

# MacromatiX Release

2023.1

Released January 2023

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## Introduction

This document communicates the major new features and changes in the 2023.1 MacromatiX Release. It also references issues that were addressed during this release. MacromatiX is a cloud-based operating system that provides operational efficiency, cost controls and real-time visibility into restaurant operations that keep the manager in front of customers and focused on their experience, rather than stuck in the back office staring at spreadsheets. Get instant insight into inventory and financials with in-depth, down-to-the item reporting. Gain access to sales data, gross profit, cost of goods sold, loss prevention and exception management with the ability to report down the item level at individual stores. With MacromatiX, food is fresher, waste is reduced, and gross profits are increased.

## About This Release

The 2023.1 release includes substantive changes to improve the MacromatiX user experience. A few of the release highlights for MacromatiX Desktop and MxConnect (Mobile) are detailed below

### Release Highlights

- ★ Mobile Inventory Count History and Correction
- ★ Inventory Count Auto-Submit Rules
- ★ Task Override Support in Mobile Workflow
- ★ Improved Handling for Shared Employee Updates Received from HotSchedules
- 🌀 17 Defects Resolved

Desktop (MMS)		
	Features	Defects
<b>Core</b>	3	3
<b>Financial</b>		4
<b>Forecasting</b>		
<b>Inventory</b>	1	2
<b>Production</b>		
<b>Reporting</b>	4	3
<b>Workforce</b>		1
<b>Total</b>	<b>9</b>	<b>13</b>

Mobile (MxConnect)		
	Features	Defects
<b>Core</b>	1	
<b>Financial</b>		
<b>Forecasting</b>		2
<b>Inventory</b>	1	
<b>Production</b>		
<b>Reporting</b>		1
<b>Workforce</b>		
<b>Total</b>	<b>2</b>	<b>3</b>

Additional Applications		
	Features	Defects
RDS		

LiveLink		
CloudLink	1	1
MPC		
<b>Total</b>	<b>1</b>	<b>1</b>

# MacromatiX Desktop (MMS)

## Core

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### HotSchedules Integration: Borrowed Employee Termination

Release Version	Change Type	Module(s)
<u>2023.1 Release</u>	<u>Enhancement</u>	<u>Core</u>

#### **Summary**

A missing integration between HS and MX - once the store put a borrowed employee from active to inactive, this employee still had access to the store that previously borrowed it. The integration between both systems now covers for that scenario - once an employee was borrowed and put to "Active" for the borrowing store, this employee had access to that store. Once the employee is put inactive for the borrowing store, then this employee has no more access to the borrowing store, only to the home store.

#### **Components**

Component	User Story
Remove Access for Borrowed Employee Upon Deactivation in HotSchedules	<u>US153012</u>

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## TECH: Test Automation Framework (Phase 4)

Release Version	Change Type	Module(s)
<u>2023.1 Release</u>	<u>Enhancement</u>	<u>Core</u>

### **Summary**

To facilitate automated testing across MacromatiX, improvements to the overall testing framework and process flows are needed. We want to rework and extend our automation solution to have daily execution and an automated test pack for running on each release. This will replace lots of manual hours the whole team spends (QA and developers) on manual testing before release.

### **Components**

Component	User Story
Improve Empty Hardening Test Cases	<u>US149558</u>
Extend Pages Project with Table, TableRow, and Other Objects	<u>US137561</u>
Add Steps for Missing CashUp Setting	<u>US143015</u>
Add and Implement Existing Safe Count Feature File Scenarios	<u>US143385</u>
Fix ~20 Outstanding Tests Failing in Nightly Run	<u>US149523</u>

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## API for Menu Item Sold Quantities

Release Version	Change Type	Module(s)
<u>2023.1 Release</u>	<u>Enhancement</u>	<u>Core</u>

### **Summary**

MacromatiX now provides an API endpoint that allows for accounts with appropriate access to the API to retrieve Menu Item (Sales Item) Quantities Sold by Store and Business Day.

Calling the API endpoint with the following parameters will return the desired data:

- StoreNumber – 0 for All Stores, or provide a single store number
- SalesItemCode – Limit results returned to the designated Sales Item Code
- BusinessDay – The business day for which item sales information is requested.

### **Components**

Component	User Story
API Call for Menu Item Sold Quantities	

# Inventory

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## Vendor Managed Inventory Enhancement – Manual Submission

Release Version	Change Type	Module(s)
<u>2023.1 Release</u>	<u>Enhancement</u>	<u>Inventory</u>

### Summary

VMI orders as Open when: - Create Electronic Order is enabled <- for VMI orders, this wouldn't be required as orders are created in a submitted & authorized state - Update Electronic Order is disabled <- must be disabled to opt into this behavior, other updates are sent when quantities are edited When submitted a VMI order that is treated as Open (which is already authorized): - Set AllowUpdates = false - Send Electronic Order - Trigger standard purchase order export (XSLT Export driven?)

### Components

Component	User Story
VMI Order Manual Submission	<u>US152124</u>

# Reporting

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## Inventory Activity with BOM Depletion Report

Release Version	Change Type	Module(s)
<u>2023.1 Release</u>	<u>Enhancement</u>	<u>Reporting</u>

### Summary

A customized version of the Inventory Activity Report is now available that includes theoretical usage for BOM Items using Usage Per Thousand calculations.

A new configuration setting exists under Reporting - Reports - Inventory Activity - Calculate Theoretical Usage using UPT factor for UPT items

1. The Inventory Reporting Engine, which supports BOM explosion (Mx.Inventory.Services.ReportingService:GetInventoryActivityList) is enhanced to calculate the theoretical usage using the UPT factor for UPT items when the new configuration setting is enabled on the store level.
2. On the new Inventory Activity with BOM Depletion report
  - For any item that is configured for UPT (tbEntityItem.UPT = 1) when the configuration setting to Calculate Theoretical Usage using UPT factor is enabled, a prefix "\*" is added to Theoretical Usage value as the indicator for calculated theoretical usage using UPT factor.
3. The formula for UPT theoretical usage: Sales value (per Sales Value Used By Forecasting (v2) between the Count Start Apply Date and Count End Apply Date) \* UPT factor / 1000
4. A new Inventory Activity with BOM Depletion report exists on MMS\_System\_Reports.aspx under the Inventory group.
5. The report template has the same styling and layout as the Inventory Activity VARPW report (System ID: 1078)
6. The reporting logic uses the Inventory Reporting Engine, which supports BOM explosion (Mx.Inventory.Services.ReportingService:GetInventoryActivityList) like the Actual vs. Theoretical report (System ID: 1374)  
(Mx.Inventory.Services.ReportingService:GetActualVsTheoreticalUsageData)
7. The report notes are indicative of the logic this report uses:
  - Use BOM explosion
  - Use UPT

- Count to count report
  - Treat uncounted items as 0
8. The following Report Filters are available:
- Store
  - Stock Count Range (Start, End) \*
  - Sales Value (One of Net Sales / Gross Sales) \*
    - When Gross Sales, the configuration setting Gross Sales Value Used By Reporting determines the sales value to use.
9. Display the Sales Value on the top of the report, like on the Actual vs. Theoretical report with a localizable label (Net Sales, Gross Sales)
10. The following Report Columns are visible:
- Item Code – The Inventory Item Code
  - Description – The item description/name
  - UOM – The reporting unit of the inventory item. If reporting unit is not set, use the base inventory item-unit.
  - Unit Cost – the unit cost value when the ending count is applied.
  - Beginning Inventory – The beginning inventory count quantity.
  - + Purchase – The total purchase quantity between the time of the beginning inventory count and the time of the ending count time.
  - + Net Transfer – The total net transfer (transfer in minus transfer out) quantity between the time of the beginning inventory count time and the ending count time.
  - - Ending Inventory – The ending inventory count quantity
  - Actual Usage – The quantity equals (Beginning Inventory + Purchase + Net Transfer - Ending Inventory)
  - Actual Cost – The value equals (Beginning Inventory value + Purchase value + Net Transfer value - Ending Inventory value).
  - Actual Cost % – The percentage of Actual Cost / Total selected Sales (Gross or Net) (new)
  - Theoretical Usage – For non-UPT items, it's the sales quantity (POS usage) from sales depletion. For UPT items, it's the sales quantity calculated from sales and the UPT factor. Can be abbreviated to Theo Usage.
  - Theoretical Cost – The value of the Theoretical usage. For UPT items, the theoretical cost is the product of UPT Theoretical usage multiples Unit cost. For non-UPT items, the theoretical cost is the cost from sales depletion. Can be abbreviated to Theo Cost.
  - Theoretical Cost % – The percentage of Theoretical Cost / Total Sales (Gross or Net). Can be abbreviated to Theo Cost %.
  - Variance – The difference between the actual usage and the theoretical usage.
  - Actual vs. Theoretical % – The percentage of Actual usage / Theoretical usage. Can be abbreviated to AvT %. (new)
  - Actual vs. Theoretical Cost % – The percentage of Actual cost / Theoretical cost. It can be abbreviated to AvT Cost %.

- Variance % – The percentage of this item’s variance value (\$) / Total Sales (Gross or Net) value.
  - Waste – The total waste quantity between the time of the beginning inventory count and the ending count time. Waste is not included in the calculation, so we need to add a disclaimer" 'Waste is for informational purposes only' it is for informational purposes only. Explanation “This is for information only” (indicate on the column and/or add a disclaimer in the header similar to )
11. Uncounted Inventory Items - The new report will list all items that are (set up to be counted) either on the selected beginning count or on the selected ending count.
- For any item that was uncounted, a prefix “\*\*” is added to the item code as the indicator for the uncounted item.
  - The report will show “-” as the beginning count if it’s not counted in the previous week’s weekly count.
  - The report will show “-” as the ending count if it’s not counted in the selected week’s weekly count.
  - For uncounted items, the report will process the beginning inventory or the ending inventory as zero to calculate the actual usage.
  - NOTE: When the customer counts an item and then goes and corrects that item (zero it out) the report will not show “-” as uncounted, but “0”
12. Grouping and Subtotal – The new report will group inventory items by item group and item subgroup. Note that the Inventory Activity VARPW report only groups by item group, so an item subgroup needs to be introduced. The report will present subtotal (for item group and item subgroup) of cost, variance, and cost of sales at both item group and item subgroup levels. The sales used to calculate cost percentages are either net sales or gross sales of the week or the range between the two selected counts. The subtotal line should have the following fields:
- Description: Item Group Name or Item Subgroup Name
  - Actual Cost
  - Actual Cost %
  - Theoretical Cost
  - Theoretical Cost %
  - Actual vs. Theoretical Cost %
  - Variance %
13. Total / Consolidated line - The report should have a consolidated total line at the bottom of the report with the following fields:
- Actual Cost
  - Actual Cost %
  - Theoretical Cost
  - Theoretical Cost %
  - Actual vs Theoretical Cost %
  - Variance %

14. Sorting - Items are grouped by Item Groups and sorted by each Item Group(s), Sub-Group(s), and Item Description
15. Printed Reports – The newly requested report should print in a way that is usable by the restaurant's staff.
  - The user should be able to view the report before printing it.
  - The restaurant should have the option to print the report in either PDF or Excel.
  - The columns of the report should fit on a single 8 ½ X 11 page in Landscape mode, not limited to 1 Page.
  - If a page break is needed, the column headers should appear at the top of each printed sheet.
16. Combine Prep and Inventory Items Usage – It will use the Actual Vs. Theoretical Usage Report algorithm and logic to calculate raw inventory usage with prep items included. For example, Total 'Avocado' usage equals the usage of '100001: Avocado Hass' and the avocado usage from '300115: P-Prep Guacamole'. See point 3.
17. The 'Sales' value currently shows the Actual vs Theoretical report in the report header.

## **Components**

Component	User Story
New Sales Value Report Parameter	<u>US146943</u>
New Inventory Activity with BOM Depletion Report	<u>US151814</u>
Add UPT Theoretical Usage	<u>US146942</u>

## **Configuration**

The report should be activated automatically upon release for the customer who requested this customized version. Activating the report in other environments will require an update the corresponding ReportNotes.

## **Configuration Settings**

### *Configuration Manager Settings*

- Inventory Activity – Calculate Theoretical Usage using UPT Factor for UPT Items (True/False)
- Gross Sales Value Used by Reporting

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## Modify Weekly Sales Report for In-Shop CC Tips

Release Version	Change Type	Module(s)
<u>2023.1 Release</u>	<u>Enhancement</u>	<u>Reporting</u>

### **Summary**

The Weekly Sales Report (WSR) now provides the ability to include In-Shop Credit Card Tips within the Expected Deposit calculation.

### **Components**

Component	User Story
Include In-Shop Credit Card Tips in Expected Deposit Calculation	<u>US148123</u>

### **Configuration**

#### *Configuration Manager Settings*

- Financial – Cashier Settlements – Include Credit Card Tips in Expected Deposit Calculations (True/False)

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## Hourly Product Sales Report

Release Version	Change Type	Module(s)
<u>2023.1 Release</u>	<u>Enhancement</u>	<u>Reporting</u>

### **Summary**

The Hourly Product Sales Report now contains additional logic to better present combo item sales:

- For any sales item that has item type set as Combo, the sales will be broken into the sales of its combo (A-La-Carte) items.
- The report should consolidate A-La-Carte items from different combos.
- For sales quantity, it's calculated from the sales quantity of the combo and combo item quantity defined in the combo.
- For sales amount, the sales of A-La-Carte items are calculated from sales quantity and UnitSellingPrice set in EntitySalesItem. The UnitSellingPrice can be maintained in the entity sales item import.

### **Components**

Component	User Story
Change Mobile Hourly Product Sales Report	<u>MX-47451</u>

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## Food Safety Inspection and Monitoring

Release Version	Change Type	Module(s)
<u>2023.1 Release</u>	<u>Enhancement</u>	<u>Reporting</u>

### Summary

The 2023.1 release contains enhancements to Batch Details for Supply Orders and Credit Notes to support additional reporting around Food Safety Inspection and Monitoring. Details of these changes are outlined below.

1. VendorEntityItemId and StockQty in tbTransactionSupplyOrderDetailBatch is updated when batch detail is processed from the shipping confirmation import.
2. StockQty and ReceiveDate in tbTransactionSupplyOrderDetailBatch is updated when the item is received.
3. VendorEntityItemId in tbTransactionCreditMemoDetailBatch is updated when batch detail is entered or imported.
4. ReturnDate in tbTransactionCreditMemoDetailBatch is updated when returned item is picked up.
5. FromVendorEntityItemId, ToVendorEntityItemId, StockQty are updated when batch detail is entered in transfer.
6. StockQty, TransferDate or ReceiveDate are updated when transfer is sent or received.

The report contains the following features:

- User can search items by inventory item code, vendor code or vendor description.
- User can change the scope of the report by selecting the expiry days filter. By default, the report list item to be expired within 3 days. Use can change the filter from 1 day to 7 days.
- User can export the report to a CSV file.
- The report list expiring items' inventory item code, vendor item code, vendor description, inventory unit, batch detail (batch number, manufacture date, expiry date), days to expiry, inventory date and inventory type.
- By default, the report is sorted by days to expiry. User can click the header of sortable columns to change the sorting.
- Added ShippedQuantity to table tbTransactionSupplyOrderDetailBatch.
- For existing open orders, set the ShippedQuantity the same as the BatchQuantity.
- Set BatchQuantity and ShippedQuantity the same when shipping confirmation is processed, and batch details are added.
- Changes will be made in shipping confirmation import, order receiving, transfer sending and transfer receiving to prevent invalid expiry date.

## Components

Component	User Story
Refactor Ordering, Credit Memos, and Transfers to get batch details efficiently	<a href="#"><u>MX-47399</u></a>
Near Expiry Report	<a href="#"><u>MX-47422</u></a>
Auto-Set Batches in Credit Memo for Order Receiving with Shortages	<a href="#"><u>MX-47400</u></a>
Do not allow expired batches	<a href="#"><u>MX-47401</u></a>

# MacromatiX Mobile (MxConnect)

## Core

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### Workflow in MxConnect - Phase 4

Release Version	Change Type	Module(s)
<u>2023.1 Release</u>	<u>Enhancement</u>	<u>Mobile, Core</u>

### **Summary**

The Daily Operational Workflow navigation menu within mobile now supports functionality that allows tasks configured as overridden within Workflow Setup to be properly hidden and excluded from completion validation when the overriding tasks are present on the configured day of week or month.

### **Components**

Component	User Story
Implement Support for Task Overrides in MxConnect	<u>US147009</u>

# Inventory

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## Inventory Count History and Correction

Release Version	Change Type	Module(s)
<u>2023.1 Release</u>	<u>New Feature</u>	<u>Mobile, Inventory</u>

### Summary

MxConnect now provides a view to access previously submitted Inventory Counts. Given appropriate permissions and other conditions, these submitted counts can be edited and re-submitted.

A new process is also available to enable the system to auto-submit counts that have not yet been submitted by a user based on a configurable set of rules.

When the user goes to the Count History and selects an already submitted count, then the user sees a read-only page of the already applied count. If the user has permission to edit, then the action button has a "Correct Count" option. When the edit option is selected, the user sees the same page is allowed to edit quantities, add items and zero items out. Once changes are entered, then the action dropdown has the following options:

- Submit
- Review changes
- Cancel

The Review Changes option displays a page in read only, where the user sees the changes to be applied (ex: bacon was previously 3 qty in red and now is 5 quantity it needs to be clear for the user what changes and to which items were made.

if the user does not submit the changes and wants to go to another page, then we display a pop up indicating, "Changes you made will be discarded. Do you want to continue?"

## Components

Component	User Story
New Inventory Count History Page Overview	<a href="#">US152054</a>
Record Applied Counts on Count Location	<a href="#">US152109</a>
Implement Review Count look-up for previous counts when viewing historic counts	<a href="#">US152681</a>
Implement Change Applied Count Processing without Apply Date	<a href="#">US152686</a>
Read-Only Count Mode to View Applied Counts and Edit Mode using the same controller for open counts	<a href="#">US152691</a>
Default Zero for Uncounted Items	<a href="#">US153562</a>
Restrict Weekly Counts to One Per Week	<a href="#">US153576</a>
Monthly and Weekly Count to not be hidden from menu once applied	<a href="#">US153577</a>
Add Actual Usage Quantity and Count Difference Columns to Review Count View	<a href="#">US146190</a>
Provide Monthly Count Submission Default Date and Time (Custom)	<a href="#">US154327</a>
Implement Change Applied Count Processing with Changed Apply Date	<a href="#">US154831</a>
Display the last user that made changes to a submitted count	<a href="#">US154366</a>
Auto-Submit Count at Configured Day and Time	<a href="#">US155217</a>
Provide a "Non-Zero Quantity" Filter on the Count Edit View	<a href="#">US155113</a>
Remove Status Column from the History Page for Submitted Counts	<a href="#">US154393</a>

## ***Configuration***

### ***Security Permissions***

- Inventory Count – Can Correct Count After Submission
- Stock Count – Can Override Apply Date

### ***Configuration Settings***

- *Mobile:*
  - Enable Count Correction After Submission (True/False)
  - Default Zero for Un-counted Items (True/False)
  - Only Allow One Weekly Stock Count Per Period (True/False)
  - Enable Apply Date Change in Count Correct (True/False)
  - Stock Count Review – Force Monthly Comparison



# CloudLink

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## Brink Cloud Point-of-Sale Integration (Phase 1)

Release Version	Change Type	Module(s)
<u>2023.1 Release</u>	<u>Enhancement</u>	<u>RDS</u>

### Summary

The CloudLink Application used by MacromatiX to integrate with cloud-based point-of-sale systems now allows for new services to be configured that are necessary for consuming store data and sales data from the Brink Cloud Point-of-Sale system.

### Components

Component	User Story
CloudLink Store Polling Service – Polling Logic	<u>US147499</u>
CloudLink Store Polling Service – Store Configuration	<u>US147500</u>
CloudLink Store Polling Service – MMS HTTP Handler to Retrieve Store Information	<u>US147498</u>
CloudLink Store Polling Service – Configuration	<u>US147497</u>

# 2023.1 Release Bug Fixes and Rapid Response

## **MacromatiX Desktop (MMS)**

### **Core**

- HotSchedules -> MacromatiX Employee Import Failed with PosClockID as -1 (D73753)
- Error Messages Relating to Transaction Service Time Inserts (D72171)
- Alerting – Check “SendDataType” Configuration Before Inserting Alert Messages (MX-47421)

### **Financial**

- Banking Amounts Not Displaying on Banking Deposit Slip (D77185)
- Cash Count Field Missing After Store Closes Shift and Bank-In is Empty (D74174)
- Missing Float Issue (D73771)

### **Inventory**

- Shipping Confirmation Import – Incorrect Invoice Number Imported for PO (D77677)
- Missing Stock and Business Days in Daily Stock Balance (D75063)

### **Reporting**

- Transaction Summary Report – Split Payments (D77287)
- Transaction Viewer – Cannot View Details (D69657)
- Uncollected Sales List – Missing Field for Requested Invoice Date (MX-47391)
- RPC Report – Incorrect Container Closing Quantity (MX-47427)

### **Workforce**

- Labor Scheduler Pop-Up Displays Off-Screen (D72410)

## **Mobile (MxConnect)**

### **Forecasting**

- Forecasting Issue After Re-Generation (D75818)
- Forecast Mirroring – Store Date Issue (MX-47458)

### **Reporting**

- Production Quantity in Production Report Not Grouped by Hold Time (D78271)

## **CloudLink**

- Home Route Not Properly Matched (D76074)