

MacromatiX Release

2023.2

Released April 2023

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Introduction

This document communicates the major new features and changes in the 2023.2 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 2023.2 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

- ★ Guest Counts (Actual) Export to HotSchedules
- ★ Improvements to Fourth Analytics Integration
- ★ Dynamic Production – Ability to Add “Run”
- ★ Dynamic Production – Increased Font Sizes
- ⚙️ 13 Defects Resolved

Desktop (MMS)		
	Features	Defects
Core	2	1
Financial		
Forecasting		
Inventory		1
Production		
Reporting	3	3
Workforce		1
Total	5	6

Mobile (MxConnect)		
	Features	Defects
Core		1
Financial		
Forecasting		
Inventory	1	3
Production	2	
Reporting		
Workforce		
Total	3	4

Additional Applications		
	Features	Defects
CloudLink	3	2
LiveLink		1
RDS	1*	
Total	4	3

* RDS Feature is outlined within the Reporting Feature “Fourth Analytics Integration Improvements (F19325)”

MacromatiX Desktop (MMS)

Core

Guest Count Actuals to HotSchedules (F20392)

Release Version	Change Type	Module(s)
<u>2023.2 Release</u>	<u>Enhancement</u>	<u>Core</u>

Summary

MacromatiX is now able to provide Guest Count Actuals to HotSchedules for use in Labor Scheduling. For point-of-sale systems integrated to MacromatiX that provide Guest Counts, the system is able to export this information to HotSchedules on a regular schedule. Exported Guest Counts are aggregated for each 15-minute interval per location and business day.

Components

Component	User Story
New Export to HotSchedules for Actual Guest Counts	<u>US157098</u>

Reporting

Fourth Analytics Integration Improvements (F19325)

Release Version	Change Type	Module(s)
<u>2023.2 Release</u>	<u>Enhancement</u>	<u>Reporting</u>

Summary

Several enhancements to the integration between MacromatiX and Fourth Analytics are available in the 2023.2 release version, including:

- Ability to configure the Sales Value exported to Analytics
- Ability to configure the Inventory Count Types exported to Analytics
- Support for Store-Specific Fiscal Calendars when determining start and end period dates for aggregated data exported to Analytics
- Improved performance by using pre-aggregated values
- Ability to account for "Refund Tax" in Sales Value calculations

Components

Component	User Story
Provide Support for Store-Specific Fiscal Calendars in the Stock Item Stats Export to Analytics	<u>US154678</u>
Provide Support for Store-Specific Fiscal Calendars in the Stock History Export to Analytics	<u>US154442</u>
Add Store-Specific Fiscal Calendar data to RDS	<u>US159511</u>
Add Store-Level Configuration data to RDS	<u>US152518</u>
Add 'RefundTax' to the TransactionSale table in RDS	<u>US159500</u>

Component	User Story
Utilize aggregated values for improved performance in the Sales Trans Export to Analytics	<u>US157885</u>
Add configuration to control the sales value (Net or Gross) exported to Analytics	<u>US148286</u>
Add configuration to control the Inventory Count Types referenced when sending count data to Analytics	<u>US151770</u>
Update the Stock History export to add Monthly (counted) Views	<u>US157312</u>
Update the Stock History export to only export configured Inventory Count Types	<u>US158469</u>

Inventory Activity Report VARPN Updates (F19316)

Release Version	Change Type	Module(s)
<u>2023.2 Release</u>	<u>Enhancement</u>	<u>Reporting</u>

Summary

A customized version of the Inventory Activity VARPN Report is available with the 2023.2 release. This version of the report adds 4 new columns:

- Actual Cost %
 - Calculated from the Actual Cost of each item divided by the Actual Cost of all items reported
- Variance Cost %
 - Calculated from the Variance Cost of each item divided by the Variance Cost of all items reported
- Waste Cost %
 - Calculated from the Waste Cost of each item divided by the Waste Cost of all items reported
- Missing Cost %
 - Calculated from the Missing Cost of each item divided by the Missing Cost of all items reported.

Components

Component	User Story
Create New Custom Version of the Inventory Activity VARPN Report	<u>US149029</u>

Configuration

The new report, "InventoryActivityCurrentDayVARPW_V2" should be activated within the Report Selector.

MacromatiX Mobile (MxConnect)

Inventory

Inventory Count History and Auto-Submit Enhancements (F20236)

Release Version	Change Type	Module(s)
<u>2023.2 Release</u>	<u>Enhancement</u>	<u>Mobile, Inventory</u>

Summary

The 2023.1 release version of MacromatiX introduced new functionality to support the auto-submit of open Inventory Counts based on configurable rules, as well as the ability to edit previously submitted counts through a new “Count History” view within MxConnect.

The 2023.2 release version enhances this functionality with several improvements, including:

- Improvements to the view filters for counted and uncounted items when performing count corrections
- Support for store-specific fiscal calendars when processing auto-submit count rules
- Ability to assign auto-submit rules to multiple stores using zones
- Ensuring counts cannot be edited after the period is locked
- Improved error handling
- Ability to search Count History by Modified User
- Improvements to custom Inventory Activity Report
- Improvements to custom Prep & Production Report

Components

Component	User Story
Reference Store-Specific Fiscal Calendars for Count Auto-Submit	<u>US156077</u>
Count History Enhancements	<u>US158134</u>
Auto-Submit Count (Server Manager Task)	<u>US156078</u>
Inventory Activity Report - New Sales Value Parameter	<u>US156075</u>
Inventory Activity Report - BOM Depletion	<u>US156076</u>
Fit Production Report to Single Page Width (Landscape)	<u>US157652</u>
Defect Fix - Auto-Submit Count - Apply Weekly Count to Correct Date	<u>D80840</u>
Defect Fix - Open New Weekly Count on Last Day of Week	<u>D80841</u>
Defect Fix - Number of Counts Per Period to Consider Configuration and Count Type	<u>D81445</u>
Defect Fix - Apply Count Correction	<u>D81564</u>
Defect Fix - Weekly Count - Correct Week Ending Date in Finish Count Dialog	<u>D80829</u>
Defect Fix - Count History Review to Load Correct Count Data	<u>D81162</u>
Defect Fix - Count Correction to Edit Correct Count	<u>D81143</u>
Defect Fix - Correct Monthly Count Default Apply Time to Last Minute of Last Business Day	<u>D80756</u>

Component	User Story
Defect Fix - Properly Update Count Summary and Daily Stock Balance Calculations After Count Edit	<u>D80754, D81322, D81593</u>
Defect Fix - Item Counted Filter to Include Manual Zero Count Items	<u>D82375</u>
Defect Fix - Item Counted Filter to Include All Counted Items	<u>D82373, D82374</u>
Defect Fix - Prevent "Operation Failed" Error When Viewing Historic Counts	<u>D80752</u>
Defect Fix - Options Displayed in Finish Count Dialog	<u>D81944</u>
Defect Fix - Apply Date Consistency	<u>D81557, D81911, D81946</u>
Defect Fix - Prevent Count Edit After Period Lock	<u>D81663</u>
Defect Fix - Allow Count Correction to be Submitted	<u>D81673, D81668</u>
Defect Fix - Inventory Activity Report to Use Reporting Unit	<u>D81664, D82179</u>
Defect Fix - Inventory Activity Report Fixes	<u>D81709, D80839</u>
Defect Fix - Auto-Submit Count Default Uncounted Items to Zero	<u>D81906, D81863</u>
Defect Fix - Do Not Auto-Submit Count Prior to Scheduled Time	<u>D81901</u>
Defect Fix - Assign Count Submission Scheduler to Multiple Zones	<u>D81407</u>
Defect Fix - Auto-Submit Count Fixes	<u>D80821</u>
Defect Fix - Prevent Load of Historic Count When Creating New Counts	<u>D81669</u>
Defect Fix - Prevent New Weekly Count from Being Created After Weekly Count is Submitted	<u>D81904</u>

Component	User Story
Defect Fix - Inventory Activity Report to Include Transfers	<u>D81690, D81877</u>
Defect Fix - Count History Fixes	<u>D81644</u>
Defect Fix - Inventory Activity Report - Round Waste Quantities	<u>D81665</u>
Defect Fix - Search Count History by Modified User	<u>D80833</u>
Defect Fix - Prevent Multiple Auto-Submit Rules for Same Count Type Within One Template	<u>D81613</u>
Defect Fix - Allow Apply Date Change on Count Edit	<u>D80831</u>

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

Production

Dynamic Production - Ability to Add Run (F19687)

Release Version	Change Type	Module(s)
<u>2023.2 Release</u>	<u>New Feature</u>	<u>Mobile, Production</u>

Summary

The Dynamic Production Dashboard now provides, by configuration and security permission, the ability for managers to specify the “Run” quantity for items to be produced within their store. This allows managers to provide direction to their team on how many batches of a given item should be produced throughout the day. As batches are entered, the “Run” quantity is reduced by the number of batches produced.

Components

Component	User Story
Configuration Settings, Permission, and UI Changes	<u>US153779</u>
Implement Logic to Save and Load Run Quantity	<u>US157882</u>

Configuration

Security Permissions

- Mobile - MPC - Production - Can Add Run Quantity

Configuration Settings

- Inventory - Production - MPC - Enable Run Quantity

Dynamic Production - Font Sizing (F19690)

Release Version	Change Type	Module(s)
<u>2023.2 Release</u>	<u>Enhancement</u>	<u>Mobile, Production</u>

Summary

The font size used for text displayed throughout Dynamic Production is now larger to improve readability of values displayed.

Components

Component	User Story
Dynamic Production Style Improvements	<u>US154422</u>

CloudLink

Recipe and Menu Engineering Integration - Phase 1 (F19318)

Release Version	Change Type	Module(s)
<u>2023.2 Release</u>	<u>New Feature</u>	<u>CloudLink</u>

Summary

The 2023.2 release version of MacromatiX and CloudLink introduces a new Subscription Service and Message Handling functionality for data provided by Recipe and Menu Engineering. The integration between RME and MacromatiX is planned for completion in the 2023.4 release version, at which point it can be activated for customers to build and manage their recipes in RME and have the relevant data automatically provided to MacromatiX for use in Inventory Depletion, Forecasting, and Prep & Production activities.

The integration between RME and MacromatiX is intended to improve the experience for our customers when building recipes, and provide enhanced features; such as Nutrition and Intolerance information for recipes, Menu board integrations, and Recipe Cards.

Components

Component	User Story
New CloudLink Service Subscription Module for RME	<u>US157311</u>
'SupplierUpdated' Message Handling	<u>US158470</u>
Support for Retry Processing from Updated Event Messages	<u>US158621</u>

2023.2 Release Bug Fixes and Rapid Response

MacromatiX Desktop (MMS)

Core

- Transaction Electronic Journal Time-Stamp Issue - French Localization (D80447)

Inventory

- User Able to Modify Purchase Order at Location They Should Not Have Access To (D79714)

Reporting

- Sold Quantity in Item Usage Analysis Report Discrepancy Compared to RDS (D77472)
- Inactive Items Included in the Inventory Activity Report (D78980)
- Drill-Down Error in the Transaction Summary Report (D75811)

Mobile (MxConnect)

Core

- Mobile UI Fails to Load due to Structure Map Error (D80749)

Inventory

- "The Requested Operation Failed" Error When Viewing Historical Counts (D80752)
- "Back" Button on Travel Path Management View Incorrectly Opens a New Count (D80817)
- "Back" Button Missing within the Count History Detail View (D80751)

CloudLink

- Symphony Integration - Condiments Not Linked to Parent Items in Transactions (D79375)
- Symphony Integration - Tax Amount is Incorrect (D79249)

LiveLink

- Void Transactions Incorrectly Repelled from Aloha Point-of-Sale (D80917)