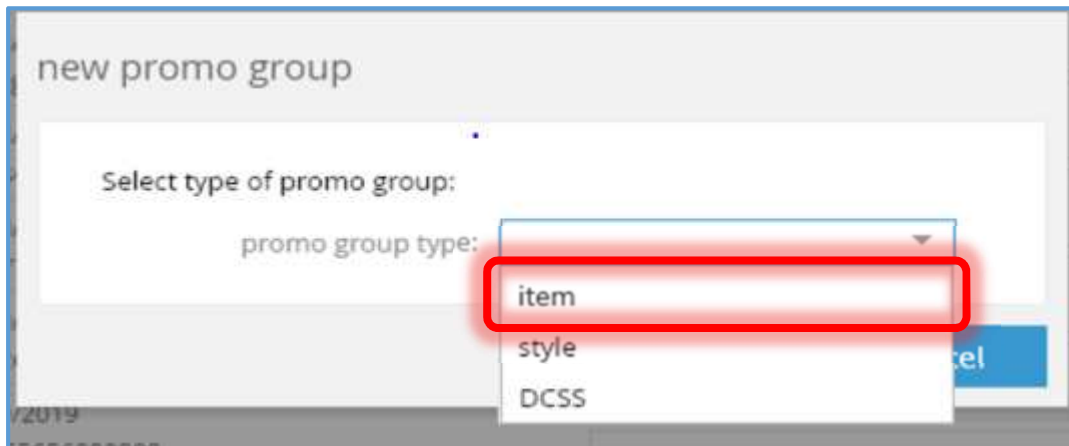
This field is editable if the user has the right the edit location settings.

## CHQ: Promo Groups: Add 'item' group type

TWD-25699

The ability to define promo groups by item has been added.

### *new promo group dialog box*



The "item" option has been added to the **promo group type** combobox in the **new promo group** dialog box (accessed via **chq > inventory > promo groups > new** or via **chq > inventory > promo groups > list** then **new**).

**new/edit promo group dialog box**

new promo group

general

promo group type: item

group name:  \*

description:

inactive:

promotional items:

remove  search

style #  search to add

plu	style #	store description	description 1	DCSS code	brand

0 records

page 1 of 1

10 25 50

close

The **Promo group** dialog (whether used for adding a new promo group or modifying an existent group) will now support the “item” promo group type.

The dialog box for items will function similarly to the other group types except that the columns in the **promotional items** grid will be the following fields. None of these values will be editable and some of them will not be visible by default (indicated below).

- **PLU**
- **CLU** (not visible by default)
- **UPC** (the primary UPC, not visible by default)
- **Style #**
- **store description**
- **description 1, 2, and 3** (not visible by default)
- **attribute 1, 2, and 3**
- **DCSS**
- **ACSS** (not visible by default)
- **brand**
- **manufacturer**

- **primary vendor**
- Those style custom fields which have been marked as visible in **settings** (such as dates, flags, text, etc.).

The **search** textbox will function similar to the Style promo group and in addition will allow searches by item ids (PLU, CLU, or UPC).

The **search to add** textbox will open a standard item search dialog box with inactive items filtered out. This textbox will be visible if the user has the "Add/Edit Promo Group" right.

The **remove** button will be visible if the user has the "Add/Edit Promo Group" right. When clicked, it will remove the currently selected item in the **promotional items** grid.

### **Promo Group Import API**

The Promo Group Import API has been enhanced to include the PLU, CLU, UPC, and EID values.

One of the following values must be supplied for a successful import:

- PLU
- UPC
- CLU
- EID
- style #
- DCSS code

## CHQ: Quantity patterns: Freeze column

TWD-26366

SIZE1

code:  \*

description:

attribute: SIZE

location depth group	XS	S	M	L	XL	XXL
Depth Group 0	0	0	0	0	0	
Depth Group 1	0	1	2	1	0	
Depth Group 2	0	1	2	1	0	
Depth Group 3	1	3	3	3	0	
Depth Group 4	1	3	3	3	0	
Depth Group 5	1	3	3	3	1	
Depth Group 6	1	3	3	3	1	
Depth Group 7	1	3	3	3	1	
Depth Group 8	1	3	3	3	1	
Depth Group 9	1	3	3	3	1	

The **New/Edit qty pattern** dialog box (accessed via **chq > settings > inventory/catalog > qty patterns > new** or **edit**) has been enhanced.

The **location depth group** column is now frozen in place when scrolling left or right though the columns in the grid.

This allows the user to see the depth group to which they are assigning quantity patterns.

## CHQ: Replenishment/Optimal stock: Negative available should be zero

TWD-27559

When calculating the need quantity for a Transfer Order, a negative available quantity will be treated as zero for the current item/location.

## CHQ: Ship Memo settings

TWD-26310

### Security rights

A new security right has been added.

SR Name	SR Id	Area	Description
V6 – Ship Memos –Ship/Reject All		Shipments	Allow selection of 'ShipAll' or 'RejectAll' on ship memos on the <i>items</i> tab in POS.

### Settings: shipping methods tab

The screenshot shows the 'shipping methods' settings page in the CHQ application. The interface includes a navigation menu on the left with 'shipping methods' selected. The main content area displays a table of shipping methods. A red box highlights the 'shipping service ID' column, which contains values like 'fedex\_priority\_overnight', 'fedex\_ground', 'ups\_ground', 'ups\_3\_day\_select', and 'ups\_2nd\_day\_air'. The table also has columns for 'code', 'description', and 'shipping service available'.

code	description	shipping service available	shipping service ID
FedEx Priority Overnight	FedEx Priority Overnight	<input checked="" type="checkbox"/>	fedex_priority_overnight
Endicia Express Mail	Endicia Express Mail	<input checked="" type="checkbox"/>	
FREESHIP	Free Standard Shipping o...	<input type="checkbox"/>	
test5		<input checked="" type="checkbox"/>	fedex_ground
UPS Freight Guaranteed	UPS Freight Guaranteed	<input checked="" type="checkbox"/>	ups_ground
Endicia Priority Mail	Endicia Priority Mail	<input checked="" type="checkbox"/>	
test6		<input checked="" type="checkbox"/>	ups_3_day_select
test7		<input checked="" type="checkbox"/>	ups_2nd_day_air
In-Store Pick up	In-Store Pick up	<input type="checkbox"/>	
STANDARD	Standard (2-7 business da...	<input type="checkbox"/>	

The shipping service ID column has been added.



**Shipping service dialog**

### FedEx Ground

code:	<input type="text" value="FEGR"/> *
description:	<input type="text" value="FedEx Ground"/>
days in transit:	<input type="text"/>
tracking URL:	<input type="text"/>
ecomm enabled:	<input type="checkbox"/>
shipping service available:	<input checked="" type="checkbox"/>
shipping service ID:	<input type="text"/>
default shipping method:	<input checked="" type="checkbox"/>

\* - required

The **shipping service ID** textbox has been added.

**Settings: shipping services tab**

The screenshot shows the CHQ settings interface. The left sidebar contains a search bar and a navigation menu with categories like security, company settings, stored value services, general settings, countries / regions, states / provinces, postal codes, time zones, currencies, taxes, phone labels, shipping methods, shipping services (highlighted), MAC addresses, custom fields, POS catalog categories, inventory import, location settings, inventory / catalog, and customer. The top navigation bar has tabs for inventory, purchasing, sales, analytics, services, and settings. The main content area is titled 'shipping services' and contains two buttons: 'edit' and 'configure methods'. Below these buttons is a table with the following data:

service ▲	contents description	API URL	API key
ShipEngine			
ShippyPro	Clothing	https://www.URL.com/moreurl...	33WE35Y3E92XMF41CCD3488756ER4...

The **chq > settings > company settings > shipping services** tab has been modified. Previously, the tab had been separated into areas for each supported shipping service. Now the supported shipping services will be displayed in a grid.

The two services currently supported by default are "ShipEngine" and "ShippyPro". These services will be preloaded on a new installation.

The previously supported "Shipit" service will not be supported in POS v6 (POS PRO) but might still be in use by Teamwork clients who are on POS v4. Therefore, "Shipit" will remain in the CHQ database, but will no longer be accessible in the user interface.

Clicking the **edit** button will open the **Edit shipping method** dialog box

The **configure methods** button will be available when "ShippyPro" is selected in the grid. Selecting this button will open the **Edit shipping method** dialog box for "ShippyPro".

**Edit shipping method dialog**

ShippyPro

contents description:

API URL:

API key:

The **contents description**, **API URL**, and **API key** textboxes are editable if the user has the right to edit company settings. They are all optional and when supplied have a maximum length of 4,000 characters. Their default values are empty.

**configure methods - ShippyPro dialog**

configure methods - ShippyPro

shipping methods

[new](#)
[edit](#)
[filter ▼](#)

TW shipping method	carrier name ▲	carrier ID	carrier service
DHL Next Day	DHLExpress	3322	Domestic Express
DHL Ground EU	DHLExpress	3322	Economy Select EU
DHL Next Day (non-EU)	DHLExpress	3322	Express Worldwide NONDOC
DHL Next Day (10:30 delivery)	DHLExpress	3322	Express Domestic 10:30

The dialog box will allow for managing the shipping methods for ShippyPro.

Clicking the **new** or **edit** buttons will open the **New/Edit shipping method** dialog box.

***New/Edit shipping method dialog***

### DHL Next Day

TW shipping method:  \*

carrier name:  \*

carrier ID:  \*

carrier service:  \*

inactive:

\* - required

All of the fields in this dialog box will be editable if the user has the right to edit company settings. The default value for all of these fields is empty.

The **TW shipping method** combobox allows for the selection of one of the available shipping methods defined in **chq > settings > company settings > shipping methods**.

The maximum length for the **carrier name**, **carrier ID**, and **carrier service** textboxes is 4,000 characters.

**Settings: order management: shipping boxes tab**

The screenshot shows the 'shipping boxes' settings page in the TEAMWORK RETAIL CHQ application. The left sidebar contains a navigation menu with categories like security, company settings, location settings, inventory/catalog, customer, sales, order management, order fulfillment, drawer management, and purchasing. The 'shipping boxes' option is selected under 'order management'. The main area displays a table with columns: code, description, package code, height, width, length, default, and list order. The 'list order' column is highlighted with a red box. The table contains 29 records, with the first row (code 1) highlighted in blue. The footer shows '29 records', 'page 1 of 3', and 'version 5.41.3.0'.

code	description	package code	height	width	length	default	list order
1			10.00	15.00	20.00	<input type="checkbox"/>	0
10			11.00	13.00	15.00	<input type="checkbox"/>	0
11	11		12.00	13.00	14.00	<input type="checkbox"/>	0
12	12		12.00	13.00	14.00	<input type="checkbox"/>	0
12222222			0.00	0.00	0.00	<input type="checkbox"/>	0
13	13		13.00	14.00	15.00	<input type="checkbox"/>	0
14	14		14.00	15.00	16.00	<input type="checkbox"/>	0
15	15		15.00	16.00	17.00	<input type="checkbox"/>	0
16	16		16.00	17.00	18.00	<input type="checkbox"/>	0
17	17		17.00	18.00	19.00	<input type="checkbox"/>	0

The **list order** column (used for sorting) has been added. It is not editable and is not visible by default.

**Shipping box dialog**

small box

code:  \*

description:

height:

width:

length:

package code:

default:

list order:

inactive:

\* - required

save cancel

The list order textbox has been added. This field defines the list order of shipping boxes. It is an integer and can be either positive, negative, or zero. If blank when the **save** pushbutton is clicked, it is set to zero.

**Location dialog: sales tab**

!!!TEST - !!!test

details

groups

schedule

custom

general settings

sales

price breaks

payments

sales receipt tabs

sales order tabs

purchasing

transfers

SVS

custom settings

cash drawer

\* - required

sales

require customer for all sales:

require customer for returns:

pass held receipts to CTS:

clear all held receipts after (mins):

prompt to print on hold:

require discount override code:

prevent negative discount:

do not print store receipt when no credit card:

enable official invoice printing:

auto reserve return (hrs):  \*

reserve reason for return:  \*

require second login for open return (V5):

require second login for verified return (V5):

enable pay in store action:

always open cash drawer:

taxes

use tax free integration:

use service for tax calculation:

service tax area:

use tax calculation service for:

sales orders

default sell from location:

default fill location:

email notifications - web and send sales

sender email:

ship memos

use shipping service:

service location name:

automatically request return label:

return service ship method:

rate shop group code:

require scan for item verification:

save cancel

The available options for the **use shipping service** combobox will now be “none”, “ShipEngine”, or “ShippyPro” (not shown in the example). The “shipit” value shown in the example is no longer supported.

If “ShipEngine” is selected in the **use shipping service** combobox, the following settings will be disabled:

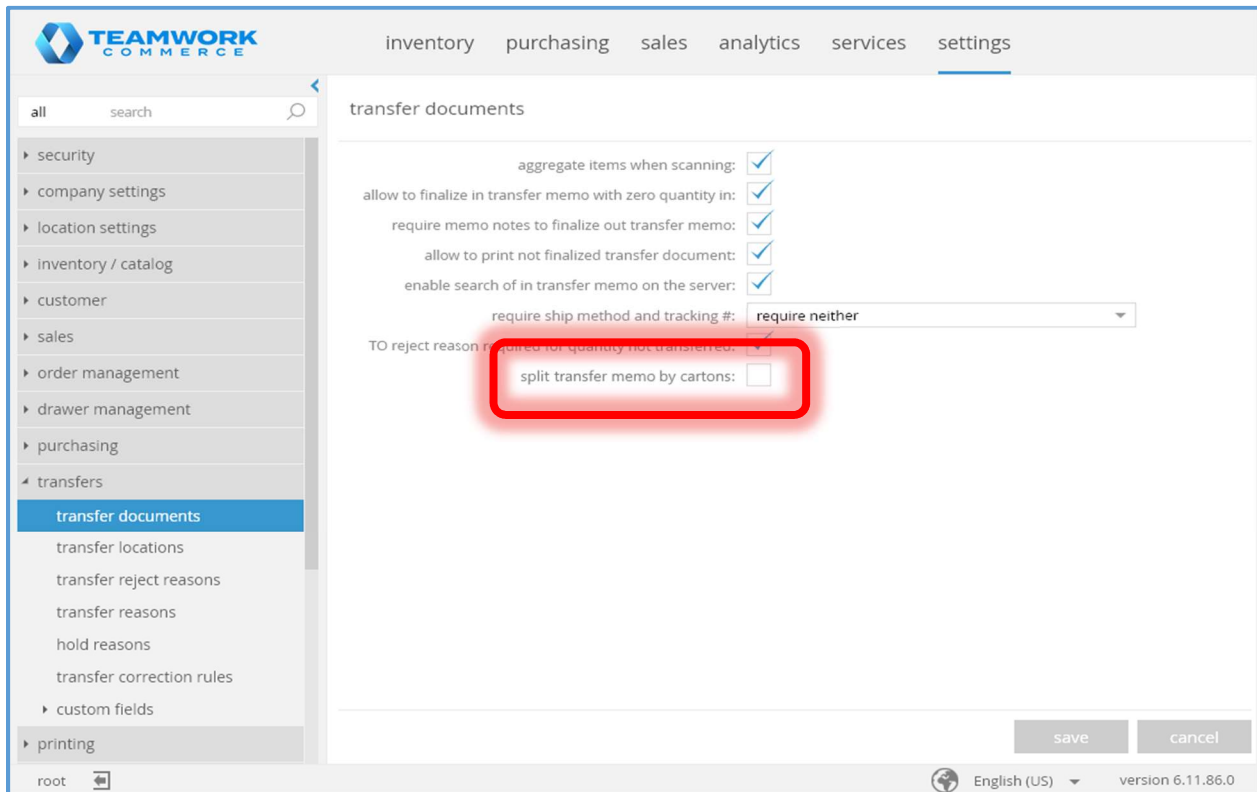
- **service location name**
- **Automatically request return label**
- **return service ship method**
- **rate shop group code**

## CHQ: Split transfer memo by cartons

TWD-25513

The ability to have multiple transfer memo documents per transfer order has been added.

### Settings:



The **split transfer memo by cartons** checkbox has been added to the **chq > transfers > transfer documents** tab. This field is editable if the user has the right to edit transfer settings. The default value is FALSE.

### Transfer Memo

The following fields have been added to the Transfer Memo line:

- **carton #** (text, any character allowed, default is empty, maximum length is 512)
- **sequence #** (integer)

The following fields have been added to the Transfer Memo header:

- **carton #** (text, any character allowed, default is empty, maximum length is 512)



## Transfer Memo Out Import API

The **carton #** field has been added to the API. It is a text field and any character is allowed. Its maximum length is 512 characters. It is optional.

## Transfer Memo Export API

The following fields have been added:

- **carton #** (on the transfer memo line level)
- **sequence #** (on the transfer memo line level)
- **carton #** (on the transfer memo header level)

### *transfer order* dialog: *general* tab

transfer order - 980 - released

general

universal order #: 100000972

order #: 980

reference #: 980

status: released

source location: TIGNATENKO - Tatyana Ignatenko

default target location: AIGNATENKO - Anya Ignatenko

order date: 04/26/2018 5:28 AM \*

ship date:

arrival date:

cancel date:

# of memos: 1

expected memos: 4

notes:

\* - required

quick transfer

release & archive

release

The **quick transfer** pushbutton has been added to the **general** tab in the **transfer order** dialog box (accessed via **chq > transfer orders > new** or **(click item in the list)**).

This button will be visible if:

1. The user has the "Transfer Memos – Add/Edit" right,
2. and the transfer order is not archived,
3. and either:
  - a. The transfer order status is "held",
  - b. or the transfer order status is "released" and there are no "held" or finalized transfer memos linked to the transfer order.

### *transfer memo tab*

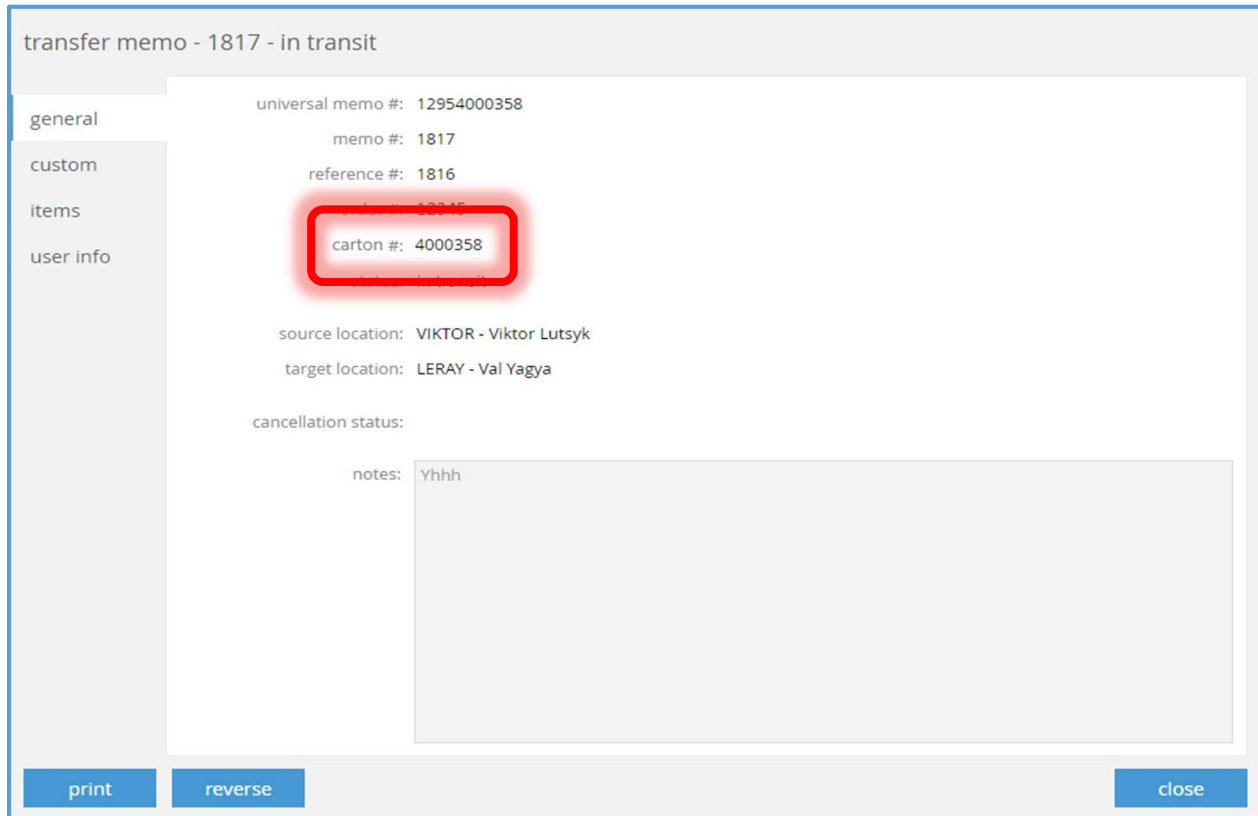
The screenshot shows the TEAMWORK COMMERCE interface with the 'inventory' tab selected. The 'transfer memos' sub-tab is active. A search bar is highlighted with a red box. Below the search bar is a table of recent transfer memos. To the right of the table is a filter panel, where the 'carton #' filter is highlighted with a red box.

recent	filter
100000698 12/04/2019 !!!TEST to NASTYA 0/500	universal memo #
100000697 12/04/2019 AIGNATENKO to AIG...	memo #
110000125 12/01/2019 EVG to EVGENIYA 2/346.1	universal order #
110000124 12/01/2019 EVG to EVGENIYA 2/4	reference #
110000123 12/01/2019 EVG to EVGENIYA 0/4	status
110000122 12/01/2019 EVG to EVGENIYA 0/2	source location
100000695 12/02/2019 VIKTOR to LERAY 1/1	target location
12954000358 12/02/2019 VIKTOR to LERAY 0/1	transfer order #
100000696 12/02/2019 LERAY to VIKTOR 1/1	carton #
100000694 12/02/2019 !!!TEST to CCCC 0/3	memo (post out) date
110000121 11/29/2019 EVG to NASTYA 0/13	post in date
110000120 11/29/2019 EVG to NASTYA 0/13	discrepancy
12955000018 11/28/2019 046535 to 084232 0/999	is reviewed

The **chq > inventory > transfer memos** tab has been enhanced.

The **search** text box now has the ability to search by the **carton #** value (from the transfer memo header). The search will be for an exact match.

A **carton #** filter has been added to allow for filtering by the **carton #** value from the transfer memo header.

***transfer memo details dialog: general tab***

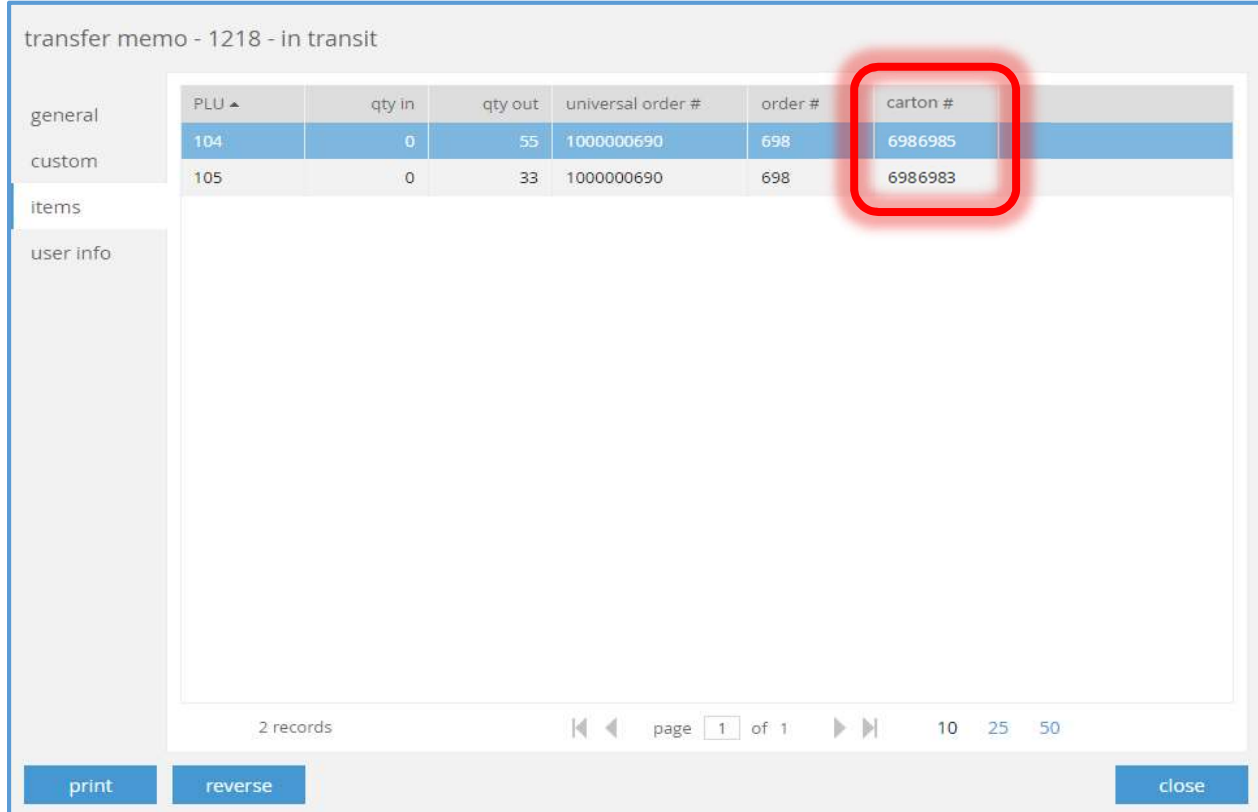
The screenshot displays a software dialog box titled "transfer memo - 1817 - in transit". On the left is a vertical navigation menu with four tabs: "general", "custom", "items", and "user info". The "general" tab is selected. The main content area shows the following information:

- universal memo #: 12954000358
- memo #: 1817
- reference #: 1816
- carton #: 4000358 (This field is highlighted with a red rounded rectangle)
- source location: VIKTOR - Viktor Lutsyk
- target location: LERAY - Val Yagya
- cancellation status:
- notes: Yhhh

At the bottom of the dialog, there are three buttons: "print", "reverse", and "close".

The **carton #** textbox has been added to the **general** tab of the **transfer memo details** dialog box (accessed via **chq > transfer memos > (click item in list)**).

This field will display the **carton #** value from the transfer memo header. It is not editable. It will be visible only if the **carton #** value from the transfer memo header is not empty.

**transfer memo details dialog: items tab**

transfer memo - 1218 - in transit

PLU ▲	qty in	qty out	universal order #	order #	carton #
104	0	55	1000000690	698	6986985
105	0	33	1000000690	698	6986983

2 records page 1 of 1 10 25 50

print reverse close

The **carton #** column has been added to the item grid in the **items** tab of the **transfer memo details** dialog box (accessed via **chq > transfer memos > (click item in list)**).

This column is not editable and is not visible by default.

**transfer memo list view**

memo #	universal memo #	order #	carton #	created date	status	qty out	qty in	difference
1274	10892000004			10/20/2017 6:47 AM	in transit	1	0	
1305	10892000025			10/24/2017 10:59 AM	in transit	2	0	
1491	1000000232	814		02/06/2018 8:33 AM	in transit	32	0	
1227	10887000142	707	6986983	01/19/2017 5:40 AM	in transit	4	0	
1421	10982000209			11/15/2017 6:55 AM	posted	1	15	14
1711	1000000570			05/07/2019 4:08 AM	posted	1	1	
1508	11452000436			03/20/2018 12:08 PM	posted	3	5	2
1346	10917000020			10/25/2017 5:09 AM	in transit	1	0	
1100	1100000106			10/05/2017 12:50 PM	in transit	2	0	
1416	1000000196	753		11/08/2017 7:36 AM	in transit	3	0	

The **carton #** column has been added to the memo grid in the **transfer memo** list view (accessed via **chq > transfer memos > list**).

This column is not editable and is not visible by default.

## V6 CHQ: Count Memos

TWD-22707

In order to improve stock count information, Teamwork Commerce is introducing in CHQ 6.12 a new document type, the Count Memo. A Count Memo will hold a count of all of the catalog (inventory) items (excluding any items which are *deleted*, *inactive*, or *service items*).

Previously, counts are only available in CHQ and these counts are global. Now a Count Memo can be requested via API either from within POS or CHQ and can include only those counts for a specific location. The Count Memo API request will also allow for other filtering of the items to appear in the memo.

The user will have the ability to view or edit (from either POS or CHQ) a Count Memo in order to identify and handle any discrepancies. When so desired, the Count Memo can be *finalized*, in which case no further updates to the content of the memo can be made.

**Settings: New Security Rights**

New security rights have been created for CHQ.

SR Name	SR Id	Area	Description
Access Count Memos		Count Memos	Allows a user to access the count memo area and create, edit, and import count memos.
Finalize Count Memos		Count Memos	Allows a user to finalize a count memo.
Create Adjustment From Count		Count Memos	Allows a user to create an adjustment memo for a count memo.
Archive Count Memos		Count Memos	Allows a user to archive a count memo.

**API Import**

The rules for how the API decides whether it should accept a request for a Count Memo are:

- If a Count Memo scan item is created with an EPC (electronic product code), then the quantity for this scan item can only be equal to one.
- If several Count Memo scan items are present for the same Count Memo header with the same EPC, then only one of them will be considered while calculating totals for the Count Memo header, Count Memo item, and Count Memo zone.
- If several Count Memo scan items are present for the same Count Memo header with the same **InvenItem**, **CountMemoZone**, **ScannedDate**, **EPC**, and **Qty** values then only one of them will be considered while calculating totals for the Count Memo header, Count Memo item, and Count Memo zone.
- If multiple Count Memo scan items are present for the same Count Memo header with the same **CountMemoZone**, **InvenItem**, **Scanned Date/Time**, and **Qty** values, but without an **EPC** value, then only one of them will be considered since the multiple scan items all have the same date/time).
- If multiple Count Memo scan items are present for same Count Memo header with the same **CountMemoZone**, **InvenItem**, and **Qty** values, but without an **EPC** value and with a *different Scanned Date/Time* value, then all scan items for that **InvenItem** will be counted.

## Screen: inventory, Tab: count memos

The screenshot shows the TEAMWORK RETAIL CHQ interface. The top navigation bar includes tabs for inventory, purchasing, sales, analytics, services, and settings. The left sidebar lists various inventory-related items, with 'count memos' highlighted in a red box. The main content area is divided into three sections: a search bar, a 'recent' table, and a 'filter' section.

recent		
	100 - Clearwater Store 12/12/2019 8:42 AM	4R55T1
	102 - Miami Store 12/12/2019 8:38 AM	46A1ZT
	106 - Orlando Store 12/12/2019 8:04 AM	UN8G0E

The 'filter' section contains the following fields:

- location
- date
- ledger differences (dropdown)
- status (dropdown)
- archived status (dropdown)

The **count memos** tab has been added to the **inventory** screen.

The fields in the **filter** area allow for the selection of the records to be shown in the **recent** area.

The **search** textbox will allow for searches by location code, location name, and count ID.

Clicking the **new** button will open the **new count memo** dialog box (see below).

Clicking the **list** button will display the **count memo list** view (see below).

**Dialog: new count memo**

new count memo

general

location:  \*

description:

filter

style #:

department:  edit

class:  edit

sub-class 1:  edit

sub-class 2:  edit

brand:  edit

manufacturer:  edit

primary vendor:  edit

style custom lookup 1:  edit

style custom lookup 2:  edit

\* - required

create cancel

The **filter** area of this dialog box is used to select the records which will appear in the Count Memo.

Click the **edit** button adjacent to the value textbox for a given filter criteria in order to set or modify that filter criteria. This will open the appropriate **filter edit** dialog box.



For example, clicking the **edit** button adjacent to the **department** textbox will open the **Department** dialog box where the department criteria can be set:

Department

[select all](#)   [unselect all](#)  

select	Department
<input checked="" type="checkbox"/>	Mens
<input type="checkbox"/>	Children
<input type="checkbox"/>	Womens
<input type="checkbox"/>	Other
<input type="checkbox"/>	Miscellaneous

1 record(s) selected   page  of 1   10 25 50

If multiple values are selected for a given filter criteria they will appear as a comma separated list in the appropriate text box as shown below.

Clicking the **create** pushbutton in the **new count memo** dialog box will create the Count Memo closing the **new count memo** dialog.

While the Count Memo is in the process of being created, the following dialog box will be displayed.

**Screen: inventory, Tab: count memos, list view**

Count ID	location	description	count date/time	status	Item differences	Items	progress
4R55T1	100 - Clearwater Store	Winter 2019 sweaters	12/12/2019 8:35 AM	open			
46A1ZT	102 - Miami Store	Winter 2019 coats & scarves	12/12/2019 8:31 AM	open	12	2167	
UN8G0E	104 - Orlando Store	Mens Accesories	12/12/2019 8:04 AM	Finalized	29	812	
A44B29	100 - Clearwater Store	Fall 2019 Tennis shoes	12/11/2019 8:19 AM	adjusted	7	166	

4 records    page 1 of 1    10 25 50

The **list view** of the **count memos** tab lists the available Count Memos (one per line).

The **Item differences** column shows the number of PLU's included in the Count Memo which have differences between the ledger quantity and the count quantity.

The **Items** column shows the total number of PLU's included in the Count Memo.

If any processing is being done on any of the displayed memos this processing is indicated by the progress bar in the **progress** column of the grid.

Clicking the **new** button will open the **new count memo** dialog box (see above).

Clicking the **edit** button will open the **edit count memo** dialog box (see below).

Clicking the **import** button will open the **import count** dialog box (see below).

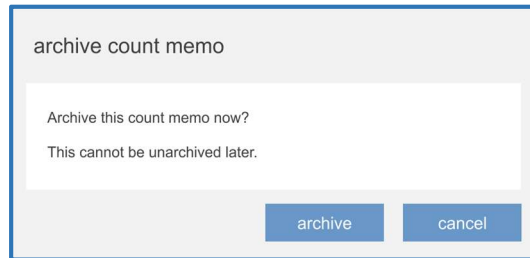
The **archive** button archives the selected count memo in the list view.

### Important Note

Be aware that it will not be possible to unarchive an archived Count Memo.

The **archive** button will be visible only if the user has the "Archive Count Memos" right.

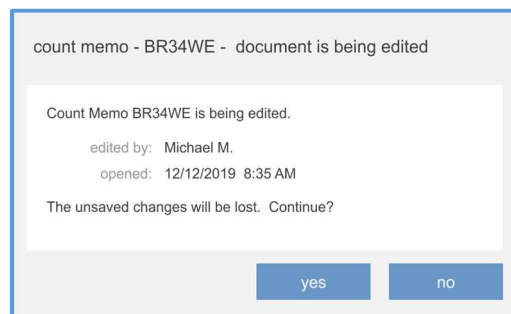
Clicking the **archive** button will display the **archive count memo** dialog box:



Since multiple users can be processing a given Count Memo simultaneously, it will be determined whether this is the case before the archive is performed.

If no one else is editing the Count Memo in question it will be archived.

If someone else *is* editing the Count Memo in question, the **count memo is being edited** dialog box will be displayed:



Clicking the **yes** button will archive the Count Memo even though someone else is editing it.

### Important Note

---

Be aware that clicking the **yes** pushbutton will cause the other user's changes to be discarded before the Count Memo is archived.

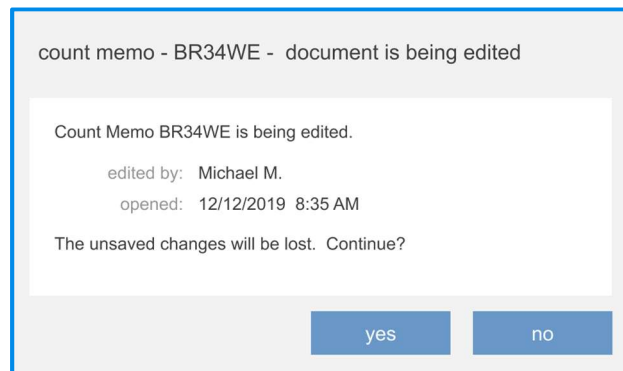
The screenshot shows the CHQ 'count memos' interface. At the top, there is a home icon, the text 'CHQ', and the title 'count memos'. Below this are navigation buttons: 'new', 'edit', 'archive', and 'import', along with a 'filter' dropdown. The main area contains a table with the following data:

Count ID	location	description	count date/time	status	Item differences	Items	progress
4R55T1	100 - Clearwater Store	Winter 2019 sweaters	12/12/2019 8:35 AM	open	4	400	
46A1ZT	102 - Miami Store	Winter 2019 coats & scarves	12/12/2019 8:31 AM	open	12	2167	
UN8G0E	104 - Orlando Store	Mens Accesories	12/12/2019 8:04 AM	finalized	29	812	
A44B29	100 - Clearwater Store	Fall 2019 Tennis shoes	12/11/2019 8:19 AM	adjusted	7	166	

At the bottom of the table, there is a pagination control showing '4 records', navigation arrows, 'page 1 of 1', and options for 10, 25, and 50 records per page.

It is possible that one or more of the Count Memos shown in the grid can be opened for editing by another user. When this is the case, it will be indicated in the grid by being shown in red and with the pencil icon.

If an attempt is made to edit a memo which is already being edited by someone else, the following dialog box will be shown.



**Important Note**

Be aware that clicking the **yes** pushbutton will cause the other user's changes to be discarded before editing by the current user will begin.

**Dialog: edit count memo, Tab: general**

count memo - BY76E3

count memo ID	BY76E3	# of Items in memo:	400
universal #:	1234567890123456	# of Items counted:	384
location:	100 - Clearwater Store	total qty scanned:	3755
description:	Winter 2019 Sweaters	items with differences:	6
count date/time:	12/12/2019 8:35 AM	unrecognized scans:	0
status:	open	quantity over:	999
archived:	<input type="checkbox"/>	quantity short:	- 9996
adjustment doc #:		net difference:	- 8999

filter

style #:

department:

class:

sub-class 1:

sub-class 2:

brand:

manufacturer:

primary vendor:

style custom lookup 1:

create adjustment Finalize save cancel

The upper area of this tab is the *header* area.

The **count memo ID** is an internally generated base36 ID number. All **count memo ID** values will be unique.

The **description** can be up to 256 characters. It will be editable until the Count Memo is *finalized*.

The **status** can be one of the following:

- open (the memo has been created and can be edited)
- finalized (the memo has been finalized and no editing is allowed, but creation of an Adjustment Memo can be done)
- adjusted (the memo has been finalized and an Adjustment Memo has been created for it)

If an Adjustment Memo has been created for the Count Memo, the adjustment's document number is shown in the **adjustment doc #** textbox. This textbox is not editable.

The **# of items in memo** value is the number of PLU's which meet the current filter criteria.

The **# of items counted** value is the number of PLUs which have a scan quantity associated with them.

The **# of items counted** value is the number of PLUs which have been scanned.

The **items with differences** value is the number of PLUs for which there is a difference between the ledger quantity and the count quantity.

The **unrecognized scans** value is the number of uploaded scans which could not be identified as an inventory item (I.E., are not in the catalog).

The **quantity over** and **quantity short** values are the number of differences which are positive (over the ledger quantity) or negative (less than the ledger quantity).

The **net differences** value is the net of the **quantity over** and **quantity short** values.

The **filter** area of this tab defines the filtering criteria used to select items for the Count Memo.

These values cannot be edited. They are set when the memo was created and cannot be modified subsequently.

Clicking the **create adjustment** pushbutton will open the **create adjustment** dialog box (see below). This pushbutton will not be visible if the user doesn't have the "Create Adjustment From Count" right and/or the Count Memo's **status** is "adjusted" or "archived".

Clicking the **finalize** pushbutton finalizes the Count Memo. This pushbutton will not be visible if the user doesn't have the "Finalize Count Memos" right.

Clicking the **save** pushbutton saves all changes made without altering the memo's **status**. This pushbutton will not be visible if the Count Memo's **status** is other than "open".

The label of the **cancel** pushbutton will be "cancel" if the Count Memo's **status** is "open". The label will be "close" if the Count Memo's **status** is other than "open" (in which case editing is not possible).

**Dialog: edit count memo, Tab: items**

count memo - BY76E3

general view/edit  filter ▾

PLU ▲	style #	store description	attribute 1	attribute 2	ledger qty	count	override qty	difference
6128	223	Classic Polo Shirt	Red	SM	8	9	7	-1
6129	223	Classic Polo Shirt	Red	MED	10	10		0
6130	223	Classic Polo Shirt	Red	LG	8	9		1
6132	223	Classic Polo Shirt	Red	XL	4	4		0
6133	223	Classic Polo Shirt	Red	XXL	4	4		0
6134	223	Classic Polo Shirt	Red	XXXL	3	1	2	-1


items

scans

zones

unrecognized

user info



**Classic Polo Shirt**  
 TN4-POL1223-1b  
 100% Cotton Classic Polo  
 Classic Polo Shirt  
 Red  
 Size L  
 Mens - Shirts - Dress

ledger quantity: 8  
 count: 9  
 override quantity: 7  
 difference: -1

6 records ⏪ ⏩ page 1 of 1 10 25 50

create adjustment Finalize save close

The grid in the **items** tab will show information about each item included in the Count Memo.

None of the columns in the grid are editable.

In addition to the columns shown in the screen image, the following columns can also be included:

- UPC
- CLU
- EID
- Description<sub>1</sub> – 3
- Attribute<sub>1</sub> Alias 1 - 2
- Attribute 2 Alias 1 – 2
- Attribute 3
- Attribute 3 Alias 1 – 2
- DCSS
- Primary Vendor
- Brand



- Manufacturer
- Any visible Style custom fields

The **ledger qty** value is the quantity recorded at the start (creation) of the Count Memo.

The **count** value is the total quantity for all uploaded or imported scans.

The **override qty** value is the quantity to be used for determining if a difference exists for the PLU.

The **difference** value is the difference between the ledger quantity and the count quantity or, if an **override qty** value has been entered, between the ledger quantity and the override quantity. If the difference is not zero, the value will be displayed in red.

Clicking the **view/edit** button will display the **edit item** dialog box (see below).

The **search** textbox will only search the list of items in the Count Memo, not all items.

Clicking the **create adjustment** pushbutton will open the **create adjustment** dialog box (see below). This pushbutton will not be visible if the user doesn't have the "Create Adjustment From Count" right and/or the Count Memo's **status** is "adjusted" or "archived".

Clicking the **finalize** pushbutton finalizes the Count Memo. This pushbutton will not be visible if the user doesn't have the "Finalize Count Memos" right.

Clicking the **save** pushbutton saves all changes made without altering the memo's **status**. This pushbutton will not be visible if the Count Memo's **status** is other than "open".

The label of the **cancel** pushbutton will be "cancel" if the Count Memo's **status** is "open". The label will be "close" if the Count Memo's **status** is other than "open" (in which case editing is not possible).

The screenshot shows a software interface for a 'count memo - BY76E3'. On the left is a sidebar with tabs: 'general', 'items', 'scans', 'zones', 'unrecognized', and 'user info'. The 'items' tab is active, displaying a table with columns: 'PLU', 'style #', 'store description', 'attribute 1', 'attribute 2', and 'ledger quantity'. The table contains six rows of data for 'Classic Polo Shirt' items with various sizes (SM, MED, LG, XL, XXL, XXXL). A search bar and a 'filter' dropdown are at the top right. The filter dropdown is open, showing two sections: 'counts' and 'override quantity'. Each section has radio button options: '(select all)', 'ledger differences', 'no ledger differences' for counts; and 'override quantity', 'no override quantity' for override quantity. At the bottom of the filter menu are 'reset filter', 'apply', and 'cancel' buttons. Below the table is a detailed view for the selected item, 'Classic Polo Shirt', showing its image, description, and a summary of quantities: ledger quantity: 8, count: 9, override quantity: 7, and difference: -1. At the bottom of the interface are buttons for 'create adjustment', 'Finalize', 'save', and 'close'. A pagination bar shows '6 records', 'page 1 of 1', and options for 10, 25, and 50 records per page.

PLU	style #	store description	attribute 1	attribute 2	ledger quantity
6128	223	Classic Polo Shirt	Red	SM	8
6129	223	Classic Polo Shirt	Red	MED	10
6130	223	Classic Polo Shirt	Red	LG	8
6132	223	Classic Polo Shirt	Red	XL	4
6133	223	Classic Polo Shirt	Red	XXL	4
6134	223	Classic Polo Shirt	Red	XXXL	1

**Classic Polo Shirt**  
TN4-POL1223-1b  
100% Cotton Classic Polo  
Classic Polo Shirt  
Red  
Size L  
Mens - Shirts - Dress

ledger quantity: 8  
count: 9  
override quantity: 7  
difference: -1

The **filter** for this tab allows for filtering out items from the grid based upon *counts* and *override quantity*.

**Dialog: edit count memo, Tab: scans**

count memo - BY76E3

general

remove scan  filter

Zone	PLU ▲	style #	store description	attribute 1	attribute 2	scan qty	manual	EPC	date/time
A	6128	223	Classic Polo Shirt	Red	SM	1	<input checked="" type="checkbox"/>		12/12/20...
A	6128	223	Classic Polo Shirt	Red	SM	1	<input type="checkbox"/>	123456789...	12/12/20...
A	6128	223	Classic Polo Shirt	Red	SM	1	<input type="checkbox"/>	123456789...	12/12/20...
C	6128	223	Classic Polo Shirt	Red	SM	1	<input type="checkbox"/>	123456789...	12/12/20...
C	6129	223	Classic Polo Shirt	Red	MED	1	<input type="checkbox"/>	123456789...	12/12/20...
	6129	223	Classic Polo Shirt	Red	MED	3	<input checked="" type="checkbox"/>		12/12/20...


items

scans

zones

unrecognized

user info



**Classic Polo Shirt**  
 TN4-POL1223-1b  
 100% Cotton Classic Polo  
 Classic Polo Shirt  
 Red  
 Size L  
 Mens - Shirts - Dress

scan qty: 1  
 Manual:   
 EPC: 123456789012345678901234  
 date/time: 12/12/2019 8:35:34.225 AM

6 records    page 1 of 1    10 25 50

create adjustment    Finalize    save    close

The grid in the **items** tab will show information about each scan included in the Count Memo.

None of the columns in the grid are editable.

In addition to the columns shown in the screen image, the following columns can also be included:

- UPC
- CLU
- EID
- Description<sub>1 – 3</sub>
- Attribute<sub>1</sub> Alias <sub>1 - 2</sub>
- Attribute <sub>2</sub> Alias <sub>1 – 2</sub>
- Attribute <sub>3</sub>
- Attribute <sub>3</sub> Alias <sub>1 – 2</sub>
- DCSS
- Primary Vendor
- Brand

- Manufacturer
- Any visible Style custom fields

The **manual** checkbox indicates whether the scan was manually entered or not.

The **search** textbox will only search the list of scans in the Count Memo, not all scans.

Clicking the **remove scan** button will remove the highlighted scan from the Count Memo after displaying a confirmation dialog box.

Clicking the **create adjustment** pushbutton will open the **create adjustment** dialog box (see below). This pushbutton will not be visible if the user doesn't have the "Create Adjustment From Count" right and/or the Count Memo's **status** is "adjusted" or "archived".

Clicking the **finalize** pushbutton finalizes the Count Memo. This pushbutton will not be visible if the user doesn't have the "Finalize Count Memos" right.

Clicking the **save** pushbutton saves all changes made without altering the memo's **status**. This pushbutton will not be visible if the Count Memo's **status** is other than "open".

The label of the **cancel** pushbutton will be "cancel" if the Count Memo's **status** is "open". The label will be "close" if the Count Memo's **status** is other than "open" (in which case editing is not possible).

count memo - BY76E3

remove scan

Zone	PLU ▲	style #	store description	attribute 1	attribute 2	sc
A	6128	223	Classic Polo Shirt	Red	SM	
A	6128	223	Classic Polo Shirt	Red	SM	
A	6128	223	Classic Polo Shirt	Red	SM	
C	6128	223	Classic Polo Shirt	Red	SM	
C	6129	223	Classic Polo Shirt	Red	MED	
	6129	223	Classic Polo Shirt	Red	MED	

search [ ] filter ▼

counts

- (select all)
- no zone defined
- A
- C

reset filter apply cancel

Classic Polo Shirt  
TN4-POL1223-1b  
100% Cotton Classic Polo  
Classic Polo Shirt  
Red  
Size L  
Mens - Shirts - Dress

scan qty: 1  
Manual:   
EPC: 123456789012345678901234  
date/time: 12/12/2019 8:35:34.225 AM

6 records page 1 of 1 10 25 50

create adjustment Finalize save close

The **filter** for this tab allows for filtering out scans from the grid based upon *counts*.

**Dialog: edit count memo, Tab: zones**

count memo - BY76E3

general

delete zone scans

zone ▲	uploaded	scans	quantity scanned
	12/12/2019 9:21 AM	9	25
A	12/12/2019 8:39 AM	234	812
B	12/12/2019 8:52 AM	441	2147
C	12/12/2019 8:54 AM	137	339

4 record(s)

create adjustment Finalize save close

The grid in the **zones** tab will show information about each upload/zone. If there are multiple uploads with no zone name defined, there will be one row for each such upload.

None of the columns in the grid are editable.

Clicking the **delete zone scans** button will remove the highlighted upload/zone from the Count Memo after displaying a confirmation dialog box.

Clicking the **create adjustment** pushbutton will open the **create adjustment** dialog box (see below). This pushbutton will not be visible if the user doesn't have the "Create Adjustment From Count" right and/or the Count Memo's **status** is "adjusted" or "archived".

Clicking the **finalize** pushbutton finalizes the Count Memo. This pushbutton will not be visible if the user doesn't have the "Finalize Count Memos" right.

Clicking the **save** pushbutton saves all changes made without altering the memo's **status**. This pushbutton will not be visible if the Count Memo's **status** is other than "open".

The label of the **cancel** pushbutton will be “cancel” if the Count Memo’s **status** is “open”. The label will be “close” if the Count Memo’s **status** is other than “open” (in which case editing is not possible).

**Dialog: edit count memo, Tab: unrecognized**

count memo - BY76E3

zone ▲	scan date/time	scan string	quantity scanned
A	12/12/2019 9:21:45.221 AM	123456789012345678909999	1
A	12/12/2019 9:21:45.578 AM	123456789012345678908888	1
A	12/12/2019 9:21:47.578 AM	123456789012345678907777	1
C	12/12/2019 9:26:04.182 AM	9876543210321	6

4 record(s) page 1 of 1 10 25 50

create adjustment Finalize save close

The grid in the **unrecognized** tab will show information about each unrecognized scan received. An unrecognized scan is one where the item is not found in the catalog.

None of the columns in the grid are editable.

Clicking the **create adjustment** pushbutton will open the **create adjustment** dialog box (see below). This pushbutton will not be visible if the user doesn’t have the “Create Adjustment From Count” right and/or the Count Memo’s **status** is “adjusted” or “archived”.

Clicking the **finalize** pushbutton finalizes the Count Memo. This pushbutton will not be visible if the user doesn’t have the “Finalize Count Memos” right.

Clicking the **save** pushbutton saves all changes made without altering the memo’s **status**. This pushbutton will not be visible if the Count Memo’s **status** is other than “open”.

The label of the **cancel** pushbutton will be “cancel” if the Count Memo’s **status** is “open”. The label will be “close” if the Count Memo’s **status** is other than “open” (in which case editing is not possible).

**Dialog: edit count memo, Tab: unrecognized**

count memo - BY76E3

general	created: 12/12/2019 7:35 AM created by: System
items	last edited: 12/12/2019 8:15 AM
counts	last edited by: Michael M.
user info	finalized: 12/12/2019 8:32 AM finalized by: Jeff S.
	adjustment created: 12/12/2019 8:35 AM adjustment created by: Jeff S.

close

None of the fields in this tab are editable.



**Dialog: edit item**

6128 - Classic Polo Shirt

---

**quantities**

ledger quantity: 8

total scan count: 9

override quantity:  [clear](#)

difference: -1

---

**scans**

[remove scan](#)

Zone	scan qty	manual	EPC	date/time ▲
A	1	<input checked="" type="checkbox"/>		12/12/2019 8:25:12.123 AM
A	1	<input type="checkbox"/>	123456789012345678901234	12/12/2019 8:31:42.221 AM
A	1	<input type="checkbox"/>	123456789012345678901235	12/12/2019 8:31:42.232 AM
C	1	<input type="checkbox"/>	123456789012345678901236	12/12/2019 8:38:01.844 AM
C	1	<input type="checkbox"/>	123456789012345678901237	12/12/2019 8:38:01.912 AM
	3	<input checked="" type="checkbox"/>		12/12/2019 8:44:59.911 AM

6 scan record(s)    ⏪ ⏩    page 1 of 1    ▶ ⏪ ⏩    10 25 50

The only field in this dialog box which can be edited is the **override quantity**. Valid values are 0 (zero) through 999,999 or *empty*. Clicking the **clear** button will set the value to *empty*. It is set to *empty* rather than zero because being empty means that there is no override quantity and the count quantity should be used for *difference* calculations.

The **scans** area lists the scans which contain the item.

The **remove scan** button will remove the selected scan from the item after the removal has been confirmed.

**Dialog: create adjustment**

Once a value is selected in the **adjustment memo reason** combobox the values for the other fields can be edited.

The **automatically archive count memo** checkbox indicates whether or not the Count Memo should be automatically archived once the Adjustment Memo has been created. The default value is FALSE. This field can only be edited if the user has the "Archive Count Memos" right.

Clicking the **adjust** pushbutton will close the dialog box and create the Adjustment Memo. While the Adjustment Memo is being created the following dialog box will be displayed:

**Dialog: import count**

import counts for: BR45WE

excel spreadsheet for import

file name:  ... \*

[download template](#)

\* - required

import cancel

The name of the file to be used for the import is supplied in the **file name** textbox.

Clicking the **import** pushbutton will initiate the import of the indicated file.

**Note**

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An import using the indicated file will not be performed if that file has been opened by another user.

## Settings

### CHQ: CR: Ship Memo and ShippyPro integration change requests

TWD-27677

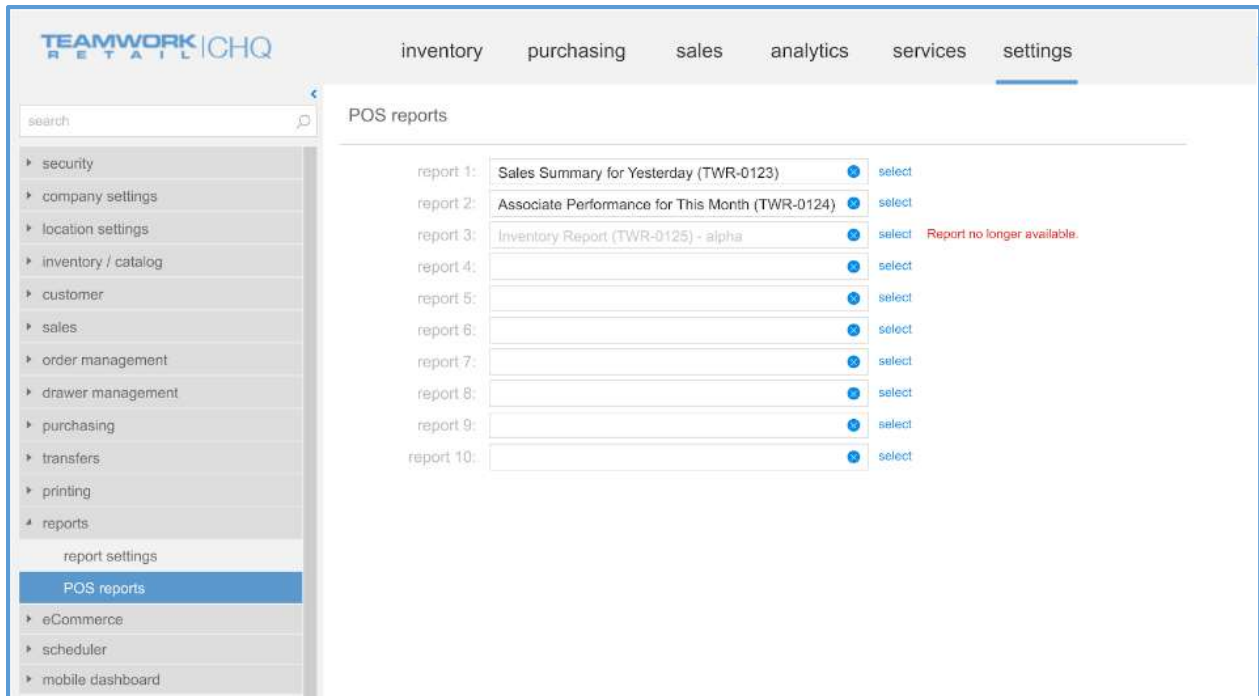
The screenshot shows the settings interface for '100 - Clearwater Store'. The left sidebar lists various settings categories: details, groups, schedule, custom, general settings, sales, price breaks, payments, sales receipt tabs, sales order tabs, purchasing, transfers, and SVS. The 'sales' tab is selected, and the 'ship memos' section is highlighted with a red box. The 'return label destination location' dropdown menu is set to 'WH2 - Warehouse 2'. Other visible settings include 'require customer for all sales', 'require customer for returns', 'pass held receipts to CTS', 'clear all held receipts after (mins): 900', 'prompt to print on hold', 'require discount override code', 'prevent negative discount', 'do not print store receipt when no credit card', 'enable official invoice printing', 'auto reserve return (hrs): 0', 'reserve reason for return', 'require second login for open return (V5): off', 'require second login for verified return (V5): off', 'enable pay in store action', 'cash drawer', and 'always open cash drawer'. The 'taxes' section includes 'use tax free integration', 'use service for tax calculation', 'service tax area: Clearwater FL', and 'use tax calculation service for: receipt ship items and ...'. The 'sales orders' section includes 'default sell from location: 100 - Clearwater Store' and 'default fill location: 100 - Clearwater Store'. The 'email notifications - web and send sales' section includes 'sender email'. The 'ship memos' section includes 'use shipping service: shipit', 'service location name: CLEARWATER', 'automatically request return label', 'return service ship method', 'return label destination location: WH2 - Warehouse 2', 'rate shop group code', and 'require scan for item verification'. A red asterisk indicates required fields. The 'save' and 'cancel' buttons are at the bottom right.

The **return label destination location** field has been added to the **sales** tab (accessed via **chq > settings > sales > ship memos**). On installation, the default value will be blank which indicates to POS that its own location should be used for return labels. If an invalid or inactive location is selected, this will also cause POS to use its own location.

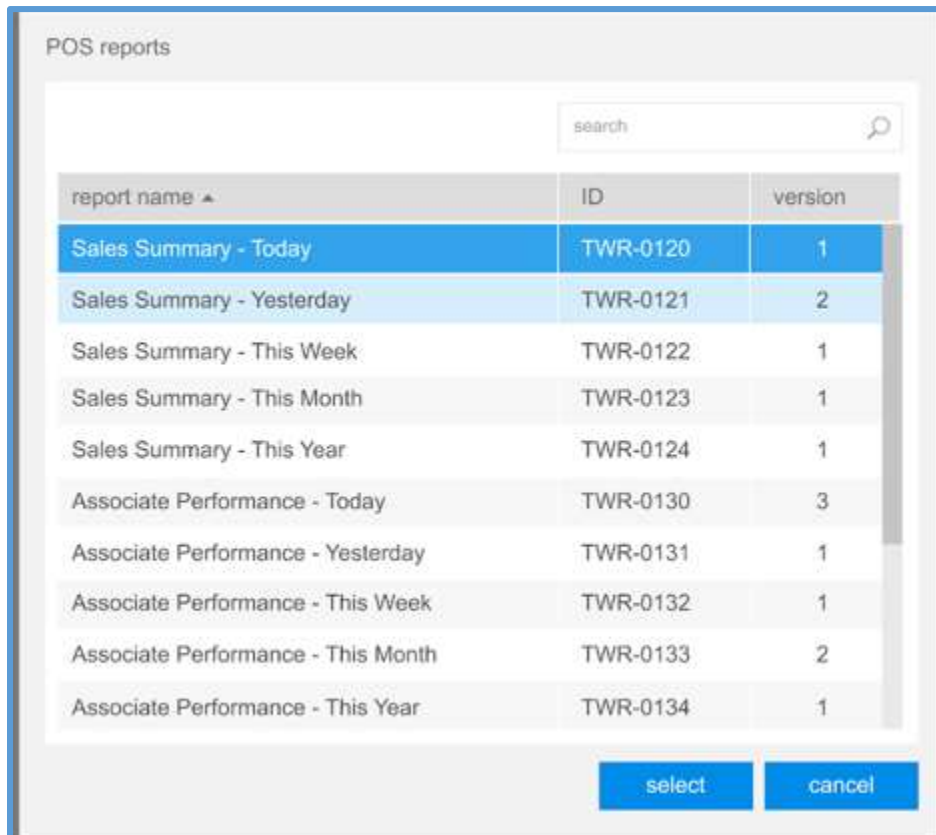
### Simplified embedded reporting

<TWD-26263>

The **chq > settings > reports > POS reports** tab has been added to support simplified embedded reporting functionality in POS.



Clicking the **select** button for **report n** opens the **POS reports** dialog box.



Selecting a report and clicking the **select** button will associate that report with the appropriate **report *n*** field (see above).

## Other enhancements

### V6 CHQ: Embedded POS reports

TWD-26236

The following report parameters are now supported in order to begin the simplification of reporting in V6 POS.

Report Parameter Name	RDL (Report Definition Language) Specification	Comments
Metadata	Text, allow multiple values, internal, has static available values, has static default values	Always present in RDL report. CHQ should populated it with default values.
LoginName	Text, allow blank value, hidden	Always present in RDL report. CHQ should populate it with login of employee who executes the report in POS.
ObjectID	Text, allow blank value	Always present in RDL report. CHQ should populate it with LocationId of POS.
TestObjectID	Text, allow null value, has dynamic available values, has dynamic default values	Can be absent in RDL report. CHQ should populate it with null value if the parameter is present.
Xml	Text, allow blank value	Can be absent in RDL report. CHQ should populate it with specially prepared XML string if the parameter is present. Example of XML value:  <pre>&lt;root   AppName="iPadPOS"   AppVersion="6.12.80"   DeviceAgentId="51DD4564-3B06-46C2-B9D8-D477824913B7"   DeviceName="iPad gray QA2"   LanguageCode="en"   EmployeeId="01CA8A3F-E2E3-4D36-8E53-4A198B229F61"   LocationId="22717944-BF7F-4169-81E1-37F27AA7B4E4"   WorkstationId="B9EEFF1B-1423-42C4-BBDD-</pre>

		<code>0FE8212BA4B5"</code> <code>ReportRunDate="2020-12-31T23:45:12.567-</code> <code>08:00"</code> <code>/&gt;</code>
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## Epilogue

This guide was published on **March 12, 2020** by Teamwork Commerce.

CHQ is accessed online through a browser and a 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@teamworkcommerce.com](mailto:training@teamworkcommerce.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@teamworkcommerce.com](mailto:support@teamworkcommerce.com).

For emergency support call the Teamwork Commerce 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.