Teamwork Mobile Release Guide

Version 6.12

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POS

ShippyPro integration

Version 6.12 – TWD-26079

February 2020

The integration with ShippyPro, a shipment delivery service, is now available.

> NOTE:
>
> For ShippyPro to be available for a particular location, the following must be selected in CHQ under **settings > location settings > locations / location settings** > **new** or **edit** > **sales > ship memos > use shipping service** > **ShippyPro**.

In the POS Pro app, to set ShippyPro as a shipment delivery method:

1. On **Home Screen**, tap **Shipments**.
2. Once the **Outgoing** area is open, find and tap the required Ship Memo.
3. Then, tap the **Shipment** tab at the top-right.
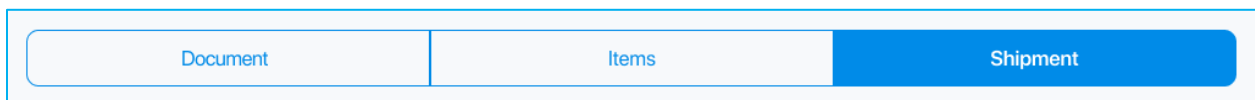
4. In the **Delivery Method** field, select **ShippyPro**.

Once ShippyPro is selected, it is required to fill out the **Weight** and **Dimension** fields and then get a label:
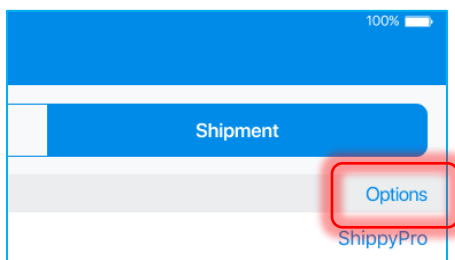
- at least one **Weight** field must be populated with a non-zero value
- at least one **Dimension** field must be populated with a non-zero value

Getting a label becomes possible only once the above fields are populated.

Weight

The user must indicate the weight of the package in the **Weight** field.

Prior to that, selecting the weight units may be required. To do so, tap **Options** in the upper right corner:

On tapping, the **Options** dialog opens. Select the required units and then tap **Save**:

Cancel	Options	Save
Weight Units		
Pounds / Ounces / Inches		
Kilograms / Grams / Centimeters		✓

Then, fill out the **Weight** field:

Status		Prepare Shipment
Weight	0 kg	0 g

For the **kg/lb** field, the valid entry is from *0* to *999*.

For the **g** field, the valid entry is from *0* to *9999*. If the user enters a value greater than *999*, it will be converted to kilograms (for example, *2300* g will be converted to *2* kg *300* g).

For the **oz** field, the valid entry is from *0* to *99*. If the user enters a value greater than *15*, it will be converted into pounds (for example, *16* oz will be converted to *1* lb *0* oz).

> NOTE:
>
> For the **Get Label** button to be enabled, at least one **Weight** field must be populated.
>
> Both fields cannot be zero at the same time.

Once the label is retrieved, the **Weight** field becomes read-only.

Dimensions

Also, the user must indicate the size of the shipping box in the **Dimensions** fields:

- **L** – length
- **W** – width
- **H** – height

For each of the fields, valid entry is from *1* to *9999*.

Below the **Dimensions** fields, the buttons for pre-defined box sizes are located. Tapping one of the buttons fills out the **Dimension** fields:

Dimensions (cm)		10 L	10 W	12 H
Box Label 1	Box Label 2	Box Label 3	Box Label 4	Box Label 5	Box Label 6	Box Label 7	Box L

NOTE:

Pre-defined box sizes can be configured under **chq > settings > order management > shipping boxes**.

Label

Once the **Weight** field and at least one **Dimension** field are populated, the **Get Label** button becomes available.
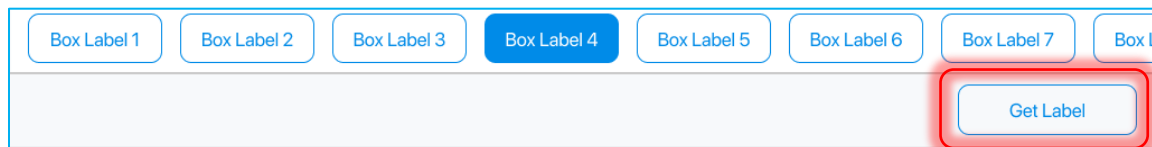
Tapping **Get Label** retrieves the shipping label for the shipment:

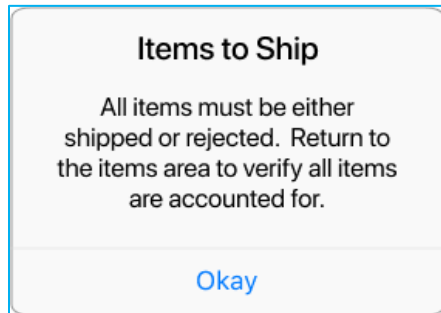Once the button is tapped, the **Label** section will display the shipping label:

Additionally, the following fields will be automatically filled out:

- **Ship Method**: the shipping method defined on order creation
- **Tracking #**: the number retrieved from the shipping service
- **Return Tracking #:** the number retrieved from the shipping service
- **Shipped**: the user and the date/time when the shipping label was retrieved

Once the label is retrieved, the **Shipped** button becomes enabled.

If the user taps **Get Label** when all the items haven't been marked as shipped or rejected in the **Items** tab, the label will not be retrieved. The following message displays:

Items to Ship

All items must be either shipped or rejected. Return to the items area to verify all items are accounted for.

Okay

If the user taps **Close** in the left upper corner after the label has been retrieved, the following dialog displays:

Cancel and Void Label

Cancelling this ship memo will void the shipping label.
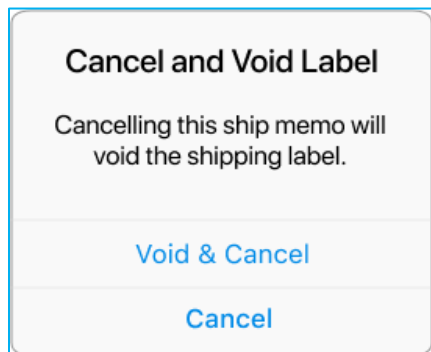
Void & Cancel

Cancel

Tapping **Void & Cancel** will discard the document no matter whether the shipping label has been voided or not. If voiding fails, the label expires after a period of time.

Voiding Label

Alternatively, label voiding is available from the **Tracking #** field.

Ship Method	FedEx 2Day
Tracking #	Void Label 1Z123456789012345
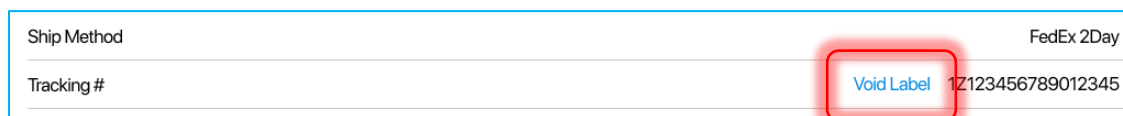
Label must be voided before the Memo is saved with the *Shipped* status.

If voiding is successful, the **Tracking #**, **Return Tracking #**, and the **Shipped** fields are cleared.

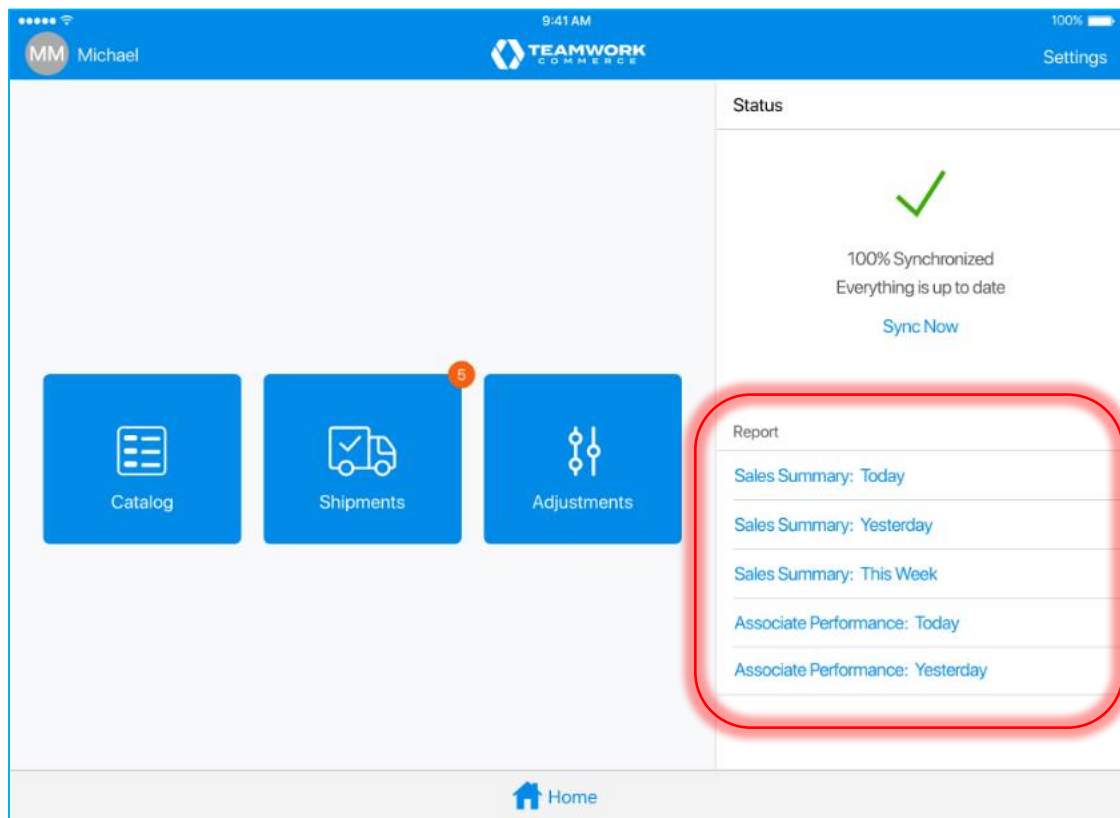The Memo will be saved and re-opened in the "Prepare Shipment" status.

Updated embedded reports
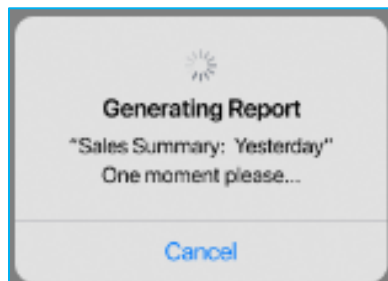
Version 6.12 – TWD-26237

February 2020

In Teamwork POS Pro, it is now possible to view reports from **Home Screen**.

The **Report** section is located under the **Status** section:

Tap the required report to start generating it. If generating is in progress, the following notification appears:

Once generated, the report will display in full screen:

Searching through the report is available via the **Quick Find** field in the upper right corner. Tap **Find** to start searching. On tapping, the user is moved to the best match found. Tap **Next** to go to the next result.

Additionally, the user can move to another page of the report by entering a page manually or tapping the arrows in the upper left corner.

Multiple Transfers Out against a Transfer Order

Version 6.12 – TWD-25449

February 2020

It is now possible to create multiple Transfers Out against a single Transfer Order.

> NOTE:
>
> For multiple Transfers Out to be available, the **split transfer memo by cartons** option must be checked under **chq > settings > transfers > transfer documents**.

To create multiple Transfers Out on finalization of a Transfer Order, the user has to define carton numbers for the Transfer Order items. The number of the resulting Transfers Out will be the same as the number of cartons.
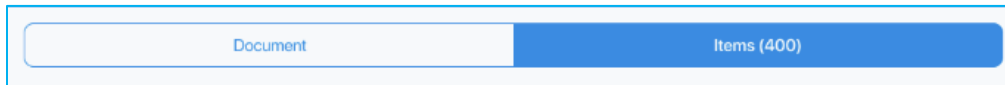
Assigning carton numbers to items

To define a carton number for an item:

1. On **Home Screen**, tap **Shipments**.
2. In **Outgoing**, find and tap the required Transfer Order.

3. Tap the **Items** tab at the top-right:

Document	Items (400)

4. Swipe left the row of the item you want to assign a carton number to and tap **Edit**.

In the **Edit** dialog, the following fields must be filled out:

- **# of Cartons**: the total number of cartons used for the edited item (valid values are *1* to *999*)
- **Carton #**: the sequence number of a carton (valid values are *1* to *999*)
- **Quantity**: the item quantity that will be packed into the corresponding carton

Cancel	Edit	Save
Item Store Description Field		
UPC: 01234567890123	PLU:	12254
	STYLE:	204
# of Cartons		1
Carton #	Carton # Quantity	0
Order Qty		100
Out Qty		0
Reject Qty		0

The number in the **# of Cartons** field determines how many **Carton #** fields will display below.

For example, if the user defined that two cartons are to be used, then two **Carton #** fields will display below:

Cancel	Edit	Save
Item Store Description Field		
UPC: 01234567890123	PLU:	12254
	STYLE:	204
# of Cartons		2
Carton #	3 Quantity	38
Carton #	4 Quantity	60
Order Qty		100
Out Qty		98
Reject Qty		0

The total number of cartons on a Transfer Order will determine how many Transfers Out will be created on the Transfer Order finalizing.

> NOTE:
>
> It is possible to assign one sequence number for two different items on the document. However, it is not possible to use one sequence number twice for one item.
>
> Also, there can be no gaps in the carton sequence numbering. For example, the user cannot create a sequence as follows: 1, 2, 4, 5. In this case, the following notification displays:
>
> **Carton Sequence Numbers**
>
> There is a gap in the carton sequence numbering and the transfer may not be finalized.
>
> Okay
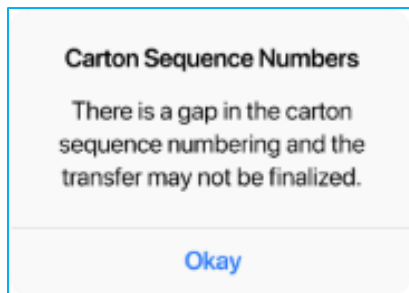
The sum of all the **Quantity** fields will display in the **Out Qty** field below. The **Out Qty** is allowed to be greater than the **Ord Qty** (order quantity).

However, if **Out Qty** is less than **Ord Qty**, the user will have to define a reject reason.

5. Once done, tap **Save** in the upper right corner of the dialog to save changes.

Alternatively, tap **Clear** at the bottom of the dialog to clear all the **Carton #** and **Quantity** fields.

Finalizing with carton numbers assigned

If all items on a Transfer Order have carton sequence numbers defined, on tapping **Finalize**, the appropriate number of Transfers Out is created.

If only a part of items on a Transfer Order have carton sequence numbers defined, the document cannot be finalized. The following notification appears:

Carton # Not Defined

One or more items do not have a carton # defined.

Okay
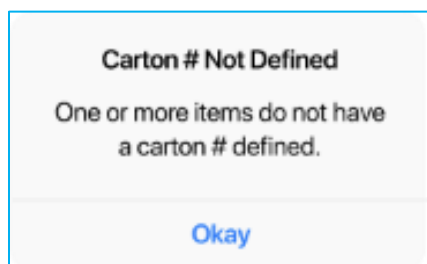
If an items **Rej Qty** equals **Ord Qty**, it doesn't need to have a carton sequence number.

If no items on a Transfer Order have carton sequence numbers defined, on tapping **Finalize**, only one Transfer Out is created.

Printing with carton numbers assigned

If carton numbers have been assigned to items, and the **Print on Finalize** switch is on, multiple Transfer Memos will be printed on finalizing.

If the user needs to print only some Memos or reprint, it is possible to print from a finalized Transfer Out in **History**.
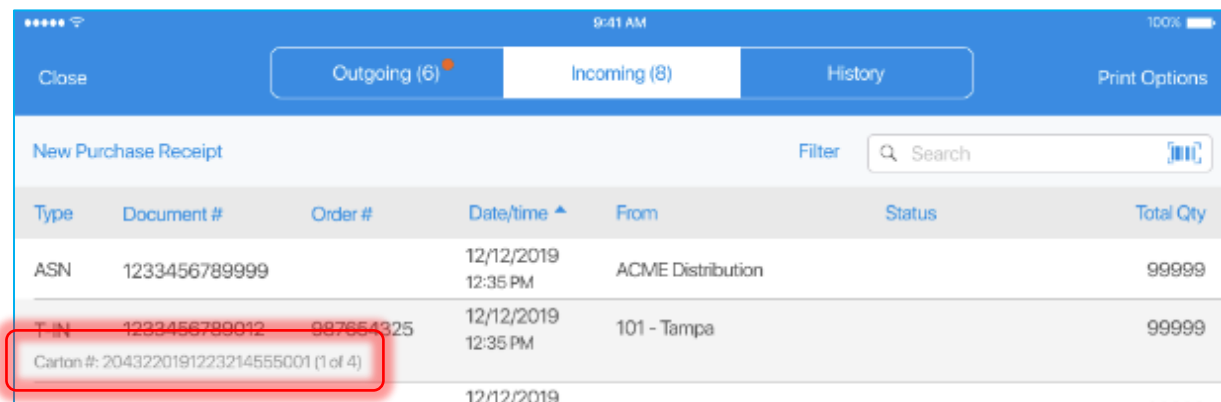
Multiple Transfers In against a Transfer Order

Version 6.12 – TWD-25459

February 2020

It is now possible to receive and finalize multiple Transfers In against a single Transfer Order.

Every Transfer In now has a carton number if it was defined in the associated Transfer Out. In **Incoming**, it is displayed in the document's row:
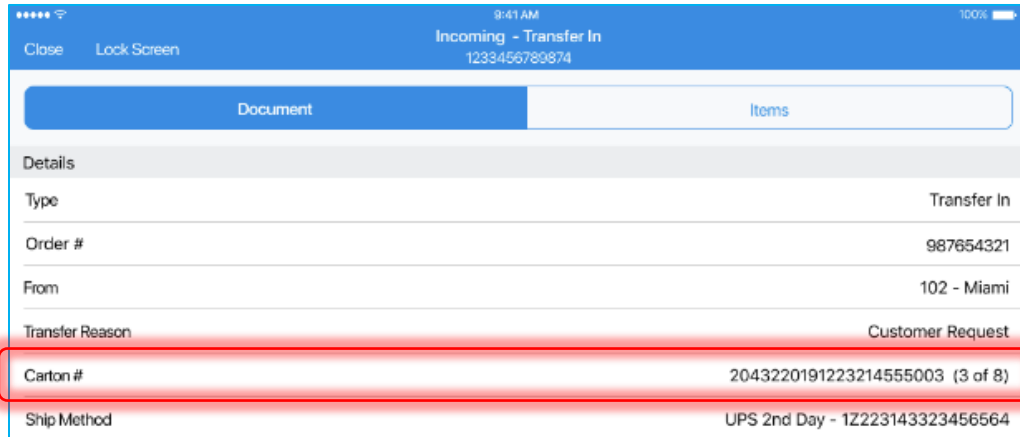

The user can scan the carton number or enter it in the **Search** field manually to find an exact match.

Alternatively, the user can scan or enter the number of the Transfer Order to see all the associated Transfers In.

The carton number is also displayed in the **Document** tab of a Transfer In:

The number in parentheses (in this example, "3 of 8") shows the total number of Transfers In associated with a single Transfer Order.

The carton number is also displayed in each item's row in the **Items** tab:
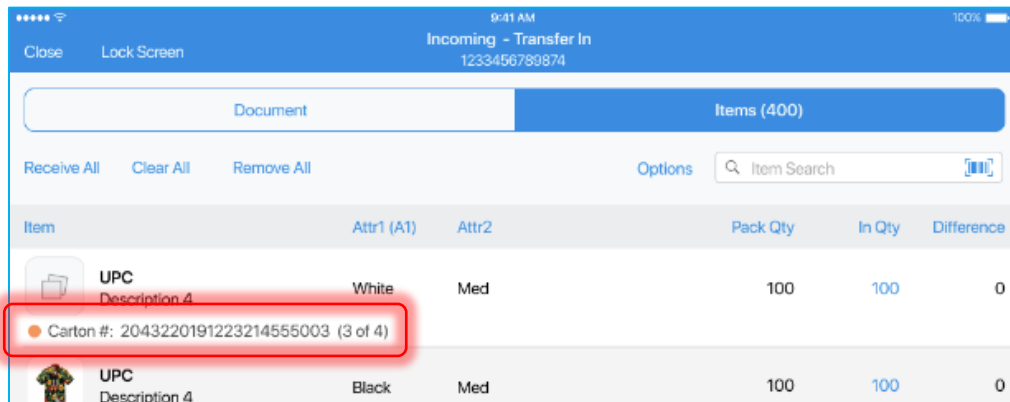
Acknowledgement on finalizing transactions

Version 6.12 – TWD-26385, TWD-26386

February 2020

In POS Pro, finalizing and posting certain documents can require entering the user's credentials (manager override) and/or capturing the user's signature.
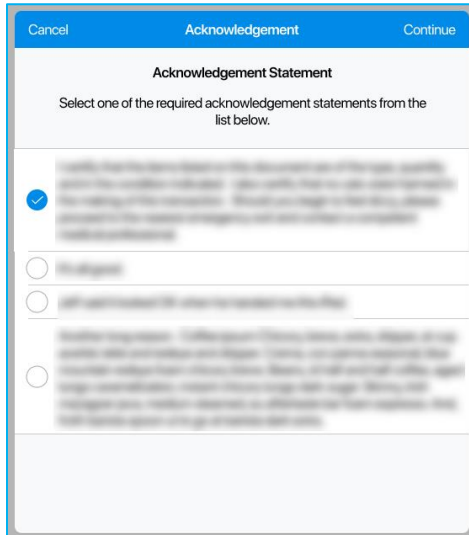
We've now introduced this feature for:

- Purchase Receipts
- Purchase Orders
- Purchase Returns
- Adjustment Memos

  NOTE:

  Configuration of verification is performed in CHQ at company and location levels.
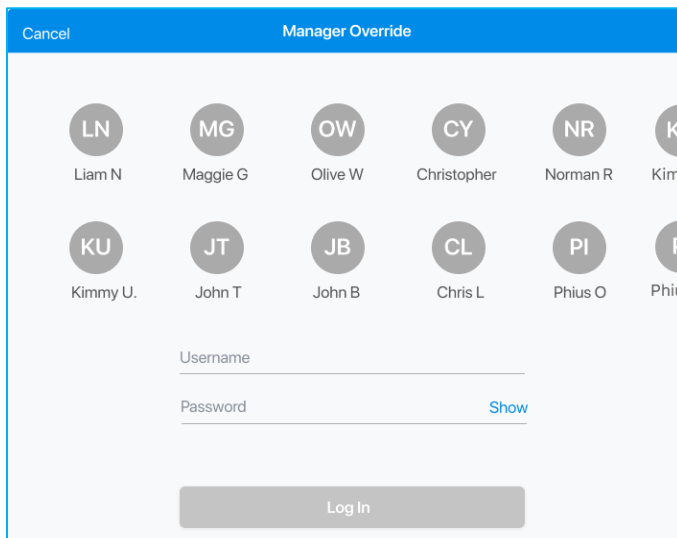
Acknowledgement

If the user taps **Finalize** (Purchase Receipts) or **Post** (Adjustment Memos), and a signature or a manager override is required, the **Acknowledgement** dialog displays:

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

Manager override

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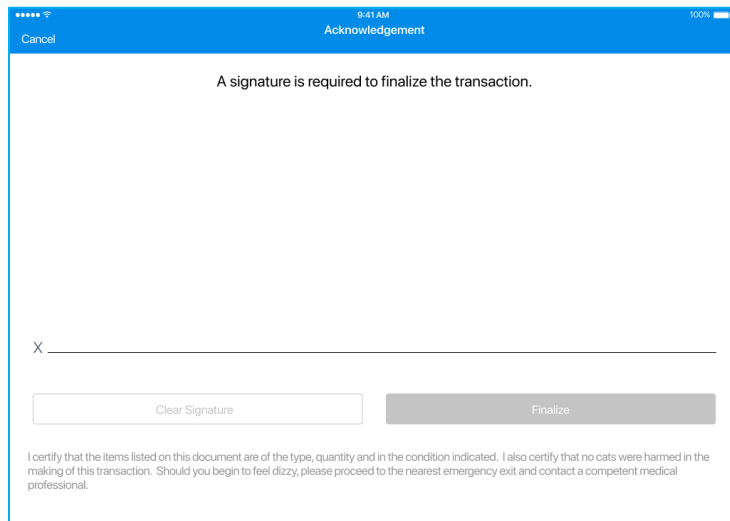

Enter the required username and password, then tap **Log In**.

NOTE:

The user logging in must be granted the **Allowed to acknowledge transaction** security right. Otherwise, the **Insufficient rights** message displays.

Capturing signature

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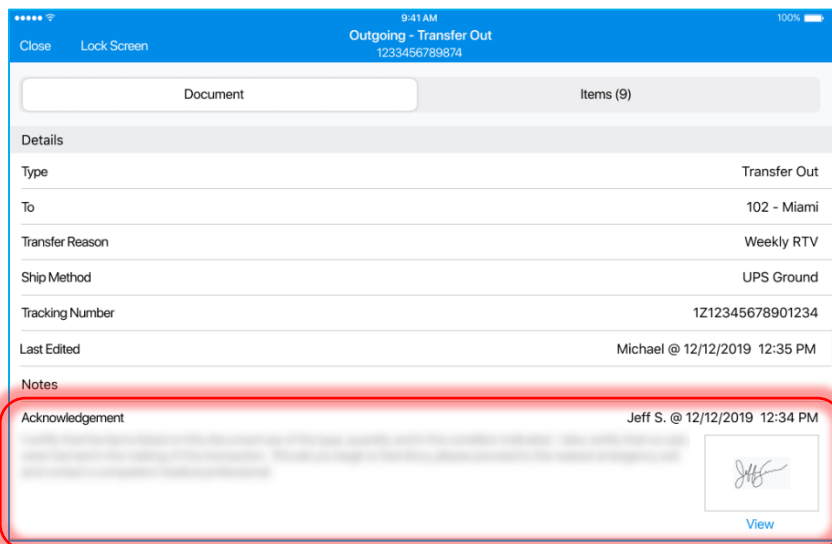

Once the user's signature is captured, tap **Finalize** (or **Post** for Adjustment Memos). Alternatively, tap **Clear Signature** to start the signature over.

Finalized documents

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

Tapping the **View** button right under the signature allows for viewing that in full screen.

Focus on the search field on opening Catalog

Version 6.12 – TWD-26850

February 2020

Now, on entering **Catalog** from Home Screen, the focus is automatically set to the **Item Search** field with the keyboard invoked.

Current location visible in RTA breakdown by locations

Version 6.12 – TWD-26850

February 2020

On opening the **Real Time Availability** (RTA) view in **Catalog** with an item selected, the grid with the item breakdown by locations is opened. In the grid, the row with the current location is now automatically scrolled into view and highlighted.

ShippyPro integration: Managing return shipping labels

Version 6.12 – TWD-27676

February 2020

Now, if the ShippyPro integration is configured, the user gets a shipping label from the Ship Memo form as the return shipping label is created automatically.

A return label enables the customer to more easily return purchased goods back to the merchant.

> NOTE:
>
> A return shipping label can only be retrieved and printed if an appropriate setting is configured in CHQ.
>
> To configure the setting, under **chq** > **settings** > **company settings** > **shipping services**, select **ShippyPro** and then click the **configure methods** button in the top left. In the **configure methods** dialog that opens, choose the required shipping method and then select **automatically obtain return label**.

Getting return label

In POS Pro, to get a return label:

1. On **Home Screen**, tap **Shipments**.
2. Once the **Outgoing** area opens, find and tap the required Ship Memo.
3. Open the **Shipment** tab on the upper-right.
4. In the **Shipment** tab, fill out the **Weight** and **Dimensions** fields and then tap **Get Label**.

NOTE:

The destination location for the return label displays in the **Return Tracking #** field of the **Shipment** tab:

To configure the destination location, in CHQ, go to **settings > location settings > locations / location settings > new** or **edit**. In the **<location>** dialog, open the **sales** tab and find the **ship memos** area. Then, specify the required location in the **return label destination location** field.

If a location is not defined in CHQ, by default, the initialized location displays.

If getting the shipping label fails, the return label is not created.

If getting the shipping label is successful, but getting the return label fails, the shipping label is voided and the **Shipment Could Not Be Completed** message appears:

If the shipping label cannot be automatically voided, it is still considered voided, as it eventually expires if the merchandise is not actually shipped.
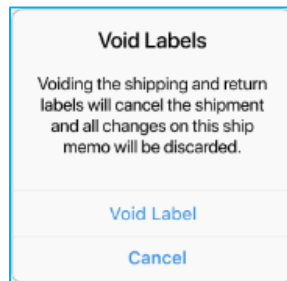
Printing return label

To print a return label, tap **Print** in the bottom left corner of the **Shipment** tab. In the pop-up menu that appears, select **Return Shipping Label**.

Voiding return label

If the user has got both shipping and return labels, the button in the **Tracking #** field reads **Void Labels**. When the button is tapped, the following message appears:

> NOTE:
>
> Tapping **Void Labels** voids both shipping and return labels. It is not possible to void only one of the labels.

ShippyPro integration: Editing the ship-to address

Version 6.12 – TWD-27676

February 2020

In case of ShippyPro integration, it is now possible to change the ship-to address of a Ship Memo in POS.

To do so:

1. On **Home Screen**, tap **Shipments**.
2. Once the **Outgoing** area opens, find and tap the required Ship Memo.
3. Open the **Shipment** tab on the upper-right.
4. In the **Shipment** tab, tap **Edit Ship To**.
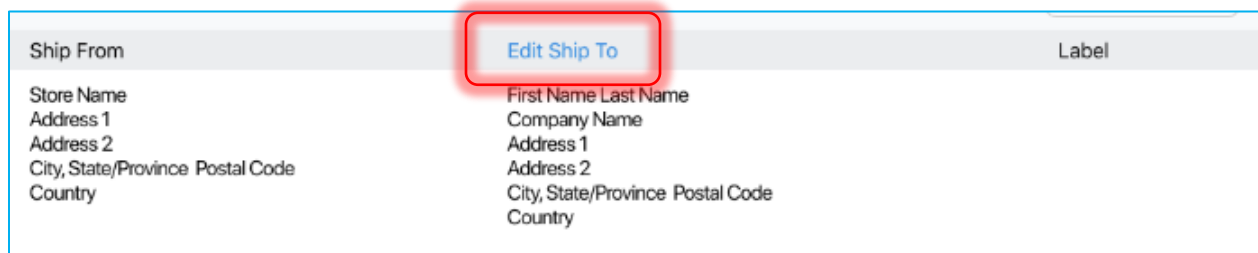
> NOTE:
>
> The user can only edit the ship-to address before the shipping label is retrieved.

If the user has voided the label before the Ship Memo is marked as **Shipped**, the address can be edited again.

On tapping **Edit Ship To**, the **Ship To Address** dialog opens:

Cancel	Ship To Address	Save
NAME		
First Name	Required	
Middle Initial	Optional	
Last Name	Required	
ADDRESS		
Address 1	Required	
Address 2	Optional	
Address 3	Optional	

In the dialog, the following fields display:

- **First Name**: the customer's first name; required
- **Middle Initial**: the customer's middle name; optional
- **Last Name**: the customer's last name; required
- **Address 1–5**: the customer's address; Address 1 is required
- **Postal Code**: the customer's postal code; required
- **City**: the ship-to city; required
- **State/Province**: the ship-to state or province; required
- **Country**: the ship-to country; required
- **Phone**: the customer's phone; required
- **Email**: the customer's email; required
- **Company Name**: the name of the customer's company; optional

Once all the necessary fields are populated, tap **Save** in the upper right corner of the dialog to save changes.
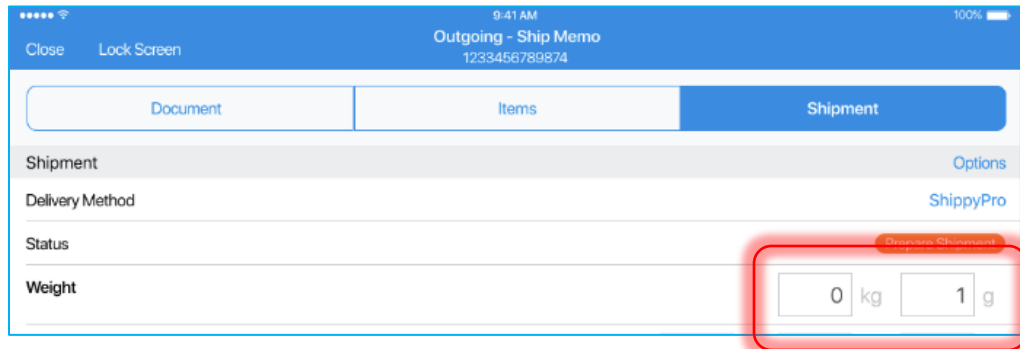
On finalizing the Ship Memo, the updated ship-to address is passed to CHQ.

ShippyPro integration: Updated Ship Memos default weight and box size

Version 6.12 – TWD-27676

February 2020

If the ShippyPro integration is configured, in Ship Memos (**Shipments > Outgoing > Outgoing - Ship Memo > Shipment**), the default weight of the package is now set to *1* g or *1* oz:

If the user has defined a default box setup (**chq > settings > order management > shipping boxes**), then the **Dimension** fields are populated based on that setup.
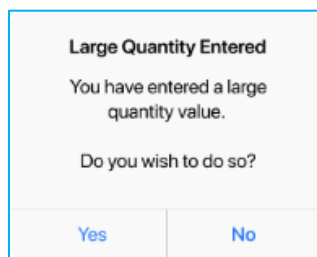
Also, the **Get Label** button will be enabled in the **Shipment** tab.

Warning when entering large quantity

Version 6.12 – TWD-27322

February 2020

The new feature allows for displaying a warning if the user enters a value of 10,000 or greater in quantity-type fields.

This feature applies to:

- Purchase Returns, Purchase Receipts, Purchase Orders
- Transfer Orders, Transfers In, Transfers Out
- Adjustment Memos
- Ship Memos
- ASNs

Updated Count Memos

Version 6.12 – TWD-26581

February 2020

The POS Pro app now has a new **Count Memos** area that allows users to create and manage Count Memos.

Count Memos (CM) are documents that record changes in merchandise quantities for the initialized location.

To open this area, on **Home Screen**, tap the **Count Memos** icon:
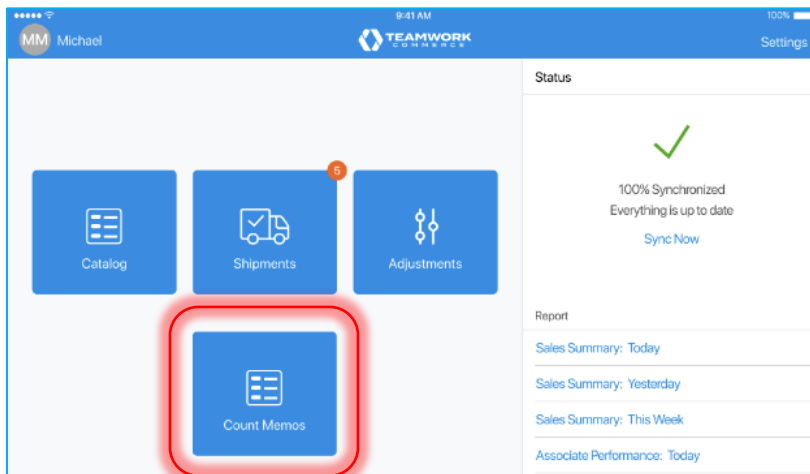
> NOTE:
>
> To access the **Count Memos** area, create, edit, and archive Count Memos, the user must have the **Access Count Memos** security right.

Count Memos list view

On tapping the **Count Memos** icon, the Count Memos list view opens:

The list displays all the Count Memos that were created from the initialized location.

NOTE:

Only 50 most recent memos display in the list view.

In the list, the following columns display:

- **Count ID:** the Memo's unique code
- **Description:** the Memo's description
- **Count Date/time:** the date and time of the Memo's creation; the date is UTC plus time zone offset
- **Status:** the Memo's status
- **Items:** the number of items on the Memo
- **Item Differences:** the difference between the **Ledger Qty** and either **Count** or **Override Qty** on the Memo

Searching for Count Memos

The user can search for Count Memos in the **Search** field:
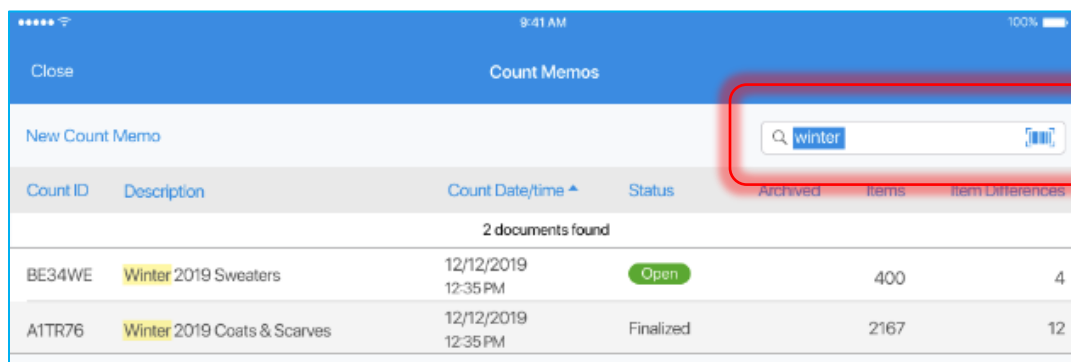
The search is performed by the **Count ID** and **Description** field.

Opening Count Memos

To open a Count Memo, tap the Memo's row in the list.

If the user tries to edit a Memo that is currently opened on another device, the following message appears:
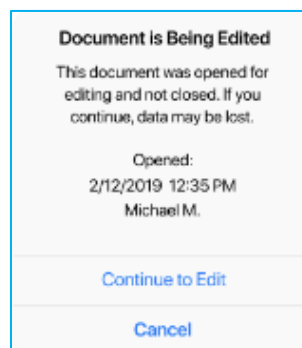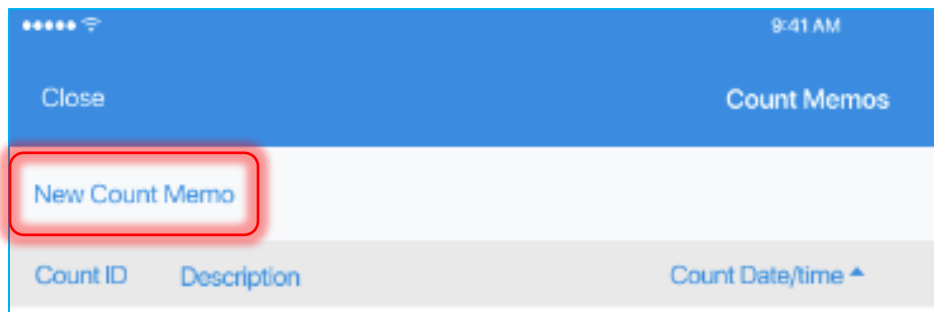

If the user taps **Continue to Edit**, the changes made on another device are lost.

If the user tries to open a Count Memo that is being processed at the moment (deleting scans, creating an Adjustment Memo, etc.), the **Processing Count Memo** notification appears:
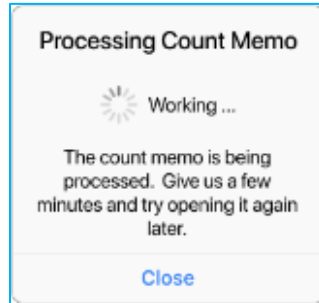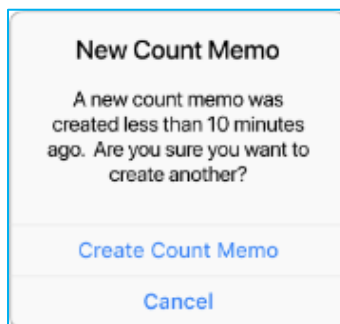

Creating a Count Memo

To create a new Count Memo (CM), in the list view, tap **New Count Memo**:

If the user taps **New Count Memo**, and the last Memo was created less than 10 minutes ago, the following notification appears:

On tapping **Create Count Memo**, the **New Count Memo** dialog displays:

Cancel	New Count Memo	Save
GENERAL		
Location		100 - Clearwater Store
Description		Winter 2019 Sweaters
FILTER		
Style #		10224, 20554, 3255
Department	Mens, Womens	Edit
Class	Sweaters	Edit
Sub-Class 1		Select
Sub-Class 2		Select
Brand		Select
Manufacturer		Select
Primary Vendor		Select
Style Custom Lookup 1		Select
Style Custom Lookup 2		Select
Style Custom Lookup 3		Select

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

- **Location**: the initialized location
- **Description**: the description of the Memo

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

- **Style #**: the ID of a style; the user can enter several IDs divided by commas
- **Department**: the department of the Memo's items
- **Class**: the class of the Memo's items
- **Sub-Class 1–2**: the subclass of the Memo's items
- **Brand**: the brand of the Memo's items
- **Manufacturer**: the manufacturer of the Memo's items
- **Primary Vendor**: the primary vendor of the Memo's items
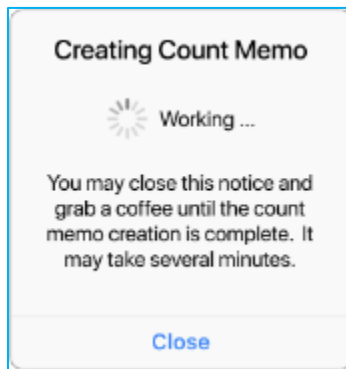- **Style Custom Lookup**: a style's custom identifier

When all the necessary fields are populated, tap **Save** in the upper right corner.

> NOTE:
>
> Alternatively, the user can create a Count Memo without defining any fields in the **FILTER** section. This includes all catalog items into the Memo.
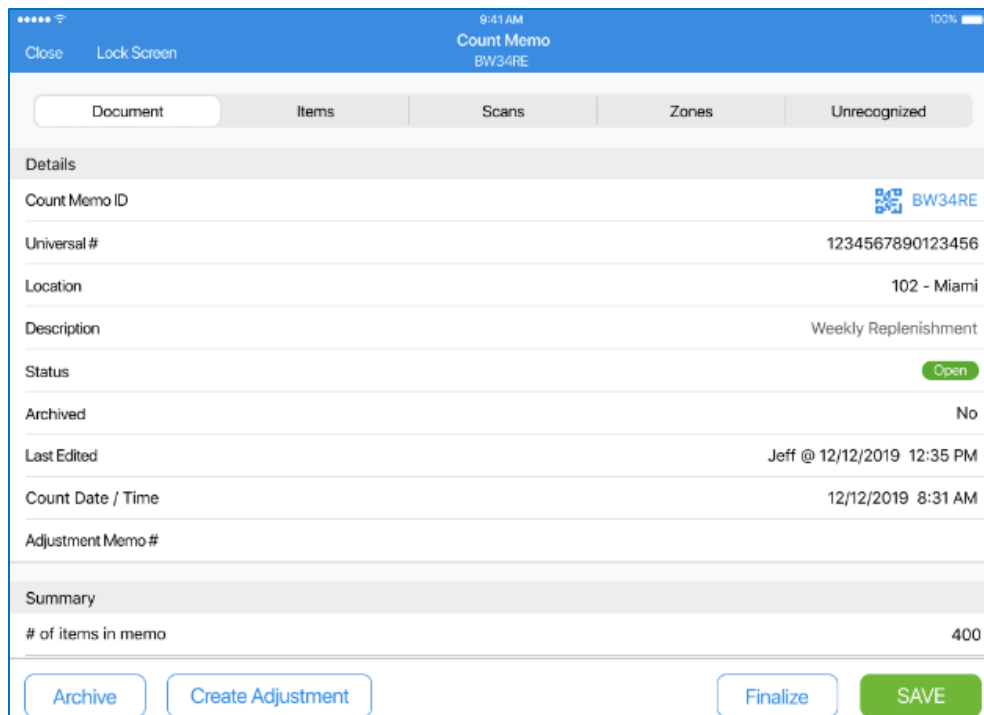
On tapping **Save**, the following message displays:

Count Memo – Document tab

Once a Count Memo is open, the user is taken to the **Document** tab.

In the **Document** tab there are 3 sections: **Details**, **Summary**, and **User Info**.

Details

In the **Details** section, the following information is available:

- **Count Memo ID**: Count Memo's unique identifier
  If the document status is *Open*, the QR code button displays in the field. Once tapped, it allows users to scan item barcodes.
- **Universal**: universal document ID
- **Location**: location code and name

- **Description**: document's description defined by the user
- **Status**: can be one of the following – *Open, Finalized, Adjusted*
- **Archived**: *Yes* or *No* depending on the document status
- **Last Edit**: name of the associate and date-time of the last edit
- **Count Date/Time**: the date-time of the document creation
- **Adjustment Memo #**: the number of an Adjustment Memo if the latter has been created for the Count Memo

Summary

In the **Summary** section, the following information is available:

Summary	
# of items in memo	400
# of items counted	384
Total quantity scanned	3755
Items with differences	6
Unrecognized scans	0
Quantity over	999
Quantity short	-9996
Net difference	-8999

- **# of items in memo**: the number of items included in the CM based on the user's CM filter setup
- **# of items counted**: the number of items that have a scan quantity associated
- **Total quantity scanned**: the total quantity of all scans for all items (either uploaded scans or manual override quantities)
- **Items with differences**: the number of items that have a difference between their ledger qty and scan qty
- **Unrecognized scans**: the number of scans that couldn't be identified as existing items in the catalog
- **Quantity over**: the total qty of differences with a positive value (more than the ledger qty)
- **Quantity short**: the total qty of differences with a negative value (less than the ledger qty)
- **Net difference**: the difference between **Quantity over** and **Quantity short**

User Info

In the **User Info** section, the following information is available:

- **Created**: contains information on the user who created the document as well as document creation date-time.
- **Finalized**: contains information on the user who finalized the document as well as document finalization date-time.
- **Adjustment Created**: contains information on the user who created an Adjustment Memo for the CM as well as the date-time of that Adjustment Memo creation.

Count Memo – Items tab

The **Items** tab contains the following information on every item that is included into the Count Memo:

- **UPC**: item's identifier

- **Description 4**: item's description taken from the **Description 4** field
- **Attr1**: attribute 1 defined for that item
- **Attr2**: attribute 2 defined for that item
- **Ledger Qty**: ledger qty for that item recorded when the Count Memo was created
- **Count**: the total qty for all uploaded/imported records for that item
- **Override Qty**: the manually entered override qty for that item; the override qty determines whether there is a difference for that item
- **Difference**: the difference between **Ledger Qty** and either **Count** or **Override Qty**

Finding an item

In the tab, it is possible to find the required item via filtering or the Item Search functionality. Both are available in the upper-right corner of the tab.

Filtering is possible by

- Differences
- Override Quantity

By default, when the user comes to the **Items** tab, all the options are selected, meaning that it is possible to see all the items.

If there are no items that match filtering criteria, the **No items match filter criteria** message appears.

Editing an item

The user can perform 2 types of edits to an item from the **Items** tab:

- manually override item quantity
- delete item scan

To perform any of the above, the user must tap the row with the required item.
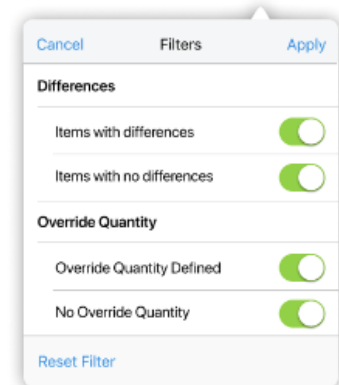
Tapping the row opens the **Quantity** tab of the **Edit** dialog:

1. In the **Quantity** tab, it is possible to override item qty. To do so, specify the required value in the **Override Quantity** field (see the screenshot above).

2. To delete scan, open the **Scans** tab of the **Edit** dialog:

Then, tap the required scan row and tap **Delete Scan**.

Count Memo – Scan tab

The tab contains information on every scan recorded. Each scan goes in a separate row, thus the same PLU may appear multiple times in the list.
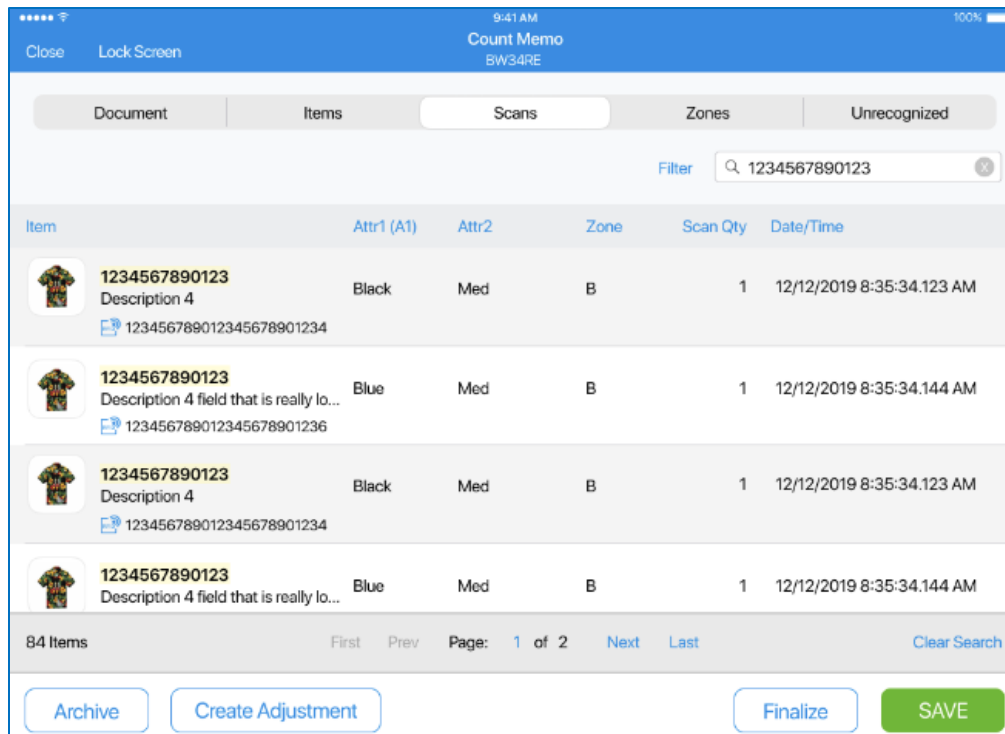
The following information is available for each scan:

- **UPC**: item's ID
- **Description 4**: item's description
- **Attr1**: item's attribute 1
- **Attr2**: item's attribute 2
- **EPC**: this information is included if an item had the RFID type of scan
- **Zone**: zone where that scan was made
- **Scan Qty**: number of scans
- **Date/Time**: the date-time of the scan down to milliseconds

Finding an item

Finding an item is possible via the Item Search functionality or filtering. Both are available in the upper-right corner of the tab.
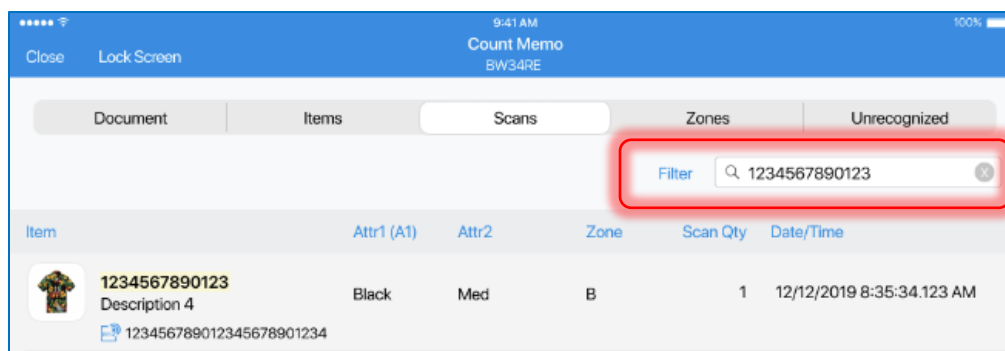
Filtering is available by zones only:
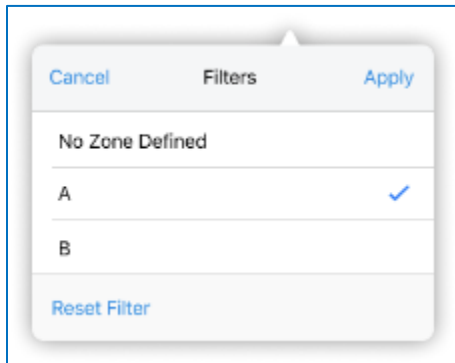
If a record has no zone label defined, it is included with the **No Zone Defined** filter option.

Searching is performed by item ID (PLU, Primary UPC, CLU, EID).

Count Memo – Zones tab

The **Zones** tab contains information on uploads / imports performed per zone:

- **Zone**: the zone recorded in the uploaded scan or import
- **Uploaded**: the date-time the upload was received
- **Scans**: the number of individual scans in the file
- **Quantity Scanned**: the total qty scanned in the record

To delete a zone scan records, it is required to tap a row and then tap **Delete Zone Scans**.

Count Memo – Unrecognized tab

The **Unrecognized** tab shows any scans or uploads that it is not possible to find a match for:

- **Zone**: the zone associated with the scan
- **Scan Date/Time**: the date-time of the scan
- **Scans**: the value of the Scan ID uploaded
- **Quantity Scanned**: the qty associated with the scan record

Creating Adjustment for a Count Memo

To create an adjustment for the Count Memo, tap the **Create Adjustment** button at the bottom of the opened Count Memo list view:

NOTE:

To be able to create an Adjustment Memo for a Count Memo, the user must have the **Create Adjustment for Count** right granted.

Tapping the **Create Adjustment** button opens the **Create Adjustment** confirmation dialog:

The dialog contains two sections – for positive and negative adjustments.

The only required field is **Adjustment Memo reason**. Here it's required to specify the reason for your adjustment.

To do so, tap **Select** next to the **Adjustment Memo reason** field and choose the required reason.

Once done, tap **Create** in the upper-right corner of the dialog for your adjustment to be created.

Limited Adjustment Memos display

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In POS Pro, in the **Adjustments** list view, it is only possible to search, open, and view Adjustment Memos that have been created for the initialized location.

Epilogue

This release guide was published on 27 March 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.