# Mobile Release Guide

Version 6.11

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# POS

## Updated POS Pro Icon

Version 6.11 – TWD-23937

January 2020

The icon that is used to access POS Pro has been updated.

## Updated Status Bar Display

Version 6.11 – TWD-21741

January 2020

In POS Pro, Status Bar is used to display useful information about the application state, like application version, date and time of the last sync, etc.

Status Bar appears at the bottom of the screen and in black if the POS Pro application is online:
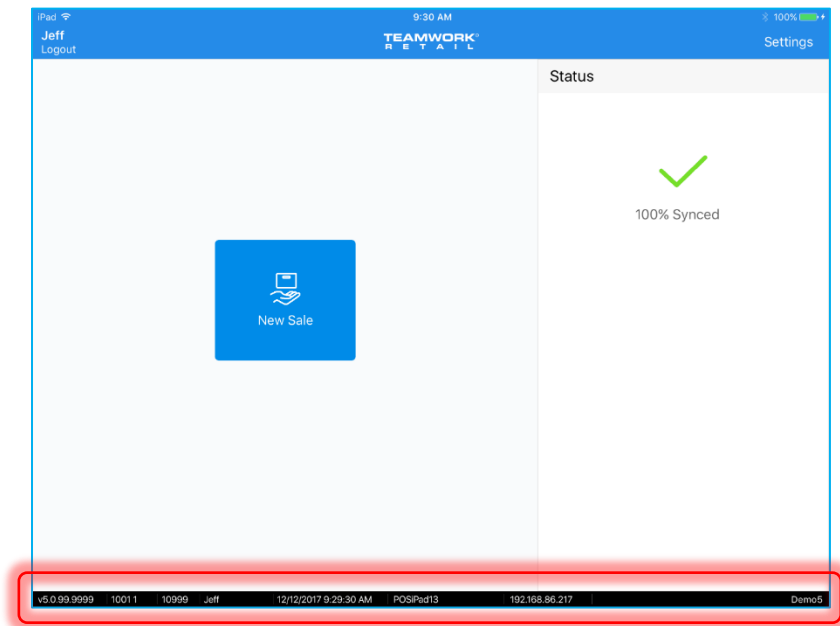


For Status Bar to be displayed when the application is online, the **Status Bar Display** switch must be turned on in POS under *Settings > General Info.*

NOTE:

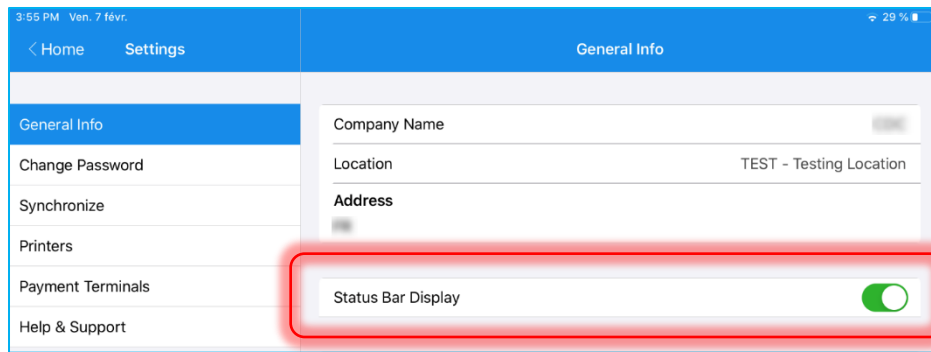By default, on new installations, the switch is always on. In that case, Status Bar displays all the time except for the case when virtual keyboards are invoked. Then, the bar is hidden by the keyboard.

## Information in Status Bar

In the bar, the following information is available:

1. Application version
2. Location and Drawer Station; by default, Location Name is displayed, if it is blank, Location Code is displayed instead.
3. Device ID (from device controller in CHQ)
4. User's login
5. Date and time of the last successful synchronization (background or forced)
6. iPad name (available under *iOS Settings > General > About*)
7. iPad IP (hidden if there's no Internet connection)
8. Server code
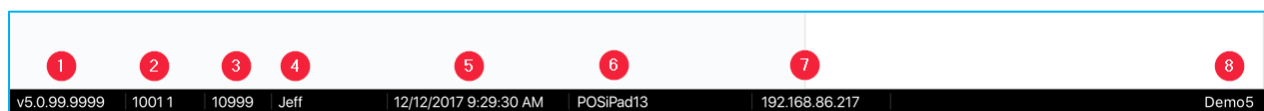


## POS Pro Offline

If POS is offline the bar displays in red with the *Offline* indicator on the left.

The bar display when the application is offline differs depending on whether Status Bar Display switch is turned on or off:

- if the **Status Bar Display** switch is on, the bar displays all the available information:
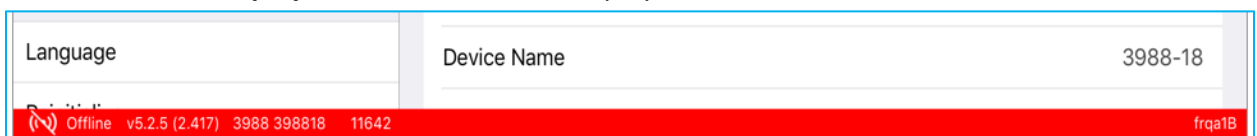
- if the **Status Bar Display** switch is off, the bar displays all the available information:
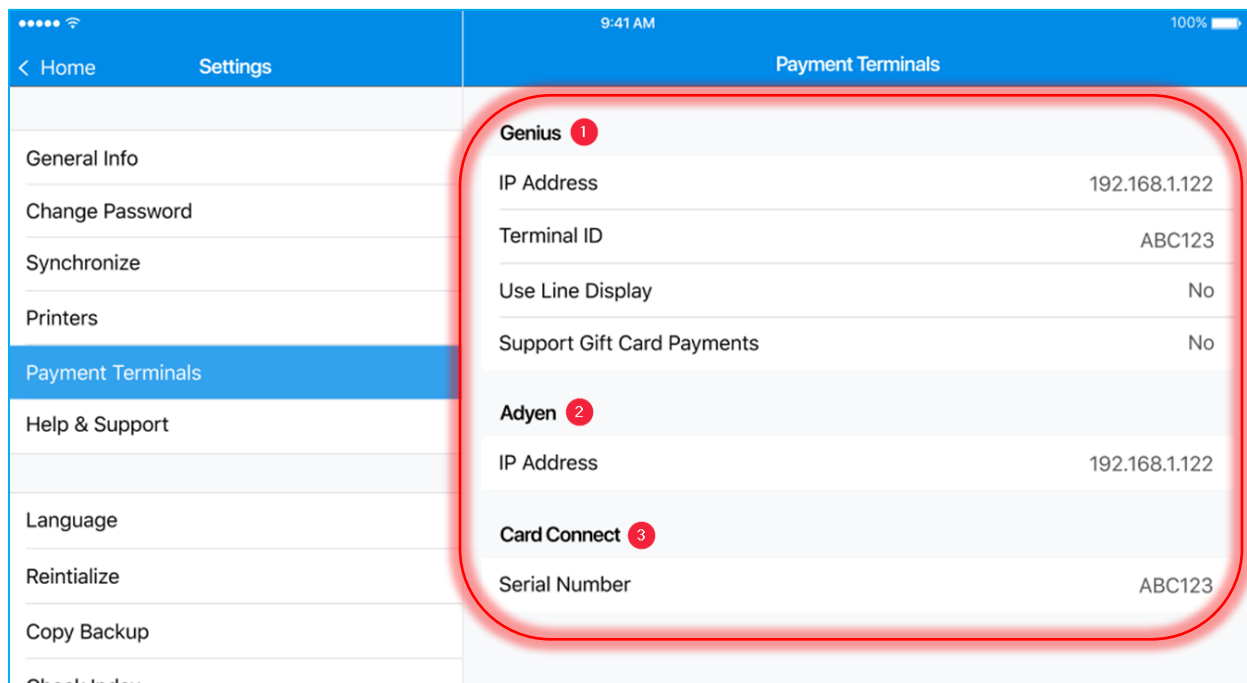


# Payment Terminal Settings Streamed from CHQ to POS

Version 6.11 – TWD-21757

November 2019

The feature allows for display of the payment terminal setup information streamed from CHQ to the POS application. The information displays under POS *Settings > Payment Terminals*.



NOTE:

In this version of the POS app, the information displayed is read-only.

# Streaming Imported Device Settings from CHQ to Devices

Version 6.11 – TWD-21710

January 2020

The new feature allows for importing location-specific settings for devices and printers to CHQ and then streaming these settings down to devices.

> NOTE:
>
> Device settings and location printers can be imported to CHQ for a specific location under *CHQ > services > device controller*. To do so, once the required location is selected under *device controller*, click the **import** button at the top of the page.

The following sections will be synchronized with the POS app:

- POS Credit Card Terminals
- POS Printing Options

No user interaction is needed to synchronize the settings.

## POS Credit Card Terminals

| Settings Code | Area | Section | Setting | Type | Example |
|---|---|---|---|---|---|
| POS.ADM.GNS.IP | Administration | Genius | Genius IP | Numeric | 192.168.1.123 |
| POS.ADM.GNS.TID | Administration | Genius | Terminal ID | Numeric | 12345 |
| POS.ADM.GNS.ULD | Administration | Genius | Use Line Display | Selection | Yes / No |
| POS.ADM.GNS.GCP | Administration | Genius | Support Gift Card Payments | Selection | Yes / No |
| POS.ADM.ADN | Administration | Adyen | Adyen IP | Numeric | 192.168.1.123 |
| POS.ADM.CCN | Administration | Card Connect | S/N | Numeric | 123-456-789 |

## POS Printing Options

| Settings Code | Area | Section/Document | Setting | Type | Example |
|---|---|---|---|---|---|
| POS.PRN.SR.POE.PRN | Printing Options | Sales Receipt | Print and/or email | Selection | Print and Email |
| POS.PRN.SR.SLPR.PTR | Printing Options | Sales Receipt | Select Printer | Selection | Printer 1 |
| POS.PRN.SR.SLPR.PRV | Printing Options | Sales Receipt | Preview | True/False | False |

| Settings Code | Area | Section/Document | Setting | Type | Example |
|---|---|---|---|---|---|
| POS.PRN.SR.ADL.CPS | Printing Options | Sales Receipt | Additional Options - Copies | Numeric | 1 |
| POS.PRN.SR.ADL.DGN | Printing Options | Sales Receipt | Additional Options – Document Design | Selection | Sales Receipt 4.3 |
| POS.PRN.GFT.POE.PRN | Printing Options | Gift Receipt | Print and/or email | Selection | Print and Email |
| POS.PRN.GFT.SLPR.PTR | Printing Options | Gift Receipt | Select Printer | Selection | Printer 1 |
| POS.PRN.GFT.SLPR.PRV | Printing Options | Gift Receipt | Preview | True/False | False |
| POS.PRN.GFT.ADL.CPS | Printing Options | Gift Receipt | Additional Options - Copies | Numeric | 1 |
| POS.PRN.GFT.ADL.DGN | Printing Options | Gift Receipt | Additional Options – Document Design | Selection | Gift Receipt 4.3 |
| POS.PRN.STR.POE.PRN | Printing Options | Store Receipt | Print and/or email | Selection | Print and Email |
| POS.PRN.STR.SLPR.PTR | Printing Options | Store Receipt | Select Printer | Selection | Printer 1 |
| POS.PRN.STR.SLPR.PRV | Printing Options | Store Receipt | Preview | True/False | False |
| POS.PRN.STR.ADL.CPS | Printing Options | Store Receipt | Additional Options - Copies | Numeric | 1 |
| POS.PRN.STR.ADL.DGN | Printing Options | Store Receipt | Additional Options – Document Design | Selection | Store Receipt 4.3 |
| POS.PRN.SO.POE.PRN | Printing Options | Sales Orders | Print and/or email | Selection | Print and Email |

| Settings Code | Area | Section/Document | Setting | Type | Example |
|---|---|---|---|---|---|
| POS.PRN.SO. SLPR.PTR | Printing Options | Sales Orders | Select Printer | Selection | Printer 1 |
| POS.PRN.SO. SLPR.PRV | Printing Options | Sales Orders | Preview | True/False | False |
| POS.PRN.SO. ADL.CPS | Printing Options | Sales Orders | Additional Options - Copies | Numeric | 1 |
| POS.PRN.SO. ADL.DGN | Printing Options | Sales Orders | Additional Options – Document Design | Selection | Store Receipt 4.3 |
| POS.PRN.ITG. ADL.CPS | Printing Options | Inventory Tag | # of Copies | Numeric | 1 |
| POS.PRN.ITG. SLPR.PTR | Printing Options | Inventory Tag | Select Printer | Selection | Printer 1 |
| POS.PRN.ITG. SLPR.PRV | Printing Options | Inventory Tag | Preview | True/False | False |
| POS.PRN.ITG. ADL.DGN | Printing Options | Inventory Tag | Additional Options – Document Design | Selection | Store Receipt 4.3 |
| POS.PRN.PLS. SLPR.PTR | Printing Options | Ship Memo Pick List | Select Printer | Selection | Printer 1 |
| POS.PRN.PLS. SLPR.PRV | Printing Options | Ship Memo Pick List | Preview | True/False | False |
| POS.PRN.PLS. ADL.CPS | Printing Options | Ship Memo Pick List | Additional Options - Copies | Numeric | 1 |
| POS.PRN.PLS. ADL.DGN | Printing Options | Ship Memo Pick List | Additional Options - Document Design | Selection | Store Receipt 4.3 |
| POS.PRN.PSL. SLPR.PTR | Printing Options | Ship Memo Packing Slip | Select Printer | Selection | Printer 1 |

| Settings Code | Area | Section/Document | Setting | Type | Example |
|---|---|---|---|---|---|
| POS.PRN.PSL.SLPR.PRV | Printing Options | Ship Memo Packing Slip | Preview | True/False | False |
| **Settings Code** | **Area** | **Section/Document** | **Setting** | **Type** | **Example** |
| POS.PRN.PSL.ADL.CPS | Printing Options | Ship Memo Packing Slip | Additional Options - Copies | Numeric | 1 |
| POS.PRN.PSL.ADL.DGN | Printing Options | Ship Memo Packing Slip | Additional Options - Document Design | Selection | Store Receipt 4.3 |
| POS.PRN.PUL.SLPR.PTR | Printing Options | Ship Memo Pick Up Label | Select Printer | Selection | Printer 1 |
| POS.PRN.PUL.SLPR.PRV | Printing Options | Ship Memo Pick Up Label | Preview | True/False | False |
| POS.PRN.PUL.ADL.CPS | Printing Options | Ship Memo Pick Up Label | Additional Options - Copies | Numeric | 1 |
| POS.PRN.PUL.ADL.DGN | Printing Options | Ship Memo Pick Up Label | Additional Options - Document Design | Selection | Store Receipt 4.3 |
| POS.PRN.SHL.SLPR.PTR | Printing Options | Ship Memo Shipping Label | Select Printer | Selection | Printer 1 |
| POS.PRN.SHL.SLPR.PRV | Printing Options | Ship Memo Shipping Label | Preview | True/False | False |
| POS.PRN.SHL.ADL.CPS | Printing Options | Ship Memo Shipping Label | Additional Options - Copies | Numeric | 1 |
| POS.PRN.SHL.ADL.DGN | Printing Options | Ship Memo Shipping Label | Additional Options - Document Design | Selection | Shipping Label (direct) |
| POS.PRN.RTL.SLPR.PTR | Printing Options | Ship Memo Return Label | Select Printer | Selection | Printer 1 |

| Settings Code | Area | Section/Document | Setting | Type | Example |
|---|---|---|---|---|---|
| POS.PRN.RTL.SLPR.PRV | Printing Options | Ship Memo Return Label | Preview | True/False | False |
| **Settings Code** | **Area** | **Section/Document** | **Setting** | **Type** | **Example** |
| POS.PRN.RTL.ADL.CPS | Printing Options | Ship Memo Return Label | Additional Options - Copies | Numeric | 1 |
| POS.PRN.RTL.ADL.DGN | Printing Options | Ship Memo Return Label | Additional Options - Document Design | Selection | Shipping Return Label (direct) |

### Shipments Printing Options

| Settings Code | Area | Section/Document | Setting | Type | Example |
|---|---|---|---|---|---|
| SHP.PRN.PR.SLPR.DNP | Print Purchase Receipt | Purchase Receipt | Do Not Print | True/False | False |
| SHP.PRN.PR.SLPR.PTR | Print Purchase Receipt | Purchase Receipt | Select Printer | Selection | Printer 1 |
| SHP.PRN.PR.SLPR.PRV | Print Purchase Receipt | Purchase Receipt | Preview | True/False | False |
| SHP.PRN.PR.ADL.CPS | Print Purchase Receipt | Purchase Receipt | Additional Options - Copies | Numeric | 1 |
| SHP.PRN.PR.ADL.DGN | Print Purchase Receipt | Purchase Receipt | Additional Options - Document Design | Selection | Purchase Receipt 4.3 |
| SHP.PRN.PRTG.SLPR.PTR | Print Tags | Purchase Receipt Tags | Select Printer | Selection | Printer 1 |
| SHP.PRN.PRTG.SLPR.PRV | Print Tags | Purchase Receipt Tags | Preview | True/False | False |
| SHP.PRN.PRTG.ADL.CPS | Print Tags | Purchase Receipt Tags | Additional Options - Copies | Numeric | 1 |
| SHP.PRN.PRTG.ADL.DGN | Print Tags | Purchase Receipt Tags | Additional Options - | Selection | Purchase Receipt Tag 4.3 |

| Settings Code | Area | Section/Document | Setting | Type | Example |
|---|---|---|---|---|---|
| | | | Document Design | | |
| SHP.PRN.TM.SLPR.DNP | Print Transfer | Transfer Memo | Do Not Print | True/False | False |
| SHP.PRN.TM.SLPR.PTR | Print Transfer | Transfer Memo | Select Printer | Selection | Printer 1 |
| SHP.PRN.TM.SLPR.PRV | Print Transfer | Transfer Memo | Preview | True/False | False |
| SHP.PRN.TM.ADL.CPS | Print Transfer | Transfer Memo | Additional Options - Copies | Numeric | 1 |
| SHP.PRN.TM.ADL.DGN | Print Transfer | Transfer Memo | Additional Options - Document Design | Selection | Transfer Memo 4.3 |
| SHP.PRN.TMTG.SLPR.PTR | Print Tags | Transfer Memo Tags | Select Printer | Selection | Printer 1 |
| SHP.PRN.TMTG.SLPR.PRV | Print Tags | Transfer Memo Tags | Preview | True/False | False |
| SHP.PRN.TMTG.ADL.CPS | Print Tags | Transfer Memo Tags | Additional Options - Copies | Numeric | 1 |
| SHP.PRN.TMTG.ADL.DGN | Print Tags | Transfer Memo Tags | Additional Options - Document Design | Selection | Transfer Memo Tag 4.3 |
| SHP.PRN.RO.SLPR.PTR | Print Reserve Orders | Reserve Order | Select Printer | Selection | Printer 1 |
| SHP.PRN.RO.SLPR.PRV | Print Reserve Orders | Reserve Order | Preview | True/False | FALSE |
| SHP.PRN.RO.ADL.CPS | Print Reserve Orders | Reserve Order | Additional Options - Copies | Numeric | 1 |
| SHP.PRN.RO.ADL.DGN | Print Reserve Orders | Reserve Order | Additional Options - Document Design | Selection | Transfer Memo Tag 4.3 |
| SHP.PRN.ML.SLPR.PTR | Mailing Label | Reserve Order | Select Printer | Selection | Printer 1 |
| SHP.PRN.ML.SLPR.PRV | Mailing Label | Reserve Order | Preview | True/False | False |

| Settings Code | Area | Section/Document | Setting | Type | Example |
|---|---|---|---|---|---|
| SHP.PRN.ML.ADL.CPS | Mailing Label | Reserve Order | Additional Options - Copies | Numeric | 1 |
| SHP.PRN.ML.ADL.DGN | Mailing Label | Reserve Order | Additional Options - Document Design | Selection | Transfer Memo Tag 4.3 |

## Device Controller Settings

| Settings Code | Area | Section | Setting | Type | Example |
|---|---|---|---|---|---|
| Location Code | Device Controller | - | Location code of record | Text | 100 |
| Device Name | Device Controller | - | Device name | Text | POSiPad1 |
| Alias | Device Controller | - | Alias | Text | "POS Station 1" |
| Device Type | Device Controller | - | Device Type | Selection | iPad |
| Cloud Log | Device Controller | - | Enable Cloud Logs | True/False | FALSE |
| Severity | Device Controller | - | Severity | Selection | Error |
| Network Stats | Device Controller | - | Collect Network Stats | True/False | FALSE |
| Notes | Device Controller | - | Notes | Notes | |
| Deactivated | Device Controller | - | Deactivated | True/False | FALSE |
| Application | Device Controller | - | Application | Selection | Teamwork POS - 4.9 |
| Drawer Memo WS Mode | Device Controller | - | Drawer memo multi- | True/False | TRUE |

| Settings Code | Area | Section/Document | Setting | Type | Example |
|---|---|---|---|---|---|
| | | | workstation mode | | |
| POS.INT.WKS | Device Controller | - | POS Drawer Station | Selection | POS1 |

In *Device Controller Settings*, if a record already exists, the following fields cannot be updated via import:

- *Location Code*
- *Alias*
- *Device Type*
- *Notes*
- *Application*
- *Drawer Memo WS Mode*
- *POS drawer station*

Instead, a new record will be added.

Alternatively, if a record already exists, the following fields will be updated via import on the existing record:

- *Deactivated*
- *Network Stats*
- *Cloud Log*
- *Severity*

  NOTE:

  If changed at the POS level, the settings will not be synchronized back to CHQ

## Sending Status Information to CHQ

Version 6.11 – TWD-22244

January 2020

It is now possible to retrieve basic information about the current status of the POS app and send it to CHQ. In case of troubleshooting, a request can be sent from CHQ, and the information will be automatically retrieved from POS.

> **NOTE:**
>
> A request can be sent under *CHQ > services > device controller*. On tapping the required device, the edit device dialog opens. Open the info tab and tap **request status** (see the screenshot below):
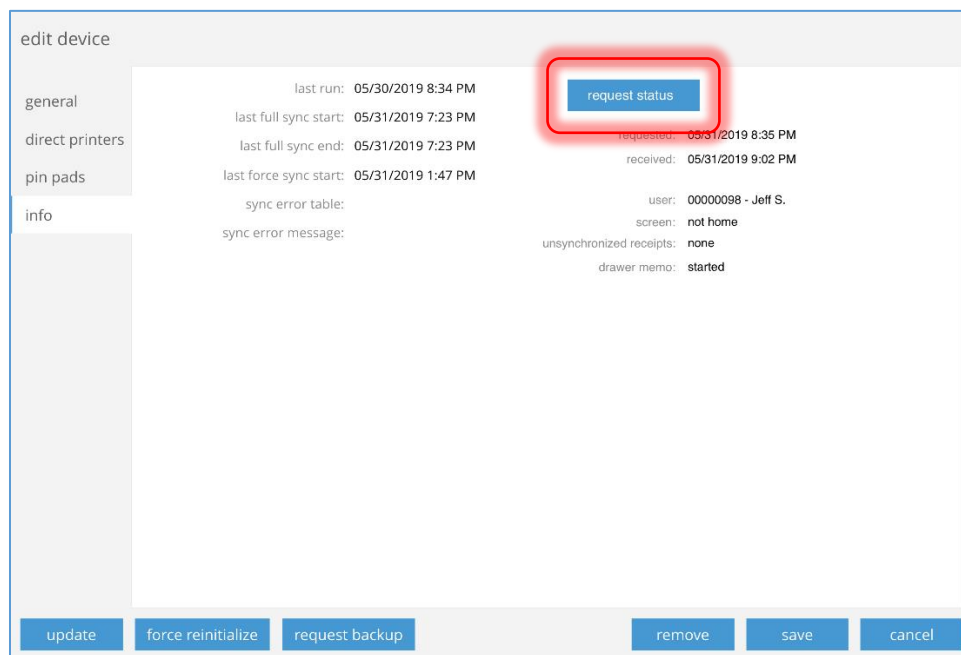


However, POS will not respond to a request when initializing, re-initializing, or during the app's start.

The following information can be retrieved from POS:
- the date/time the request was made
- the date/time the information was received
- the login code and name of the user logged in when POS replies to request
- whether POS in on the *Home Screen* or not
- the count of the synchronized receipts
- the status of Drawer Memo on POS

# Configuring Printing Settings and Printing Ship Memos Documents and Tags

Version 6.11 – TWD-21798

January 2020

In POS Pro, it is possible to configure printing setting to print out shipment documents.
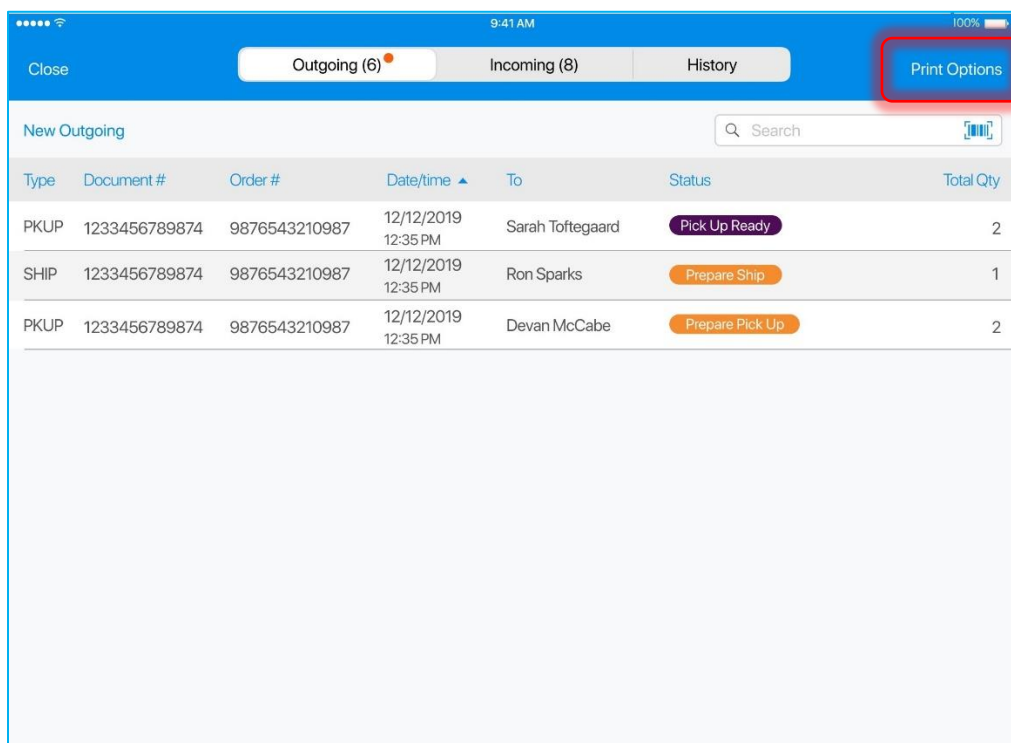
## Configuring Printing Settings

In POS, printing settings for ship memos can be changed in two ways:

- from *Shipments* list view
- from the *Shipment* or the *Pick Up* tab of a particular ship memo

*Configuring Settings from the Shipments List View*

In the *Shipments* list view, tap **Print Options**:

On tapping, the *Printing Options* dialog opens:



In the dialog, select the required document type to configure its print settings:

> NOTE:
>
> Once configured, the settings will be set as default for the associated document or tag types.

For each document or tag, the following settings are available:

- Type
- Select Printer
- Document Template
- Number of Copies

## Type

On tapping the **Type** field, the following list appears:
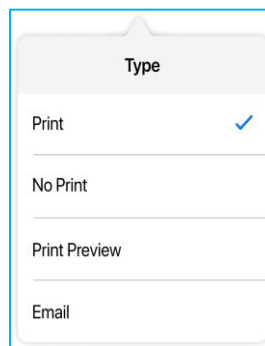


*Print* or *No Print* defines whether this type of document or tag will be printed on selection.

> IMPORTANT NOTE:
>
> *Print Preview* and *Email* options are displayed but not available for use in POS version 6.11.

## Select Printer

The POS app supports AirPrint, Bluetooth and directly connected printers.

On tapping **Select** in the *Select Printer* field, the app will start looking for available printers.
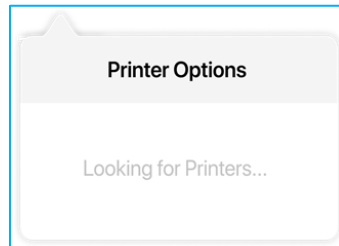


If AirPrint printers are found, tapping the **Air Printers** option in the popover list takes the user to the iOS interface for selecting an AirPrint printer:
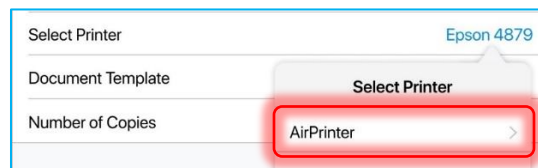


If Bluetooth printers are found, they will be named in letters (e.g. Printer A, Printer B, etc.) in Bluetooth Printers section in the popover list:
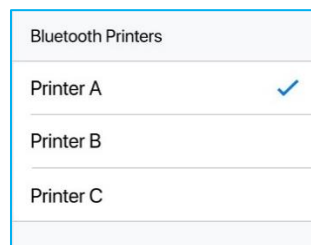


If directly connected printers are found, they will be named in numbers (e.g. Printer 1, Printer 2, etc.) in Direct Printers section in the popover dialog:
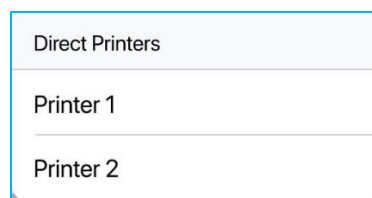


## Document Template/Tag Template

If only one document/tag template is available, the field is in grey and read-only.

If more than one template is available, the field will be in blue. On tapping this field, a popover list appears showing other options:
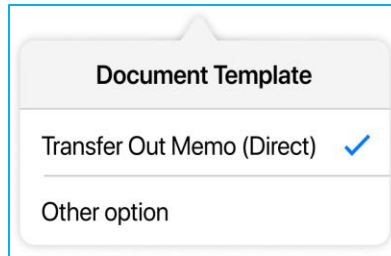
## Number of Copies

On tapping the field, the numeric keyboard is invoked:
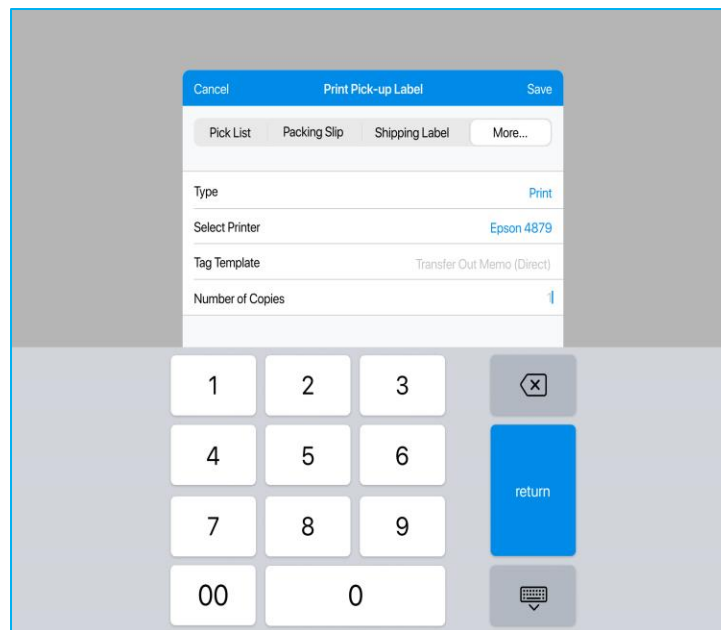


NOTE:

The user can input value from 1 to 999,999. The value cannot be "0" entered.

When finished, tap **Save** to confirm changes.
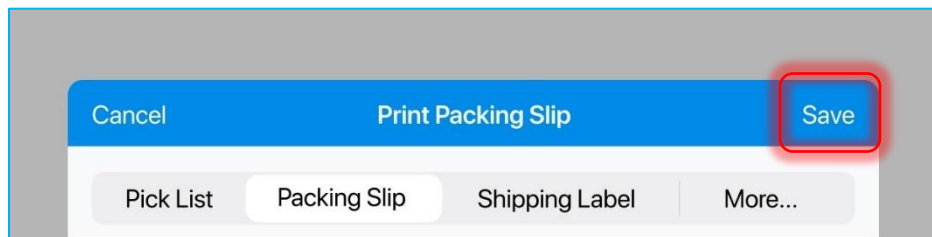
*Configuring Settings from Ship Memo*

To configure printing settings when viewing a Ship Memo, in any of the tabs (*Document*, *History*, or *Shipment*), tap **Print** in the bottom left corner:
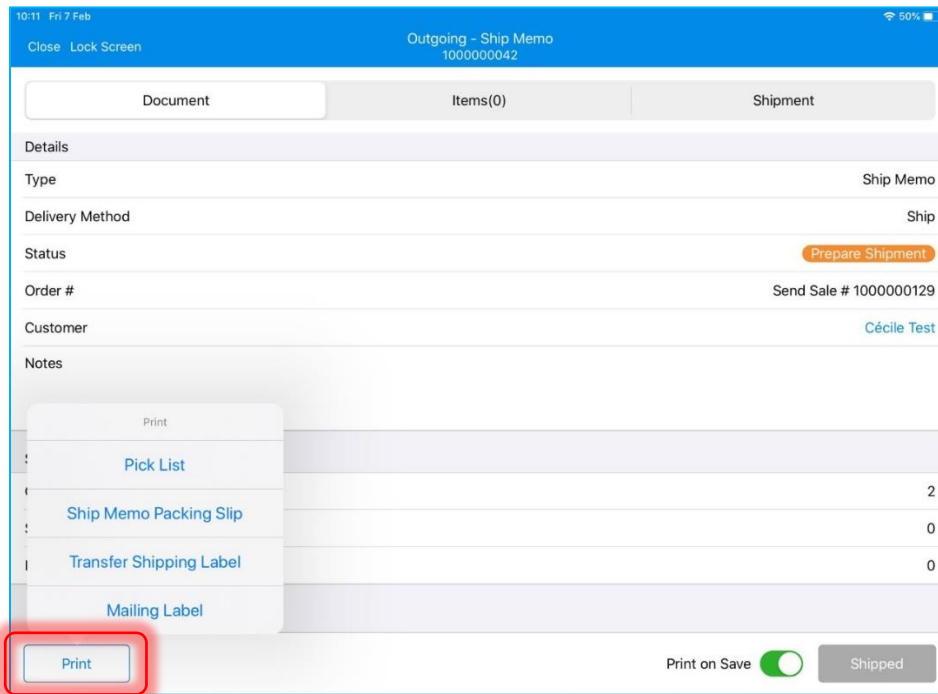


Selecting any option from the *Print* popover list opens the *Printing Options* dialog:
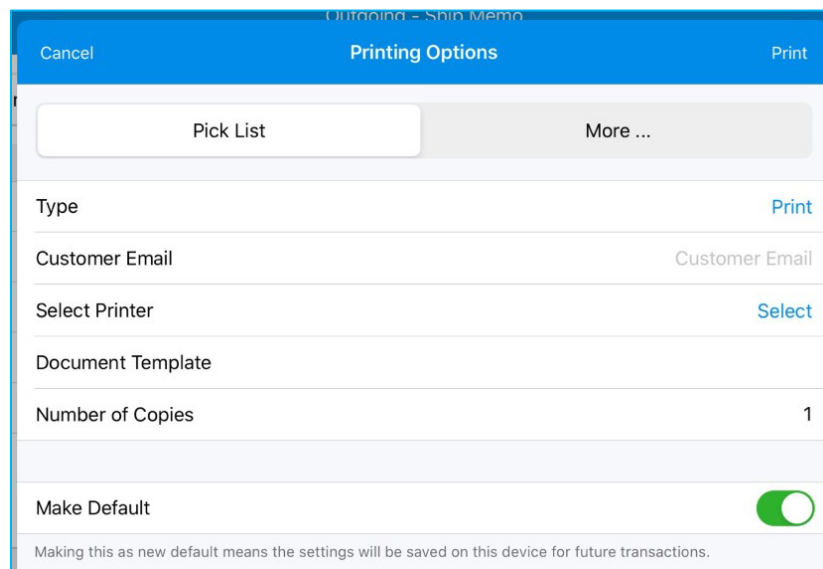


To configure other available documents or tags for the Ship Memo, tap **More…** at the top of the dialog.

In the document selected from the *Print* popover, the *Type* field will be set to "*Print*". All other documents and tags in the dialog will be set to "No Print".

In this case, if the user taps **Print** in the top right corner, only one active document/tag will be printed. If the user wants to print several documents/tags, they will have to tap through the other tabs and set their Type to *"Print"*.

> NOTE:
>
> The user can toggle the *Make New Default* switch ON to make new settings default.

## Updated Application Launch and Time Verification Screens

Version 6.11 – TWD-21745

January 2020

Once the user logs in, updated screens and messages are shown during the app's launch and time verification.

### Application Launch

When the app is launching, the *"Preparing App…"* message is shown on the launch screen:
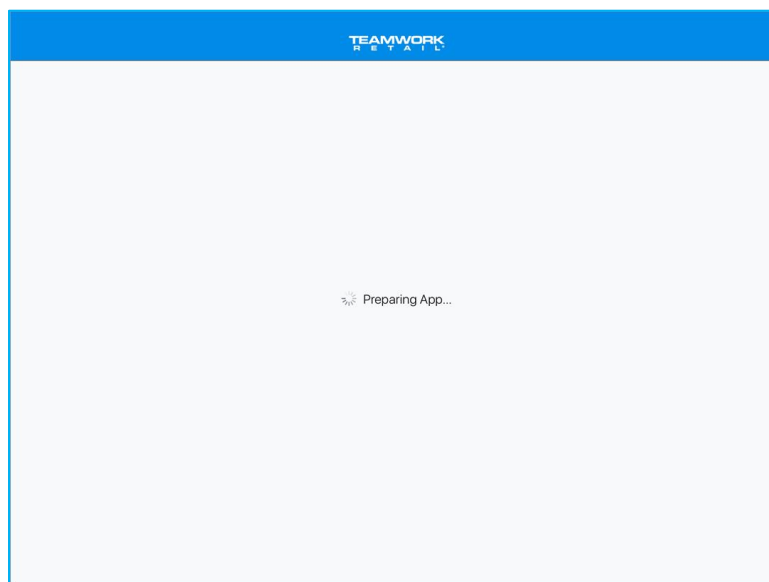


If the preparation process runs on start of the app, it cannot be skipped. If it runs after, for example, synchronizing the employees, there will be the **Skip** button available.

If the app is running the index check, the "Checking Index" message is shown:
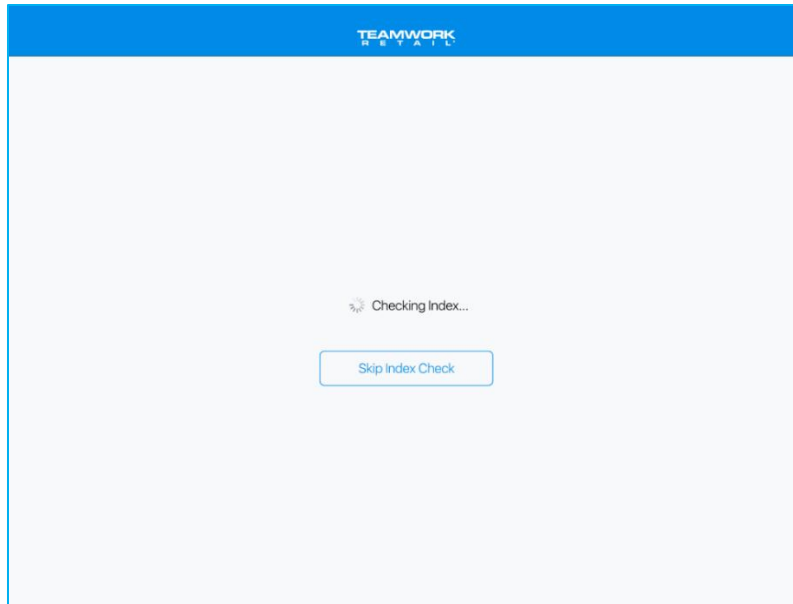
To cancel the index check, tap the **Skip Index Check** button. On tapping it, the button is disabled and the following message is shown:
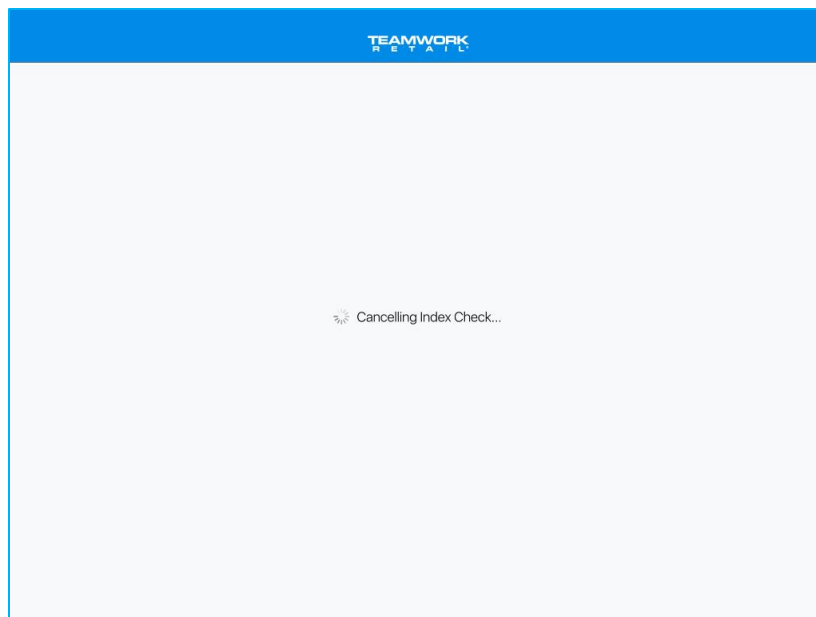
If the app is synchronizing employees, the following message is shown:
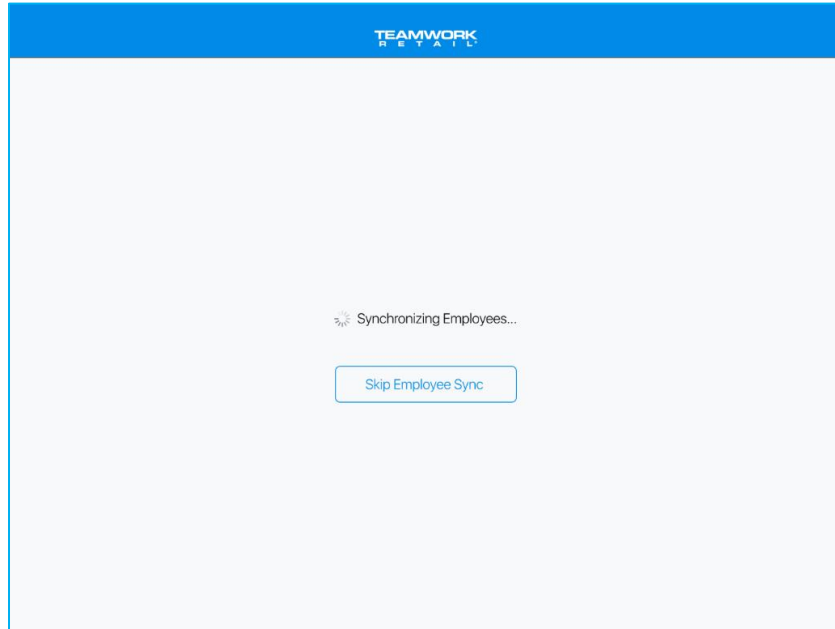


To skip the synchronizing process, tap the **Skip Employee Sync** button.

### Time Verification

The time verification process starts automatically once the user logs into the app. If time verification is running, the following message is shown:
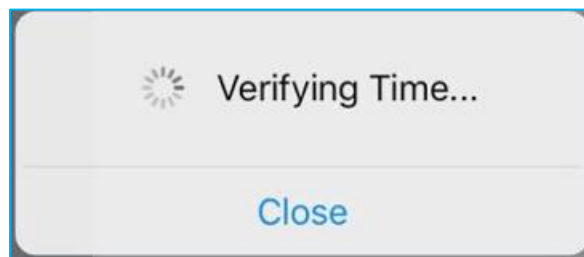


Tapping **Close** will cancel time verification.

If time verification is completed successfully, the app changes to *Home Screen*.

If there is at least a 5-minute time mismatch between the iPad and the server time, the following alert message is shown:
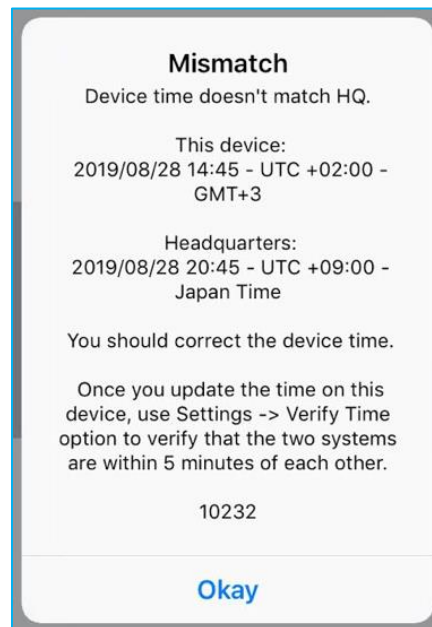


NOTE:

The 5-digit code at the bottom of the alert message is the error code assigned to each error message in the app.

On tapping **Okay**, the app changes to *Home Screen*.

If there is no Internet connection on the iPad or the server is unavailable, the following error message is shown:
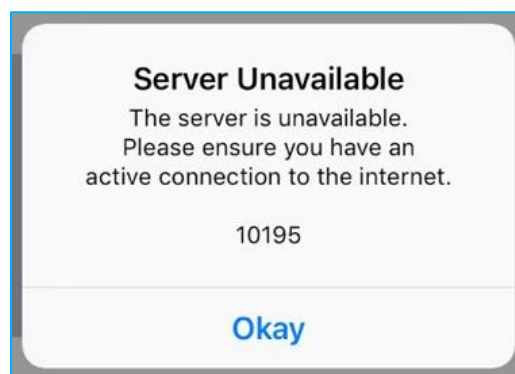


On tapping **Okay**, the app changes to *Home Screen*.

## Updated Catalog View

Version 6.11 – TWD-21259

January 2020

We've updated the Catalog view. To access the view, tap **Catalog** on *Home Screen.*
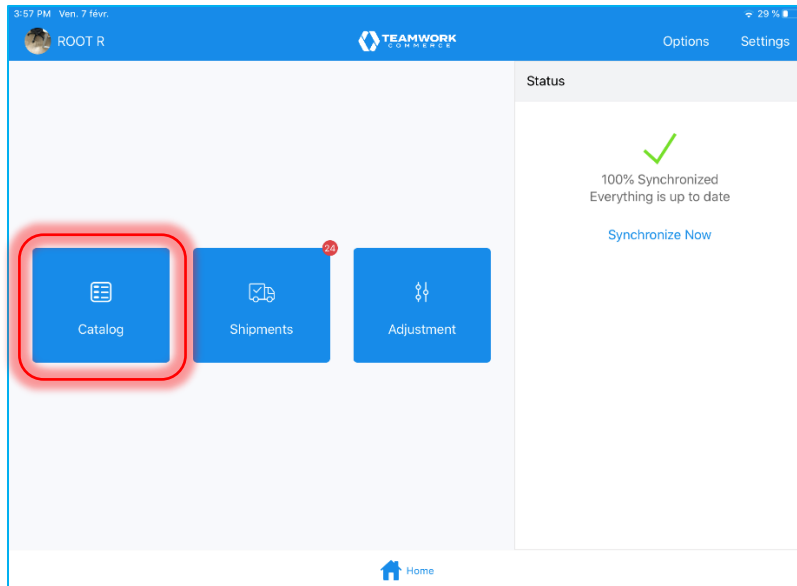


On tapping, the *Item Search* screen opens:
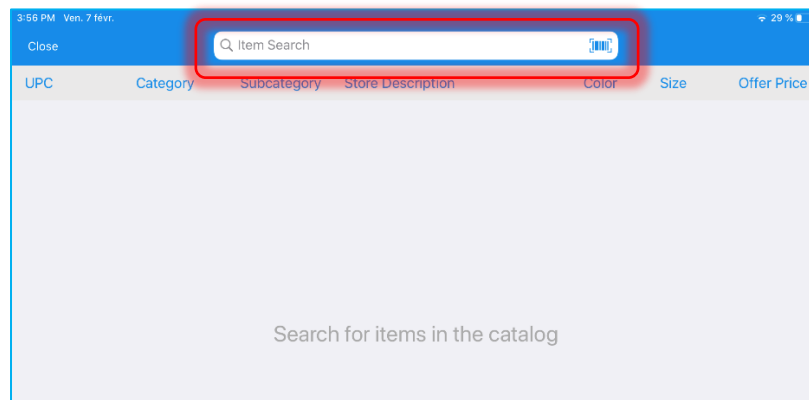


### Item Searching

The *Item Search* field at the top of the screen allows the user to search for the required items.
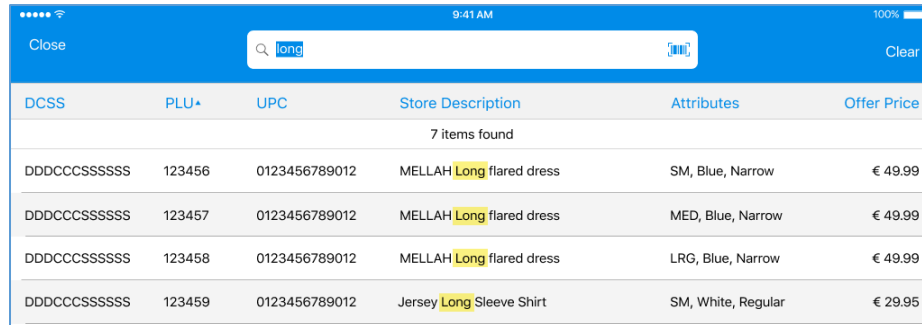
There are two ways you can search for an item:

- In the *Item Search* field, enter the item's UPC, PLU, CLU, or your item's description.
- Tap the **barcode scanning** icon to scan the item's tag.

  NOTE:

  Tapping **Close** in the top left corner will return the user to *Home Screen*.

Once the input has been made, the items matching the search criteria will display.



Any of the column headers can be tapped to make it the sorting criterium according to the following principle:

- 1st tap: descending arrangement
- 2nd tap: ascending arrangement
- 3rd tap: remove sort (back to the intial sort order)

If sort is applied to a header, an arrow indicator appears beside the header:



If no results are found, a blank screen with the corresponding message will appear:
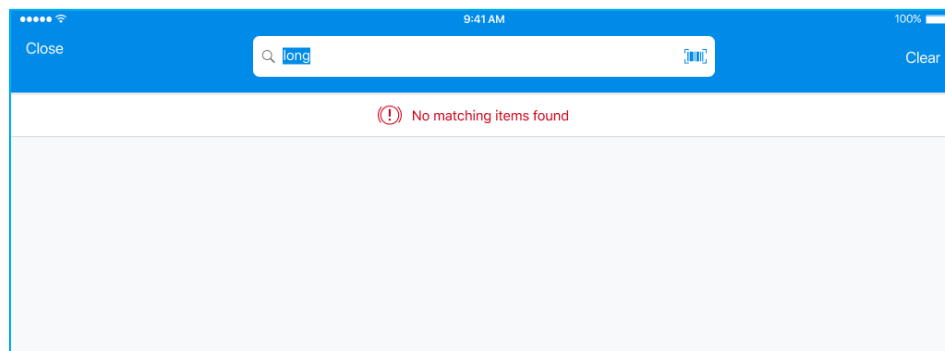


The last search input will be automatically highlighted and the keyboard invoked. If camera bar scanning interface was used for the search, it will be invoked instead of the keyboard.

## Availability View

The POS app allows the user to access detailed information about the searched items through the *Availability* view:



There are two ways to open the *Availability* view from *Catalog*:

- tapping the required item row
- if only one match is found, the app will automatically direct the user to *Availability view*

From *Availability*, you can print tags. To do so, tap **Print Tag** in the top right corner of the screen.

In the *Print Tags* dialog that opens, you can configure printing settings. It is possible to select a printer, choose a template for your tag as well as specify the number of copies you want to print.

Having configured the settings, tap **Print**.

### *Items Grid*

The structure of the items grid is defined by the pre-set attributes, namely:



1. **Attribute 1**: corresponds with horizontal rows ("size" in the example above)

2. **Attribute 2**: corresponds with vertical columns ("color" in the example above)
3. **Attribute 3**: corresponds with horizontal rows ("width" in this example)

To change the label that is displaying for the attribute (for example, "Black" in the screenshot above), tap **Options** in the upper right corner of the screen.

If all the columns or rows do not fit on one page, the grid can be scrolled vertically and horizontally.

## Item Breakdown by Locations

In *Availability*, tap the required quantity to see its breakdown by locations.



The item breakdown by location is displayed at the bottom of the items grid. This section displays the following information:

- **Code**: the code of the location
- **Location**: the name of the location
- **Available**: the quantity of the items available per location (commitment and on-hand)
- **Commit**: the committed quantity of the items per location
- **On Hand**: the quantity of the items on hand per location
- **Incoming**: the quantity of the items incoming per location
- **Distance**: the distance to the location if GPS coordinates were defined

Each column can be sorted by tapping it according to the following principle:

- 1st tap: descending arrangement
- 2nd tap: ascending arrangement
- 3rd tap: reverts to the initial state

The currently sorted column will have an arrow beside its header name as well as the text in its rows in semi-bold:



On the right side of the header row, there is an arrow icon that allows to hide the location information section:
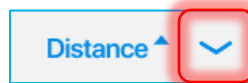


When the location breakdown is hidden, the user can invoke it again by tapping the arrow icon in the bottom right corner:



If the user taps a row in the item breakdown grid, a dialog with additional location| information displays:



NOTE:

All the information in the *Location Information* section is read-only.

## Updated Settings Area

Version 6.11 – TWD-22233

January 2020

We've updated POS *Settings* area. To access the area, tap **Settings** in the upper-right corner of the *Home Screen*:
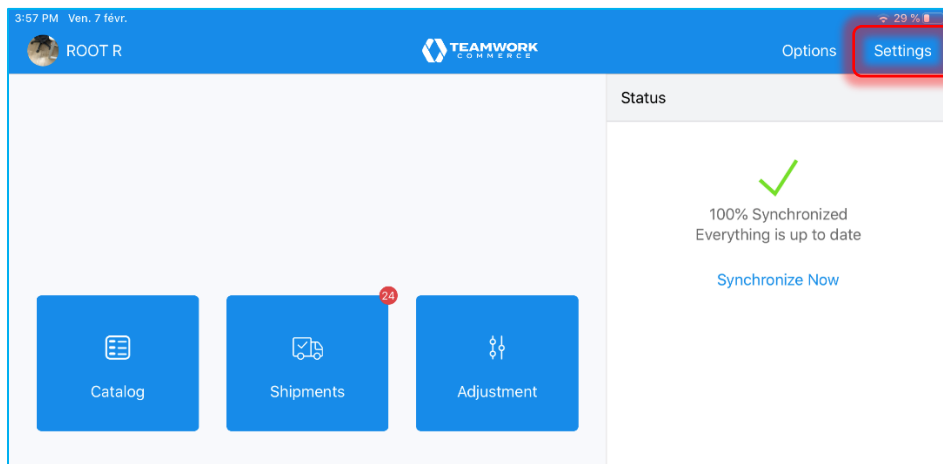


The following settings don't require the administrator security right to be accessed:
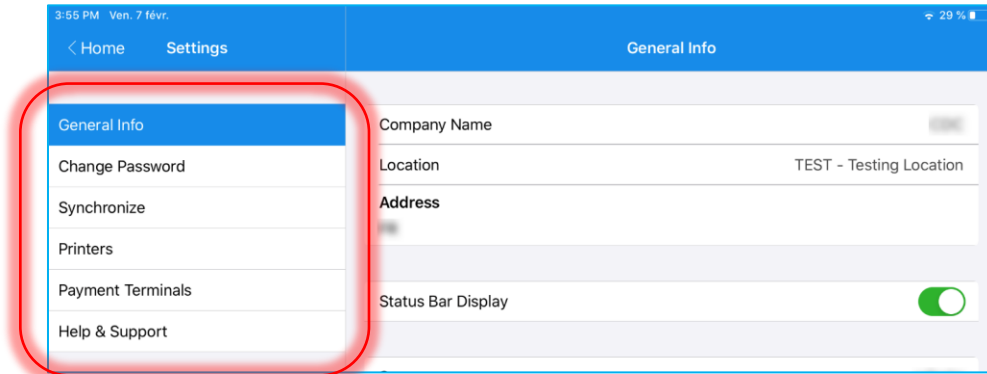


NOTE:

If the user doesn't have administrator rights, *Printers* area will be available, but the user won't be able to add, edit or remove printers.

The following settings require the administrator security right to be accessed. If the user doesn't have this right, these settings will be hidden:
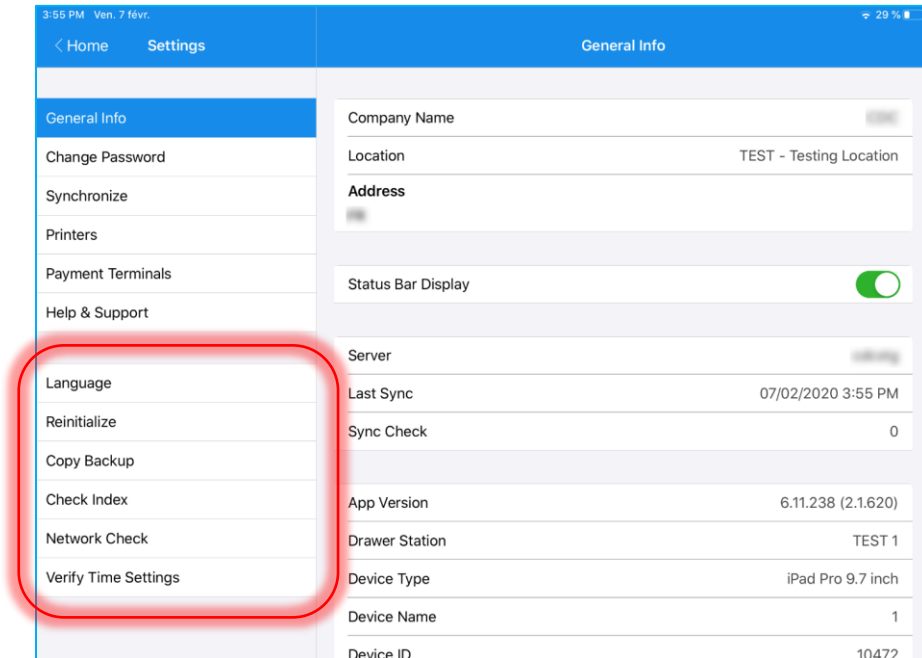


## General Info

The *General Info* section displays information specific for your POS.

To open this section, tap **General Info** in *Settings*:
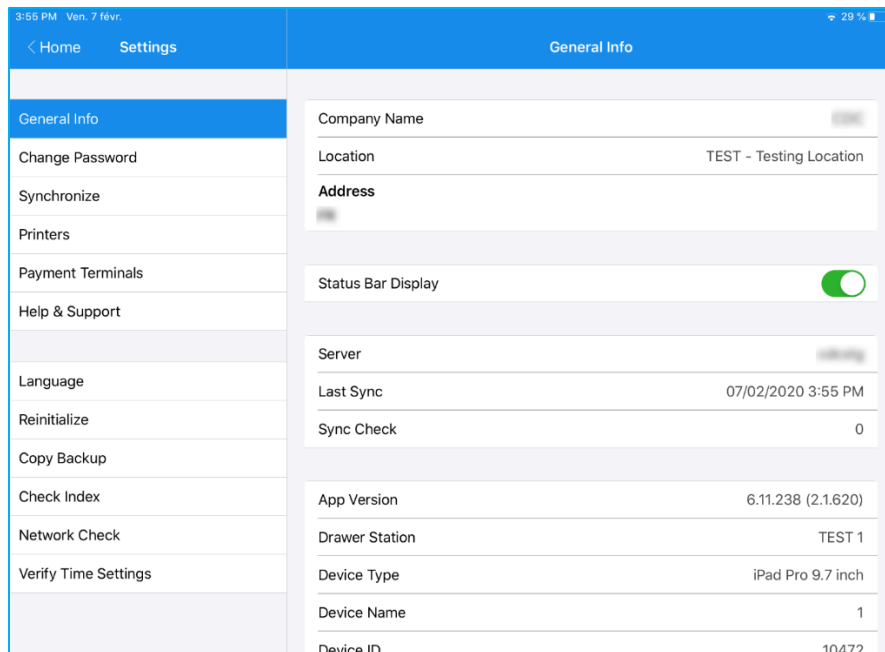
NOTE:

All the information in *General Info* is read-only.

In *General Info*, the following fields display:
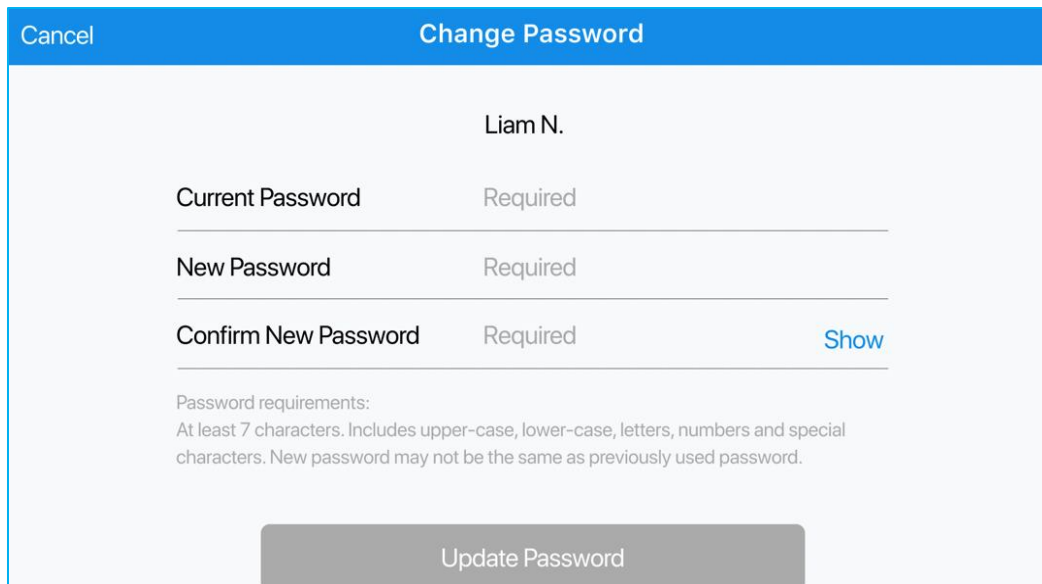
| Field | Information |
|---|---|
| Company Name | Name of the company from the Company Info section of the settings |
| Location | Currently initialized location in format "code–location"; if Name is blank, only Code will be displayed |
| Address | Address of the location from Location settings |
| Status Bar Display | The toggle shows/hides the bottom status bar; is ON by default |
| Server | Server code the iPad is initialized to |
| Last Sync | Date and time of the last successful synchronization |
| Sync Check | An interval at which the POS app is synchronized after every Sales Receipt finalization |
| App Version | Current POS app version |
| Drawer Station | Drawer Station name; if it's blank, "DS #" is displayed |
| Device Type | Device model name (for example, iPad Mini 4) |
| Device Name | Device name from iPad settings *General > About > Name* |
| Device ID | Unique ID of the device |
| IP Address | IP address of the device |
| Printer Port | Port printer uses for communication |
| Scale Port | Port scale uses for communication |
| Notes | Notes defined in Device Controller, in CHQ, for this iPad |

## Change Password

To access the *Change Password* section, tap **Change Password** in *Settings*:
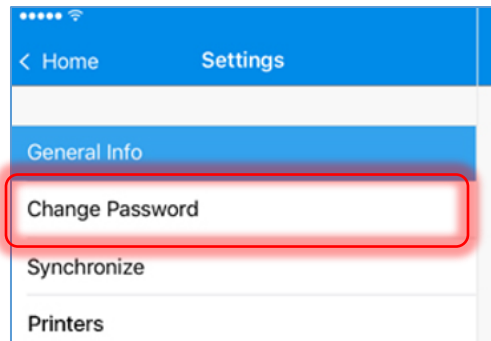


The *Change Password* section allows the user to change the current password that is used for logging into POS.



Once all the fields are filled in, tap **Update Password**.

## Synchronize

To access the *Synchronize* area, tap **Synchronize** in *Settings*.

Under *Synchronize*, the user can launch the synchronization process of the POS app with the server and monitor its progress.
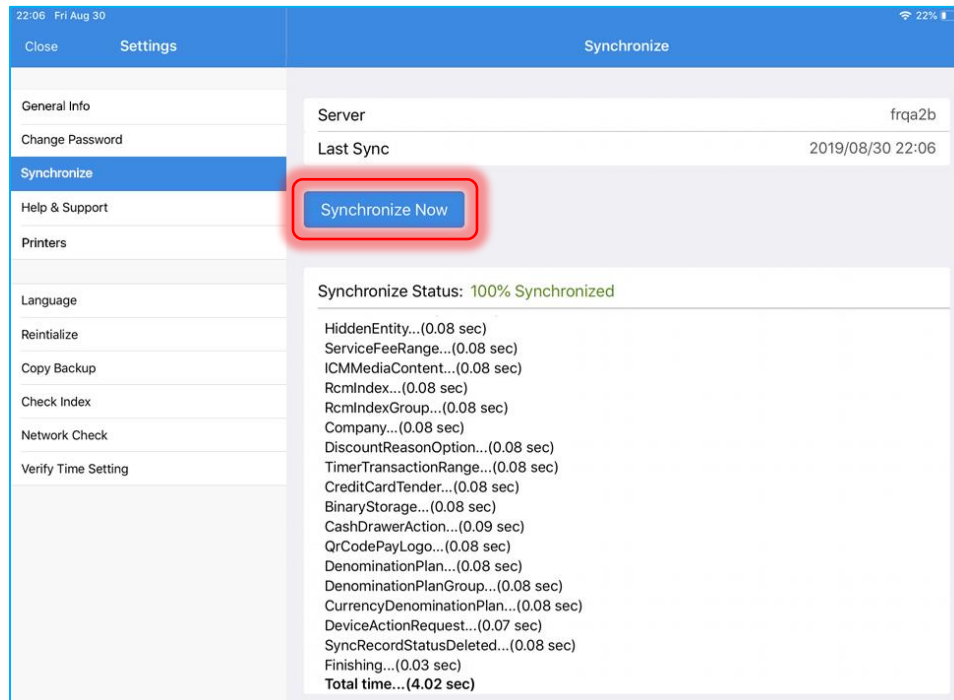


To launch synchronization with the server, the user can tap **Synchronize Now** button:

> NOTE:
>
> If synchronization is in progress, the button will be disabled.

At the top of the area, the user can always see the server code and the date and time of the last successful synchronization.

There are 4 possible statuses of synchronization which can display:

- **In Progress**: displays if the sync process is in progress; syncing can't be stopped by the user
- **100% Synchronized**: displays if the sync process has been successfully completed; the details of the latest successful sync display under the status
- **Last Sync Failed**: displays if the sync hasn't been completed or any of the processes has failed (displays in red)
- **Last Sync Cancelled**: displays if the user taps the **Cancel** button

### Help & Support

To access the *Help & Support* area, tap **Help & Support** in *Settings*.

The section is designed to provide the user with the information to contact Teamwork support.
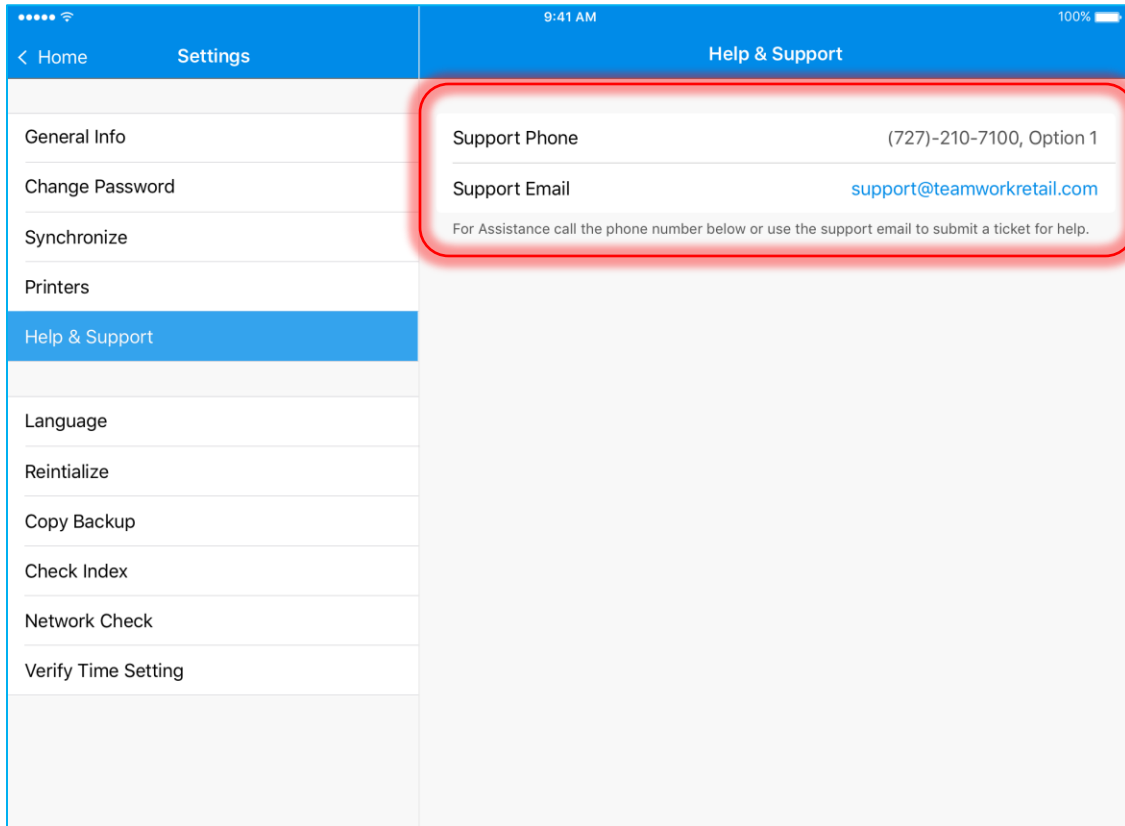


*Support Email* contains a link that opens the default email application on the iPad.

NOTE:

The values for the *Support Phone* and *Support Email* fields as well as the text displayed below these fields can be set under *CHQ > Settings > Company Settings > General Information > Support Communication.*

## Language

To access the *Language* area, tap **Language** in *Settings*.

This section allows for changing the app's language.
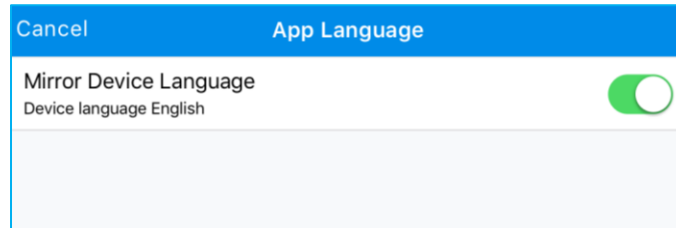


When *Mirror Device Language* switch is ON, the language of the POS app is the same as defined in the iPad settings.

If the current language of the device is unavailable for POS, it is defaulted to English. In this case, the following information is displayed in *App Language* dialog:
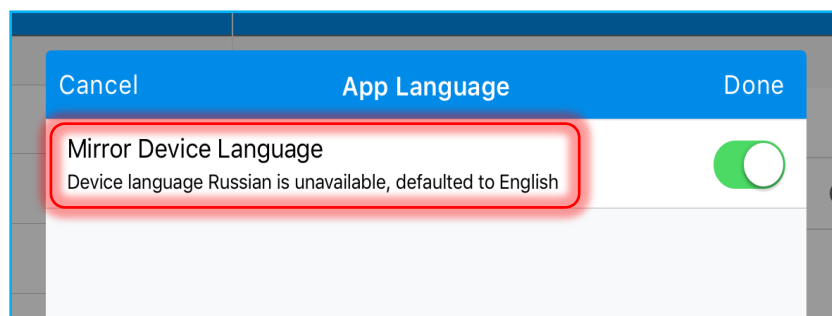


NOTE:

By default, Mirror Device Toggle is ON.

If the user toggles *Mirror Device Language* OFF, the option to manually select another language appears:
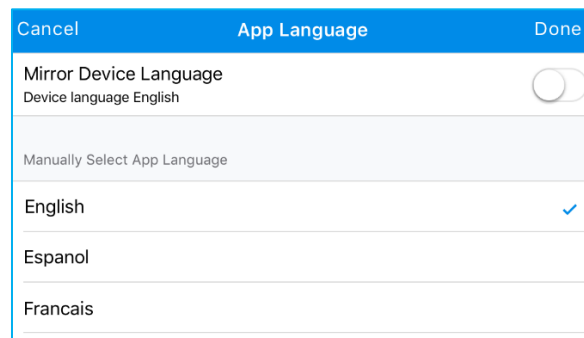


On tapping any language in a list, it is selected and checked on the right.

On tapping **Cancel** in the top left corner, all the changes will be discarded and the dialog closed:

## Copy Backup

To access the *Copy Backup* area, tap **Copy Backup** in *Settings*.

Under the section, it is possible to create a backup of the POS database and send it to the cloud.

To start preparing a backup, the user must tap the **Start Backup** button:
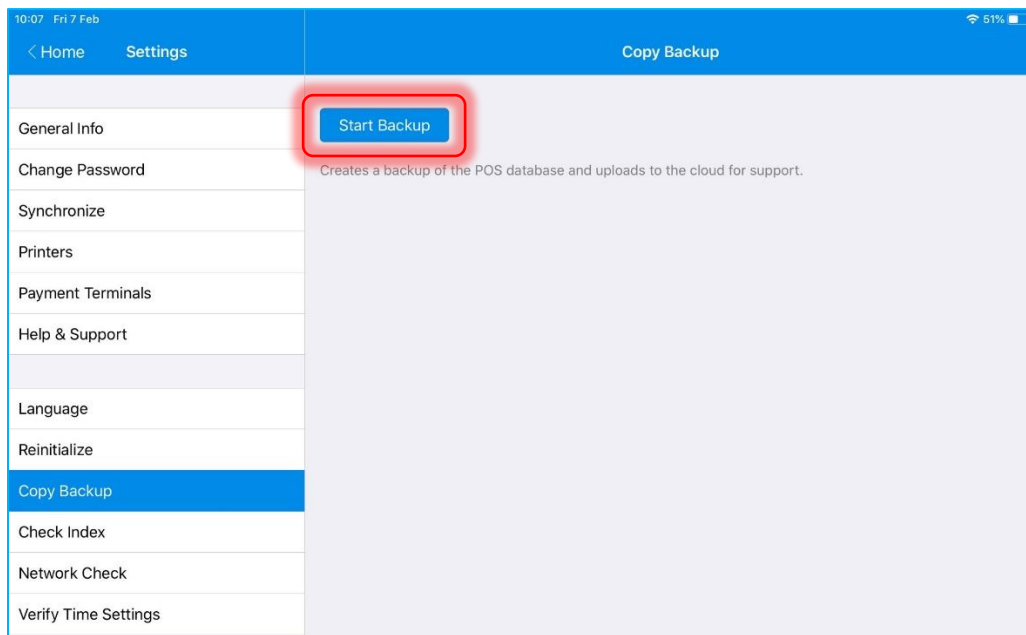


While compressing and sending the backup, a progress bar appears:
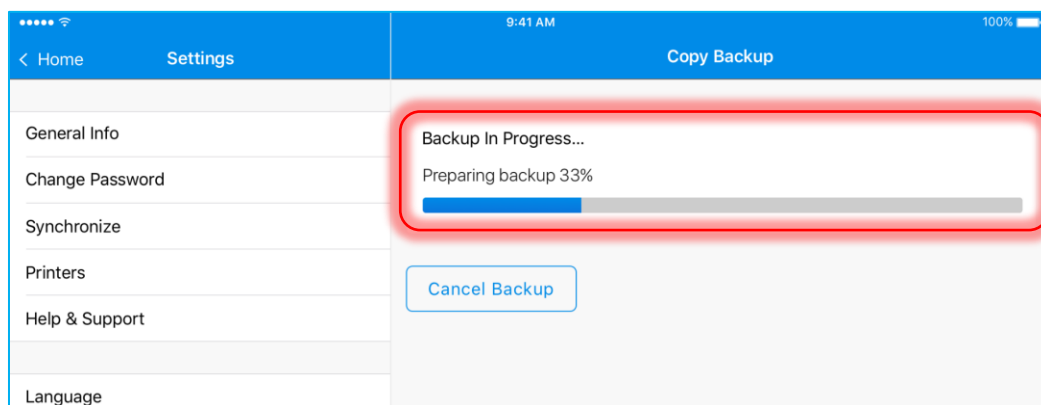


The user can cancel the preparation of the backup by tapping the **Cancel Backup** button.

While the backup is in progress, the user can open another *Settings* section or tap **Home** in the bottom left corner to return to the main menu. In the latter case, the backup progress will be shown in the status area:
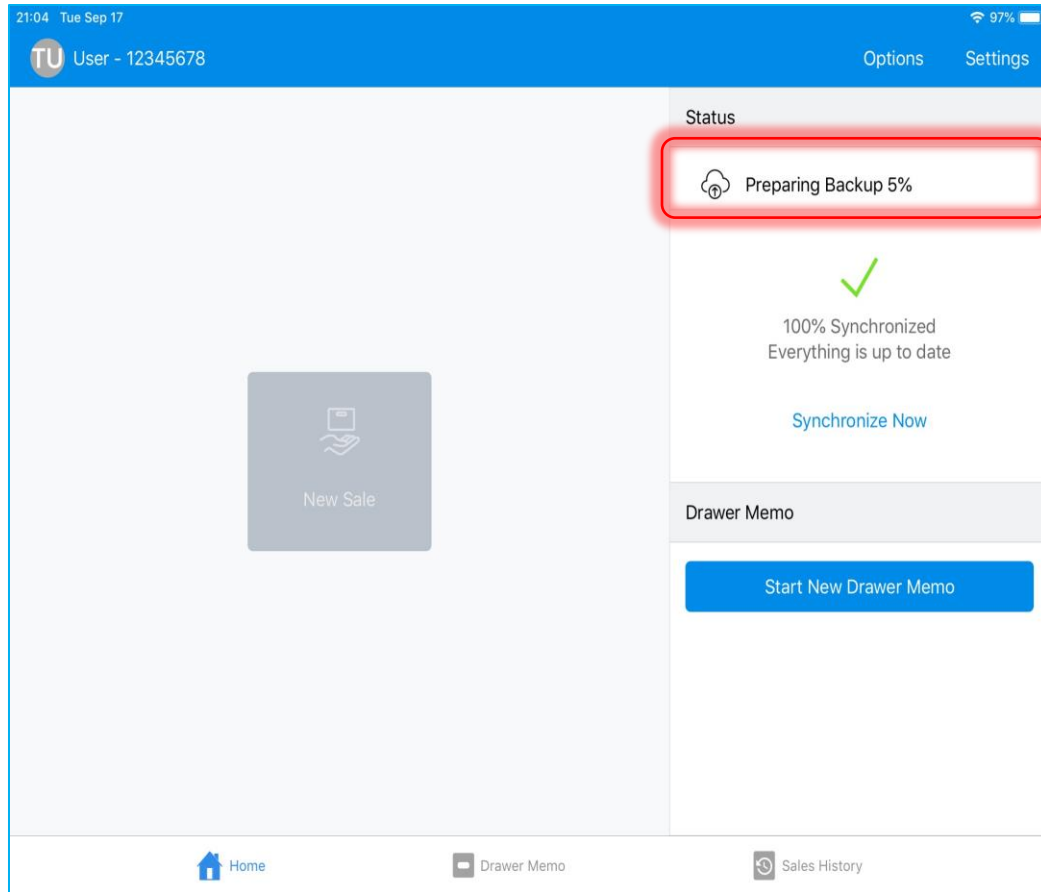
Once the backup is finished, the above record disappears.

If the backup process cannot be completed successfully (for example, there is no Internet connection or the server is down), the following dialog appears:
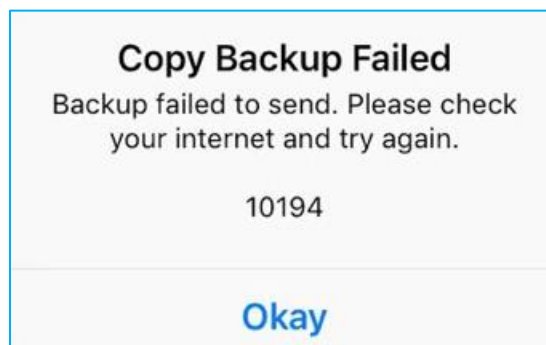


Tapping **Okay** will return the user to the *Copy Backup* area with *Start backup* button.

NOTE:

The "Copy Backup Failed" alert will still appear if the user is in any other *Settings* area or on *Home Screen*. However, in this case, the user won't be directed to *Copy Backup* automatically.

If the backup process fails while the user is not in *Settings*, the following record displays in the *Status* panel of *Home Screen*:
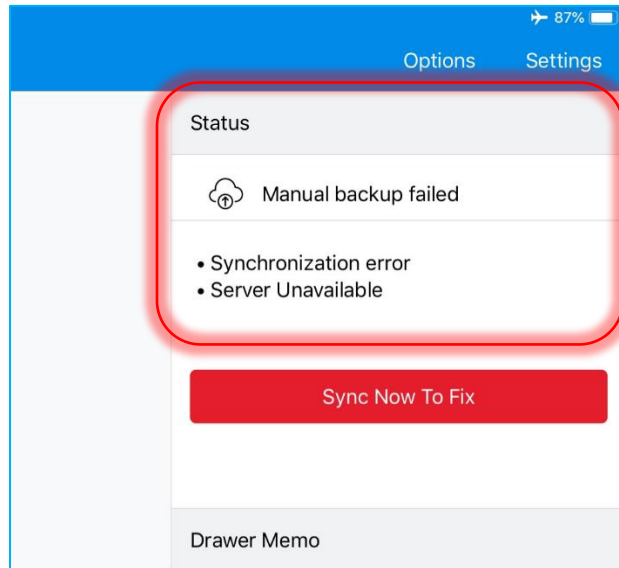


This record will not disappear until the app is restarted or a new backup is initiated.

### Check Index

Index checking tests whether the database indexes are in working condition and creates them anew if they aren't. Also, this process includes checking whether the database is corrupted. If corrupted, it sends a message to the log.

On tapping **Check Index** section in *Settings* area, the process is immediately initiated and the following dialog appears:
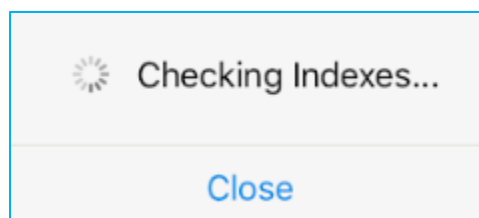


Tapping **Close** will stop the process and close the dialog.

If index check is successfully completed, the following dialog appears:
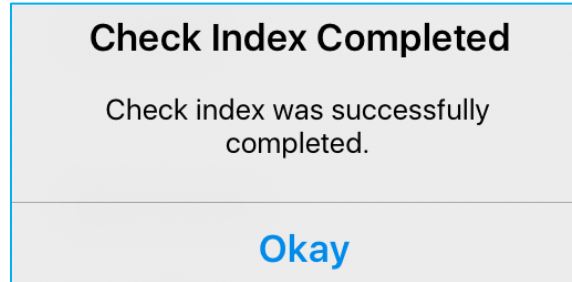


If index check fails, an alert message displays.

## Network Check Section

On tapping **Network Check** in *Settings* area, the process starts immediately and the following dialog appears:
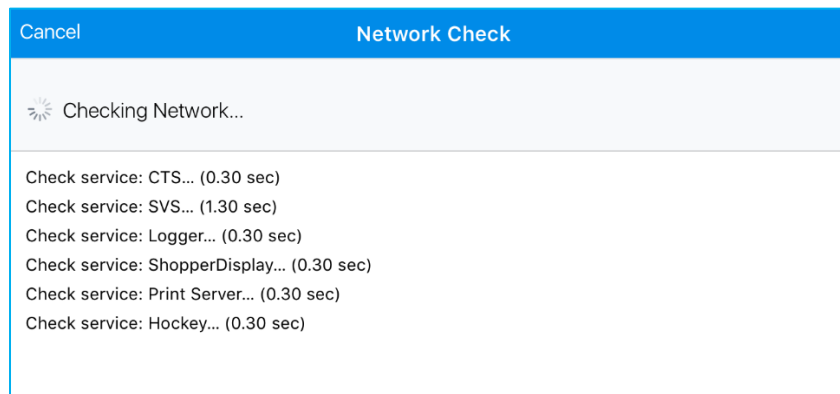


Tapping **Cancel** in the top left corner stops the process.

If the checking process is successful, the following message is displayed:
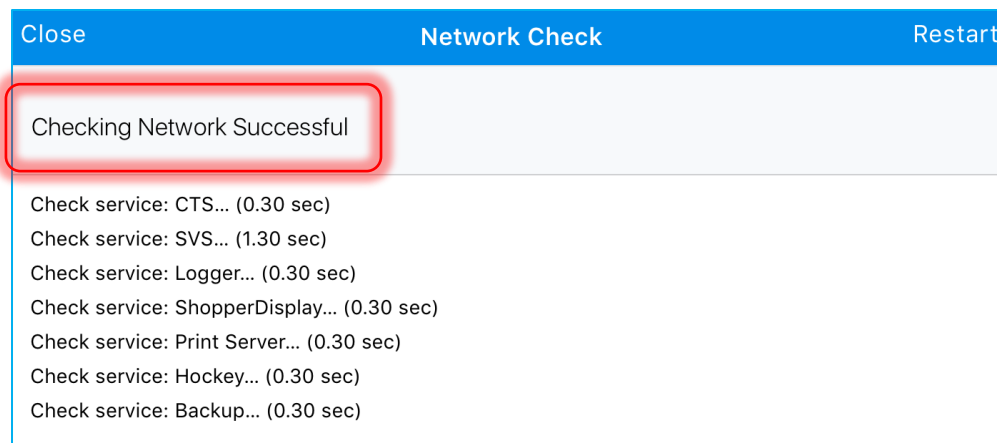


Tapping **Restart** in the top right corner restarts the checking process.

If the checking process is failed, the following message displays:
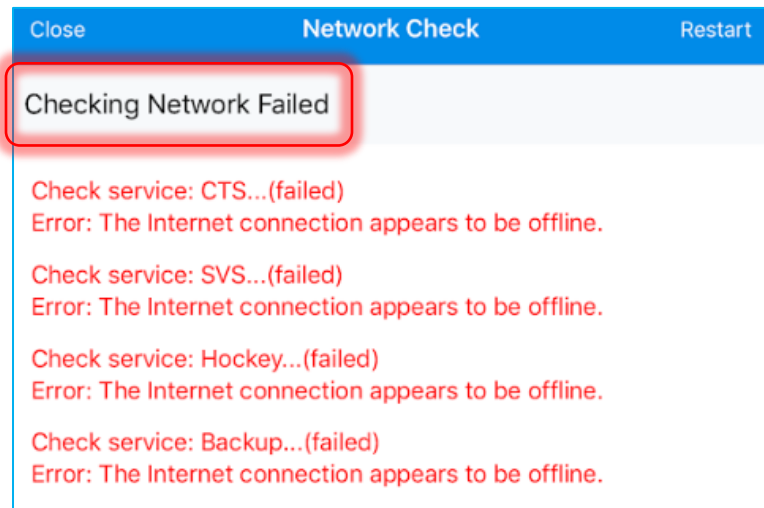


Every failed process and the probable cause of the error display in red in the dialog.

Tapping **Restart** in the top right corner restarts the checking process.

### Verify Time Setting

On tapping **Verify Time Setting** in *Settings*, the process of checking the device time against the server time starts and the following dialog displays:
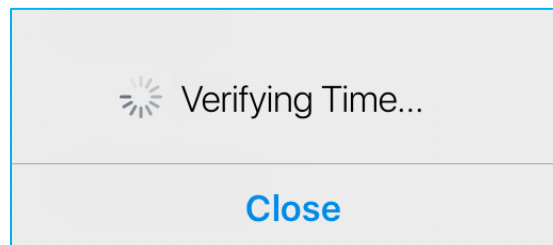


Tapping **Close** will cancel the process.

If mismatch between the device time and the server time is less than 5 minutes, the time check will be successful and the following dialog will appear:
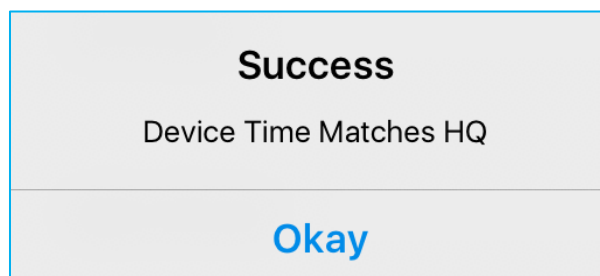
If there is a mismatch of more than 5 minutes, the following dialog appears:

**Mismatch**

Device time doesn't match HQ.

This device:
11/22/16, 9:27 AM - UTC - 08:00 - PDT

Headquaters
11/22/16, 9:27 AM - UTC - 07:00 - PST

You should correct the device time.

Once you update the time on this device,
use Setting -> Verify Time option to
verify that the two systems are within 5
minutes of each other.

**Okay**
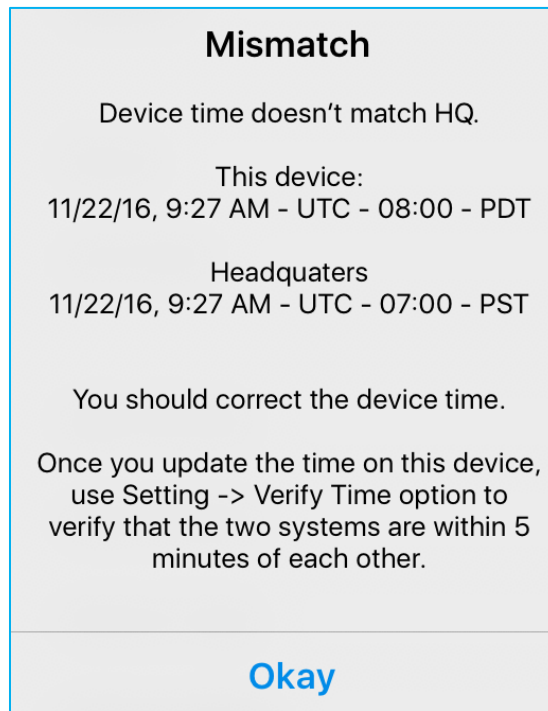
NOTE:

The checking process is device-centric, as, most commonly, mismatches happen on the iPad side. If the device time is corrected and time check still fails, the user will need to call CHQ support to correct the HQ time.

If server is unavailable and time check can't be finished, the following dialog appears:

**Server Unavailable**
The server is unavailable.
Please ensure you have an
active connection to the internet.

10195

**Okay**
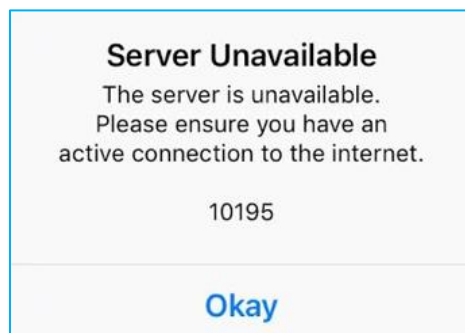
# Ship Memo Processing Functionality Added to POS

Version 6.11 – TWD-22154

January 2020

Previously, all the shipments were managed by a separate application. We've added the Ship Memo functionality to the POS Pro app.

Ship Memo is an outgoing document containing merchandise that needs to be delivered to the customer.

There are two types of Ship Memos:

- **Shipment** (SHIP): contains merchandise that is to be shipped to the customer
- **Store Pickup** (PKUP): contains merchandise that is to be picked up from a store by the customer

To access this Shipments area, the user must tap **Shipments** on *Home Screen*:
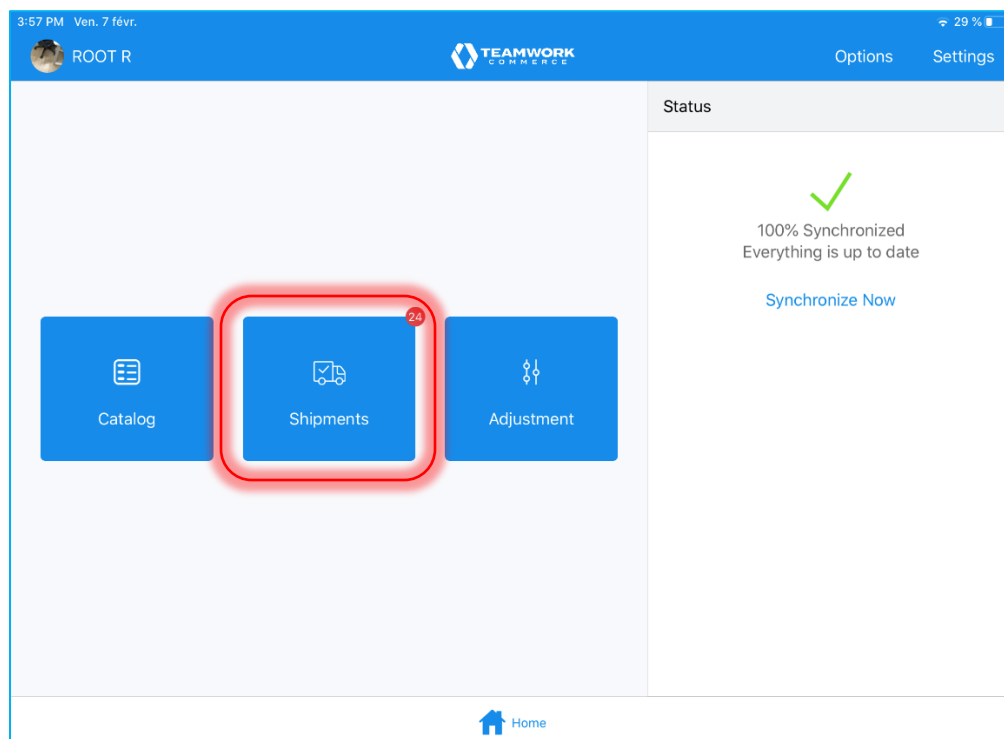


### Shipments Area

On tapping **Shipments**, the *Shipments* area displays. The area consists of the following three tabs:

a. *Outgoing*: contains documents with items that go out from your location
b. *Incoming*: contains documents with items that your store is receiving
c. *History*: contains both incoming and outgoing documents that are finalized
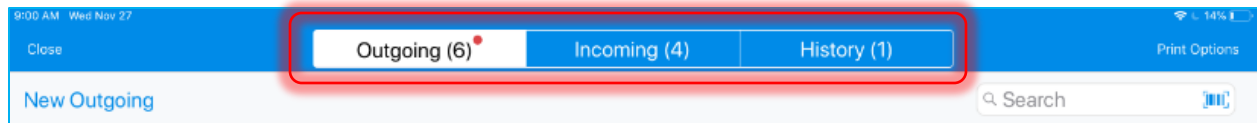
*Outgoing Tab*

The *Outgoing* tab contains information on Shipments and Store Pickups. This tab automatically opens on tapping **Shipments**.

The Outgoing tab's grid contains the following columns:
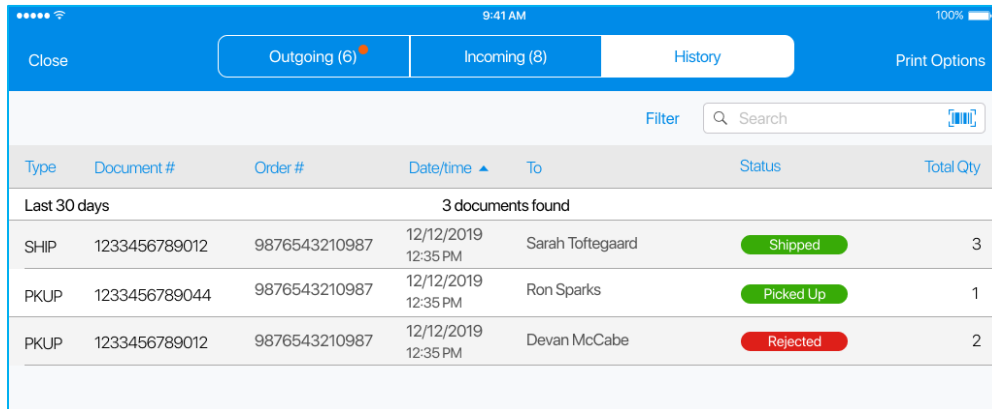


- **Type**: the type of the document; possible values are PKUP – for store pickup type ship memos, and SHIP – for shipment type ship memos
- **Document #**: the number of the document
- **Order #**: the related order number of the ship memo
- **Date/time**: the date/time of the last edit of the document
- **To**: the first and last name of the customer the ship memo is for
- **Status**: the status of the ship memo; possible values are:
  *Prepare Ship*
  *Prepare Pick Up*
  *Ship Ready*
  *Pick Up Ready*
- **Total Qty**: the total order quantity of items on the ship memo

*History Tab*

In *History*, only ship memos with the following statuses are displayed:

- *Shipped*
- *Picked Up*
- *Rejected*

To open this tab, in *Shipments,* tap **History**:



Tapping **Filter** allows for arranging the displayed SMs based on the date/time criterium:
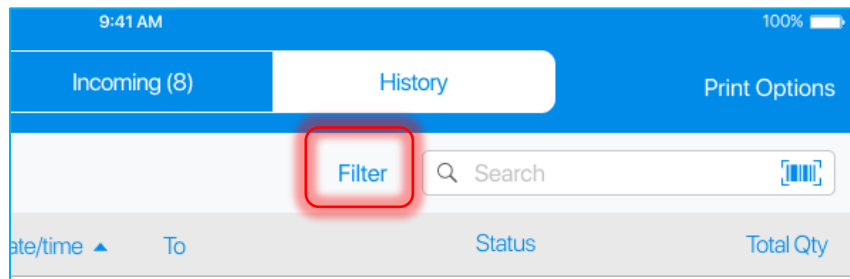


By default, the documents that were created within the last 30 days are displayed.

On tapping, the following dialog is displayed, where the above time span can be changed:
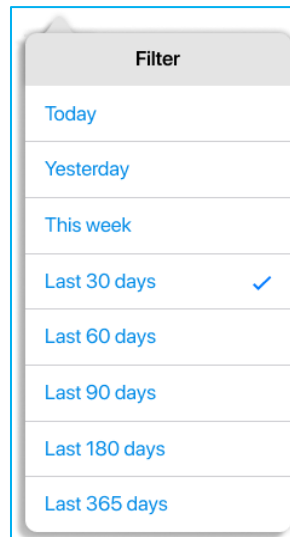


The selected option is marked with a check.

*Searching Ship Memos*

To search for Ship Memos, use the *Search* field under the **Print Options** button.
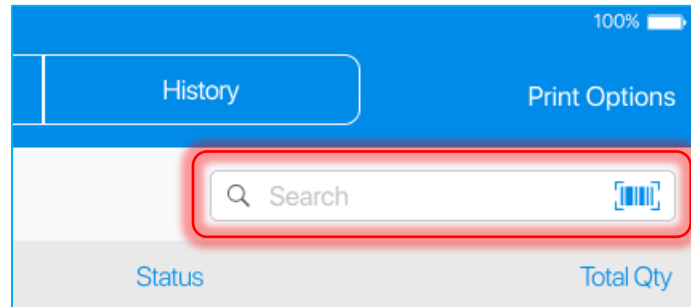


You can manually enter *Document #*, *Order #* or any other descriptive element to identify the required document.

Alternatively, it is possible to use the device camera or scanner.

## Viewing Ship Memos

On tapping any document in *Shipments*, a separate dialog with detailed information on that ship memo opens.

The dialog contains the following three tabs:

- **Document:** general information about the order
- **Items:** information about the Ship Memo items
- **Shipment** or **Pick Up:** information about the shipment or pickup process (depending on your ship memo type)

NOTE:

If on tapping a document in *Shipments* the server cannot be contacted, the following message displays:
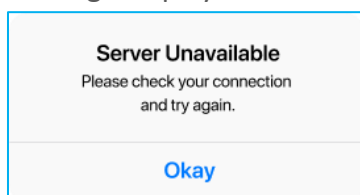


On tapping **Okay**, the user will be returned to the list view.

*Document Tab*

Once a document is tapped in *Shipments*, the *Document* tab opens automatically:



The tab contains two sections:

- *Details*
- *Summary*

The *Details* section includes the following information:

- **Type**: Ship Memo
- **Delivery Method**: the type of the ship memo; possible values are "Shipment" and "Store Pickup"
- **Status**: the current status of the memo; possible values are: "Prepare Shipment", "Ship Ready", "Shipped", "Prepare Pickup", "Pick Up Ready", "Picked Up", and "Rejected"
- **Order #**: the type of order the ship memo comes from and the order number; possible values for the type of order are: "Web Order #", "Send Order #", "Send Sale#", and "Sales Order #"
- **Customer**: the first and the last name of the customer. The customer's name is a link; on tapping it displays all the information about the customer recorded on this ship memo
- **Notes**: notes assigned to this ship memo from CHQ

The *Summary* section below *Details* includes the following information:

| Summary | |
| --- | --- |
| Order Qty | 3 |
| Ship Qty | 0 |
| Rejected Qty | 0 |

- **Order Qty**: the total quantity ordered or to be shipped
- **Ship Qty**: the quantity entered in the ship memo as being shipped to the customer; the sum of ship quantity from each item
- **Rejected Qty**: the quantity entered in the ship memo as being rejected; the sum of reject quantity from each item

  NOTE:

  For a ship memo to be saved and get the "Ship Ready" status, Order Qty must be equal to the sum of Ship Qty and Rejected Qty. If there is a difference, the user must account for the quantity before the status can be changed, that is either ship or reject an item.

## Printing Documents and Labels

To select the type of a document or a label to print for the SM, tap the **Print** button in the left bottom corner of the *Document* tab:

| Rejected Qty | |
| --- | --- |
| | |
| Print | Print on Save ⬤ |
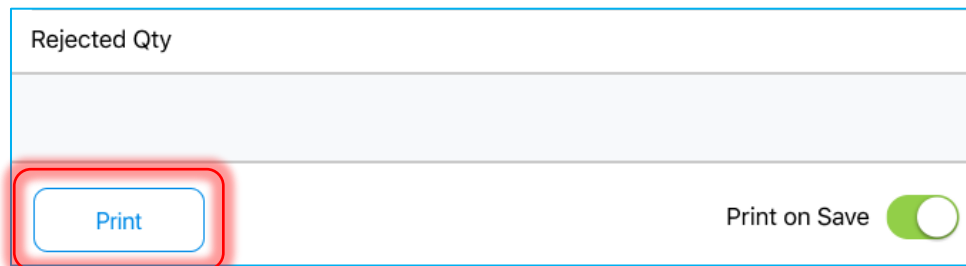
On tapping, a dialog with available document/label types will open. The types available differs depending on the ship memo type and its status.

Overall, the following types are available for printing:

- **Pick List**: contains a copy of the ship memo formatted for the merchandise to be easily picked for packing
- **Packing Slip**: contains a copy of the ship memo formatted to place the merchandise in the box for the customer
- **Shipping Label**: contains the shipping label retrieved from the integrated shipping service
- **Mailing Label:** contains the store address from Settings (the FROM address) as well as the customer name and address from the ship memo (the TO address)
- **Pick Up Label**: contains a label to put on the products to identify it as a specific SM

After the user selected a type of document to print, the dialog with printing settings opens:
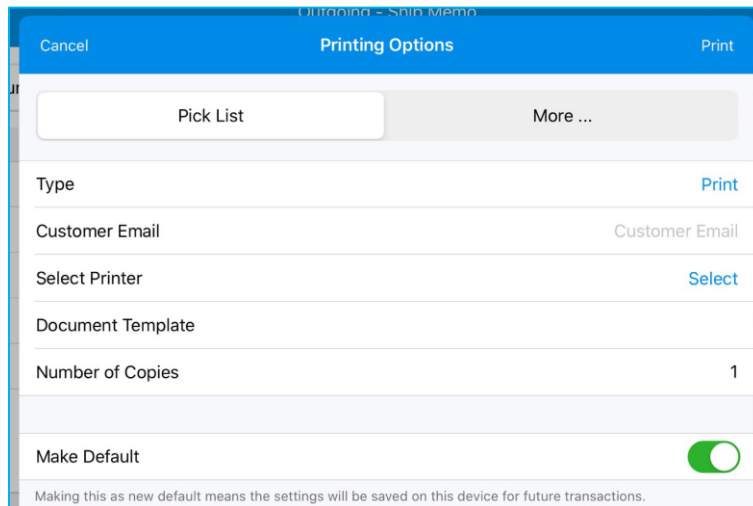


Also, if the **Print on Save** switch in the *Document* tab is ON, the app will automatically print documents/labels on saving:
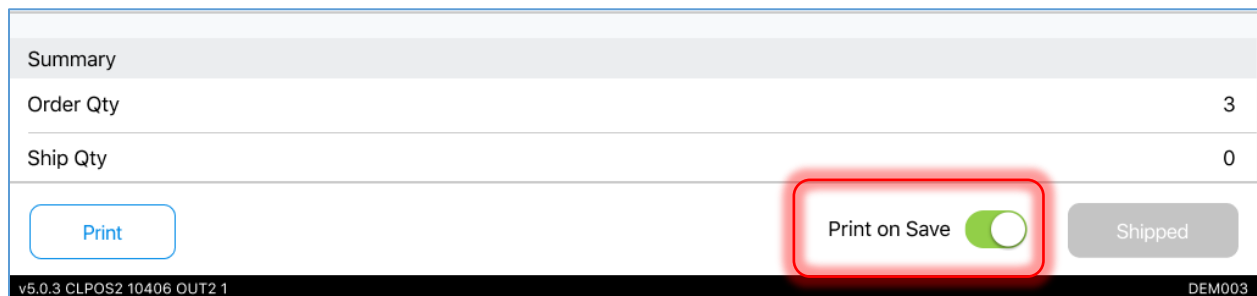


> NOTE:
>
> If for a specific document the value of the *Type* field in the printing settings is "Not Print", the document will not be printed.
>
> Also, if the current status of a shipment type memo is "Ship Ready", the **Print on Save** switch will be defaulted to OFF and disabled.

## Saving Ship Memos

For different types of ship memos there will be different saving buttons at the bottom right of the Details tab:

- for the shipment type, the user has to tap **Shipped**
- for the pickup type, the user has to tap **Pickup Ready** or **Picked Up**

### Shipment Type

To save the Ship Memo of the Shipment type, in the *Documents* tab, tap **Shipped**:



Tapping **Shipped** saves the ship memo and sets its status to "Shipped", meaning the order is prepared and released to the shipping carrier.

### Pickup Type

For Pickups, in the *Documents* tab, there are two saving buttons in the right bottom corner:



Tapping **Pick Up Ready** saves the ship memo and sets its status to "Pick Up Ready", meaning the order has been prepared and is ready for customer to pick up.

> NOTE:
>
> The button will be disabled if the memo is already in "Pick Up Ready" status or all items have not been either verified or rejected.

Tapping **Picked Up** saves the ship memo and sets its status to "Picked Up", meaning the order has been already picked up by the customer.

It is possible for the user to set the memo's status to "Picked Up" either from the "Prepare Pick Up" or "Pick Up Ready" status.

> NOTE:
>
> The button will be disabled if the memo is already in "Prepare Pick Up" status and all the items have not been either verified or rejected.
>
> If the memo is in "Pick Up Ready" status, the Picked Up button is always enabled.

After tapping one of the saving buttons, the following notification appears:
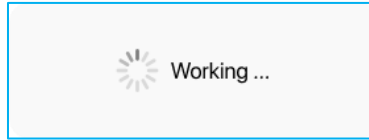


If there is no Internet connection, saving will not be completed and the following notification will appear:
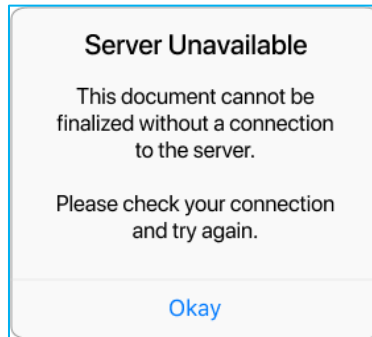


If all items in the memo were rejected, the memo status will be "Rejected":
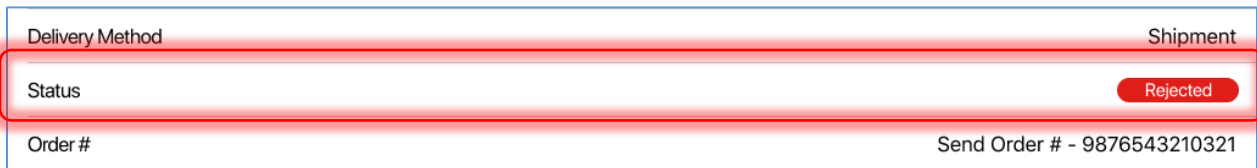


If some items on the ship memo were rejected and some shipped, the status will be "Shipped":

*Items Tab*

In the *Items* tab, the list of merchandise that needs to be shipped to / picked up by the customer

In the *Items* tab, it is possible to:

- ship all the items on the Ship Memo
- reject all the items on the Ship Memo
- search for items on the Ship Memo
- change item ship and reject quantities

To open the *Items* tab, tap **Items** at the top of the screen:
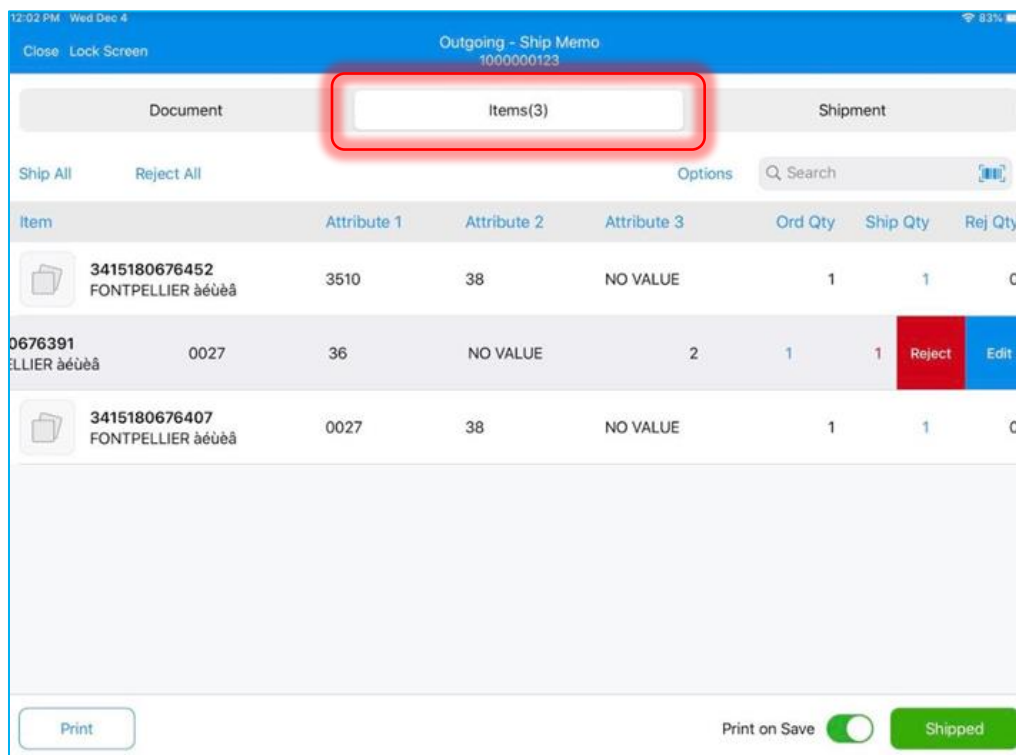


In the grid, the following columns display:

- **Item:** item UPC and description
- **Attribute 1–3:** item attributes
- **Ord Qty**: quantity from the order added when the memo was created in CHQ
- **Ship Qty**: quantity to be shipped; on tapping the value in the field, the *Edit* item dialog opens
- **Rej Qty**: the quantity of the items the user selected as rejected; every value except for zero will be in red

To sort a column, taping a column header is required:

- 1st tap: descending arrangement
- 2nd tap: ascending arrangement
- 3rd tap: back to the initial sort order

    NOTE:

    If the user applied a sort and then added or scanned another item, the sort will be 16
    setremoved.

## Shipping All Items

In the *Items* tab, it is possible to ship all the items on the Ship Memo at once. To do so, tap **Ship All** in the upper left part of the screen:
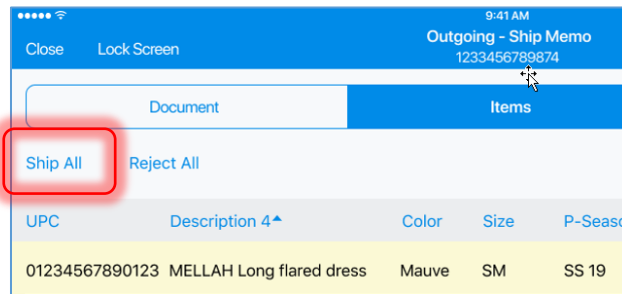


Tapping **Ship All** in the *Items* tab shows a dialog to confirm shipping of all items on the memo:
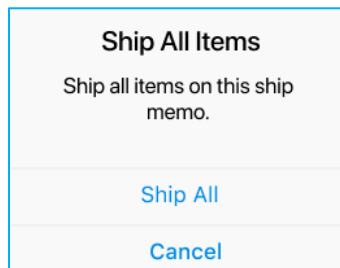


On tapping **Ship All**, the value in the *Ship Qty* field in the grid will be set to equal the value in the *Ord Qty* field for all items.

If any items had been previously rejected, tapping **Ship All** will discard that and set the items to ship.

## Rejecting All Items

On tapping **Reject All** in the *Items* tab, the *Reject All Order Items* dialog to confirm rejection of all the items on the memo displays:
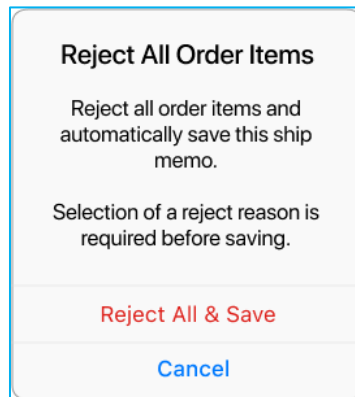


Selecting **Reject All & Save** will set the value in the *Rej Qty* field to equal that in the *Ord Qty* field.

> NOTE:
>
> If there is no Internet connection, after a corresponding notification, the document isn't saved and quantities aren't set to "rejected".

## Automatic Opening of Item Edit

It is possible to configure the app to open the item *Edit* dialog when an item is scanned.

To do so, tap **Options** in the *Items* tab:
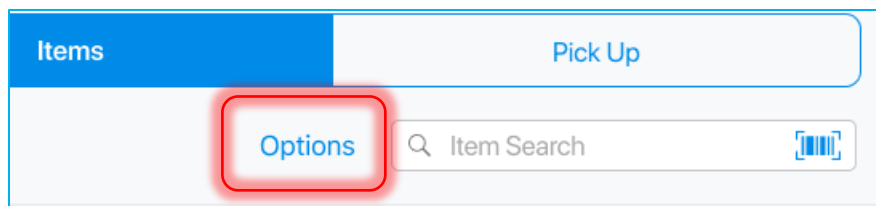


In the popover dialog, toggle the **Open Edit on Good Scan** switch ON:
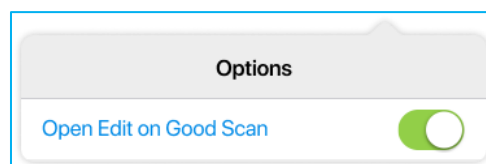


> NOTE:
>
> On a new installation, the switch is set to OFF by default.

## Item Search

The *Search* field in the upper right corner allows the user to search for exact matches by PLU, UPC, ALU for items listed on the Ship Memo:
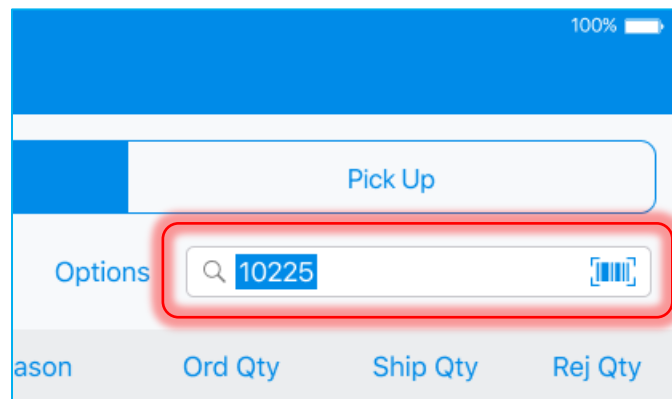


If no match is found, the following message appears:



> NOTE:
>
> The app will search only among the items listed on the document, not in the whole catalog.

## Item Edit Dialog

The item *Edit* dialog allows the user to change quantities of a particular item on the SM.

To open the *Edit* dialog, swipe left the row with the required item. Then, tap **Edit**:

Tapping **Edit** opens the *Edit* dialog:



In the top section, information about the item edited displays:

- *Item Store Description*
- *UPC*
- *PLU*
- *Style*

In the grid, the following information is presented:

- **Order Qty**: the quantity of the items ordered; the field is read-only
- **Ship Qty**: the quantity of the items being transferred; valid entry is from 0 up to the value in the *Order Qty* field; on adding an item or first scanning, the value is 1 by default
- **Reject Qty**: the quantity of the items rejected; valid entry is from 0 up to the value in the *Order Qty* field

  NOTE:

  For a ship memo to be saved, the sum of the values in the *Ship Qty* and the *Reject Qty* fields must equal the value in the *Order Qty* field.

  If the user enters a value greater than the *Order Qty*, or a value greater than *Order Qty* minus *Reject Qty*, the following warning will appear:

- **Reject Reason**

  If the user defines Reject Qty, the Reject Reason field is required for the changes to be saved successfully.

  If the user defines Reject Qty and Reject Reason, and later changes this Qty to zero, the Reason will be also automatically cleared.

  Also, if the document has been saved and has either the "Rejected" or "Shipped" status, the whole *Items* tab will be read-only.

## Shipment

The *Shipment* tab displays only if the type of the Ship Memo is Shipment:



There are two sections in the *Shipment* tab:

- Shipment
- Ship To

In the *Shipment* section, the following information displays:

- **Delivery Method**: type of delivery; possible values are "Manual Ship" if no integrated shipping service is used, or the name of an integrated shipping service

NOTE:

If the user changes from one type of delivery to another, any entered data will be cleared.

Also, once a label has been retrieved using a shipping service, the field cannot be changed back to "Manual Ship".

- **Status**: the status of the ship memo
- **Ship Method**: shipping methods from the CHQ settings

NOTE:

If the ship memo doesn't come with a ship method assigned, the shipping method marked as "default" in *Settings* will be assigned.

Also, this field is required, so the value cannot be "none".

- **Tracking #**: the tracking number

NOTE:

The above field is required for Manual Ship.

- **Actual Shipping Cost**: currency field; the amount that the shipping service charges the retailer to ship the package; valid entry is from 0.00 to 999,999,999.00
- **Return Tracking #:** the return tracking number
- **Shipped**: when the ship memo is saved and has the "Shipped" status, the field will be updated with the user name and date/time:

| Return Tracking # | None |
|---|---|
| Shipped | Jeff S. @ 12/12/2019 12:35 PM |

For Manual Ship, the *Ship To* section below the *Shipments* section will display the following information:

- The customer's first and last name
- Company name
- Address 1–2
- City, state/province, postal code
- Country

NOTE:

If the memo has the "Shipped" status, all the fields in the *Shipment* tab are read-only.

*Pick Up*

The *Pick Up* tab displays only if the type of the Ship Memo is Store Pick Up:



The tab contains two sections:

- Details
- Customer

In *Details*, the following information displays:

- **Status**: the status of the memo
- **Prepared By**: the user that is logged in when the "Pick Up Ready" Status is set for the ship memo; the user's login and date/time
- **Filled by**: the user that is logged in when the "Picked Up" status is set for the ship memo; the user's login and date/time
- **Pickup Signature**: the customer's signature that can be captured when the order is picked up

In the *Customer* section, located below the *Details* section:

- the information about the "sell-to" customer displays on the left
- the information about the pickup customer is displays on the right

Customer

First Name Middle Name Last Name
Organization
Address 1
Address 2
Address 3
Address 4
Address 5
City, State, Postal Code
Country

Phone 1:  Phone 1
Email 1:   Email 1

**Pickup Customer**
First Name Middle Name Last Name
Organization
Phone:  Phone
Email:   Email

## Signature Capture

In the *Pick Up* tab, it is also possible to capture the customer's signature.

Tap the **Tap to Capture Customer Signature** button in the *Pickup Signature* field:

Filled By:

Pickup Signature:                                                                    Tap to Capture Customer Signature

On tapping, the *Capture Signature* dialog opens:

Cancel               Capture Signature               9:41 AM          100%

Customer acknowleges this merchandise has been received.

Signature Here

X _____

Clear Signature                    Done

**Clear Signature** immediately clears any captured signature (no confirmation dialog displays) and resets the interface to its initial state.

The **Done** button is enabled as soon as the customer starts signing. Tapping **Done** saves the signature and returns the user to the *Pick Up* tab.

After the signature has been captured, its preview will be shown in the *Pickup Signature* field:



Tapping **Clear & Resign** or the preview opens the signature UI, where the user can capture a new signature.

## Updated User Image

Version 6.11 – TWD-21706

January 2020

We've updated how a user picture is assigned, edited and removed.

Once assigned, the user image displays in all the POS areas in the left upper corner of the screen beside the user's name.

For example, POS *Home Screen*:
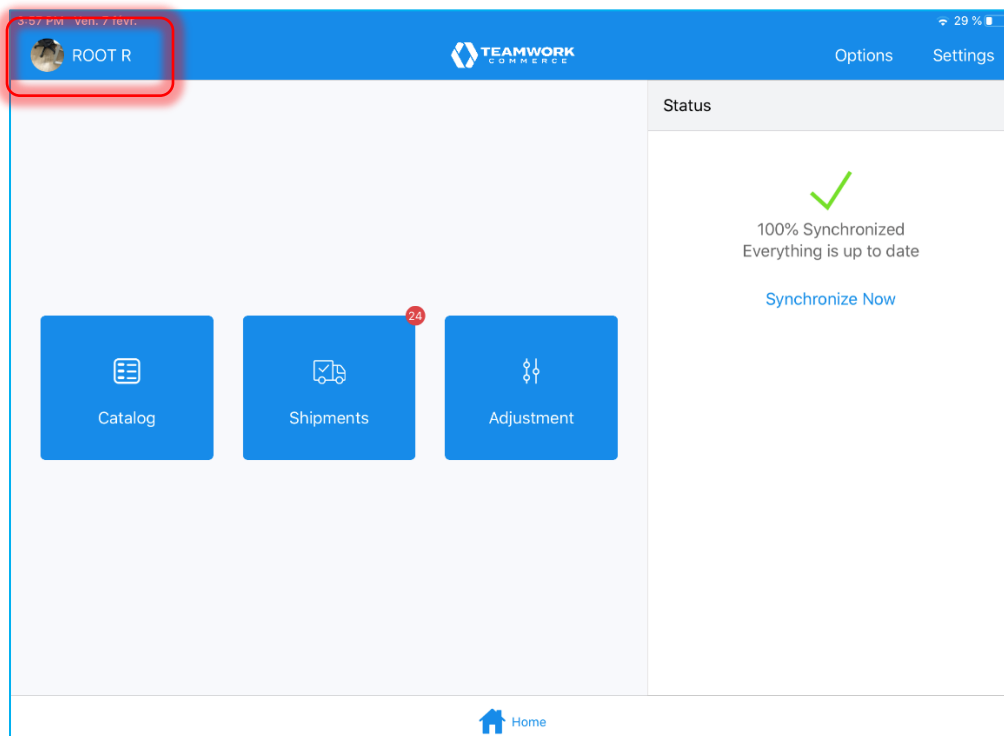
## Assigning Image

To add a new image:

1. Tap the circle with the user's initials or name in the upper left corner of the app
2. In the dropdown menu, tap **Take Photo:**
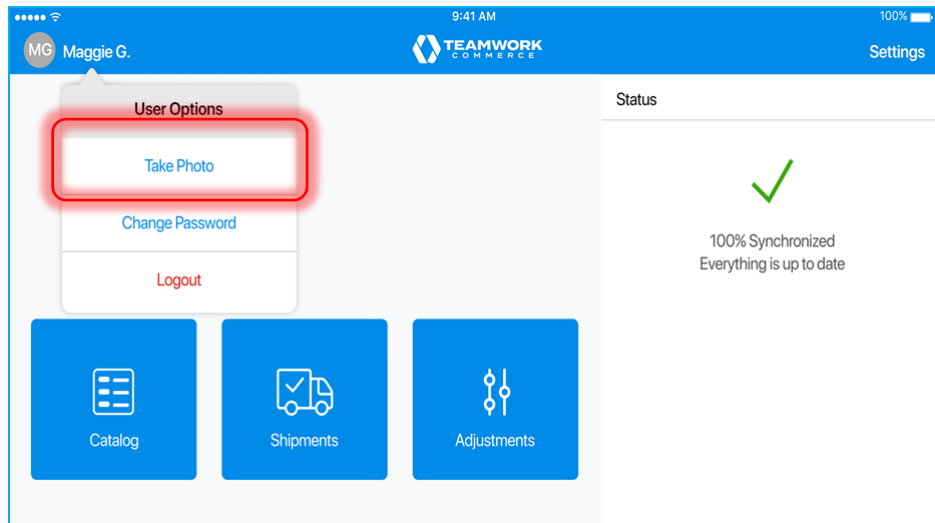


Tapping **Take Photo** takes the user to the camera interface. Once the photo has been taken, the result will be shown with a circle overlay.
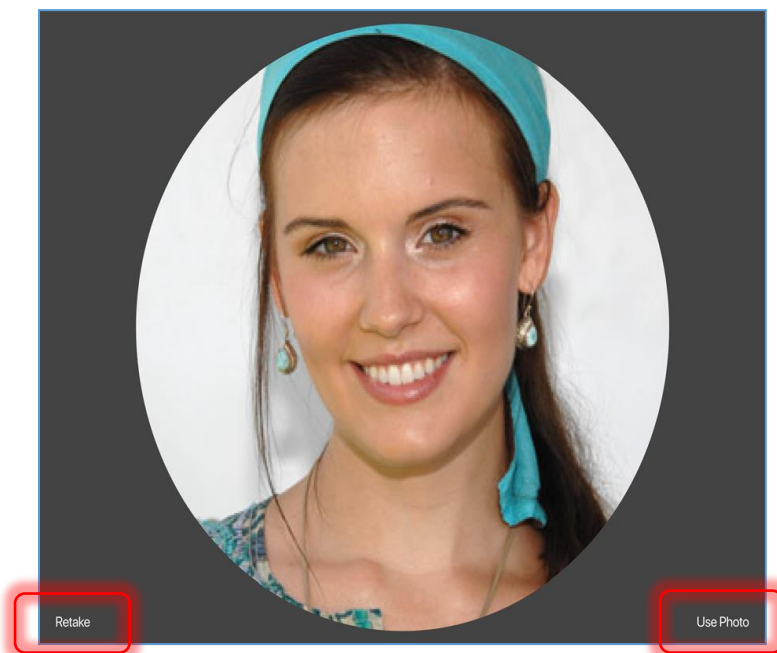
3. Tapping **Use Photo** accepts the image.

On tapping **Use Photo**, the image will be kept in the local storage and used as the user's image in POS. Also, the image will be sent to CHQ and stored for the user's profile.

The circular shape will be automatically applied to the image.

4. Tapping **Retake** allows to take another picture.

### Editing Image

If an image is already assigned, it is possible to edit the image. To do so:

1. Tap the circle with the user's initials or name in the upper left corner of the app
2. On the dropdown menu, tap **Edit Your Photo**

Tapping **Edit Your Photo** allows the user to take a new photo or upload an image from the device.
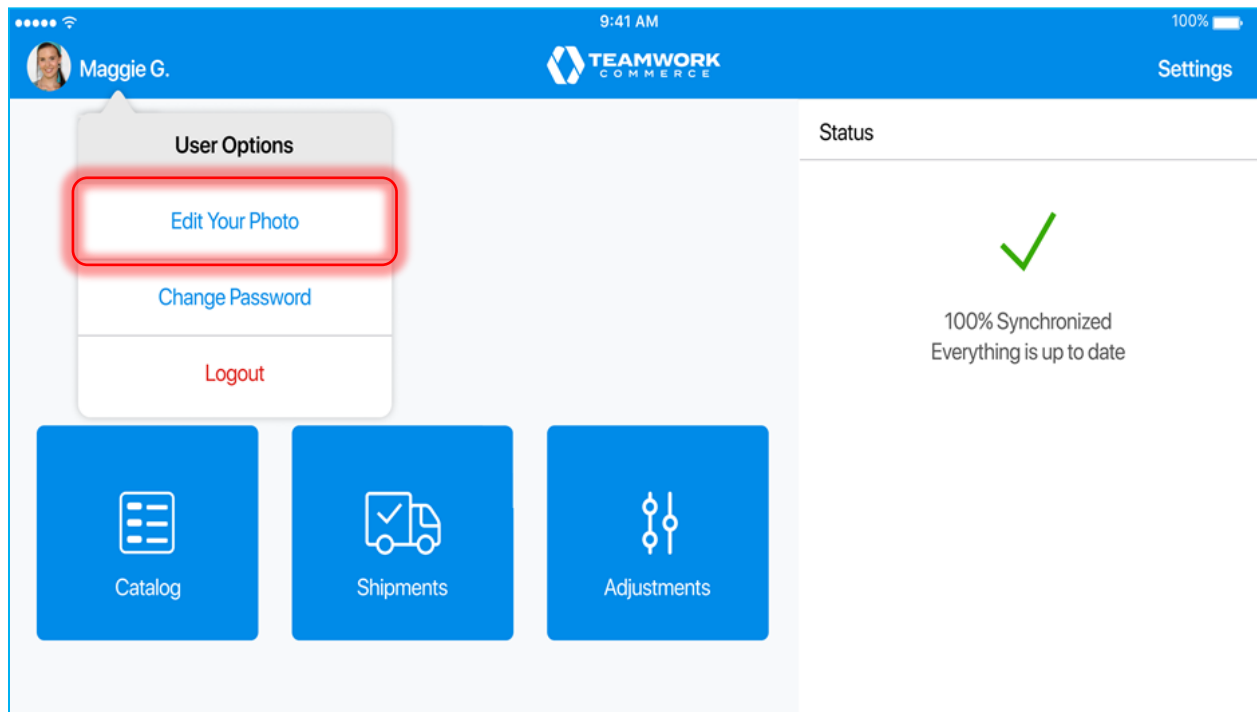


### Removing Image

If an image is already assigned, to is possible to remove that. To do so:

1. Tap the circle with the user's initials or your name in the upper left corner of the app
2. On the dropdown menu, tap **Delete Photo**

On tapping **Delete Photo**, a popup dialog with two options displays:
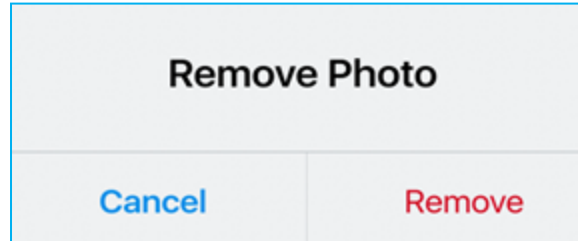


On tapping **Remove**, the image will be deleted from the local storage and from the user's profile on the CHQ side.

## Updated Cashier Login Dialog

Version 6.11 – TWD-21705

January 2020

If you are running POS Pro for the first time or you have logged out, you will need to log in.

**Login Dialog without Assigned Photos:**
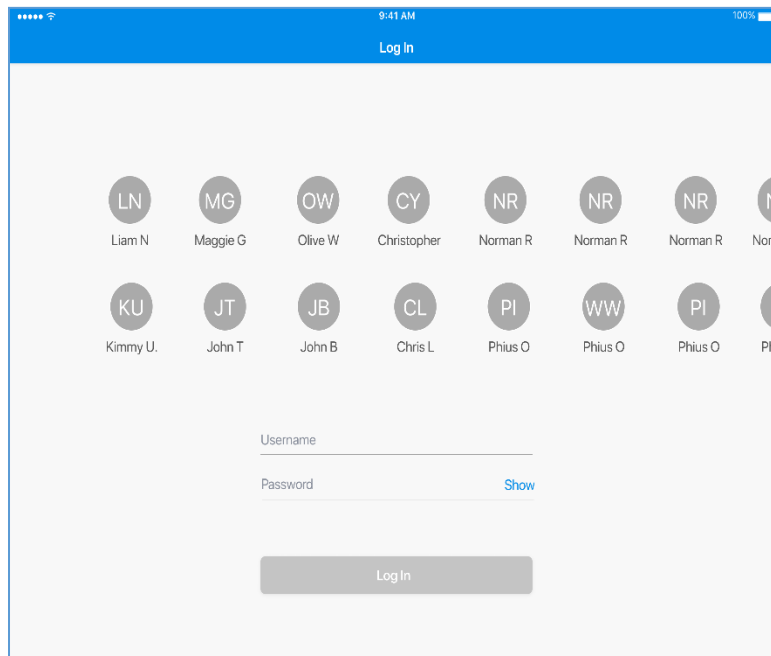
**Login Dialog with Assigned Photos:**
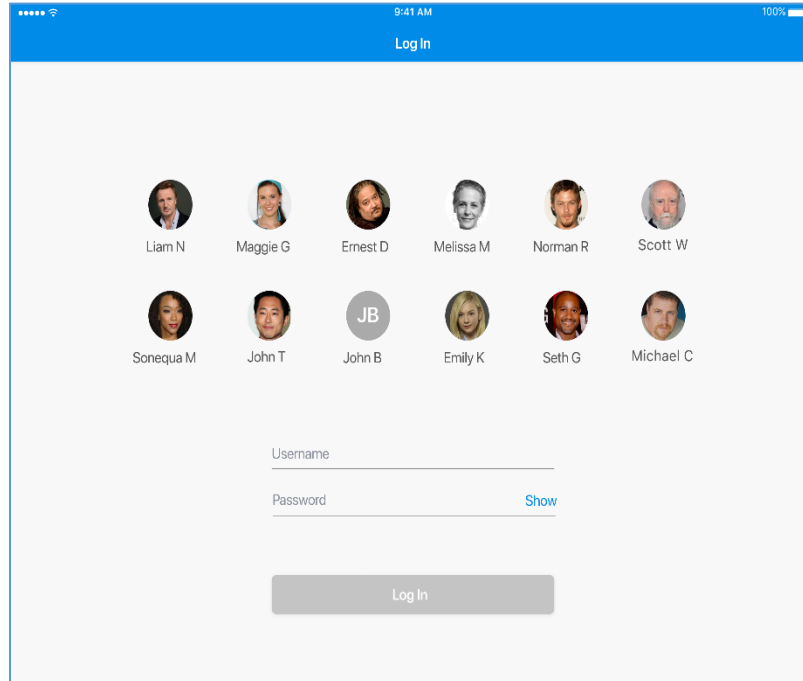


## Displaying Users in Log In Screen

In the *Log In* screen, users display if:

- they are not marked as universal and are assigned to the current location
- they are marked as universal and their Home location is the current location
- they are marked as universal, their Home location is not the current location, but they logged in at least once for the last four days

Users will not display if:

- they are flagged as *IsDeleted*
- their accounts are marked as inactive
- their accounts have expired

If a user with the above parameters tries to log in, the *Invalid User* message displays.

### Login Dialog with User Selected

Once a user is selected, the following dialog displays:
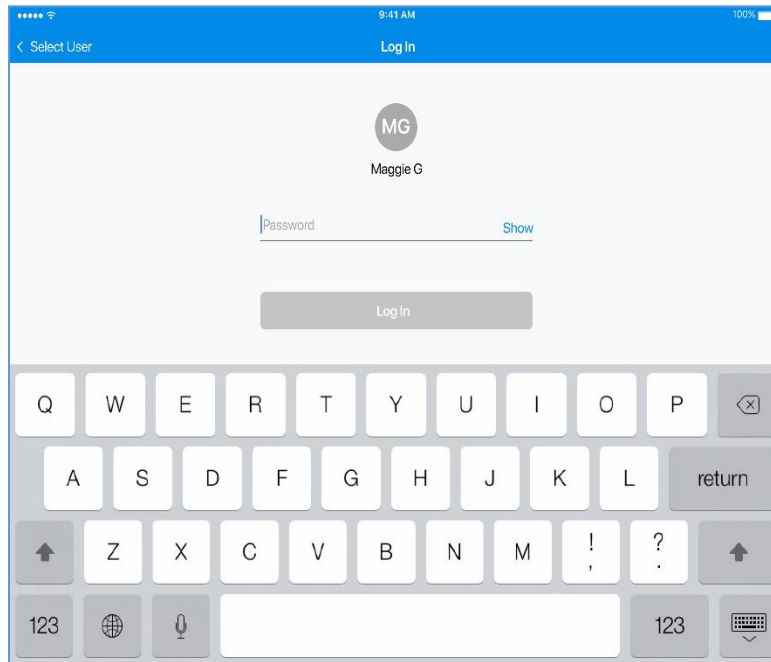


Tapping **Select User** in the upper left corner brings back the screen with the user list.

The **Log In** button becomes active once at least once character is typed in the *Password* field.

### Login dialog with Error Messages

*Insufficient Rights*

If a user who tries to log in doesn't have the required rights, the *Insufficient Rights* message displays.
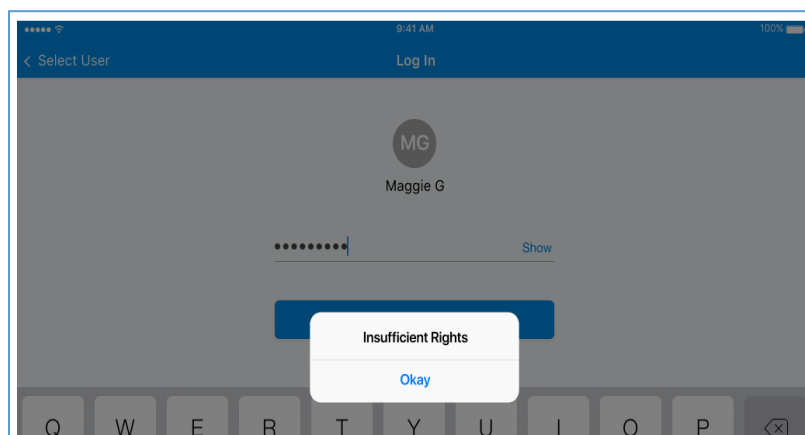


Tapping **Okay** brings back the dialog with the user selection list.

*Password Expired*

Users are notified if their passwords are about to expire:
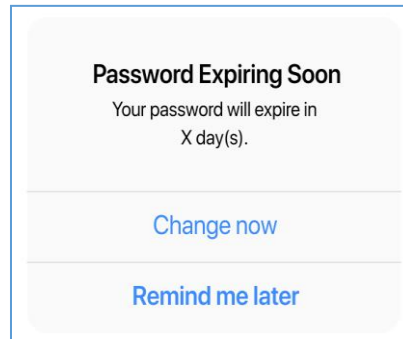
Once **Change now** is tapped, the *Change password* dialog opens (see below for details).

Also, if a user password has expired the **Password Expired** message displays.
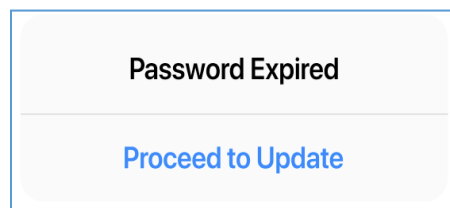
Tapping **Proceed to Update** also opens the *Change Password* dialog, where a user can enter their new password.

**Change Password Dialog**
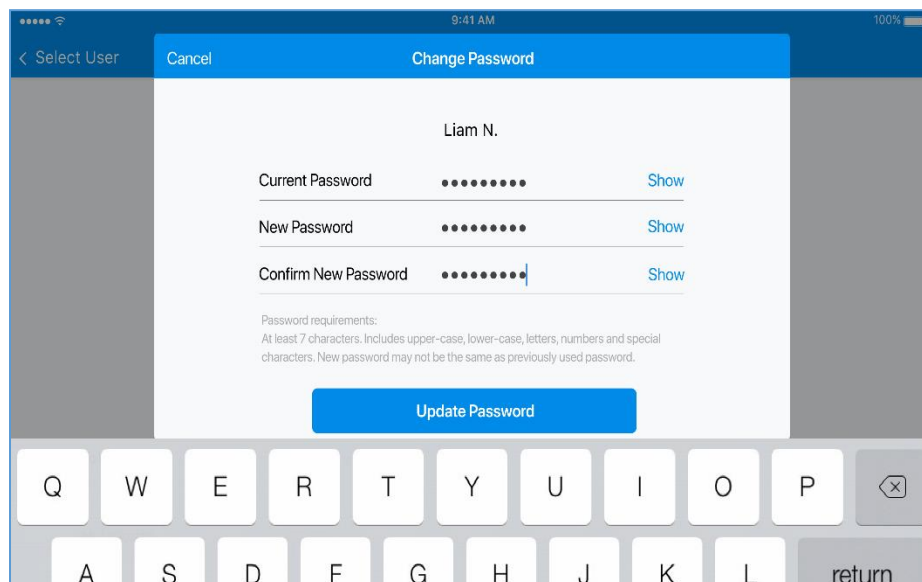
If the current password is incorrect, the *Current password was incorrect* message displays at the top of the *Change Password* dialog.

If passwords don't match in the *New Password* and *Confirm New Password* fields, the *Passwords don't match. Please try again* message displays at the top of the *Change Password* dialog.

If the new password has been previously used, the *Old password. The new password has been used previously* message displays at the top of the *Change Password* dialog.

If the password has been changed successfully, the *Password Successfully Updated* notification displays.

> NOTE:
>
> If during password update, there is no connection to CHQ, the *Connection Unavailable* dialog displays. Tapping **Okay** in the dialog brings users back to the *Change Password* dialog.

*Invalid Login*

If a username or password aren't valid, the *Invalid Login* dialog displays.

**Invalid Login**
Username or password is incorrect.
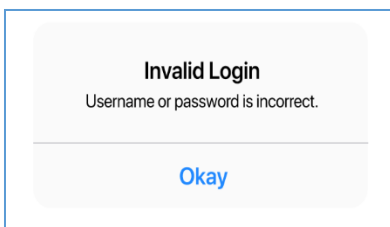
**Okay**

Tapping **Okay** brings the user back to the *Log In* screen with the same user selected.

# Updated Shipments Area

Version 6.11 – TWD-21260

January 2020

The POS Pro app now has a new area – *Shipments.* The area allows the user to manage a store's outgoing and incoming documents.

To access this area, tap **Shipments** on *Home Screen*:
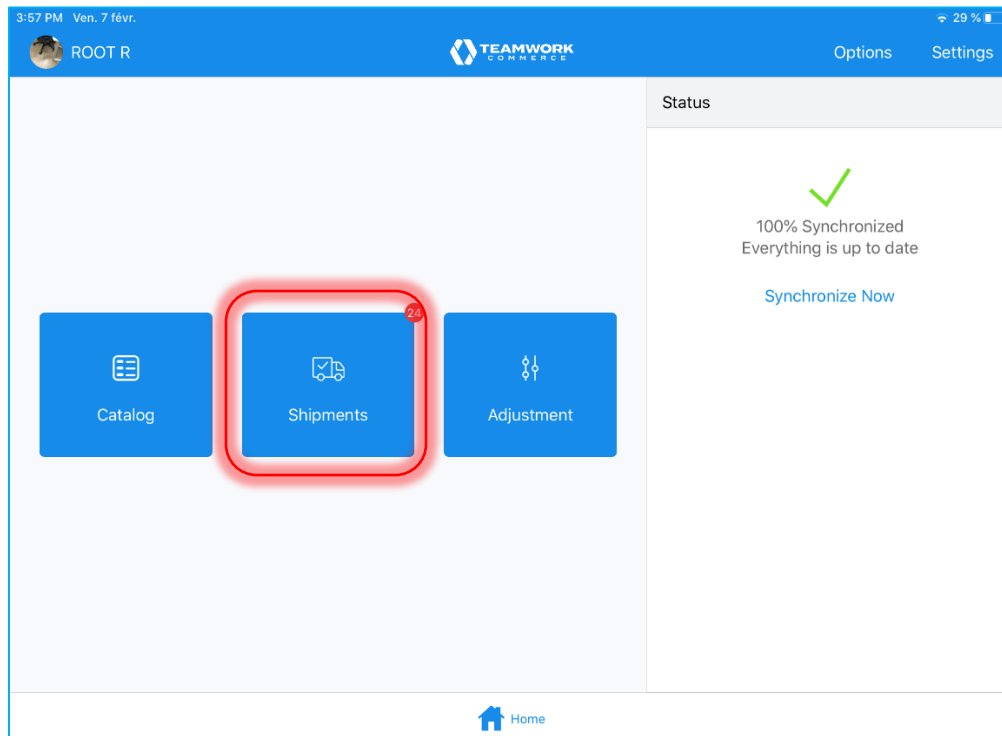
NOTE:

The badge app icon (red circle) next to Shipments indicates the current number of outgoing documents.

## Shipments Area

The *Shipments* area contains the following three tabs:

- **Outgoing**: contains documents with items that go out from a location
- **Incoming**: contains documents with items that a location is receiving
- **History**: contains both incoming and outgoing documents that are finalized

In the grid with documents, the following columns display by default:

- *Type*
- *Document #*
- *Order #*
- *Date/time*
- *To and/or From (depending on the tab)*
- *Status*
- *Total Qty*

The information in the grid can be sorted by any of the columns according to the following principle:

- 1st tap: descending arrangement
- 2nd tap: ascending arrangement
- 3rd tap: back to default sort order

  NOTE:

  By default, the grid is sorted by the *Date/time* column.

*Searching for Documents*

There are two ways to search for a document:

- tapping the **barcode scanning icon** and scanning a document
- searching for matches in the *Search* field
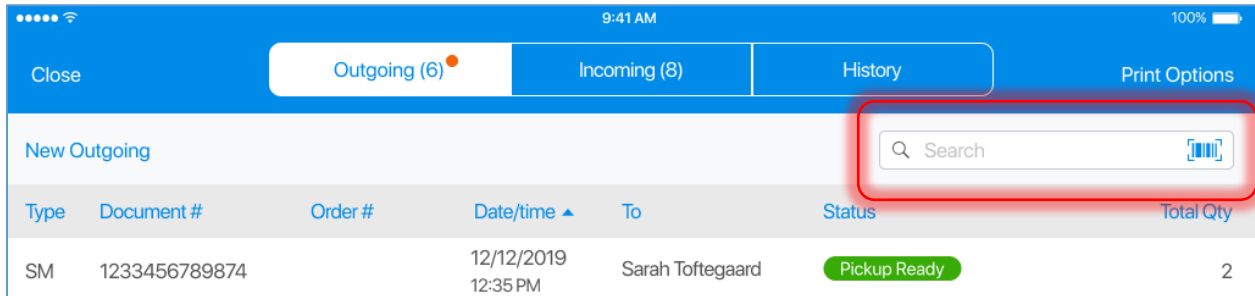


NOTE:

The *barcode scanning icon* will be hidden if the *enable camera barcode reader* option is disabled in CHQ.

You can enable it under *CHQ > settings > location settings > locations / location settings*. On tapping the necessary location, in *general settings*, check **enable camera barcode reader**.

In the *Search* field, the user can search by the following fields:
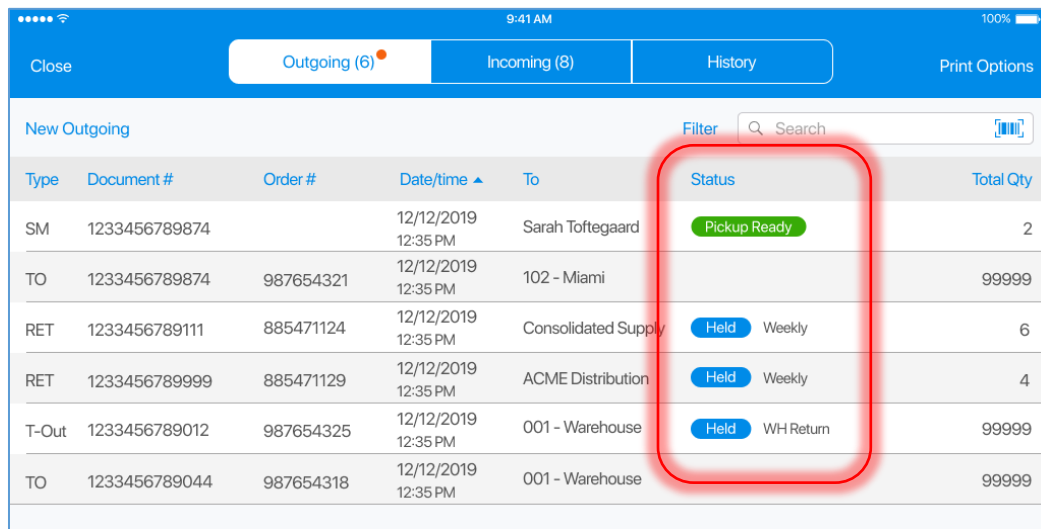
- *Document #*
- Order #
- *Location Code*
- *Location Name*
- *Vendor Name*

If no matching documents are found, the following message displays:
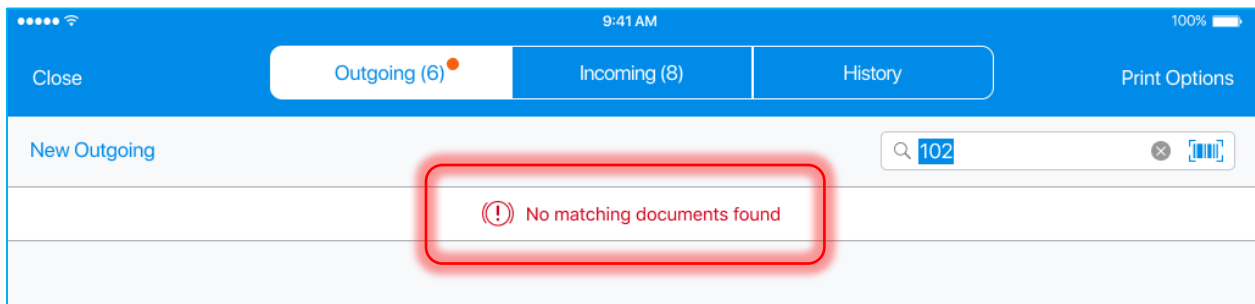
*Document Statuses*

The document status informs the user about the state of a document:



The following statuses can be applied to a document:

- **Held**: the document is not finalized; the reason for the hold is displayed next to the status
- **Editing**: the document is currently being edited on another device or in CHQ
- **Reversed**: the document has been reversed (cancelled)
- **Reversing**: the document is being reversed (cancelled)
- **Not Sent**: the document is finalized but not synchronized with CHQ
- **Prepare Ship** (for Ship Memos): a shipment for a customer needs to be prepared
- **Prepare Pick Up** (for Ship Memos): a pickup order for a customer needs to be prepared
- **Pick Up Ready** (for Ship Memos): a pickup order has been prepared but not picked up by a customer

NOTE:

If there is no Internet connection or the server is unavailable, the user cannot hold a document.

Also, hold reasons can be defined in CHQ:  for Purchase Receipts, Return Receipts, ASNs, Purchase Orders: *settings > purchasing > hold reasons*; for Transfer Out, Transfer In, Transfer Orders: *settings > transfers > hold reasons*.

Tapping any row with a document will open this document for editing.

NOTE:

A document cannot be opened for editing if there is no connection with the server. In this case, the following notification displays:
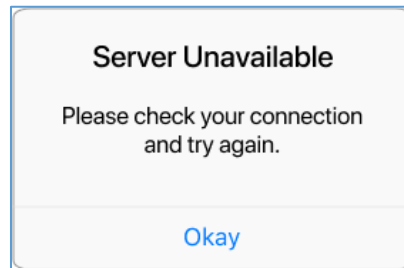


If the app cannot contact CHQ, the following message appears:
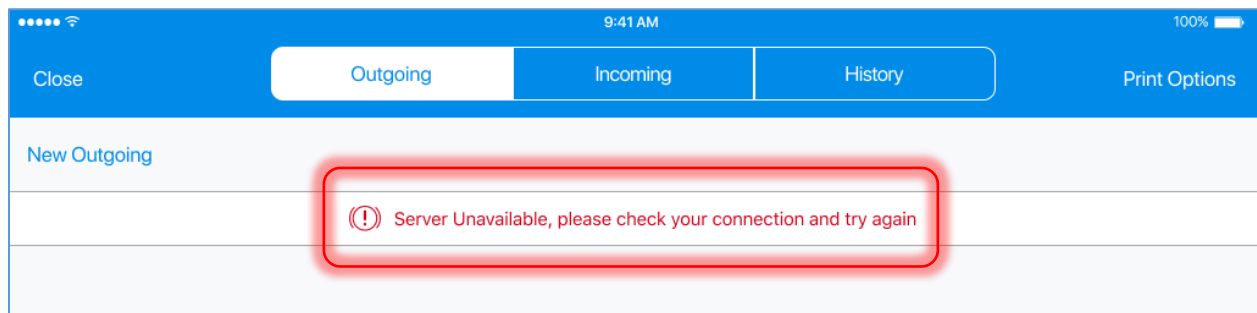


## Data Refreshing

To refresh the data, pull the screen down. On refreshing, the following notification displays:
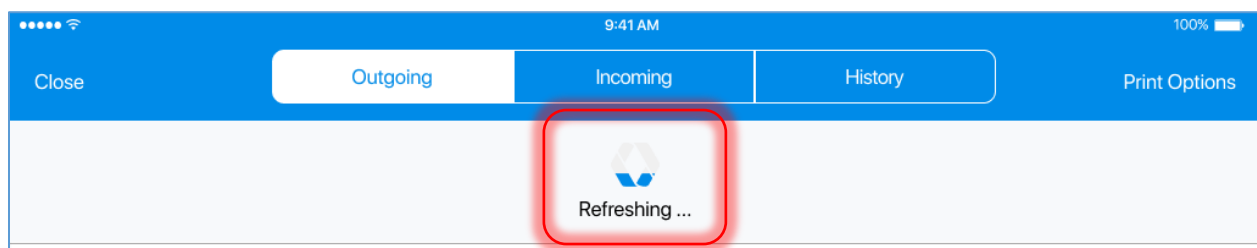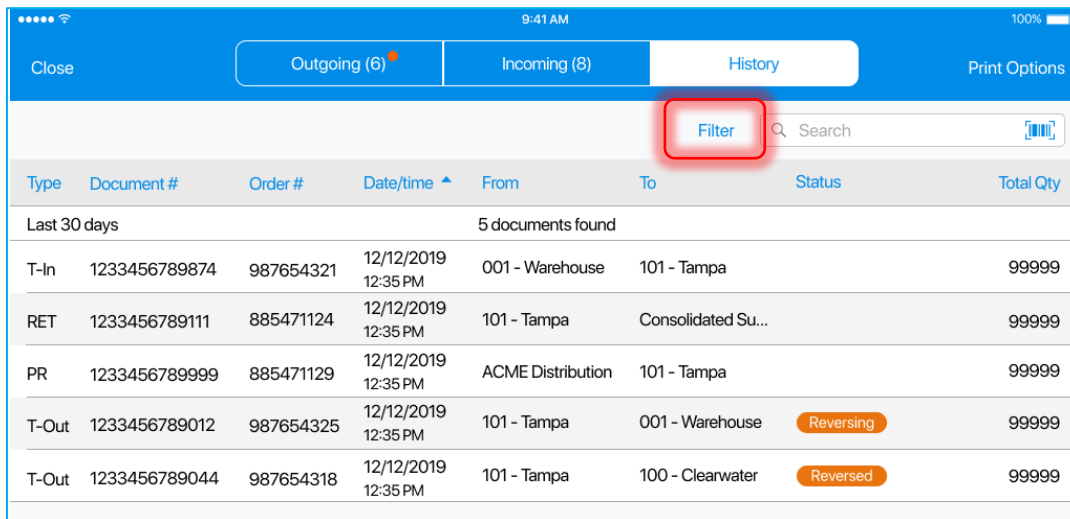


NOTE:

If a sort is applied to the data in the grid, and the user pulls the screen to refresh, that sort will be cleared.

## History

The *History* tab contains all the finalized documents from *Incoming* and *Outgoing* in the read-only mode.

The user can define a time frame for the displayed documents by tapping **Filter**:



NOTE:

By default, the documents finalized within the last 30 days are displayed.

In *History*, if there is no server connection, only local history will display. The user will see the *Server Unavailable* message.

## Print Options

It is possible to configure default settings for printing documents in the *Shipments* area. Printing options can be accessed from the *Outgoing*, *Incoming*, or *History* tabs. To do so:

Tap **Print Options** in the top right corner:
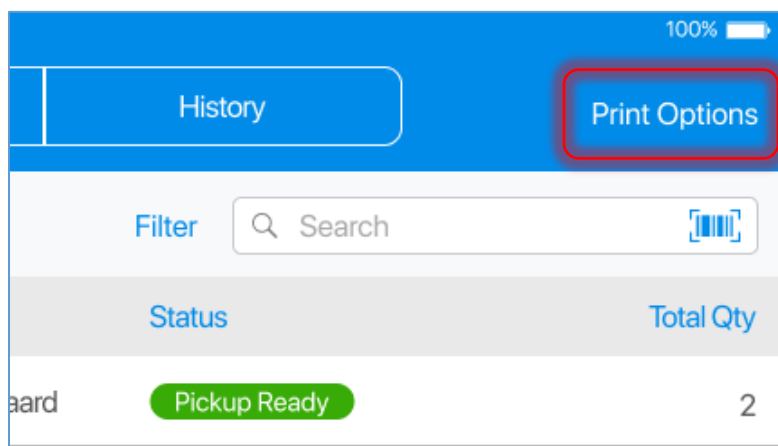
On tapping, the *Printing Options* dialog opens:
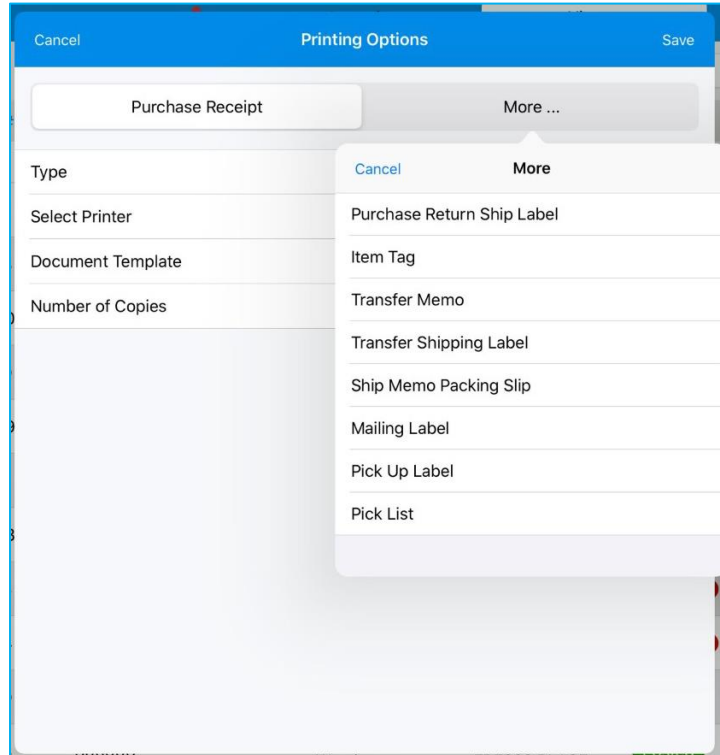


Select the required document type and then configure the default settings for it (the *Type*, *Select Printer*, *Document Template*, and *Number of Copies* fields).

## Updated Shipments: Incoming Documents

Version 6.11 – TWD-21641

January 2020

In POS Pro, the *Incoming* section of the *Shipments* area contains all the shipments documents a store location is receiving.

### Transfer In

Transfer In (T-IN) is a type of incoming document containing merchandise that a store is receiving from another store.

In the *Incoming* tab, tap the required Transfer In to open it:



A Transfer In contains two tabs: *Document* and *Items*.

## Document Tab

On tapping a Transfer In, the *Document* tab opens:



The Document tab contains two sections: *Details* and *Summary*.

In the *Details* section, the following fields display:

- **Type:** document type – Transfer In
- **Order #**: number of the associated Transfer Order
- **From**: code and name of the source location
- **Transfer Reason**: reason selected in the associated Transfer Order
- **Ship Method**: method and tracking number defined in the associated Transfer Out
- **Last Edited**: date/time of the last edit and the user who performed the edit
- **Hold Reason**: the reason for the hold of the document; tap **Select** to define a reason

- **Notes:** information to be communicated to the user when receiving

In the *Summary* section, the following fields display:



- **Pack Qty**: the quantity that has been sent from another location
- **In Qty**: the quantity that has been received
- **Difference Qty**: the difference between *Pack Qty* and *In Qty*

## Items Tab

To access the tab tap **Items** that is located at the top-right of the screen.

The *Items* tab contains the merchandise that's been sent from another location:



In the *Items* tab, the user can mark how many items were received by the store.

The following information on items is available:

- **Item:** item UPC and description

- **Attributes 1–3:** item attributes
- **Pack Qty:** number of items that have been sent by another location
- **In Qty:** number of items that have been received
- **Difference:** difference between *Pack Qty* and *In Qty*

Items can be sorted by any of the columns according to the following principle:

- 1st tap: descending arrangement
- 2nd tap: ascending arrangement
- 3rd tap: back to default sort order

## Searching for Items

It is possible to search for items in two ways:

- scanning the item's barcode; to do so, tap the **barcode scanning icon**
- entering the item's UPC, CLU, or PLU in the *Item Search* field
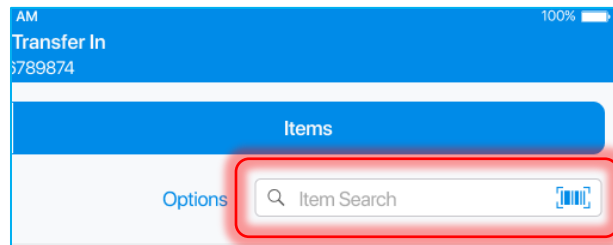


If an exact match on the Transfer In is found, the *In Qty* of that item will be incremented by 1.

If the searched item is not on the Transfer In, the search will be performed in the *Catalog*. If an item is found in the *Catalog*, it will be added to the document with the *In Qty* "1". The *Pack Qty* and *Difference* fields will be blank.

## Managing Item Quantities

It is possible to manage the quantities of all items at once.

Tapping **Receive All** in the top left corner will match the *In Qty* field with the *Pack Qty* field for all items on the document.
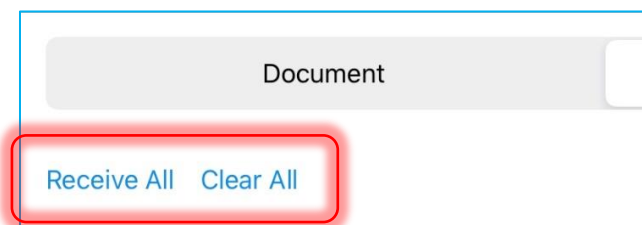


Tapping **Clear All** will set the *In Qty* field to zero for all items.

## Left Swipe Options

In the *Items* tab, on swiping left an item's row, the following options display:

- **Edit**: opens the *Edit* dialog for the item
- **Print Tag**: opens a dialog to print tags for the item
- **Clear**: clears the *In Qty* field for the item (only for items that were initially in the document and have *Pack Qty*)
- **Remove**: clears the *In Qty* field for the item (only for items that were added to the document by the user)
- **View**: in finalized documents, opens the *Edit* dialog for the item in the read-only mode

| 01234567890125 | MELLAH Long flared dress | | Mauve | LRG | SS 19 | 98 | 98 | 0 |
|---|---|---|---|---|---|---|---|---|
| ss | | Mauve | XLG | SS 19 | 100 | 100 | 0 | Clear    Print Tag    Edit |
| 01234567890126 | MELLAH Long flared dress | | Mauve | XLG | SS 19 | 100 | 0 | -100 |

## Editing Items Manually

In the *Items* tab, each item's received quantity can be edited manually. To open an item's *Edit* dialog, swipe left that item's row and tap **Edit**.

| Cancel | Edit | Save |
|---|---|---|
| **Item Store Description Field** | | |
| UPC: 01234567890123 | PLU: | 12254 |
| | STYLE: | 204 |
| Pack Qty | | 52 |
| In Qty | | 50 |
| Difference | | -2 |
| | Clear Quantity | |

In the *Edit* dialog, define *In Qty*. When done, tap **Save** in the right upper corner to confirm changes.

Alternatively, tap **Clear Quantity** at the bottom of the dialog to set the item's *In Qty* to zero and close the dialog.

NOTE:

If the edited item was not initially in the Transfer In, the **Remove** button will be displayed instead of **Clear Quantity**.

## Opening Item Edit Dialog Automatically

To open an item's *Edit* dialog automatically on that item's good scan, tap **Options** in the right upper corner of the screen:



In the dialog that displays, turn the **Open Edit on Good Scan** switch on:



## Holding Transfer In

Tapping **HOLD** saves the document in its current state without finalization:
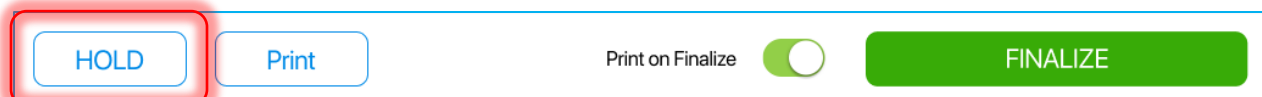


If several possible hold reasons are defined in CHQ, on tapping **HOLD**, the *Hold Reason* dialog displays:
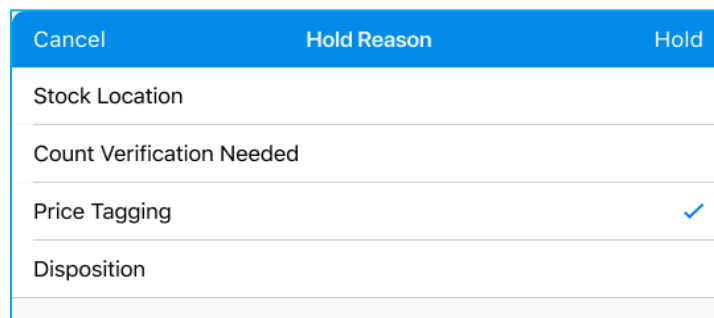


Having selected a reason, tap **Hold** in the top right corner of the dialog.

*Printing Documents*
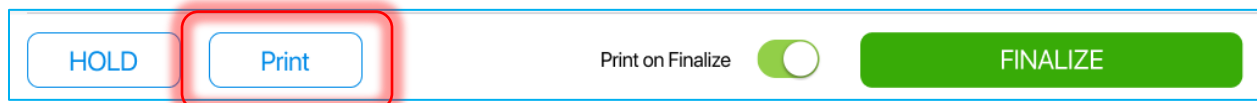
To select a document for printing, tap **Print** at the bottom of the screen:



In the list, select the required document:
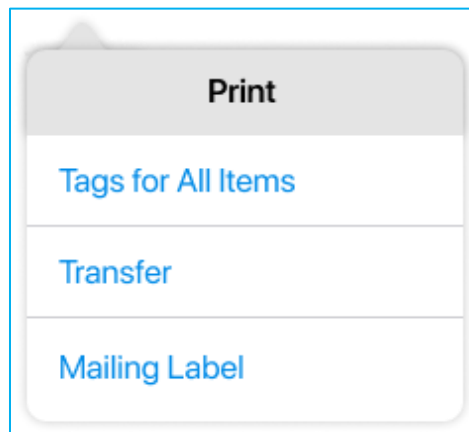


On selecting, the *Printing Options* dialog will open.

If printing several documents at once is required, in the *Printing Options* dialog, select "Print" in the *Type* field for each document.
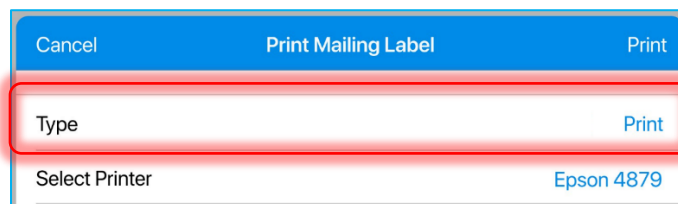


When done, tap **Print** in the right upper corner of the dialog.

To automatically print the selected document on finalizing, turn the **Print on Finalize** switch on:



## ASN

Advanced Shipping Notice (ASN) contains merchandise that a vendor is sending to your store. On finalizing an ASN, a Purchase Receipt associated with that ASN is created. The resulting Purchase Receipt will have an associated ASN.

In the *Incoming* tab, tap the required ASN to open it:



An ASN contains three tabs: *Document*, *Items* and *Transfer*.

## Document Tab

On tapping an ASN in the *Incoming* tab, its *Document* tab will open:



In the *Details* section, the following fields are displayed:

- **Type:** Purchase Receipt (ASN)
- **Vendor**: the vendor sending the merchandise; on tapping, displays the *Vendor Info* dialog
- **ASN #:** ASN identifier
- **Carton #:** number of cartons created
- **PO #:** the number of the associated Purchase Order
- **Last Edited:** the time/date of the last edit and the user who edited
- **Hold Reason:** the reason for the hold of the document; tap **Select** to define a reason
- **Notes:** information added to the order to be communicated to the user when receiving

In the *Summary*, the following fields are displayed:

- **Pack Qty**: the quantity that has been sent by the vendor
- **Receive Qty**: the quantity that has been received at the store location
- **Difference Qty**: the difference between *Pack Qty* and *Receive Qty*

*Items Tab*

To access the tab, tap **Items** at the top of the screen.

The *Items* tab contains the list of items that have been sent by the vendor:
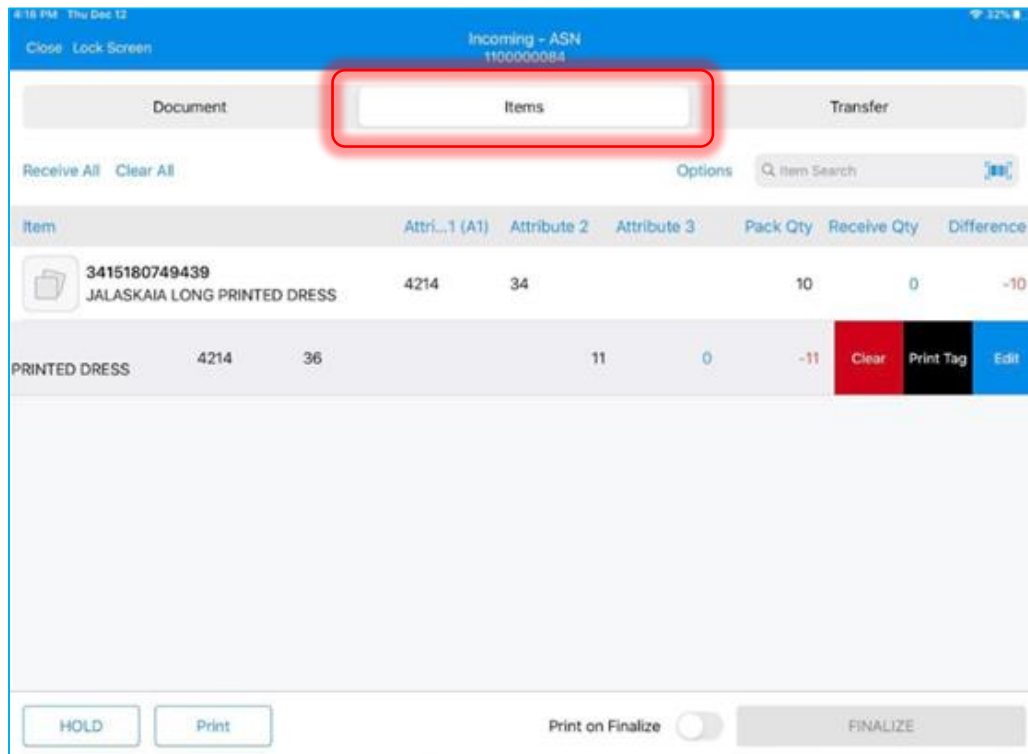


In the *Items* tab, the user can mark how many items were received at the store.

By default, the following columns are displayed in the *Items* tab:

- **Item:** item UPC and description
- **Attributes 1–3:** item attributes
- **Pack Qty:** the quantity of the items that have been sent by the vendor
- **Receive Qty:**  the quantity of the items that have been received at the store location
- **Difference:** the difference between *Pack Qty* and *Receive Qty*

The list of items can be sorted by any of the columns according to the following principle:

- 1st tap: descending arrangement
- 2nd tap: ascending arrangement
- 3rd tap: back to default sort order

## Searching for Items

It is possible to search for items in two ways:

- scanning the item's barcode; to do so, tap the **barcode scanning icon**
- entering the item's UPC, CLU, or PLU in the *Item Search* field
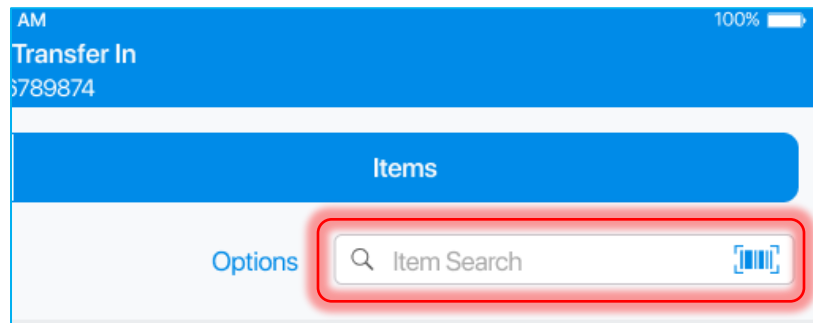


If an exact match on the ASN is found, the *Receive Qty* of that item will be incremented by 1.

## Managing ASN Item Quantities

It is possible to manage the quantities of all items at once.

Tapping **Receive All** in the top left corner will match the *Receive Qty* field with the *Pack Qty* field for all items on the document.



Tapping **Clear All** will set the *Receive Qty* field to be zero for all items. On tapping, the following dialog displays:



## Left Swipe Options

In the *Items* tab, on swiping left an item's row, the following options can be displayed:

- **Edit**: opens the *Edit* dialog for the item
- **Print Tag**: opens a dialog to print tags for the item
- **Clear**: clears the *Receive Qty* field for the item
- **View**: in finalized documents, opens the *Edit* dialog for the item in the read-only mode

| 012345678 90125 | MELLAH Long flared dress | Mauve | LRG | SS 19 | 98 | 98 | 0 |
|---|---|---|---|---|---|---|---|
| ss | Mauve | XLG | SS 19 | 100 | 100 | 0 | Clear  Print Tag  Edit |
| 012345678 90126 | MELLAH Long flared dress | Mauve | XLG | SS 19 | 100 | 0 | -100 |

## Editing Items Manually

In the *Items* tab, each item's received quantity can be edited manually. To open an item's *Edit* dialog, swipe left that item's row and tap **Edit**.



In the *Edit* dialog, define *Receive Qty*. When done, tap **Save** in the right upper corner to confirm changes.

Alternatively, tap **Clear Quantity** at the bottom of the dialog to set the item's *Receive Qty* to zero and close the dialog.

## Opening Item Edit Dialog Automatically

To open an item's *Edit* dialog automatically on that item's good scan, tap **Options** in the right upper corner of the screen:

In the dialog that displays, turn the **Open Edit on Good Scan** switch on:



## Holding ASN

Tapping **HOLD** saves the document in its current state without finalization:



If several possible hold reasons are defined in CHQ, on tapping **HOLD**, the *Hold Reason* dialog displays:



Having selected a reason, tap **Hold** in the top right corner.

## Printing Documents

To select a document for printing, tap **Print** at the bottom of the screen:

In the list, select the required document:

| Print |
|---|
| Tags for All Items |
| Purchase Receipt |

On selecting, the *Printing Options* dialog will open.

If printing several documents at once is required, in the *Printing Options* dialog, select "Print" in the *Type* field for each document.

| Type | Print |
|---|---|
| Select Printer | Epson 4879 |

When done, tap **Print** in the right upper corner of the dialog.

To automatically print the selected document on finalizing, turn the **Print on Finalize** switch on:

| HOLD | Print | Print on Finalize ⬤ | FINALIZE |
|---|---|---|---|

### *Transfer Tab*

Optionally, it is possible to transfer all items on the document to another location. In this case, on finalizing the ASN, an associated Transfer Out can automatically be created.

To do so, tap **Transfer** at the top-right of the screen.

By default, for a new document, the option to transfer items is disabled. To enable it, turn the **Automatically Transfer Out** switch on.



Once the switch is turned on, all the other fields become available for configuration.

In the *Transfer Items* section, the following fields are displayed:



- **To**: the target location; tap **Select** in the field to bring up a dialog and select your destination
- **Finalize with Purchase Receipt**: if true, a Transfer Out is automatically created and finalized on finalizing the ASN; if false, a Transfer Out is created but put on hold on finalizing the ASN; if **Automatically Transfer Out** is enabled, is true by default

- **Hold Reason**: only enabled if **Finalize with Purchase Receipt** is disabled; tap **Select** to define a reason for holding the resulting Transfer Out
- **Ship Method**: tapping **Select** displays the *Ship Method* dialog
- **Tracking #**
- **Notes**

NOTE:

If the **Automatically Transfer Out** switch is on, and there is no connection to the server, on tapping **Finalize**, the *Server Unavailable* message displays.

*Finalized ASN*

A finalized ASN is stored in the *History* tab in the read-only mode.

After finalization, it is possible to void/reverse an ASN, that is, cancel any quantity changes made in the stock ledger by finalization of the ASN. To do so, open the finalized ASN and tap **Void/Reverse** in the left bottom corner:
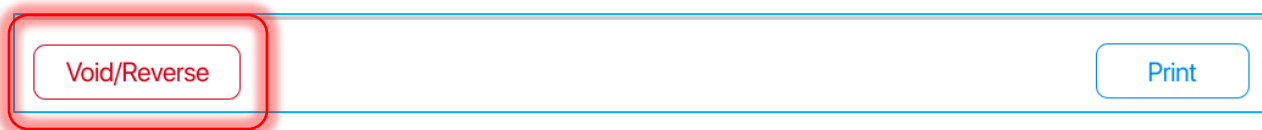


## Purchase Order with Purchase Receipt

Purchase Order (PO) is a type of incoming document containing merchandise that has been ordered from a vendor and sent to a store.

On finalizing, a Purchase Order is converted into a Purchase Receipt. The resulting Purchase Receipt will have an associated Purchase Order.

In the *Incoming* tab, tap the required Purchase Order (PO) to open it:



A Purchase Order contains three tabs: *Document*, *Items* and *Transfer*.

*Document Tab*

On tapping a Purchase Order, its *Document* tab opens:
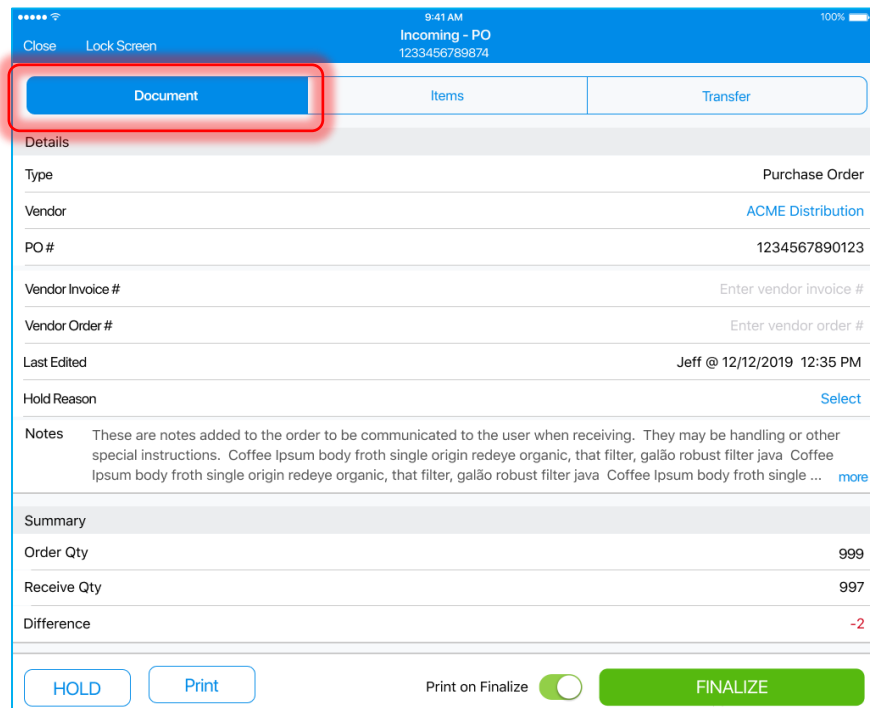


In the *Details* section, the following fields are displayed:

- **Type:** Purchase Order
- **Vendor**: the vendor sending the merchandise; on tapping, displays the *Vendor Info* dialog
- **PO #:** Purchase Order identifier
- **Vendor Invoice #:** vendor invoice number
- **Vendor Order #:** vendor order number
- **Last Edited:** the time/date of the last edit and the user who edited
- **Hold Reason:** the reason for the hold of the document; tap **Select** to define a reason
- **Notes:** notes added to the order

In the *Summary* section below *Details*, the following fields are displayed:

- **Order Qty**: the quantity of the items that have been sent by the vendor
- **Receive Qty**: the quantity of the items that have been received at the store location
- **Difference**: the difference between *Order Qty* and *Receive Qty*

*Items Tab*

To access the Items tab, tap **Items** at the top of the screen.

The *Items* tab contains the list of items that have been sent by the vendor:



In the *Items* tab, the following columns display:

- **Item:** item UPC and description
- **Attributes 1–3:** item attributes
- **Order Qty:** quantity of the items that have been sent by the vendor
- **Receive Qty:** quantity of the items that have been received at the store location
- **Difference:** difference between *Order Qty* and *Receive Qty*

The list of items can be sorted by any of the columns according to the following principle:

- 1st tap: descending arrangement
- 2nd tap: ascending arrangement
- 3rd tap: back to default sort order

### Searching for Items

It is possible to search for items in two ways:

- scanning the item's barcode; to do so, tap the **barcode scanning icon**
- entering the item's UPC, CLU, or ALU in the *Item Search* field
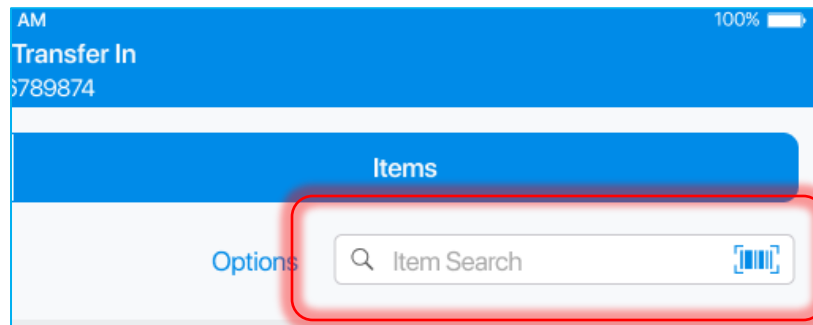


If an exact match on the Purchase Order is found, the *Receive Qty* of that item will be incremented by 1.

If the searched item is not on the Purchase Order, the search will be performed in the *Catalog*. If an item is found in the *Catalog*, it will be added to the document with the *Receive Qty* "1". The *Order Qty* and *Difference* fields will be blank.

### Managing Purchase Order Item Quantities

It is possible to manage the quantities of all items on the document at once.

Tapping **Receive All** in the top left corner will match the *Receive Qty* field with the *Order Qty* field for all items that were initially on the document.
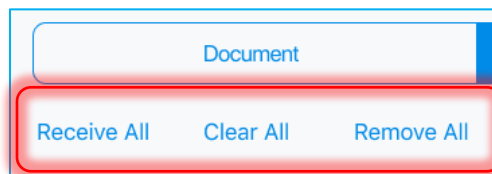


Tapping **Clear All** will set the *Receive Qty* field to be zero for all items. On tapping, the following dialog displays:
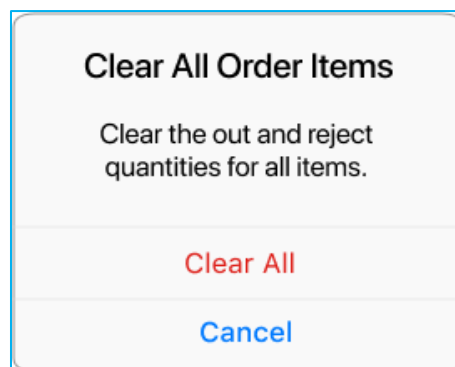
Tapping **Remove All** removes all the items that weren't initially on the Purchase Order. On tapping, the following dialog displays:
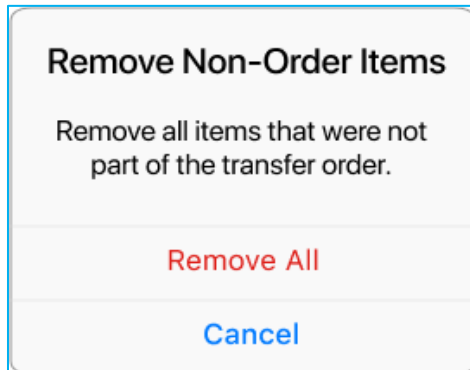
**Remove Non-Order Items**

Remove all items that were not part of the transfer order.

**Remove All**

Cancel

## Left Swipe Options

In the *Items* tab, on swiping left an item's row, the following options display:

- **Edit**: opens the *Edit* dialog for the item
- **Print Tag**: opens a dialog to print tags for the item
- **Clear**: clears the *Receive Qty* field for the item
- **Remove**: removes the item that wasn't initially on the document
- **View**: in finalized documents, opens the *Edit* dialog for the item in the read-only mode

| 01234567890125 | MELLAH Long flared dress | Mauve | LRG | SS 19 | 98 | 98 | 0 |
|---|---|---|---|---|---|---|---|
| ss | Mauve | XLG | SS 19 | 100 | 100 | 0 | Clear | Print Tag | Edit |
| 01234567890126 | MELLAH Long flared dress | Mauve | XLG | SS 19 | 100 | 0 | -100 |

## Editing Items Manually

In the *Items* tab, each item's received quantity can be edited manually. To open an item's *Edit* dialog, swipe left that item's row and tap **Edit**.



In the *Edit* dialog that opens, define *Receive Qty*. When done, tap **Save** in the right upper corner to confirm changes.

Alternatively, tap **Clear Quantity** at the bottom of the dialog to set the item's *Receive Qty* to zero and close the dialog.

> NOTE:
>
> If the edited item was not initially in the Purchase Order, the **Remove** button displays instead of **Clear Quantity**.

## Opening Item Edit Dialog Automatically

To open an item's *Edit* dialog automatically on that item's good scan, tap **Options** in the upper right corner of the screen:
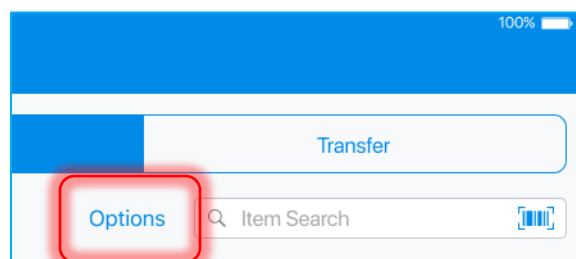
In the dialog that displays, turn the **Open Edit on Good Scan** switch on:
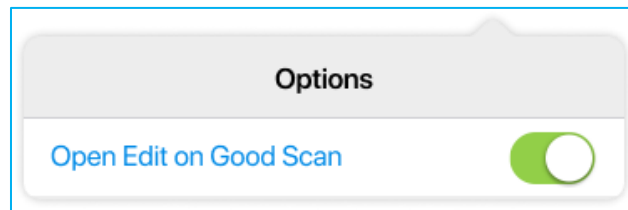


## Holding Purchase Order

Tapping **HOLD** saves the document in its current state without finalization:



If several possible hold reasons are defined in CHQ, on tapping **HOLD**, the *Hold Reason* dialog displays:



Having selected a reason, tap **Hold** in the top right corner.

## Printing Documents

To select a document for printing, tap **Print** at the bottom of the screen:

In the list, select the required document:

| Print |
| --- |
| Tags for All Items |
| Purchase Receipt |

On selecting, the *Printing Options* dialog opens.

If printing several documents at once is required, in the *Printing Options* dialog, select "Print" in the *Type* field for each document.

| Type | Print |
| --- | --- |
| Select Printer | Epson 4879 |

When done, tap **Print** in the right upper corner of the dialog.

To automatically print the selected document on finalizing, toggle the **Print on Finalize** switch on:

| HOLD | Print | | Print on Finalize | | FINALIZE |
| --- | --- | --- | --- | --- | --- |

*Transfer Tab*

Optionally, it is possible to transfer all items on the document to another location. In this case, on finalizing the Purchase Order, an associated Transfer Out can be automatically created.

To do so, tap **Transfer** at the top-right of the screen, next to *Items*.
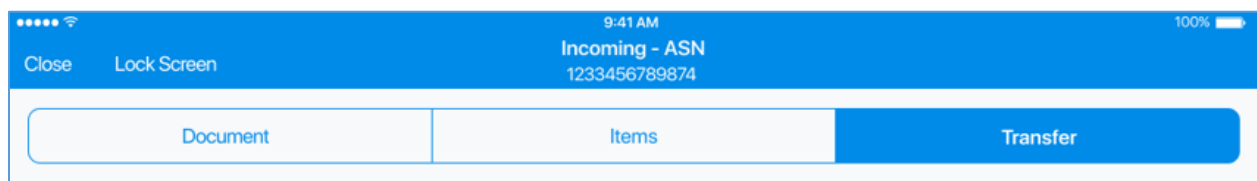
| Close   Lock Screen | Incoming – ASN 1233456789874 | 100% |
| --- | --- | --- |
| Document | Items | Transfer |

By default, on a new document, the option to transfer items is disabled. To enable it, turn the **Automatically Transfer Out** switch on.
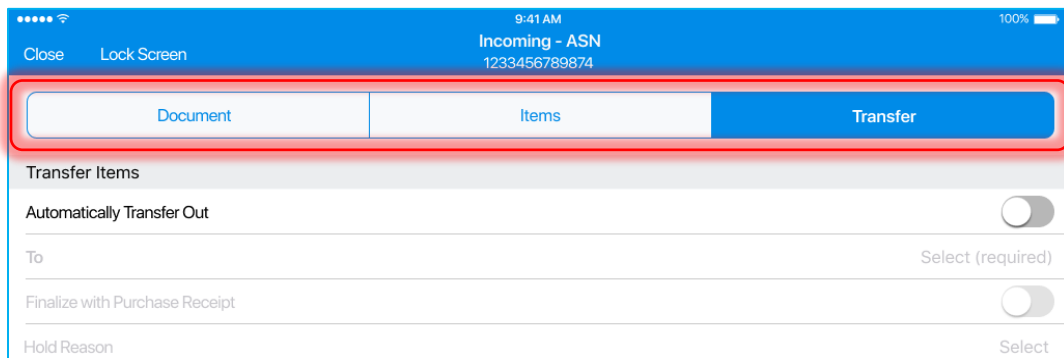


Turning the switch on allows for configuring all the other related fields:



NOTE:

If the **Automatically Transfer Out** switch is on, and there is no connection to the server, on tapping **Finalize**, the Server unavailable message displays:

*Finalized Purchase Order*

A finalized Purchase Order is stored in *History* in the read-only mode.

After finalization, it is possible to void/reverse a Purchase Order, that is cancel any quantity changes made in the stock ledger made after finalization of the Purchase Order.

To do so, open the finalized Purchase Order and tap **Void/Reverse** in the left bottom corner:
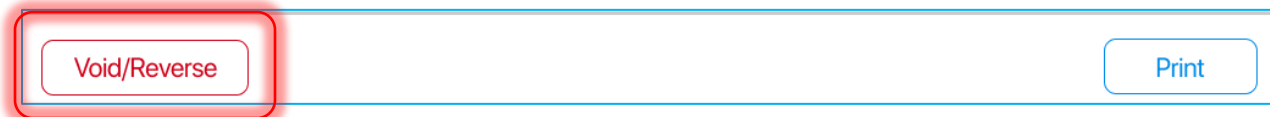


## Purchase Receipt without Purchase Order

A Purchase Receipt (PR) is used to add items received from a vendor to inventory.

Usually, a Purchase Receipt will be created automatically once a Purchase Order (PO) is finalized. In that case, the resulting PR is associated with that PO.

In POS Pro, however, it is possible to create and finalize a new PR <u>without</u> an existing PO.

To do so, in the *Incoming* tab of *Shipments*, tap **New Purchase Receipt**:
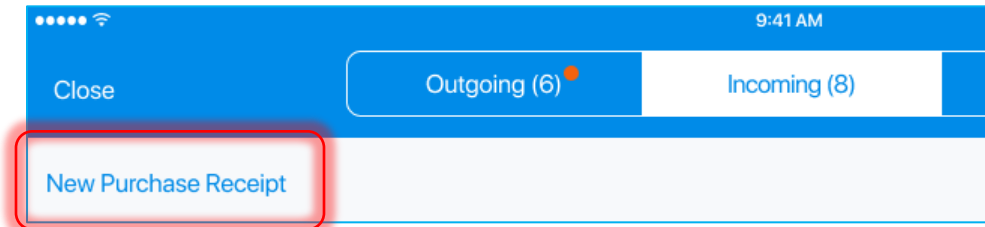


On tapping, the *Vendor* dialog opens:
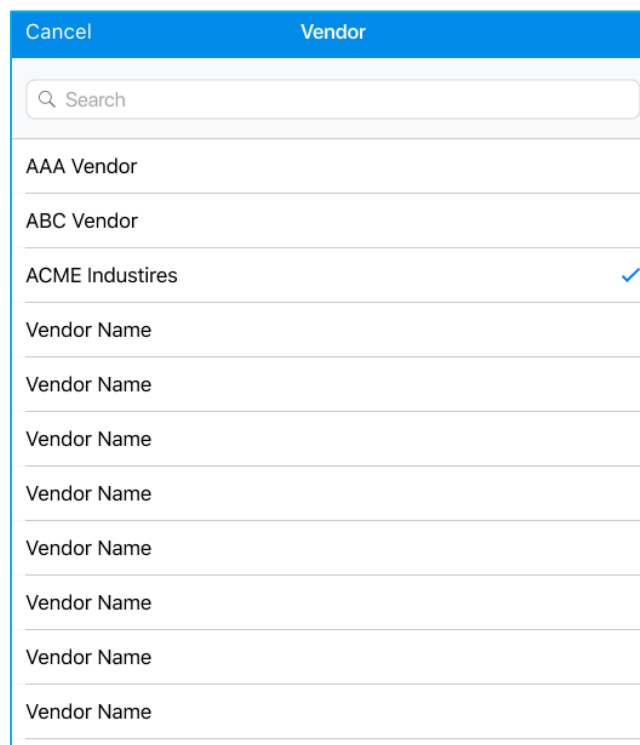


In the *Vendor* dialog, find and then tap the required vendor. Once selected, you will be redirected to the *Incoming* – Purchase Receipt area.

## Document Tab

The *Document* tab contains two sections: *Details* and *Summary.*



In the *Document* tab, the following fields are displayed in the *Details* section:

- **Type:** Purchase Order
- **Vendor:** vendor sending the merchandise; on tapping, the *Vendor Info* dialog displays
- **Vendor Invoice #:** vendor invoice number
- **Vendor Order #:** vendor order number
- **Last Edited:** the time/date of the last edit and the user who edited
- **Hold Reason:** the reason for holding the document; tap **Select** to choose a reason from the list
- **Notes**

In the *Summary* section below *Details*, the following fields are displayed:

- **Order Qty**: the quantity of items that have been ordered from a vendor
- **Receive Qty**: the quantity of items that have been received at a store location
- **Difference**: the difference between *Order Qty* and *Receive Qty*

*Items Tab*

To access the Items tab, tap **Items** at the top of the screen.
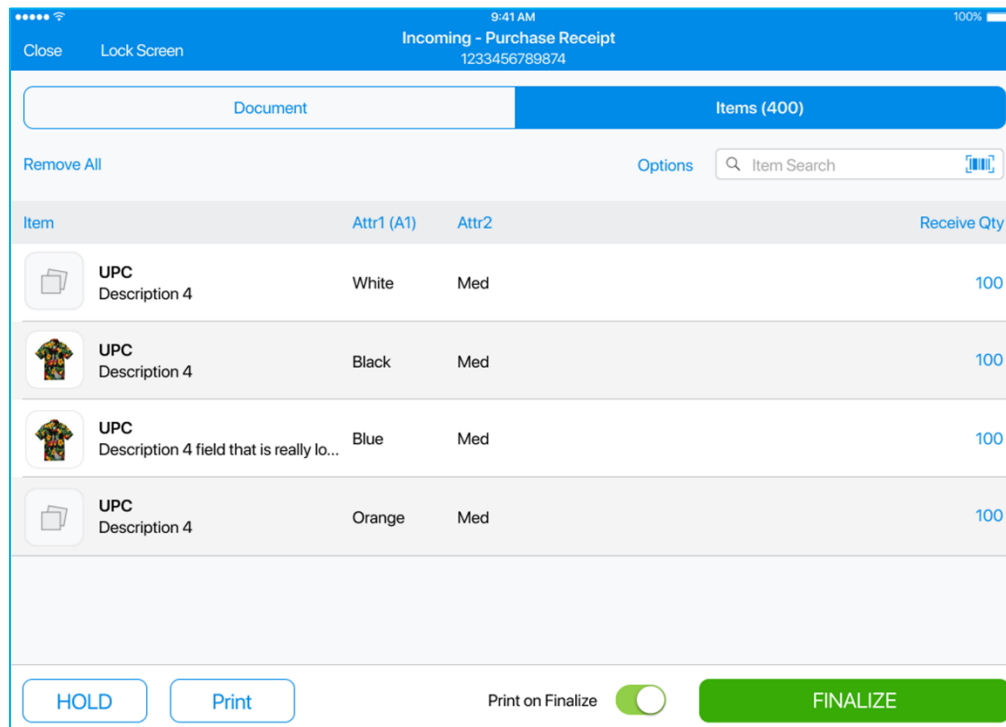


Initially, the *Items* tab contains no items. The user has to add items to the Purchase Receipt to finalize it.

Adding items is possible via scanning their bar codes. Alternatively, enter the item's UPC, PLU, or CLU in the *Item Search* field.

Receiving the item via any of the above methods will increase that item's *Receive Qty* by 1.

By default, the following columns are displayed in the *Items* tab:

- **Item:** item UPC and description
- **Attributes 1–3:** item attributes
- **Receive Qty:**  the quantity of the items that have been received at the store location

The list of items can be sorted by any of the columns according to the following principle:

- 1st tap: descending arrangement
- 2nd tap: ascending arrangement
- 3rd tap: back to default sort order

### Removing All Items

To remove all items added to the document, tap **Remove All**:



On tapping, the following dialog displays:



### Left Swipe Options

In the *Items* tab, on swiping left an item's row, the following options can be displayed:

- **Edit**: opens the *Edit* dialog for the item
- **Print Tag**: opens a dialog to print tags for the item
- **Remove**: removes the item that wasn't initially on the document

## Editing Items Manually

In the *Items* tab, each item's received quantity can be edited manually. To open an item's *Edit* dialog, swipe left that item's row and tap **Edit**.



In the *Edit* dialog that opens, define *Receive Qty*. When done, tap **Save** in the right upper corner to confirm changes.

Alternatively, tap **Remove** at the bottom of the dialog to remove the item and close the dialog.

## Opening Item Edit Dialog Automatically

To open an item's *Edit* dialog automatically on that item's good scan, tap **Options** in the right upper corner of the screen:
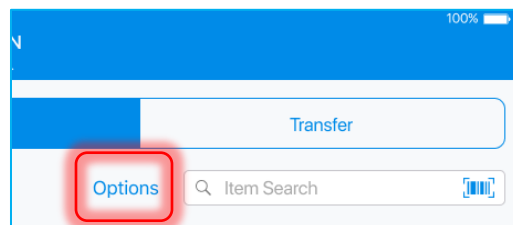


In the dialog that displays, turn the **Open Edit on Good Scan** switch on:
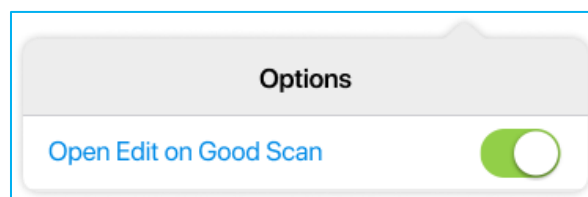
## Holding Purchase Receipt

Tapping **HOLD** saves the document in its current state without finalization:
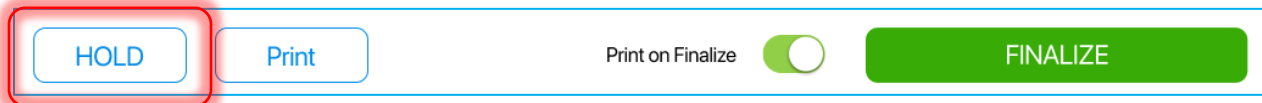
| HOLD | Print | | Print on Finalize | ⬤ | FINALIZE |

If several possible hold reasons are defined in CHQ, on tapping **HOLD**, the *Hold Reason* dialog displays:

| Cancel | **Hold Reason** | Hold |
|---|---|---|
| Stock Location | | |
| Count Verification Needed | | |
| Price Tagging | | ✓ |
| Disposition | | |

Having selected a reason, tap **Hold** in the top right corner.

## Printing Documents

To select a document for printing, tap **Print** at the bottom of the screen:

| HOLD | Print | | Print on Finalize | ⬤ | FINALIZE |

In the list, select the required document:

**Print**

Tags for All Items

Purchase Receipt

On selecting, the *Printing Options* dialog opens.
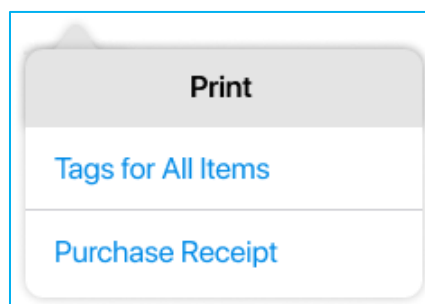
If printing several documents at once is required, in the *Printing Options* dialog, select "Print" in the *Type* field for each document.

| Type | Print |
|---|---|
| Select Printer | Epson 4879 |

When done, tap **Print** in the right upper corner of the dialog.

To automatically print the selected document on finalizing, turn the **Print on Finalize** switch on:



*Transfer Tab*

Optionally, it is possible to transfer all items on the document to another location. In this case, on finalizing the Purchase Receipt, an associated Transfer Out is automatically created.

To allow automatic transferring, tap **Transfer** at the top-right of the screen.
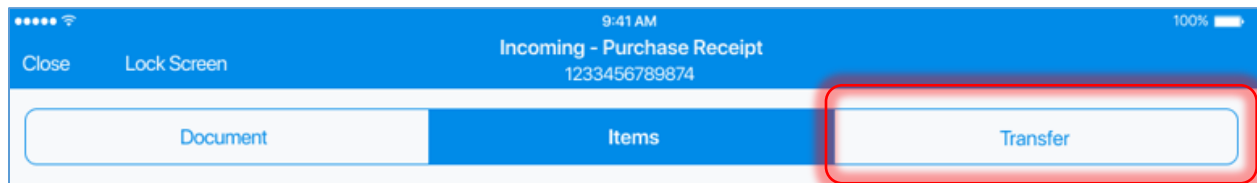


By default, on a new document, the *Automatic Transfer Out* option is disabled. To enable it, turn the **Automatically Transfer Out** switch on.
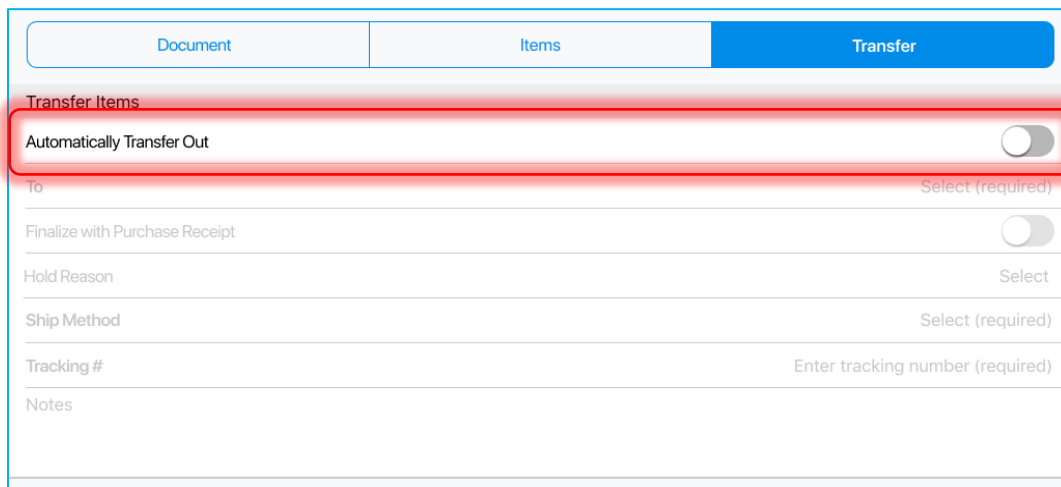


Once the switch is turned on, the related fields in the *Transfer Item* section of the tab become available for configuration:

- **To**: the target location; tap **Select** in the field to bring up a dialog and select a destination
- **Finalize with Purchase Receipt**: if true, a Transfer Out is automatically created and finalized on finalizing the Purchase Receipt; if false, a Transfer Out is created but put on hold on finalizing the Purchase Receipt; if **Automatically Transfer Out** is enabled, is true by default
- **Hold Reason**: only enabled if **Finalize with Purchase Receipt** is disabled; tap **Select** to define a reason for holding the resulting Transfer Out
- **Ship Method**: tapping **Select** displays the *Ship Method* dialog

- **Tracking #:** transfer tracking number
- **Notes:** transfer notes

    NOTE:

    If the **Automatically Transfer Out** switch is on, and there is no connection to the server, on tapping **Finalize**, the Server Unavailable message displays.

### Finalized Purchase Receipt

A finalized Purchase Receipt is stored in *History* in the read-only mode.

After finalization, it is possible to void/reverse a Purchase Receipt, that is cancel any quantity changes made in the stock ledger after finalization of the Purchase Receipt.

To do so, open the finalized Purchase Receipt and tap **Void/Reverse** in the bottom left corner:



## Updated Shipments: Outgoing Documents

Version 6.11 – TWD-21432

January 2020

In POS Pro, the *Outgoing* section of the *Shipments* area contains all the store's outgoing shipment documents.

### Transfer Order

Transfer Order (TO) is a request to your location to send out inventory to another location.

To open a Transfer Order, in the *Outgoing* tab of the *Shipments* area, tap the required Transfer Order (TO):



A Transfer Order contains two tabs: *Document* and *Items*.

*Document Tab*

On tapping a Transfer Order in the *Outgoing* tab, its *Document* tab opens:
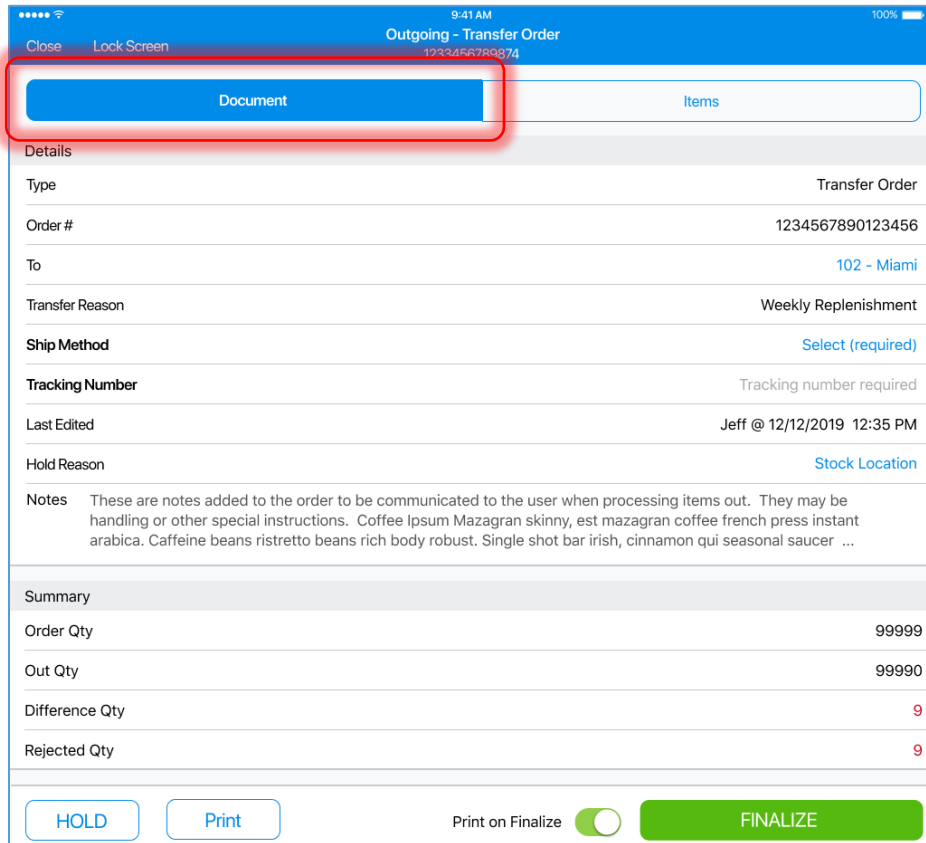


The tab contains two sections: *Details* and *Summary*.

In the *Details* section, the following fields are displayed:

- **Type:** Transfer Order
- **Order #** Transfer Order identifier
- **To**: the code and name of the target location; tap to display the *Location Information* dialog
- **Transfer Reason:** reason for performing a transfer
- **Ship Method**: the method of shipping; tap **Select** to define a ship method
- **Tracking Number:** transfer tracking number
- **Last Edited**: the date/time of the last edit and the user who edited
- **Hold Reason**: the reason for the hold of the document; tap **Select** to define a reason
- **Notes:** notes to be communicated to the customer while processing the order

In the *Summary* section*,* the following fields display:

- **Order Qty**: the quantity of items that have been ordered to transfer
- **Out Qty**: the quantity of items that the location is transferring
- **Difference Qty**: the difference between *Order Qty* and *Out Qty*

- **Rejected Qty:** the quantity of items that the store location is rejecting (the store cannot send them)

### Items Tab

To access item details, tap **Items** at the top-right of the screen.

The *Items* tab contains the list of items that are to be transferred to another location:
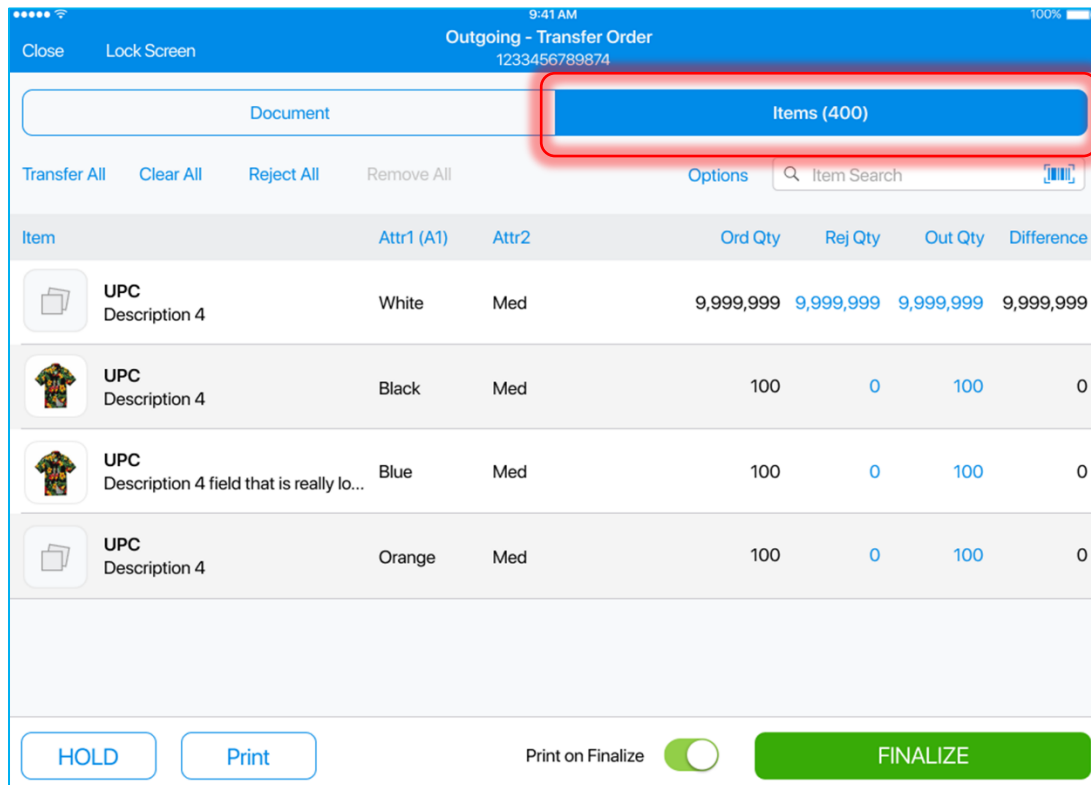


Also, in the *Items* tab, the user can mark how many items the store is transferring and/or rejecting.

By default, the following columns are displayed in the *Items* tab:

- **Item:** item UPC and description
- **Attributes 1–3:** item attributes
- **Ord Qty:** the quantity of the items that need to be transferred to another location
- **Rej Qty:**  the quantity of the items that have been rejected (the store cannot send them); tap any value in the column to open the *Edit* dialog for that item
- **Out Qty:** the quantity of the items that the store is transferring; tap any value in the column to open the *Edit* dialog for that item
- **Difference:** the difference between *Ord Qty* and *Out Qty*

The list of items can be sorted by any of the columns according to the following principle:

- 1st tap: descending arrangement
- 2nd tap: ascending arrangement
- 3rd tap: back to default sort order

## Searching for Items

It is possible to search for items in two ways:

- scanning the item's barcode; to do so, tap the **barcode scanning icon**
- entering the item's UPC, PLU, or ALU in the *Item Search* field
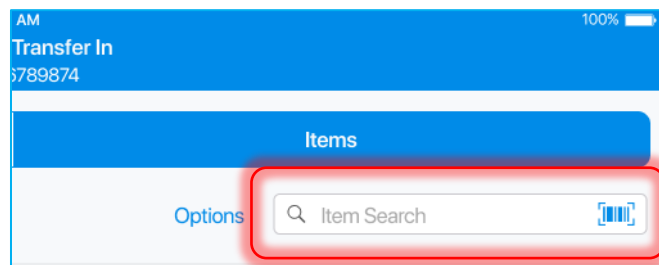


If an exact match on the Transfer Order is found, the *Out Qty* of that item will be incremented by 1 immediately.

If the searched item is not on the Transfer Order, the search will be performed in the *Catalog*. If an item is found in the *Catalog*, it will be added to the document with the *Out Qty* "1".  The *Ord Qty*, *Rej Qty*, and *Difference* fields will be blank.

## Managing Transfer Order Item Quantities

It is possible to manage the quantities of all items at once.

Tapping **Transfer All** in the top left corner matches the *Out Qty* field with the *Ord Qty* field for all items on the document.
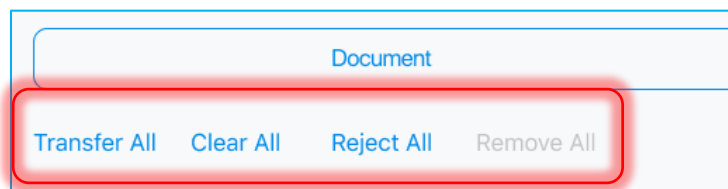
Tapping **Clear All** sets the *Rej Qty* and the *Out Qty* field to zero for all items that were initially on the document. On tapping, the following dialog displays:
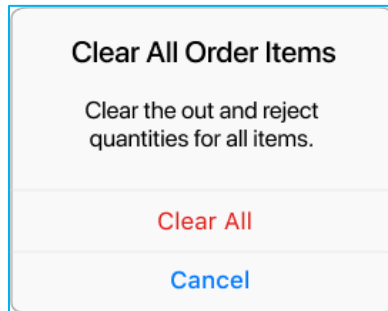


Tapping **Reject All** matches the *Rej Qty* field with the *Ord Qty* field. On tapping, the following dialog displays:
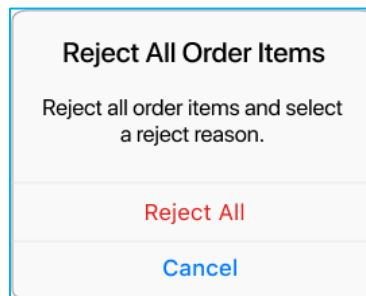


On tapping **Reject All**, the *Reject Reason* dialog displays. Selecting a reason in the dialog applies that reason to all rejected items and closes the dialog.

Tapping **Remove All** removes all the items that were not initially on the Transfer Order. On tapping, the following dialog displays:
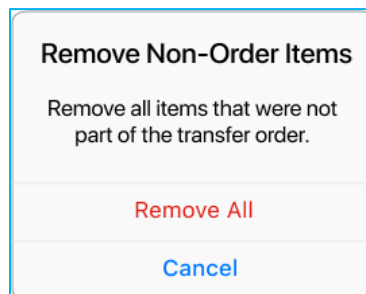


## Left Swipe Options

In the *Items* tab, on swiping left an item's row, the following options can be displayed:

- **Edit**: opens the *Edit* dialog for the item
- **Print Tag**: opens a dialog to print tags for the item
- **Clear**: clears the *Out Qty, Rej Qty* fields, and the reject reason for the item (only for items that were initially in the document and have an *Ord Qty*)

- **Remove**: clears the *Out Qty* field for the item (only for items that were added to the document by the user)
- **View**: in finalized documents, opens the *Edit* dialog for the item in the read-only mode



## Editing Items Manually

In the *Items* tab, each item's quantities can be edited manually. To open an item's *Edit* dialog, swipe left that item's row and tap **Edit**.



In the *Edit* dialog, define *Out Qty, Reject Qty* and *Reject Reason*. When done, tap **Save** in the right upper corner to confirm changes.

Alternatively, tap **Clear Quantity** at the bottom of the dialog to set the item's *Out and Reject Qty* to zero and close the dialog.

> NOTE:
>
> If the edited item was not initially in the Transfer In, the **Remove** button will be displayed instead of **Clear Quantity**.

## Opening Item Edit Dialog Automatically

To open an item's *Edit* dialog automatically on that item's good scan, tap **Options** in the right upper corner of the screen:



In the dialog that displays, turn the **Open Edit on Good Scan** switch on:



## Holding Transfer Order

Tapping **HOLD** saves the document in its current state without finalization:



If several possible hold reasons are defined in CHQ, on tapping **HOLD**, the *Hold Reason* dialog displays:



Having selected a reason, tap **Hold** in the top right corner.

## Printing Documents

To select a document for printing, tap **Print** at the bottom of the screen and select the required document:



On selecting, the *Printing Options* dialog will open.

If printing several documents at once is required, in the *Printing Options* dialog, select "Print" in the *Type* field for each document.



When done, tap **Print** in the upper right corner of the dialog.

To automatically print the transfer memo on finalizing, turn the **Print on Finalize** switch on:



## Finalizing

To finalize the Transfer Order, tap **Finalize** in the bottom right corner.

If some required information is missing on finalizing the document, the following message displays:
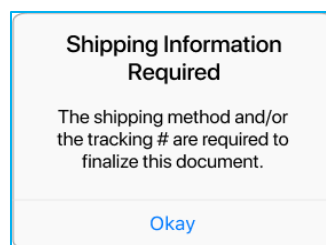
f there is no Internet or server connection on finalizing the document, the following message displays:
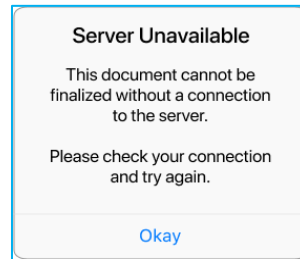


If the document has been finalized or changed by another user since it was opened, and the user tries to finalize it, the following message displays:
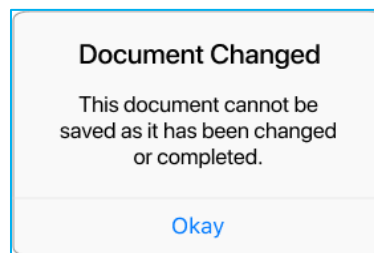


## Transfer Out

Transfer Out (T-Out) contains items that your store is sending to another location. In POS Pro, it is possible to create a Transfer Out without a Transfer Order.

To do so, in the upper right corner of *Outgoing* in the *Shipments* area, tap **New Outgoing**:
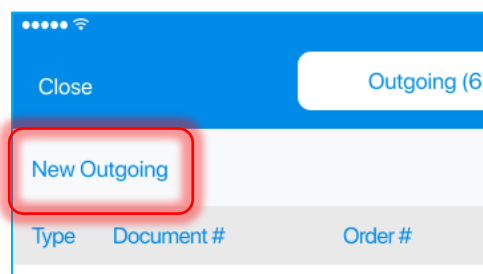


On tapping, the *New Outgoing* dialog opens:



On opening, the default type of the created document is Transfer Out. Tap **Select** in the *Location* field to define the target location from a list.

Once done, tap **Create** in the right upper corner.

*Document Tab*

After the Transfer Out is created, its *Document* tab opens:



The document tab contains two sections: *Details* and *Summary.*

In the *Details* section, the following fields display:

- **Type:** Transfer Out
- **To**: the code and name of the target location; tap to display the *Location Information* dialog
- **Transfer Reason:** the reason for the transfer; tap **Select** to define a reason
- **Ship Method**: the method of shipping; tap **Select** to define a ship method
- **Tracking Number:** transfer tracking number
- **Last Edited**: the date/time of the last edit and the user who edited
- **Hold Reason**: the reason for the hold of the document; tap **Select** to define a reason
- **Notes:** notes to be communicated during transfer execution

In the *Summary* section, the following field displays:

- **Out Qty**: the quantity of items that the location is transferring

*Items Tab*

To access information on items, tap **Items** at the top-right of the screen.

Initially, the *Items* tab contains no items. The user has to add items to the document to be able to finalize it.
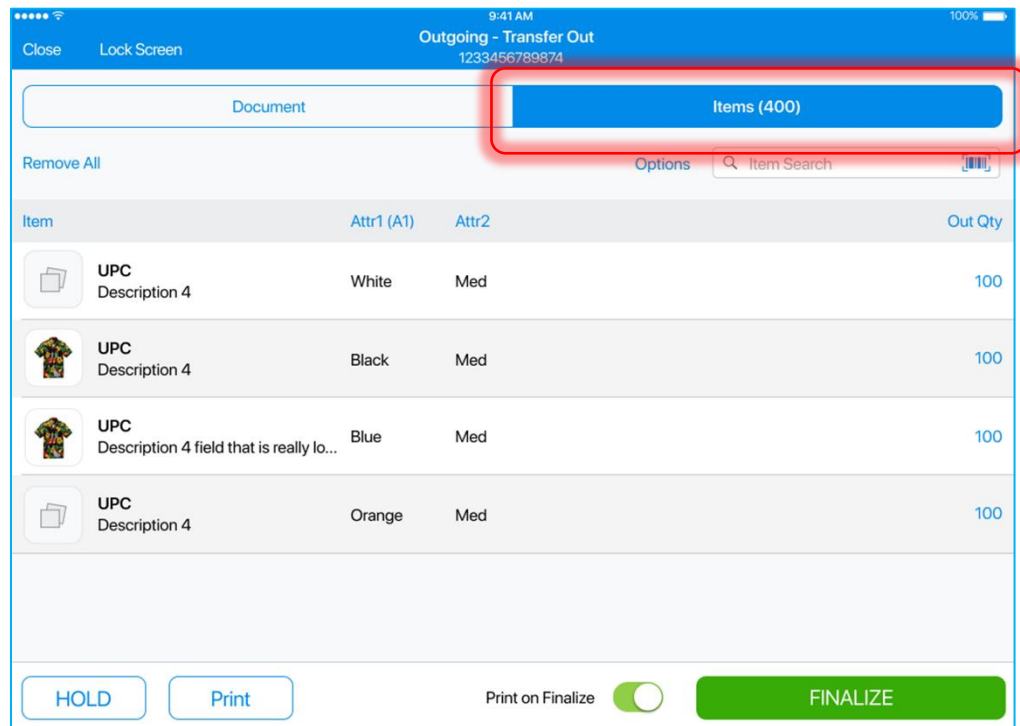


There are two ways to add an item to the document:

- scanning the item's barcode; to do so, tap the **barcode scanning icon**
- entering the item's UPC, PLU, or ALU in the *Item Search* field
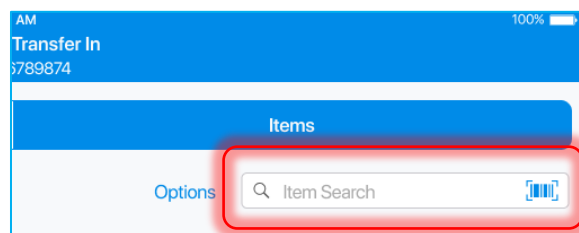


Each successful scan or search for an item increments that item's *Out Qty* by 1.

In the Items tab, the following columns item information is available:

- **Item:** item UPC and description
- **Attributes 1–3:** item attribute
- **Out Qty:** the quantity of the items that the store is transferring; tap any value in the column to open the *Edit* dialog for that item

The list of items can be sorted by any of the columns according to the following principle:

- 1st tap: descending arrangement
- 2nd tap: ascending arrangement
- 3rd tap: back to default sort order

## Removing All Items

To remove all items from the Transfer Out, tap **Remove All** in the top left corner:



On tapping, the following dialog displays:



## Left Swipe Options

In the *Items* tab, on swiping left an item's row, the following options can be displayed:

- **Edit**: opens the *Edit* dialog for the item
- **Print Tag**: opens a dialog to print tags for the item
- **Remove**: clears the *Out Qty* field for the item
- **View**: in finalized documents, opens the *Edit* dialog for the item in the read-only mode

## Editing Items Manually

In the *Items* tab, each item's quantity can be edited manually. To open an item's *Edit* dialog, swipe left that item's row and tap **Edit**.



In the *Edit* dialog, define *Out Qty*. When done, tap **Save** in the right upper corner to confirm changes.

Alternatively, tap **Remove** at the bottom of the dialog to set the item's *Out Qty* to zero and close the dialog.

## Opening Item Edit Dialog Automatically

To open an item's *Edit* dialog automatically on that item's good scan, tap **Options** in the right upper corner of the screen:



In the dialog that displays, turn the **Open Edit on Good Scan** switch on:

## Holding Transfer Out

Tapping **HOLD** saves the document in its current state without finalization:



If several possible hold reasons are defined in CHQ, on tapping **HOLD**, the *Hold Reason|* dialog displays:



Having selected a reason, tap **Hold** in the top right corner.

## Printing Documents

To select a document for printing, tap **Print** at the bottom of the screen:



In the list, select the required document:



On selecting, the *Printing Options* dialog will open.

If printing several documents at once is required, in the *Printing Options* dialog, select "Print" in the *Type* field for each document.

When done, tap **Print** in the right upper corner of the dialog.

To automatically print the transfer memo on finalizing, toggle the **Print on Finalize** switch on:



### Purchase Return

Purchase Return (RET) is a type of outgoing document returning a store's merchandise to a vendor.

To create a Purchase Return, in the upper right corner of *Outgoing* in the *Shipments* area, tap **New Outgoing**:
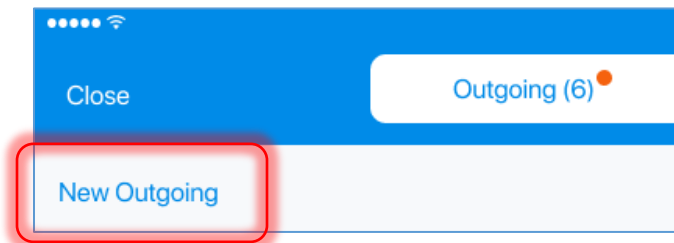


On tapping, the *New Outgoing* dialog opens:



Select **Purchase Return** in the *Type* field.

Then, fill out the fields underneath:

- **Vendor**: the vendor the merchandise is being returned to; tap **Select** to select a vendor from the list
- **Vendor Invoice #**
- **Vendor Order #**

When done, tap **Create** in the right upper corner.

*Document Tab*

On tapping **Create**, the *Document* tab of the resulting Purchase Receipt opens:



The *Document* tab contains two sections: *Details* and *Summary*.

In the *Details* section, the following fields are displayed:

- **Type**
- **To**: the vendor the merchandise is being returned to; tap the value to open the *Vendor Info* dialog
- **Vendor Invoice #**
- **Vendor Order #**
- **Ship Method**: the method of shipping; tap **Select** to define a ship method
- **Tracking Number**
- **Last Edited**: the date/time of the last edit and the user who edited
- **Hold Reason**: the reason for the hold of the document; tap **Select** to define a reason
- **Notes**

In the *Summary* section below *Details*, the following field is displayed:

- **Return Qty**: the quantity of items that are being returned

*Items Tab*

Initially, the *Items* tab contains no items. The user has to add items to the document to be able to finalize it.
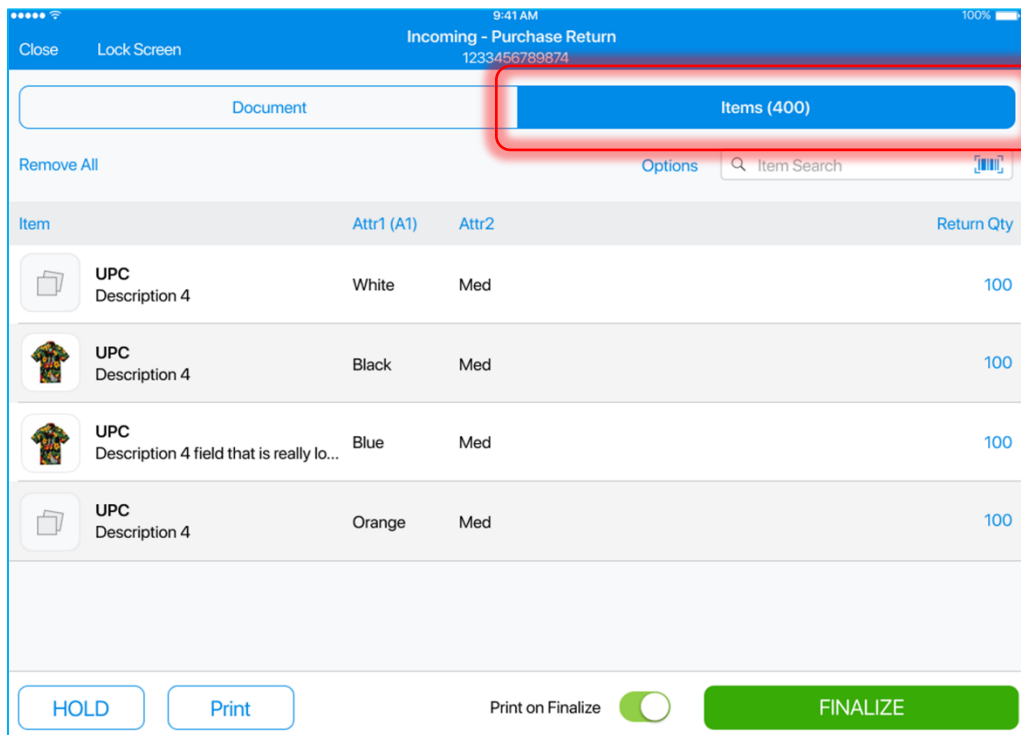


There are two ways to add an item to the document:

- scanning the item's barcode; to do so, tap the **barcode scanning icon**
- entering the item's UPC, PLU, or ALU in the *Item Search* field
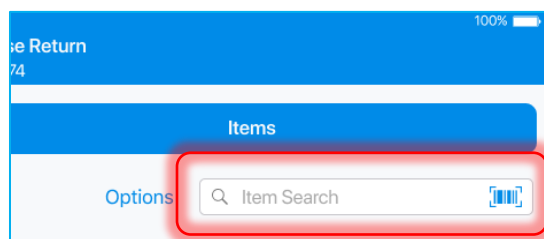


Each successful scan or search for an item increments that item's *Return Qty* by 1.

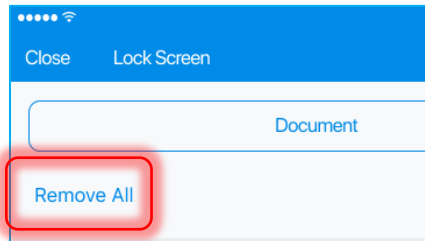In the *Items* tab, the following columns item information is available:

- **Item:** item UPC and description
- **Attributes 1–3:** item attribute
- **Return Qty:** the quantity of the items that are being returned to the vendor; tap any value in the column to open the *Edit* dialog for that item

The list of items can be sorted by any of the columns according to the following principle:

- 1st tap: descending arrangement
- 2nd tap: ascending arrangement
- 3rd tap: back to default sort order

## Removing All Items

To remove all items from the Purchase Return, tap **Remove All** in the top left corner:



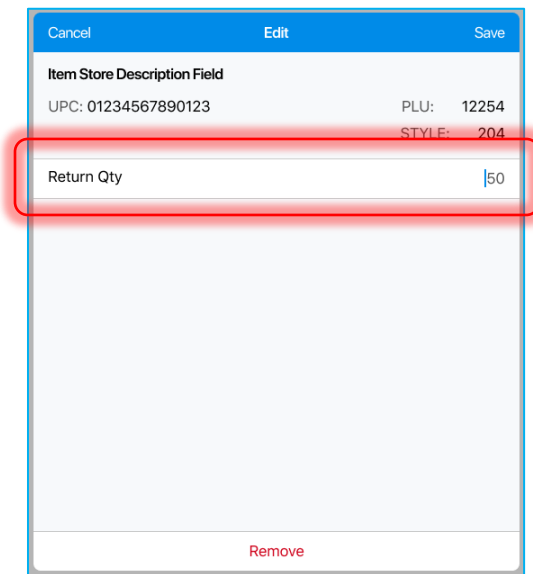On tapping, the following dialog displays:



## Left Swipe Options

In the *Items* tab, on swiping left an item's row, the following options can be displayed:

- **Edit**: opens the *Edit* dialog for the item
- **Remove**: clears the *Out Qty* field for the item

## Editing Items Manually

In the *Items* tab, each item's quantity can be edited manually. To open an item's *Edit* dialog, swipe left that item's row and tap **Edit**.



In the *Edit* dialog, define *Return Qty*. When done, tap **Save** in the right upper corner to confirm changes.

Alternatively, tap **Remove** at the bottom of the dialog to set the item's *Return Qty* to zero and close the dialog.

## Opening Item Edit Dialog Automatically

To open an item's *Edit* dialog automatically on that item's good scan, tap **Options** in the right upper corner of the screen:



In the dialog that displays, turn the **Open Edit on Good Scan** switch on:

## Holding Purchase Return

Tapping **HOLD** saves the document in its current state without finalization:



If several possible hold reasons are defined in CHQ, on tapping **HOLD**, the *Hold Reason|* dialog displays:
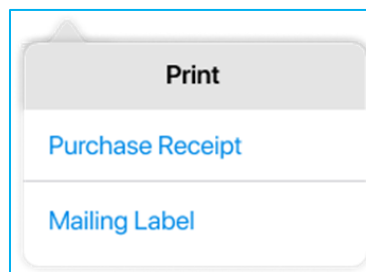


Having selected a reason, tap **Hold** in the top right corner.

## Printing Documents

To select a document for printing, tap **Print** at the bottom of the screen:



In the list, select the required document:



On selecting, the *Printing Options* dialog will open.

If printing several documents at once is required, in the *Printing Options* dialog, select "Print" in the *Type* field for each document.



When done, tap **Print** in the right upper corner of the dialog.

To automatically print one of the above documents on finalizing, toggle the **Print on Finalize** switch on:



### Finalized Purchase Return

A finalized Purchase Return is stored in *History* in the read-only mode.

After finalization, it is possible to void/reverse a Purchase return, that is, cancel any quantity changes made in the stock ledger by finalization of the Purchase Return. To do so, open the finalized Purchase Return and tap **Void/Reverse** in the left bottom corner:
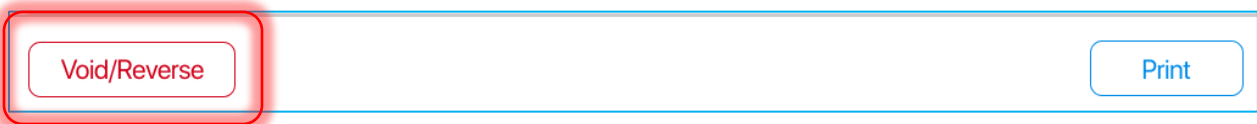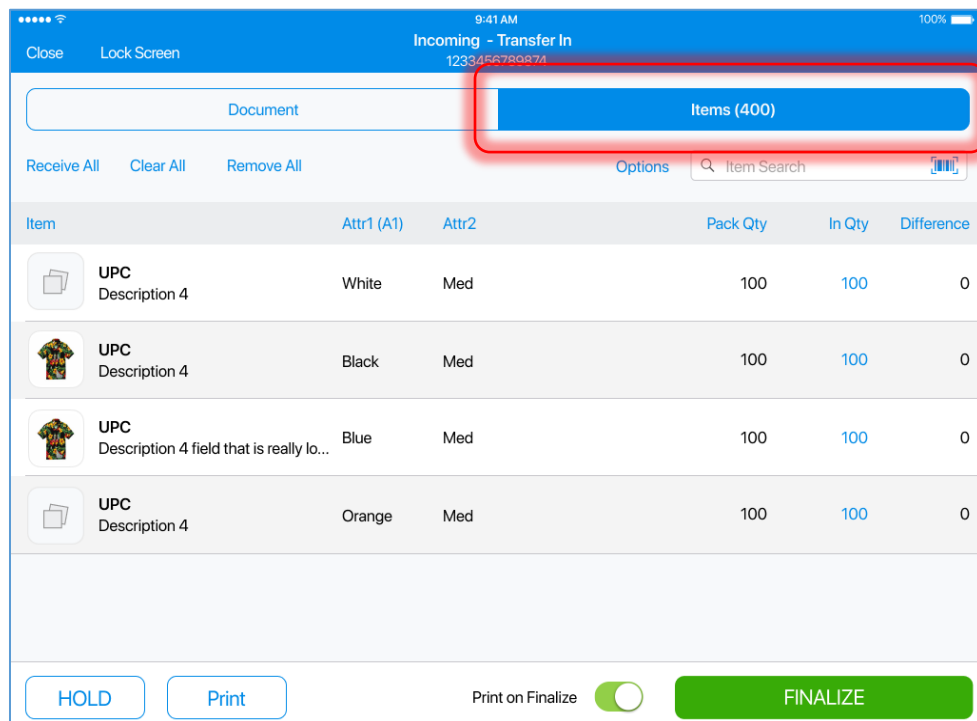


## Updated Items Area for Shipment Documents

Version 6.11 – TWD-23134

January 2020

For Shipment documents, we've updated the item grid in the *Items* tab.

The tab is available once you opened any Shipment document at the top of the screen:

### Multiple Item Lines and Image

Now, it is possible to display multiple lines for one item as well as assign an image to it:

| Item | | Attr1 (A1) | Attr2 | Pack Qty | In Qty | Difference |
|---|---|---|---|---|---|---|
| | UPC<br>Description 4 | White | Med | 100 | 100 | 0 |
| | UPC<br>Description 4 | Black | Med | 100 | 100 | 0 |

Also, the item grid contains the following columns:

- **Item**: the column displays the *UPC* and *Description 4* fields for each item; in this POS Pro version, only these two fields are available for display
- **Attr 1–3:** the user can configure aliases for *Attributes* in CHQ
- **Quantity Fields:** the number and the type of *Quantity* fields displayed depend on the type of the document

NOTE:

The aliases for Attributes can be configured under *CHQ > settings > inventory / catalog > inventory labels >* the *attributes* section.

### Applying Sort to Item

It is possible to sort items by the fields displayed in the *Item* column. To do so, tap the *Item* label to open the following dialog:

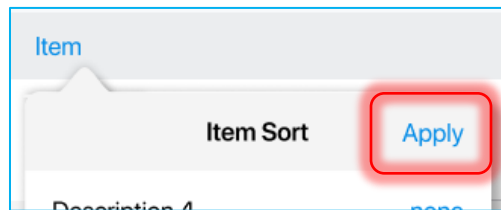| Item | | Attr1 (A1) | Attr2 |
|---|---|---|---|
| **Item Sort** | **Apply** | White | Med |
| Description 4 | none | | |
| | | Black | Med |
| Description 1 | none | | |
| PLU | none | Blue | Med |
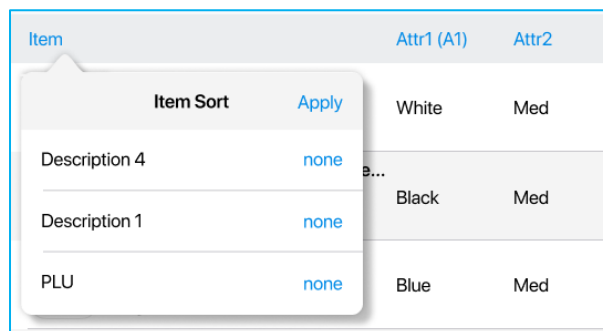
Tap **none** for the required column to configure sorting.

There are following types of sort available:

- ascending
- descending
- default sort/none

When done, tap **Apply** in the right upper corner of the dialog:
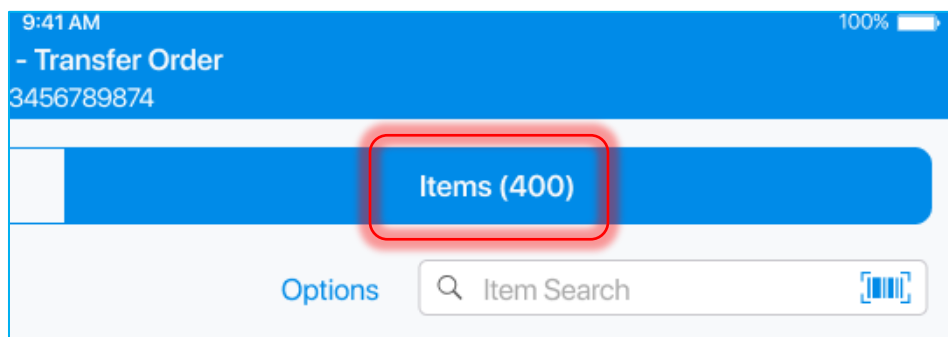


> NOTE:
>
> If the user has applied a sort, and then added new items to the list, the sort will be cleared.

## Quantity Count in the Items Label

The new feature allows for displaying the current total quantity next to the *Items* tab label:



The type of quantity displayed differs for various documents:

| Type of document | Quantity displayed |
|---|---|
| Purchase Order, ASN, Purchase Receipt | total *Received Qty* |
| Adjustment Memo | net *Adjustment Qty* |
| Ship Memo, Store Pickup Memo | total *Ship Qty* |
| Transfer Order, Transfer Out | total *Out Qty* |
| Transfer In | total *In Qty* |

## Updated Shipment Items Grid

Version 6.11 – TWD-25804

January 2020

In the *Items* section of all shipment documents, the following changes have been applied:

- *Description 4:* the field length has been increased
- *Attribute 1:* Alias 1 will display as column header (for example, "Color")
- *Attribute 2:* the base value (without aliases) will display as column header (for example, "Size")
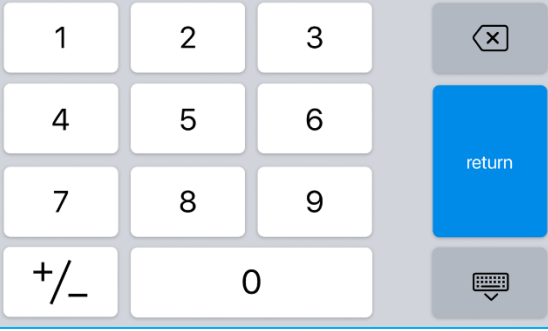
  NOTE:

  The changes are hardcoded.
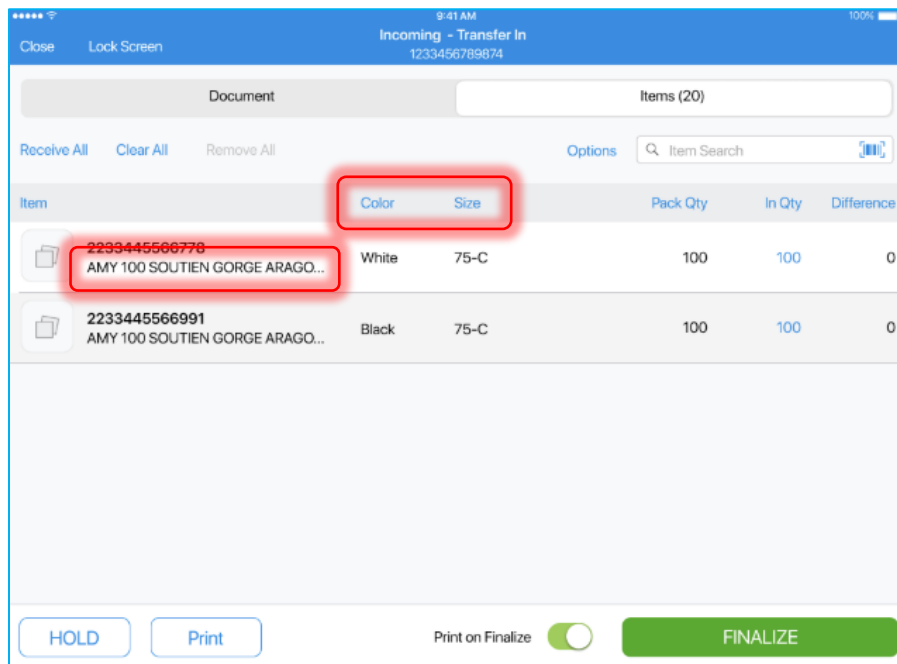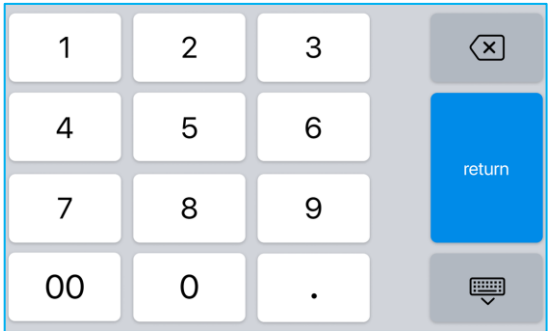


## Numeric Keyboards

Version 6.11 – TWD-21933

January 2020

In POS Pro, the numeric keyboard is used when manual input is required. In different areas, different types of keyboard are used.

The following types of keyboard are used:

| Cases of use | Keyboard |
|---|---|
| • changing an item's quantity in a field<br>• editing or adding discounts<br>• typing in a decimal value |  |
| • typing in a number of duplicate items<br>• typing in a barcode ID<br>• typing a number of copies to be printed<br>• typing in an item's PLU or UPC<br>• typing in an order number |  |
| • typing in a number of duplicate items<br>• editing or adding discounts<br>• typing in a negative value; tap **+/-** to enter a negative or a positive value |  |
| • typing in a number of duplicate items<br>• editing or adding discounts<br>• typing in a decimal value<br>• typing in a negative value; tap **+/-** to enter a negative or a positive value |  |
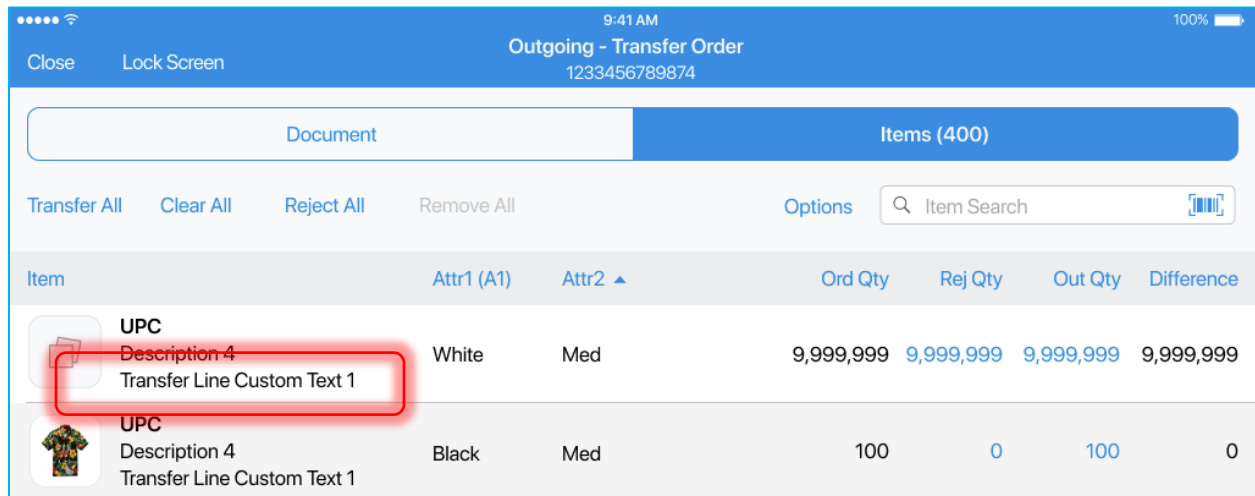
## Transfer Item Custom Text 1 Added for Display in Transfers

Version 6.11 – TWD-25075

January 2020

In the *Shipments* area of the POS Pro, a Custom Text 1 field has been added for display for Transfer Orders, Transfers In, and Transfers Out.

The field displays in the *Item* column of the Items tab of the documents:



> NOTE:
>
> The custom line can be configured under *CHQ > settings > transfers > custom fields > transfer lines.*
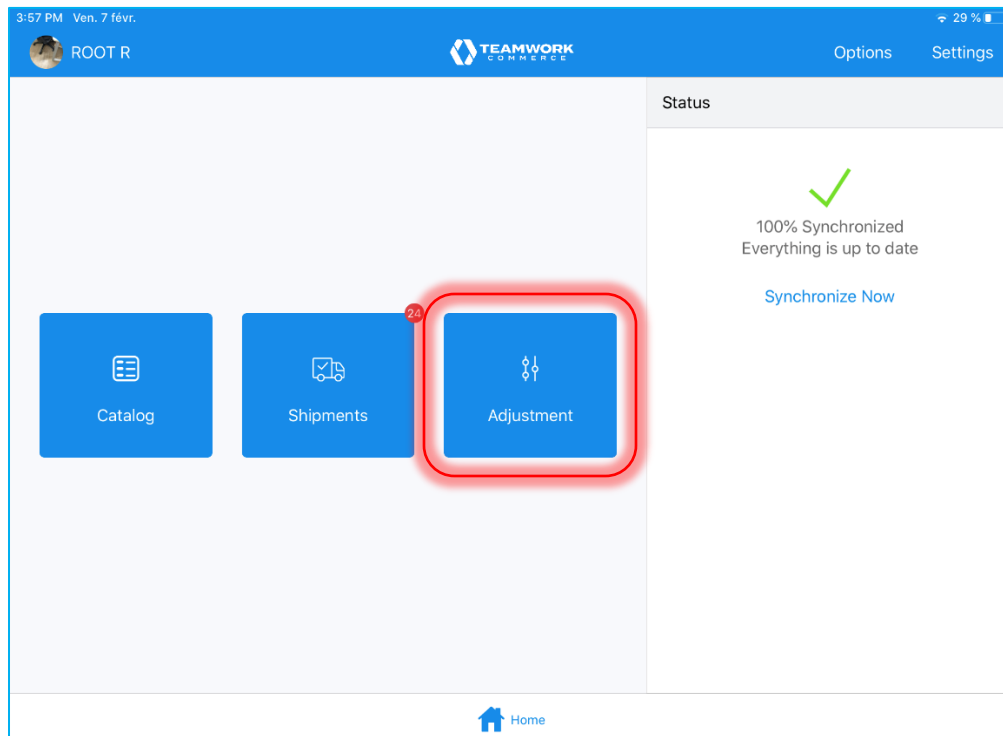
## Updated Adjustments

Version 6.11 – TWD-22958

January 2020

The POS Pro app now has new *Adjustments* area that allows the user to create and manage Adjustment Memos.

Adjustment Memos are used to record changes in quantities of merchandise that has been stolen, lost, found, or returned.

To access the *Adjustments* area, tap **Adjustments** on *Home Screen*:



## Adjustments Area

Once the **Adjustments** icon is tapped on the app's *Home Screen*, the list of existing Adjustment Memos opens:

In the document grid, the following information on the Adjustment Memos display by default:

- *Memo #*
- *Universal #*
- *Date/time*
- *Status*
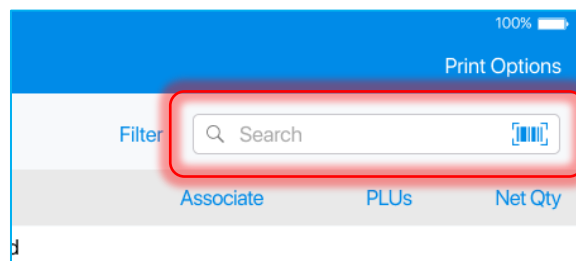- *Associate*
- *Line Items*

## Data Refreshing

To refresh, pull the screen down. On pulling, the following icon appears:



Refreshing ...
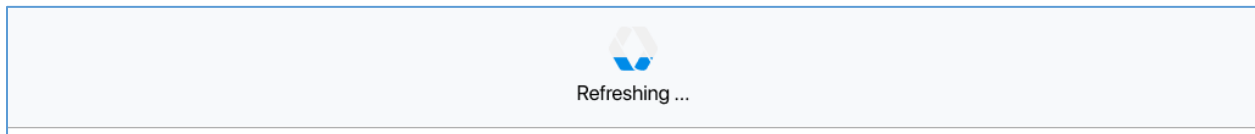
## Searching Adjustment Memos

There are two ways to search for a document:

- tapping the **barcode scanning icon** and scanning a document
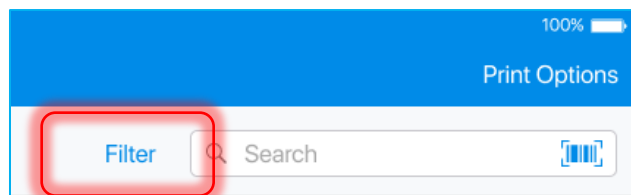- searching for matches in the *Search* field



> NOTE:
>
> The search is performed by the *Memo #* and *Universal #* fields.

## Setting Time Frame

In *Adjustments*, to set a time frame for the displayed documents, tap **Filter** next to the search field:

NOTE:

The default time frame is "Last 30 days".

*Document Statuses*

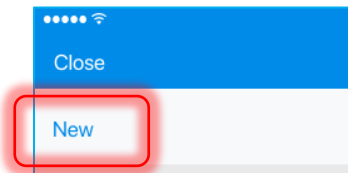Statuses inform the user about the current state of an Adjustment Memo:



The following statuses can be applied:

- **Held**: the Memo is not posted; the reason for the hold is displayed next to the status
- **Editing:** the Memo is currently being edited
- **Posted:** the Memo has been posted

## Creating Adjustment Memo

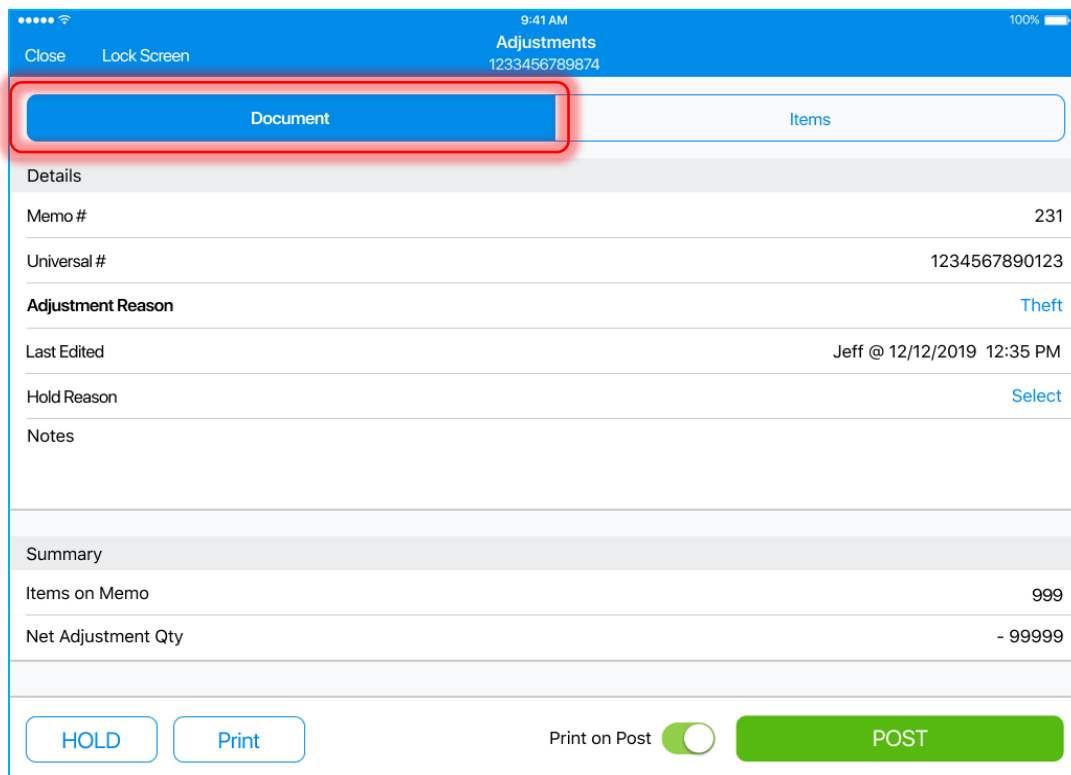To create an Adjustment Memo, in *Adjustments*, tap **New**:



On tapping, the *Adjustment Reason* dialog opens:

*Document Tab*

On selecting a reason, the *Document* tab of the resulting Adjustment Memo opens:



The tab contains two sections: *Details* and *Summary*.

In the *Details* section, the following fields display:

- **Memo #:** adjustment memo id
- **Universal #:** adjustment memo universal id
- **Adjustment Reason**: the reason for the quantity adjustment; tap the value to select a different reason
- **Last Edited:** date/time of the last edit and the information on who performed edits
- **Hold Reason:** the reason for hold of the Memo; tap **Select** to define a reason
- **Notes:** any information that needs to be passed while adjustment memo processing

In the *Summary* section, the following fields display:

- **Items on Memo:** the number of items on the Memo
- **Net Adjustment Qty:** the net quantity being adjusted, as a Memo can contain items with positive and negative values
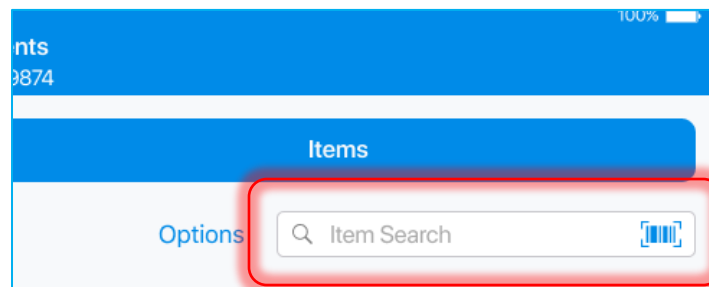
*Items Tab*

On initial opening, the *Items* tab displays no items. The user has to add items to be able to post the Memo.
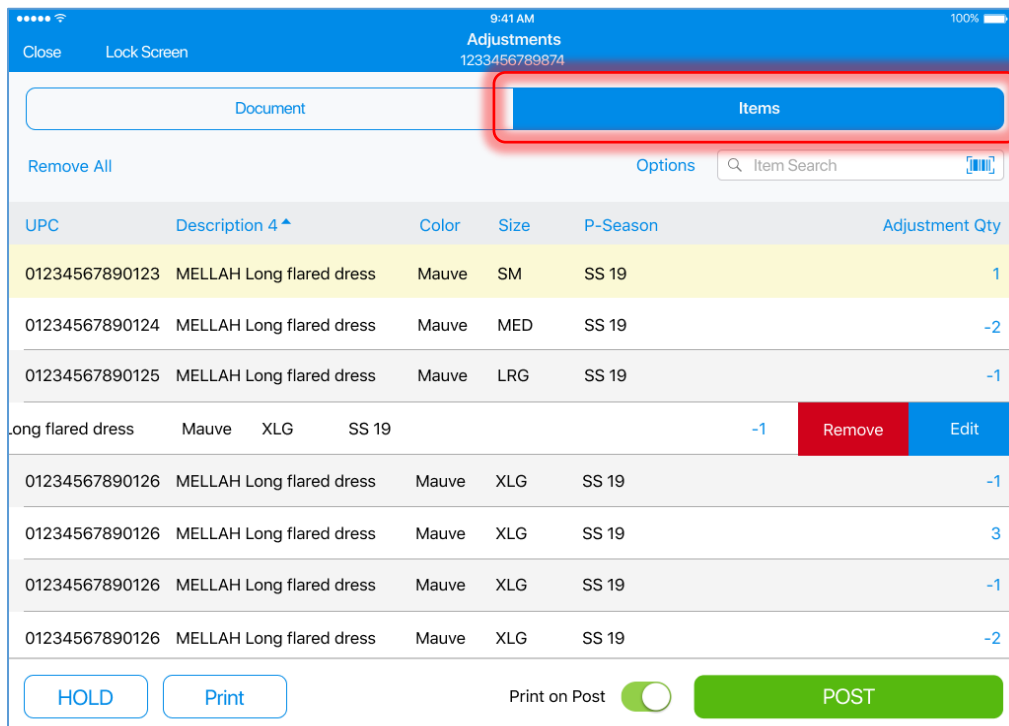


There are two ways to add an item to the document:

- scanning the item's barcode; to do so, tap the **barcode scanning icon**
- entering the item's UPC, PLU, or ALU in the *Item Search* field



Each successful scan or search for an item increments that item's *Adjustment Qty* by 1.

By default, the following columns display in the *Items* tab:

- **UPC:** item Universal Product Code
- **Description 4:** item description
- **Attributes 1–3:** item attributes
- **Adjustment Qty:** the quantity that is being adjusted

The list of items can be sorted by any of the columns according to the following principle:
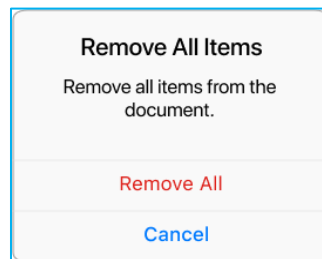
- 1st tap: descending arrangement
- 2nd tap: ascending arrangement
- 3rd tap: back to default sort order

## Removing All Items

To remove all items from the Adjustment Memo, tap **Remove All** in the top left corner:
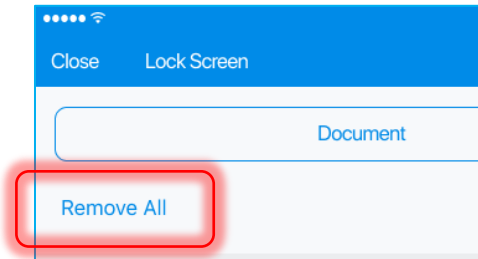


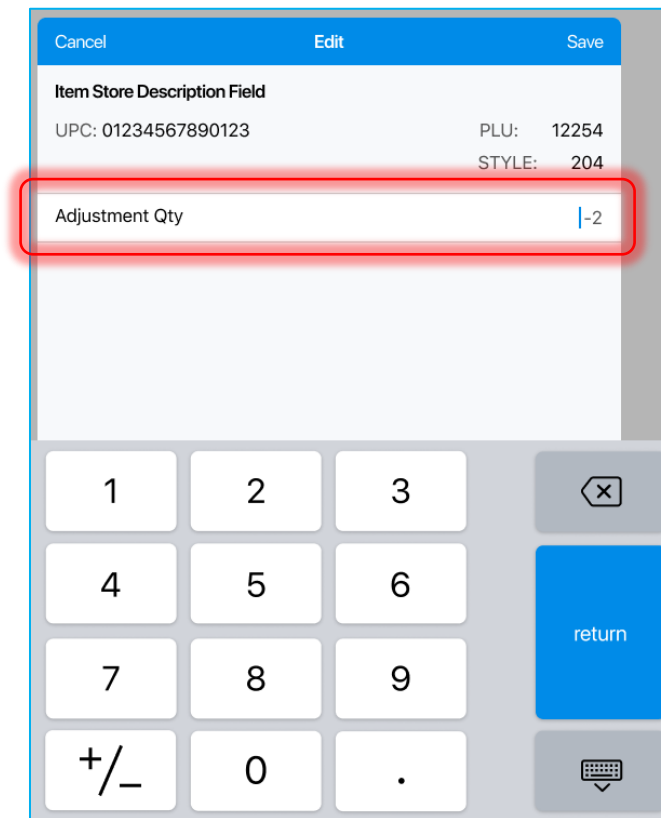On tapping, the confirmation dialog displays:



## Left Swipe Options

In the *Items* tab, on swiping an item's row left, the following options can be displayed:

- **Edit**: opens the *Edit* dialog for the item
- **Remove**: removes the item from the document
- **View**: in posted Memos, opens the *Edit* dialog for the item in the read-only mode

Editing Items Manually

In the *Items* tab, each item's quantity can be edited manually. To open an item's *Edit* dialog, swipe left that item's row and tap **Edit**.



In the *Edit* dialog, define *Adjustment Qty*. To change the value to positive or negative, on the numeric keyboard, tap **+/-**.
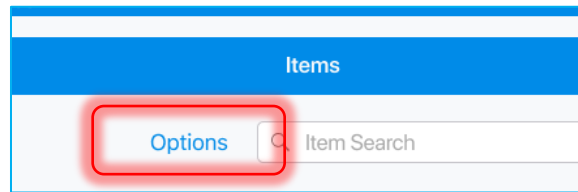
> NOTE:
>
> If the user clears the *Adjustment Qty* field or enters "0", the *Quantity must be non-zero value* message will be displayed.

When done, tap **Save** in the right upper corner of the *Edit* dialog to confirm changes.
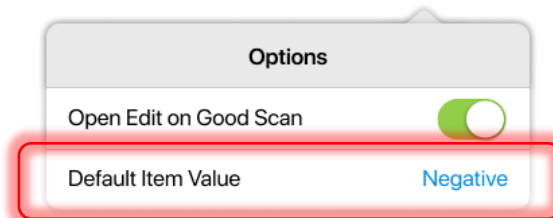
Alternatively, tap **Remove** at the bottom of the *Edit* dialog to remove the item from the memo and close the dialog.

## Changing the Default Item Value

To change the default value (positive or negative) for items that are added to the Memo, tap **Options** next to the *Item Search* field:
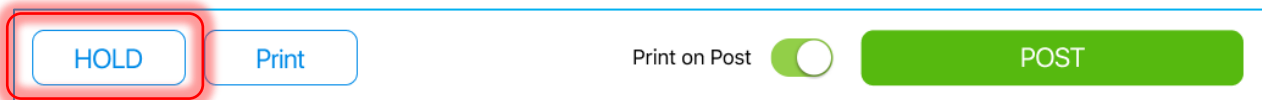


In the *Options* dialog, set the required type of value:



## Holding Adjustment Memo

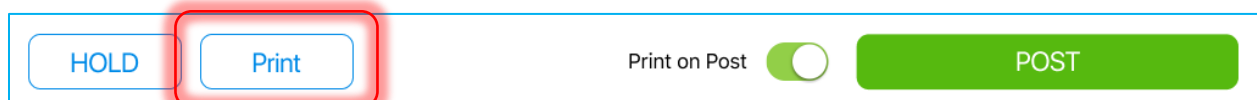Tapping **HOLD** saves the document in its current state without posting:



If several possible hold reasons are defined in CHQ, on tapping **HOLD**, the *Hold Reason* dialog displays:



Having selected a reason, tap **Hold** in the top right corner.

## Printing Adjustment Memo

To print out the Adjustment Memo, tap **Print** at the bottom of the screen:

The resulting document contains the following columns:



- **Qty**: positive or negative Adjustment Quantity
- **PLU:** Product Look Up code
- **Store Description:** item description
- **Attribute 1–3:** item attributes

## Acknowledgement on Finalizing Transactions
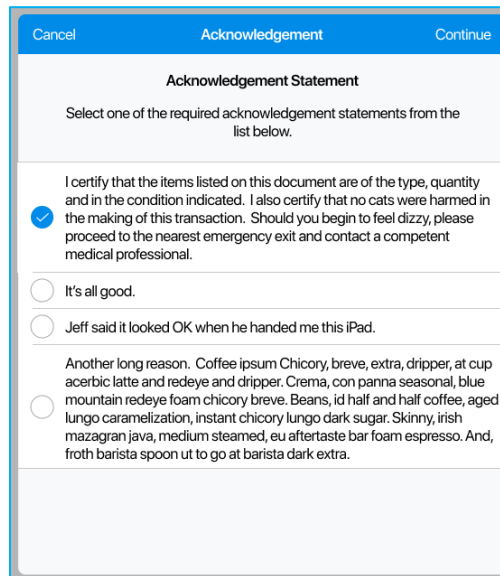
Version 6.11 – TWD-24929

January 2020

In POS Pro, finalizing certain shipment documents or posting an Adjustment Memo requires entering the user's login and password or capturing a signature. This feature is applied to:

- Purchase Receipts
- Transfers (Transfer Order, Transfer In, Transfer Out)
- Adjustment Memos

### Acknowledgement
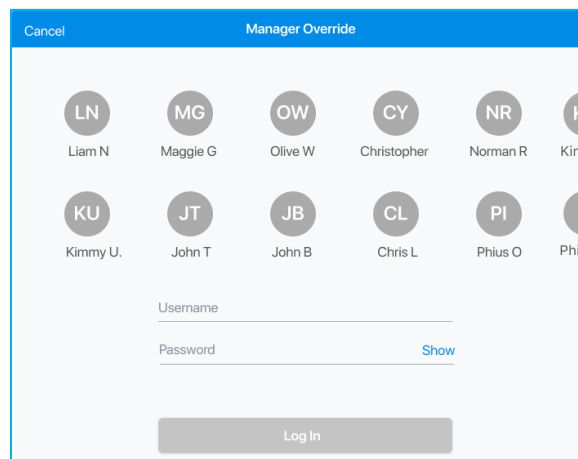
If the user taps **FINALIZE** in one of the shipment documents listed above or **POST** in an Adjustment Memo, and a signature or a manager override is required, the *Acknowledgement* dialog is displayed:



Check one of the statements, then tap **Continue** in the right upper corner to proceed to the signature capture or manager override.

### Manager Override

If manager override is required for finalization, the *Manager Override* dialog is displayed:



Enter the required user's username and password, then tap **Log In**.

NOTE:

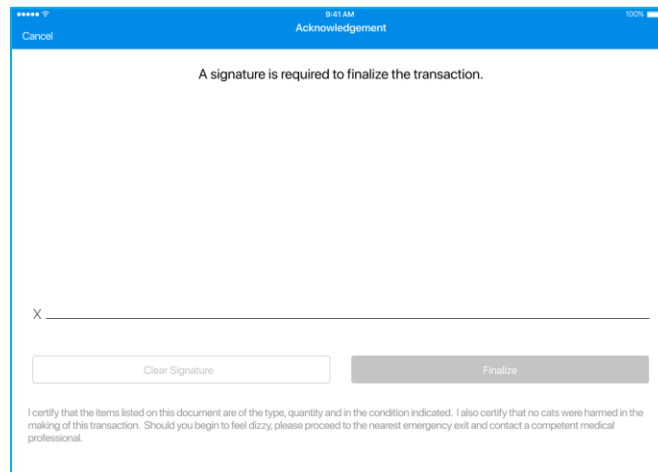The user logging in needs to have sufficient security right for acknowledgement. Otherwise, the *Insufficient right*s message displays.

## Capturing Signature

If capturing signature is required for finalization, the following dialog displays:



Once the user's signature is captured, tap **Finalize** (or **Post** for Adjustment Memos) to finalize the document. Alternatively, tap **Clear Signature** to start the signature over.

### Finalized Documents

In finalized documents, the acknowledgement information displays in the *Document* tab below *Notes*:
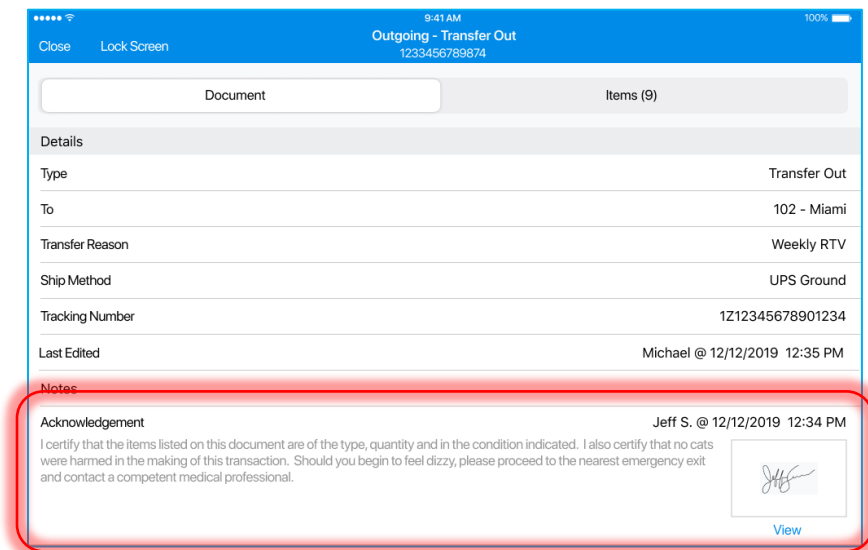


Tap **View** to see the signature in full screen.

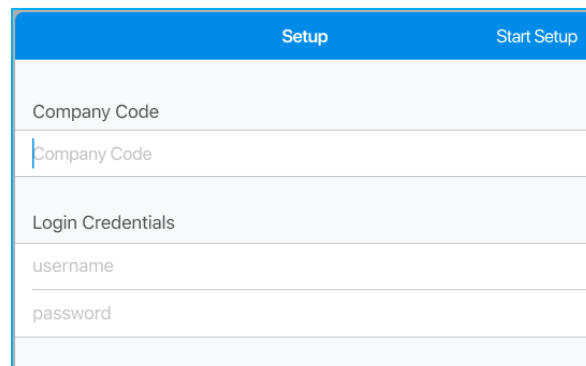# Application Initialization and Reinitialization

Version 6.11 – TWD-23087

January 2020

In POS Pro, after a major update of the app, initialization or reinitialization may be required on the app's start.

## Initialization

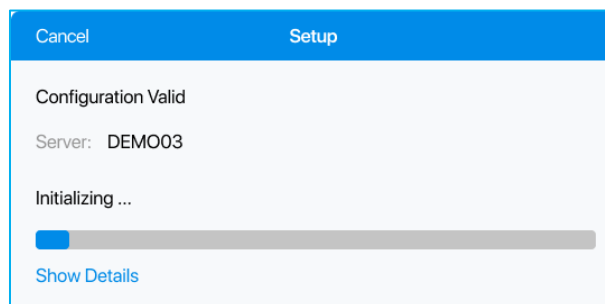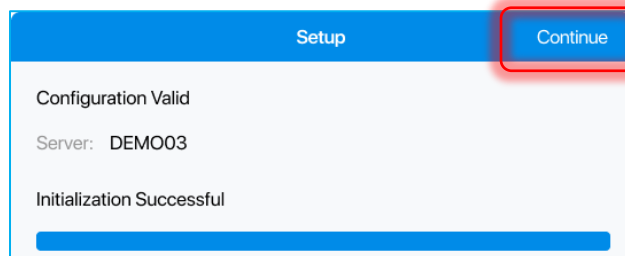If initialization is required, the *Setup* dialog displays:



Fill out all the fields and tap **Start Setup** in the right upper corner. On tapping, the *Checking server…* message displays.

Once the initialization process starts, the progress bar displays:



Tap **Show Details** to see observe the process step-by-step.

If initialization has been successfully completed, tap **Continue** in the upper right corner:

If there is an error, the *Setup Failed* message displays:
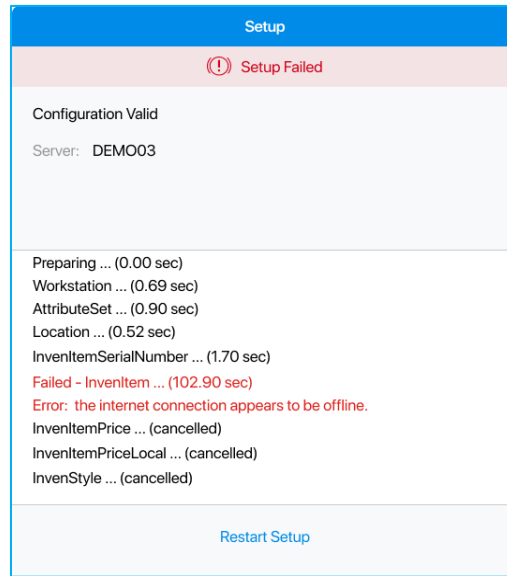


The failed options are displayed in red.

Tapping **Restart Setup** at the bottom of the dialog returns the user to the screen with *Company Cod*e and *Login Credentials*.

### Reinitialization

If the user selects **Reinitialize** in the *Settings* area of POS Pro, the confirmation dialog is displayed:



On tapping **Continue**, the *Reinitialize* dialog displays:

Fill out all the fields and tap **Start** in the upper right corner of the dialog.

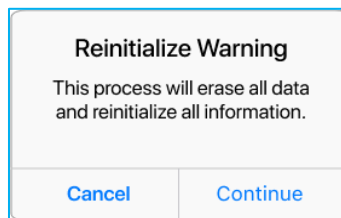On start of reinitialization, the dialog with the progress bar is displayed. Once the reinitialization is completed, tap **Continue** in the right upper corner of the dialog.
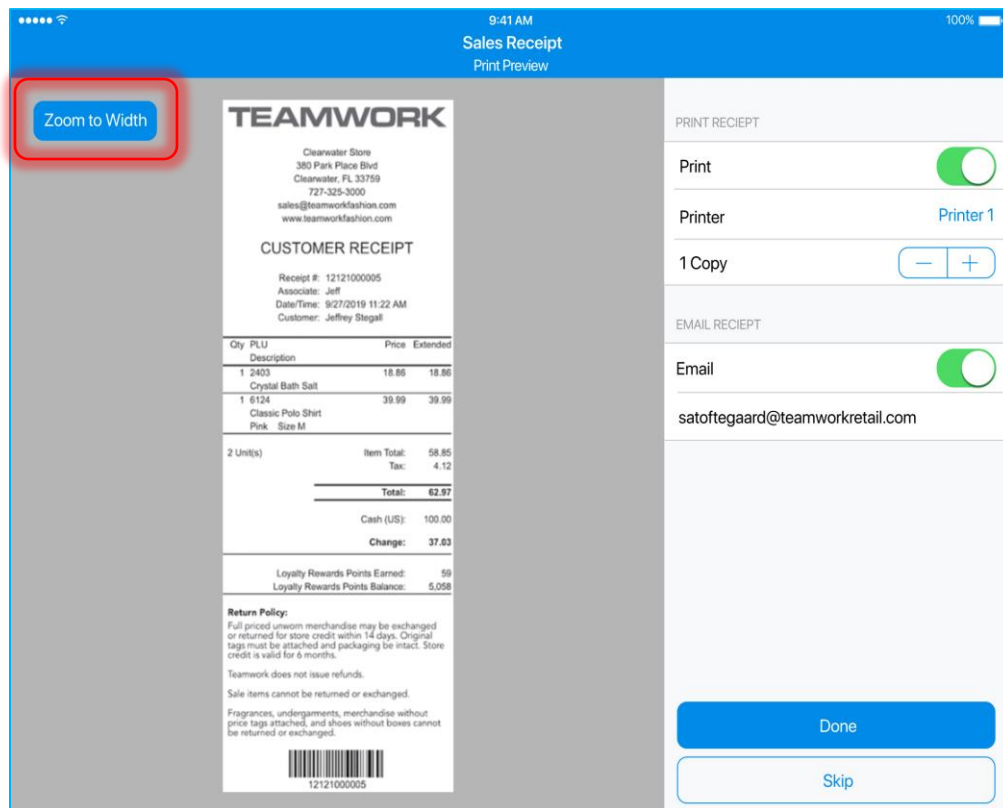
## Updated Print Preview

Version 6.11 – TWD-22672

January 2020

We've updated Print Preview by adding the Zoom to Width feature. If the receipt is long, zooming allows for seeing the document's details.

In POS Pro, print preview is available in areas where printing is possible. In the *Print Preview* area, the user can print the viewed document, send it to an email address, or just preview and skip to the next step.



To enlarge the image of the document, tap **Zoom to Width** in the upper left corner. Once zoomed, tap **Zoom to Fit** to return to the previous view.

In *Print Preview*, two sections are located on the right: *PRINT RECEIPT* and *EMAIL RECEIPT*.

In the *PRINT RECEIPT* section, the following fields display:

- **Print**: turn the switch on to be able to print the document

- **Printer**: tap the value in the field to select a printer from the list
- **Copy**: tap **-** or **+** to decrease or increase the number of copies

In the *EMAIL RECEIP*T section, the following fields display:

- **Email**: toggle the switch on to send the document to the indicated email address
- **Email address**: tap the field to define the email address that the document will be sent to

When finished, tap **Done** to complete the selected actions:



Alternatively, tap **Skip** to return to the previous screen or proceed to the next one without printing or emailing.

> NOTE:
>
> For the **Done** button to be enabled, at least one of the switches (either **Print** or **Email**) has to be toggled on.
>
> Also, the **Email** option will not be available for the following documents: Purchase Receipt, Transfer Memo, Adjustment Memo, Ship Memo, Stock Count, Inventory Tag.

# Epilogue

This release guide was published on 19 February 2020 by Teamwork Commerce.

Mobile apps are procured via the app store, Meraki, or otherwise provided by a Teamwork representative. This manual provides documentation on new features and product updates to the existing Mobile 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 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.