MacromatiX Release

2023.4

Released October 2023

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Introduction

This document communicates the major new features and changes in the 2023.4 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 2023.4 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

★ New Store Default Zone Support

★ Accept Location data from Central Location Service

★ Emit New and Updated Location data to Central Location Service

★ MX Next Gen Forecasting - Part 2 - Reference and Actual Sales Data Exports

★ MX-RME Integration - Phase 3 - Data Imports to MX MX-RME integration Phase 2 - Message Handling and Reference Data

❀ 5 Defects Resolved

Desktop (MMS)		
	Features	Defects
Core	4	4
Financial		
Forecasting		
Inventory	1	
Production		
Reporting	1	
Workforce		
Total	**6**	**4**

Mobile (MxConnect)		
	Features	Defects
Core	8	1
Financial	5	
Forecasting		
Inventory	2	
Production	4	
Reporting		
Workforce		
Total	**19**	**1**

Additional Applications	
	Features
CloudLink	5
LiveLink	1

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RDS	3
Server Manager	4
Total	**13**

MacromatiX Desktop (MMS)

Core

New Store Default Zone Support (F21305)

Release Version	Change Type	Module(s)
2023.4 Release	Enhancement	Core

Summary

The introduced functionality is adding support for default zones, which new stores are added to. In MacromatiX the term Zone represents multiple group of stores and there are two Zone Types - with and without category. This is not visible on the user interface and it is only configurable through the database.

- The ones which have category must have just one default zone. When a store is part of Zone type with category it can be only assigned to one zone.

- The ones which do not have category can have multiple default zones.

- Labour zones is a zone type without category. In the previous versions the Labour zone dropdown was a required field. With the current changes an entity/store can be saved without Labour zone filed (because this entity/store will be included in the default zone of that zone type).

New changes on **Zone Management** page:

- New "Default" checkbox, indicating if the Zone is default or not.

- New "Default" checkbox, when Add button is clicked, indicating that the new Zone can be assigned as default or not.

- When user is trying to add second default zone to Zone type with category, validation will be displayed:
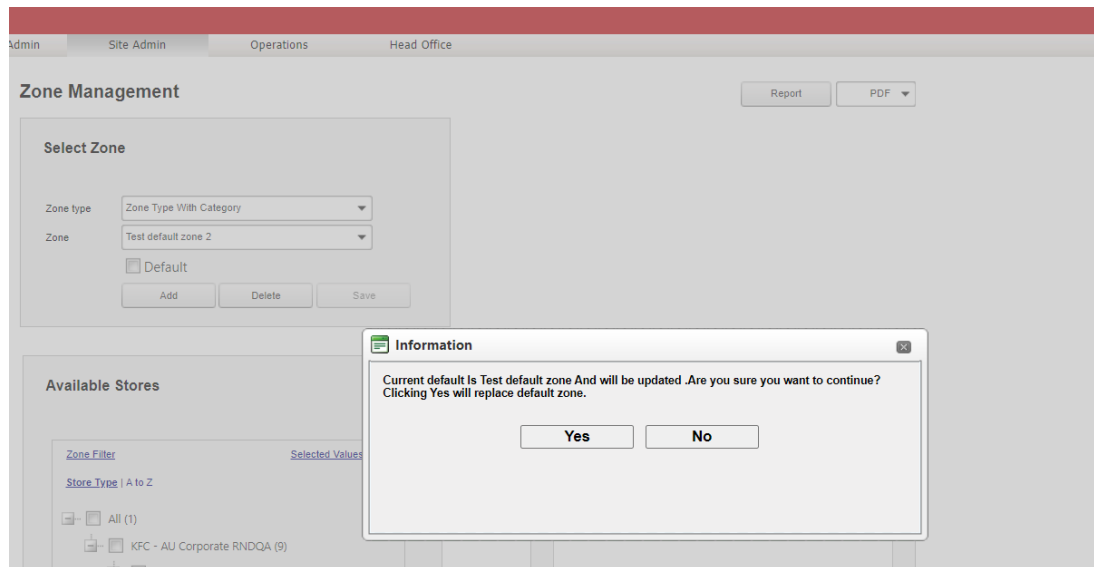
By clicking "Yes" this will overwrite the existing default zone. By clicking "No" the current default zone will remain and the new one will be created without the default flag. In the mobile app the changes introduced are related to creation of a new store. When a new store is created, it will be part of all default zones (no matter if the zone has category or not).

This functionality reduces operational intervention required and will simplify new customer roll outs.

Components

Component	User Story
Store Default Zone > Configure Default Zones on MMS_Manage_Zones.aspx	US162776
Store Default Zone > Add new stores to default zones when create a store on MMS_Admin_Entity.aspx	US168904
Store Default Zone - Rework Labour functionality for zones	US169435
Store Default Zone > Add new stores to default zones on Entity Import	US169452
Store Default Zone > Add new stores to default zones when create a store on Mobile app	US169742

Privacy Standards Compliance - Policy Link (F22287)

Release Version	Change Type	Module(s)
2023.4 Release	Enhancement	Core

Summary

Amend MacromatiX login screens with Privacy policy link information where the user can review it prior entering his/her login information.

Data privacy compliance in all regions we operate.

Components

Component	User Story
Add "View Privacy Policy" link to MMS and MxConnect login screens	US168083

Inventory

Enable EDI for Enterprise Ordering (F21589)

Release Version	Change Type	Module(s)
2023.4 Release	Enhancement	Financial

Summary

To ensure consistency, the system is enhanced to automatically generate the same EDI purchase order files for enterprise orders. System checks if the CreateQuatroOrder flag is set for the store and the vendor of the order, and sends Electronic Order if the flag is enabled. For each individual order in the Enterprise order, the system will also raise the event PurchaseOrderExportTriggered if the enterprise order is NOT set as Auto Receive. This allows the ERP export that handles the event to be generated automatically.

Customer use MacromatiX for vendor integration and ERP integration, which includes an automated process for generating EDI order files when purchases are made from their stores. However, when it comes to enterprise orders, the system currently only sends them to vendors via email, without generating EDI purchase order files.

Components

Component	User Story
Generate EDI when Enterprise Orders are authorized.	US167174

Reporting

Change Font Type and Font Colour in Reports (F21403)

Release Version	Change Type	Module(s)
2023.4 Release	Enhancement	Financial

Summary

Some customer have expressed dissatisfaction with the readability of the font used in certain reports and had consequently requested to alter the font type and colour in some of those reports. Currently for some reports, the font type is predetermined and cannot be modified. Most reports use "Arial Unicode MS" as the default font. Sometimes the font that the report is trying to use is not present on the device, some other font get used to display the text instead. When Chinese is displayed using a font that doesn't support that character, a default font will be used. The font might not be suitable for the context.

For the purposes of consistency and improving the readability, the following reports are enhanced that the font type and font colour can be configured.

Components

Component	User Story
Generate EDI when Enterprise Orders are authorized.	US167174

Configuration Settings

➤ Introducing a new configuration setting under Reporting -> Report Formatting ->"Report Formatting – Font Type". The default value of this configuration is "Arial Unicode MS".

MacromatiX Mobile (MxConnect)

Core

Mobile Splash Page (F22466)

Release Version	Change Type	Module(s)
2023.4 Release	New Feature	Financial

Summary

Added Splash Page to the MxConnect Mobile solution. When a user logs on to the MxConnect, the Splash page will be the first page they will see.

MacromatiX currently operates with two systems: the legacy MMS Desktop solution and the modern MxConnect Mobile solution. Restaurant users currently need to switch between these two systems to carry out their daily tasks. In order to streamline and simplify the user experience, we are in the process of moving all store functions from the legacy MMS Desktop solution to the MxConnect Mobile solution. As part of this effort to make the transition to the mobile solution smoother for our customers, we have also been asked to migrate the Splash Page feature to the mobile platform.

Components

Component	User Story
Mobile Splash Page	US169187

Mobile Report Page (F22468)

Release Version	Change Type	Module(s)
2023.4 Release	New Feature	Financial

Summary

Added Report Page to the MxConnect Mobile solution. Currently, only a limited number of SSRS reports are added to Mobile Report page. More changes will be done in following releases to allow the mobile report page to generate more reports.

MacromatiX currently operates with two systems: the legacy MMS Desktop solution and the modern MxConnect Mobile solution. Restaurant users currently need to switch between these two systems to carry out their daily tasks. In order to streamline and simplify the user experience, we are in the process of moving all store functions from the legacy MMS Desktop solution to the MxConnect Mobile solution. As part of this effort to make the transition to the mobile solution smoother for our customers, we have also been asked to migrate the Report Page feature to the mobile platform.

Components

Component	User Story
Mobile Report Page	US169429

Mobile Download Center Page (F22468)

Release Version	Change Type	Module(s)
2023.4 Release	New Feature	Financial

Summary

Added Download Center Page to the MxConnect Mobile solution.

MacromatiX currently operates with two systems: the legacy MMS Desktop solution and the modern MxConnect Mobile solution. Restaurant users currently need to switch between these two systems to carry out their daily tasks. In order to streamline and simplify the user experience, we are in the process of moving all store functions from the legacy MMS Desktop solution to the MxConnect Mobile solution. As part of this effort to make the transition to the mobile solution smoother for our customers, we have also been asked to migrate the Download Center Page feature to the mobile platform.

Components

Component	User Story
Mobile Report Page	US169188
Mobile Download Center Page - Phrase 1.1	US170841
Username can not display correctly	US170840

Mobile Workflow - Defects and Gaps (Q3 2023) (F22489)

Release Version	Change Type	Module(s)
2023.4 Release	Enhancement	Financial

Summary

Fixing defects and filling gaps in Mobile Workflow. This is for both existing and new customers who are going to use Mobile WorkflowAs part of our company's mobile strategy, the R&D team recently created the new cash management modules in the MacromatiX mobile solution. However, during the conversion process from the legacy ASP.NET | Open-source web framework for .NET pages to the mobile solution, a significant number of defects and gaps emerged between the existing functions in the MMS and the new functions in the mobile solution. As a result, it is currently not possible to release the new Mobile Cash features to both existing and new customers. To address these issues, the Shanghai team has been tasked with fixing the defects and filling the gaps in Q3 2023.

Components

Component	User Story
Workflow - B. Mobile Workflow Does Not Open Count for Specific Shift.	US163603
Workflow - C. Should be able to open deposit and dispatch/collection directly from Workflow task.	US163604
Workflow - E. Workflow Setting Issues	US163652
[Defect] Some UI issues for creating Mobile workflow.	US170609
[Defect] Mobile workflow panel can't hide when load pages from MMS workflow	US169733
Workflow - B. Mobile Workflow Does Not Open Count for Specific Shift.	US163603

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Production

EMPC Cooking Prioritization (F19692)

Release Version	Change Type	Module(s)
2023.4 Release	Enhancement	Financial

Summary

The EMP&C system is enhanced to prioritize the cooking order based on cook times and item availability. During busy periods or when there are large quantities of items to be cooked, it can be challenging for the staff to determine what to cook first, leading to product shortages and increased stress. This feature will benefit kitchen staff, customers, and all users in the restaurant. Kitchen staff will have a clear understanding of the order in which to cook items, reducing confusion and improving efficiency. Customers will enjoy faster service and reduced wait times for their favorite products. By having a prioritized list of items, all users in the restaurant will benefit from minimized product runouts and reduced stress.

Components

Component	User Story
A. Prioritize the cooking order based on cook times and item availability.	US163437

Configuration Settings

➢ Introducing a new configuration setting under Inventory -> Production ->"MPC – Enable Cooking Prioritization", where False will represent disabled setting.

➢ A new configuration column called Display Priority is added to the Management Projection & Control V2 Setup page. The new configuration column is visible only if the configuration "MPC – Enable Cooking Prioritization" is turned on.

➢ Introducing the Cook Order color setting in the mobile Production Management Settings

EMPC Quantities of Label Printing (F21765)

Release Version	Change Type	Module(s)
2023.4 Release	Enhancement	Financial

Summary

The EMPC label printing feature is enhanced to dynamically print labels that correspond to the size of each batch cooked and the divisible units of the item.

The current system prints a fixed number of labels based on the store's Auto Print Quantity settings, regardless of the actual batch size being cooked.

Components

Component	User Story
A. Dynamically Print Labels	US168311

EMPC Quantity Table View (F19693)

Release Version	Change Type	Module(s)
2023.4 Release	Enhancement	Financial

Summary

An alternative view is added to the production forecast window. This new view shows the data currently presented in the graph histogram in a table format, giving users the ability to switch between the graph and table views depending on their preference.

Some restaurant teams find the graph format difficult to understand as they are used to the standard MP&C report presented in a table format. To assist with the adoption of the new E-MP&C system, customer has requested an alternative view to be added to the production forecast window.

Components

Component	User Story
A. Add the Table View to Production Forecast Window.	US167134

EMPC Reduce Keystrokes (F19691)

Release Version	Change Type	Module(s)
2023.4 Release	Enhancement	Financial

Summary

Introduce different key labels for different items to simplify the process and minimize confusion faced by the kitchen crew teams. Additionally, to further minimize keystrokes and reduce the likelihood of human error, dropdown boxes are defaulted to the most common or pre-selected options for "delete batch" and "waste item". When the kitchen crew needs to confirm cooking an item, they use a touch screen device on the EMPC system to enter the quantity of batches to be cooked. However, since different items have varying batch sizes and units such as bags, heads, and so on, the teams are currently facing confusion while entering the batch quantity. This feature is to improve operational efficiency and reduce errors by minimizing keystrokes and providing consistency while confirming cooking items in restaurants.

Components

Component	User Story
A. Reduce EMPC Keystrokes.	US163440

Configuration Settings

➢ Introducing a new configuration setting under Inventory -> Production ->"MPC - Show Batch Label Configuration", where False will represent disabled setting.

➢ A new configuration column called EMPC Batch Key Labels is added to the Management Projection & Control V2 Setup page. This column is located next to the Divisor column. The new configuration column is visible only if the configuration "MPC – Show Batch Label Configuration" is turned on. The Batch Key Labels are comma-delimited string. Each field in the string is a label that will be shown on the batch keys.

Inventory

Waste Management Reporting Enhancement (F21401)

Release Version	Change Type	Module(s)
2023.4 Release	Enhancement	Financial

Summary

A new Raw and Finished Waste with Summary and Detail report is added. The report has four sections, the Finished Waste Summary section, the Finished Waste Detail section, the Raw Waste Summary section, and the Raw Waste Detail section. In the Waste Summary section, it lists total (quantity and amount) waste by item and the total cost. In the Waste Detail section, it lists all waste with sales item code, description, quantity, cost, user, transaction time, and reason. Mobile waste is enhanced to allow users to generate waste report within the mobile waste module. This change should improve the usability and efficiency of the waste management system. It makes the process easier for users to access and analyze the data they need to make informed decisions about waste management. By default, the system generates the Raw and Finished Waste (Report ID 455) report for the current store and selected date range from Mobile Waste History Page. To improve the user experience and increase efficiency in waste management reporting. Currently, users can only access waste details from either the Raw and Finished Waste by Date Range report or the Waste History page, and they must manually count each waste entry to obtain a waste summary.

Components

Component	User Story
A. Reduce EMPC Keystrokes.	US163440

ConfigurationSettings

➢ Mapping can be added to tbReportCustom to replace the existing Raw and Finished Waste with the new **Raw and Finished Waste with Summary and Detail** report. With this mapping configuration, the new Raw and Finished Waste with Summary and Detail report will be generated when the button is clicked

Mobile Ordering Enhancement 2023 (F21404)

Release Version	Change Type	Module(s)
2023.4 Release	Enhancement	Financial

Summary

Mobile Ordering is enhanced to display additional information about an order, such as the name of the person who created it, the person who submitted it, and the person who received it, etc. Mobile Ordering is enhanced to allow users to print the order detail report directly from the mobile order history page, eliminating the need to navigate to the legacy ordering page.

To enhance the usability and functionality of the mobile ordering and to provide users with a more comprehensive and streamlined experience.

Components

Component	User Story
A. Display additional information of about an order.	US163435
B. Generate Order Detail Report from Mobile Order History Page.	US163436

Financial

Mobile Cash Reconciliation - Defects and Gaps (Q3 2023) (F22484)

Release Version	Change Type	Module(s)
2023.4 Release	Enhancement	Financial

Summary

Fixing defects and filling gaps in Cash Reconciliation of Mobile Cash Management.

As part of our company's mobile strategy, the R&D team recently created the new cash management modules in the MacromatiX mobile solution. However, during the conversion process from the legacy ASP.NET | Open-source web framework for .NET pages to the mobile solution, a significant number of defects and gaps emerged between the existing functions in the MMS and the new functions in the mobile solution. As a result, it is currently not possible to release the new Mobile Cash features to both existing and new customers. To address these issues, the Shanghai team has been tasked with fixing the defects and filling the gaps in Q2 2023.

Components

Component	User Story

Cash Recon - D. Drawer Skim Issues.	US163401
Cash Recon - M. Financial Subgroups Can not be edited.	US163490
Cash Recon - H. Drawer Count Down only has one variance warning.	US163405
Cash Recon - G. Cash Reconciliation is reversed.	US163404
Cash Recon - I. Refresh Sales.	US163406
[Defect] when set financial group with "None" operation,financial group amount can not be saved after authorizing cash reconciliation	US169834
[Defect] when variance is 0,"This count has a balance that out of tolerance xxxx" will pop up in traditional mode	US170911
[Defect] - Cash recon - Unable to access cash verification section if permission is on	US170935

Configuration Settings

➢ Introducing a new configuration setting under Mobile -> Cash Management ->"Cash Reconciliation View Type". Two options of the configurations are Traditional and New.

Mobile Daily Reconciliation - Defects and Gaps (Q3 2023) (F22485)

Release Version	Change Type	Module(s)
2023.4 Release	Enhancement	Financial

Summary

Fixing defects and filling gaps in Daily Reconciliation of Mobile Cash Management.

As part of our company's mobile strategy, the R&D team recently created the new cash management modules in the MacromatiX mobile solution. However, during the conversion process from the legacy ASP.NET | Open-source web framework for .NET pages to the mobile solution, a significant number of defects and gaps emerged between the existing functions in the MMS and the new functions in the mobile solution. As a result, it is currently not possible to release the new Mobile Cash features to both existing and new customers. To address these issues, the Shanghai team has been tasked with fixing the defects and filling the gaps in Q3 2023.

Components

Component	User Story
Daily Recon - C. Daily Summary Sales and Variance do not match MMS banking.	US163412
Daily Recon - D. Editable fields in Daily Reconciliation are not editable.	US163413
Daily Recon - G. Can not release authorized banking.	US163508
Daily Recon - E. Mobile Cash Daily Reconciliation is reversed.	US163414
Daily Recon - H. Daily Recon should open with current business day	US163785
[Defect] After authorizing cash reconciliation, click "shift list", unsaved message will pop up	US170001
[Defect] Can not view current business day.	US169957
Daily recon page load data error in some special case	US169186
[Defect] When authorizing daily recon on MMS, mobile will not display authorizing time	US169999
[Defect] the operation symbol of subgroup's total amount can not display correctly in traditional mode	US171090

Mobile Petty Cash - Defects and Gaps (Q3 2023) (F22488)

Release Version	Change Type	Module(s)
2023.4 Release	Enhancement	Financial

Summary

Fixing defects and filling gaps in Petty Cash of Mobile Cash Management.

As part of our company's mobile strategy, the R&D team recently created the new cash management modules in the MacromatiX mobile solution. However, during the conversion process from the legacy [ASP.NET | Open-source web framework for .NET](#) pages to the mobile solution, a significant number of defects and gaps emerged between the existing functions in the MMS and the new functions in the mobile solution. As a result, it is currently not possible to release the new Mobile Cash features to both existing and new customers. To address these issues, the Shanghai team has been tasked with fixing the defects and filling the gaps in Q2 2023.

Components

Component	User Story
Petty Cash - B. Can not Link Paid In/Out to Cash Reconciliation	US163594
Petty Cash - D. Can not see petty cash for current business day.	US163596
Petty Cash - G. Open Petty Cash from Workflow should open with current business day	Us168527
Petty Cash - Delete Petty Cash	US170183

Mobile Deposits - Defects and Gaps (Q3 2023) (F22487)

Release Version	Change Type	Module(s)
2023.4 Release	Enhancement	Financial

Summary

Fixing defects and filling gaps in Deposits of Mobile Cash Management.

As part of our company's mobile strategy, the R&D team recently created the new cash management modules in the MacromatiX mobile solution. However, during the conversion process from the legacy [ASP.NET | Open-source web framework for .NET](#) pages to the mobile solution, a significant number of defects and gaps emerged between the existing functions in the MMS and the new functions in the mobile solution. As a result, it is currently not possible to release the new Mobile Cash features to both existing and new customers. To address these issues, the Shanghai team has been tasked with fixing the defects and filling the gaps in Q2 2023.

Components

Component	User Story
Banking Deposit - D. Dispatch Deposit button showing outside of the row.	US163427
Banking Deposit - E. Banking Deposit Dispatch and Collection.	US163428
Banking Deposit - F. Mobile banking deposit only lists deposit for the select date.	US163429
Banking Deposit - G. Can not enter banking deposit	Us163651
Banking Deposit - H. Banking Deposit should open with current business day	US163757
[Defect] Part of Completed deposit will be cut off and can not be fully displayed in Android pad portrait mode	US169685
[Defect] mobile dispatched deposit can not displayed in MMS's "Deposits dispatched for 2023/08/23"	US169956
[Defect] The boxes are not aligned.	US170096
[Defect] Available deposit amount increased once accessing the same business day	US170742

Configuration Settings

➢ Introducing a new configuration setting under Mobile -> Cash Management ->"Banking Deposit Mode". There are two options for this configuration: Collection and Dispatch.

Mobile Safe Count - Defects and Gaps (Q3 2023) (F22486)

Release Version	Change Type	Module(s)
2023.4 Release	Enhancement	Financial

Summary

Fixing defects and filling gaps in Safe Count of Mobile Cash Management.

As part of our company's mobile strategy, the R&D team recently created the new cash management modules in the MacromatiX mobile solution. However, during the conversion process from the legacy [ASP.NET | Open-source web framework for .NET](#) pages to the mobile solution, a significant number of defects and gaps emerged between the existing functions in the MMS and the new functions in the mobile solution. As a result, it is currently not possible to release the new Mobile Cash features to both existing and new customers. To address these issues, the Shanghai team has been tasked with fixing the defects and filling the gaps in Q2 2023.

Components

Component	User Story
Safe Count - B. For authorized Safe Count, the system should display user's name.	US163418
Safe Count - C. Default Date Issue on Safe Count page.	US163419
Safe Count - D. Not able to enter count by denomination in Safe Count (Qdoba)	US163420

Other applications

CloudLink

MX Next Gen Forecasting - Part 2 - Reference and Actual Sales Data Exports (F20728)

Release Version	Change Type	Module(s)
2023.4 Release	New Feature	Financial

Summary

For this quarter the introduced changes are related to the creation of Master Data, Volume data and Event data exports. MacromatiX has a legacy forecasting engine that produces forecasts for Sales, Transactions, Sales Items, and (based on recipe data) Inventory demand. The algorithm used by this forecast is very basic, utilizing a rolling average for the same day of week over the past N weeks and configurable options for removing highs/lows and applying last-year weighting. Fourth has developed an advanced AI forecasting engine that utilizes machine learning to analyze multiple inputs and produce a more accurate forecast. The purpose of this initiative is to integrate MacromatiX with the AI Forecasting service, which requires export of actual sales and related reference data to the forecasting service as well as importing the forecast generated by the service into MacromatiX. To support this initiative, the MacromatiX engineering team will need to develop several back-end integration points between AI Forecasting and MacromatiX.

This includes:

Message-handling services to process inbound messages from AI Forecasting and produce outbound messages.

Exporting actual sales data and a variety of reference data points in a manner that the AI Forecasting service can consume them.

Importing the forecast data generated by the AI Forecasting service.

MacromatiX currently supports the import of a forecast from an external source, but transforming the forecast provided by the AI Forecasting service into this format does require development.

However until a centralized user interface is available for interacting with the Forecast, the MacromatiX Forecasting UI will continue to be used, but should not require any development related to this initiative .

Users/Personae:

- Store-level Manager - "I'm very busy. I need to spend the least time possible on this but at the same time, I know it's important (I have KPIs against it). We had a system-generated forecast at my last place and I didn't trust the results. But if gets the job done…."
- Above-store Manager / Area Coach - "I'm also very busy but I definitely see this as a priority - especial where regulation and cost around labour is concerned. I need an easy way to understand what my managers are doing (or not doing) right now and tools to help them get it right in the future."
- Central analytics user - "I'm looking for historical trends in the data to improve process and forecast for the future. I need to be able to justify the extra effort that goes into this with bottom-line results."
- Central administrator - don't give me too much to manage and configure but let me have control…

There are three primary drivers to integrating MacromatiX with the AI Forecasting service:

1. To provide our customers with a more accurate forecast, which will require less manual intervention.
   a. The legacy forecast within MacromatiX is often manually adjusted by restaurant managers to improve its accuracy.
   b. Failure to provide a more robust forecasting solution gives our competitors an edge in this area.

      c.   Due to previous lack of investment in advanced forecasting directly within MacromatiX, some existing customers have opted to build/contract external forecasting solutions.

2. To enable customers using multiple Fourth products to utilize a consistent forecast within Inventory and Labor.
      a.   Eliminate the need for MacromatiX to share our forecast data with the other Fourth products using direct integrations.
      b.   Provide a cohesive experience to our customers and remove any confusion as to where/how to view and manage the forecast.
      c.   Enable Fourth to focus investment on Demand Forecasting on a single solution instead of maintaining different forecasting solutions across the portfolio of products.

3. To improve performance, scalability, and parity with existing forecasting functionality in MacromatiX and HotSchedules.

Components

Component	User Story
RDS - TransactionSaleItem - New Function to backfill ServiceTypeId from TransactionSale	US164800
Next GEN E2E testing - Create scenarios	US169570
Master Data - Event Type export	US159321
Master Data - Location Menu Item export	US159324
Volume Data - Forecast - Forecast Sales Item - Menu Item Count export by calendar day	US159330
Volume Data - Actual - Transaction Sales Item - Menu Item Count, Menu Item Cost and Menu Item Amount export by calendar day	US159334
Master Data - Inventory Item export	US159708
Master Data - Location Inventory Item export	US159709
Master Data - Standard Operating Hours export	US163324
[Testing] RDS - StoreSaleItem - Map Active to InUse	US164026

RDS - Map Entity Time tables	US164813
RDS - Map Forecasting Event tables	US164814
RDS - Map Forecasting Promotion tables	US164815
Data Extracts - Add support to export data from RDS	US167286
DataExtractionGenerated - Add ExtractionTimestamp	US167405
Volume Data - Actual - Transaction Sale - Sales Amount, Transaction Count and Guest Count export by calendar day	US168030
Master Data - Menu Item Inventory Item Quantity export	US169437
Volume Data - Forecast - Forecast Detail - Sales Amount, Transaction Count export by calendar day	US169438
Rework existing exports to filter on FourthAcountId	US169440
Event Data - Non-Trading Event export by calendar month	US169442
[Testing] RDS - Map Entity Time tables	US169745
[Testing] RDS - Map Forecasting Event tables	US169746
[Testing] RDS - Map Forecasting Promotion tables	US169747
Event Data - Menu Item Promotion Event export [5]	US170046
Event Data - Special Operating Hours Event export [3]	US170185
Event Data - Local Event export	US170473

MX-RME Integration - Phase 3 - Data Imports to MX (F20943)

Release Version	Change Type	Module(s)
2023.4 Release	New Feature	Production

Summary

Synchronization and mapping the ingredients and recipes data between MacromatiX and RME system to enable customers to use both systems integrated.

- Enable consumption and saving of Ingredients, Units of Measure and Categories information for ingredients through IngredientUpdated message from RME system.

- Enable consumption and saving of Recipes, Units of Measure and Categories information for recipes through RecipeUpdated message from RME system.

- Enable consumption and saving of Combos and BOM items information for ingredients through RecipeUpdated message from RME system.

- Adding support in CloudLink application for testing the consumption of IngredientUpdated and RecipeUpdated messages.

Components

Component	User Story
RME E2E Ingredient Updated	US169446
RME E2E Recipe Updated	US169447
RME Cloudlink Test Page for RecipeUpdated message	US170047
RME SM Message Handler - RecipeUpdated(Regular Inventory Item (Inventory Item Master Import Template))	US142275
RME SM Message Handler - Update VendorDescription	US168542
RME SM Message Handler - IngredientUpdated(Regular Inventory Item (Inventory Item Master Import Template), Vendor Item, Units of Measure)	US168897

RME SM Message Handler - IngredientUpdated outstanding automation and minor tasks	US169449
RME SM Message Handler - IngredientUpdated/RecipeUpdated - Units of Measure	US169472
RME Cloudlink Test Page for IngerdientUpdated message	US170045
RME Inventory Item Master Import check if Inventory Item Exists	US170202
RME SM Message Handler - RecipeUpdated - Sales Item Recipes	US171016
RME SM Message Handler - RecipeUpdated - Sales Item Recipes(Sales Master Import)	US171020
RME SM Message Handler - RecipeUpdated - Batch/BOM items(Regular Inventory Item (Inventory Item Master Import Template), Units of Measure)	US171023
RME SM Message Handler - RecipeUpdated - Combo Sales Items	US171033

Simphony Warranty & Gaps (F21415)

Release Version	Change Type	Module(s)
2023.4 Release	Enhancement	CloudLink

Summary

To fix the outstanding issues regarding the implementation of the Simphony integration.

- Making sure that the refunds are capturing correctly into the ARTS files and MMS. Also added a new configurable option to reverse the inventory movement as part of the refund transaction.

- Update the CloudLink POS polling services to include retry mechanisms for handling connection/data response errors to the POS APIs (currently Simphony and RedCat integration).

- Fix for Simphony cancelled sales not being correctly exported from CloudLink into MMS data tables and Transaction Viewer page.

- Restrict manual reprocessing of sales data to maximum of 7 days and automatically reprocess the previous business day at the store open time based on value saved in DayStartTime column of CloudLink.dbo.tbServiceGroupStore

- Adding in new ARTS mappings for Cashier Open, Cashier Close and Cashier Float events to export these events to MMS from CloudLink.

- Fix for manually reprocessing CloudLink polled stored data incorrectly including additional dates outside of selected date range.

- Updating Vue.js code for CloudLink to follow Vue.js 3's patterns and improve future compatibility with new versions/JS frameworks.

- Simphony polling fixes in ARTS file to correctly map discount tax calculations and displaying discounts in MMS on the Transaction Viewer

- Added Simphony deduplication logic to speed of service, cancellations, day open, day close, register open, register close, register open float and void transactions to prevent generating ARTS files that only contain duplicated transaction data (will improve server resource usage and transaction processing speed).

- Added visual indication that CloudLink manual reprocessing is in progress by disabling the reprocess button until the operation is complete.

- Fixed issue with CloudLink service log screen where it wasn't consistently ordering the log entries in chronological order and made the logs sortable by severity

Components

Component	User Story
CloudLink Simphony Polling Service - Refunds needs to be captured as a separate negative transaction in the ARTS file (process refund transactions into ARTS file)	US163549
CloudLink Simphony Polling Service - Service should retry restart after maintanance	US163550
CloudLink Simphony Polling Service - Cancelled Sales polled correctly from API into ARTS file	US163551
CloudLink Simphony Polling Service - [Enhancement] Reprocessing data for a store limited to 7 days	US164372
Spike - CloudLink Simphony Polling Service - Cancelled Sales read correctly from ARTS file into MMS	US167274
CloudLink Simphony Polling Service - Process Cashier Events (Cashier - Float)	US167323

CloudLink Simphony Polling Service - [Enhancement] Refunds needs to return items to inventory - CloudLink changes	US167329
CloudLink Simphony Polling Service - [Enhancement] Manually reprocessing data for a store shouldn't include additional processDataPeriod days)	US167331
Spike - Vue Modernization and Refactoring	US167972
CloudLink Simphony Defects > Sprint 279	US168295
CloudLink Simphony Defects > Sprint 280	US168911
CloudLink - Apply Prometheus configuration updates to facilitate Slack webhook notifications on service error/failure	US169379
CloudLink Simphony Defects > Sprint 281	US169491
(Investigation) CloudLink Simphony Polling Service - [Enhancement] Refunds needs to return items to inventory - MMS changes	US170270
CloudLink Simphony Polling Service - [Enhancement] Reprocessing data - Restrict the automatic reprocessing of store data based on processDataPeriod	US170300
(Part 2) CloudLink Simphony Polling Service - [Enhancement] Refunds needs to return items to inventory - CloudLink changes	US170788
CloudLink Simphony Polling Service - [Enhancement] Process Refund transactions in ARTS file into MMS	US171077
CloudLink Simphony Defects > Sprint 282	US171078
CloudLink Simphony Defects > Sprint 283	US171079

Accept Location data from Central Location Service (F21488)

Release Version	Change Type	Module(s)

2023.4 Release	New Feature	CloudLink

Summary

MacromatiX has existing functionality used by customers to create and manage their organizational hierarchy and store locations. The mechanisms available for these tasks are 3 ways: trough MMS, mobile MxConnect app and Entity Import functionality. MacromatiX considers all locations and various levels in the hierarchy as "entities", each with a unique identifier (Store Number) typically defined by the customer and an internal system-generated identifier (Entity ID). Entities in MacromatiX are defined at one of four levels in the hierarchy using an attribute named "Entity Type ID":

- 1 - Corporate (Top-level entity)

- 2 - Principal (high-level segment of the organization, such as Franchise groups, Corporate-Owned groups, or geographical region)

- 3 - Master (parent entity of store locations, often a specific Franchisee, Area Manager jurisdiction, or geographical area)

- 4 - Store (lowest level in the hierarchy, all store locations)

Every entity created in MacromatiX must be associated with a parent entity, except for the singular "Corporate" entity at the top of the hierarchy. Therefore, all applicable hierarchy entities must exist before store locations can be imported or added in the UI, so that the store can be properly linked to their parent entity. Once an entity is created, it cannot be moved to a different level of the hierarchy (i.e. from "Store" to "Master"), but can be moved to reside under a different parent. The outlined approach for the Central Location Service requires that each product integrating with the service be able to both consume and emit location updates using messaging. As such, the following changes will be implemented in MacromatiX:

- General

    - Add the Fourth Canonical Location ID to the Entity data model.

    - Allow for the Fourth Canonical Location ID to be manually assigned to locations.

    - A new CloudLink Subscription Service for processing and routing messages from the Central Location Service.

- Inbound Messaging

    - Message Handing of CanonicalLocationUpdated messages from the Central Location Service

- Inbound Processing

    - Transform of the data provided by the Central Location Service into the existing MacromatiX Entity Import format.

    - Import Locations provisioned through the Central Location Service by another source.

o   Assign the Fourth Canonical Location ID to locations provisioned through the Central Location Service when MacromatiX is the source.

Each Fourth product maintains locations through various means and location details that are required or available to be defined may vary by product. This includes how locations are uniquely identified. To provide a consistent identifier across all Fourth products, the concept of a "Fourth Canonical Location ID" has been introduced. Every location provisioned through the Central Location Service is assigned a globally-unique Canonical Location ID.

In addition to ensuring each product can identify a location with a common ID, integration between MacromatiX and the Central Location Service will allow customers using any combination of Fourth products to create and manage their locations using a single entry point and have this data shared across all relevant products. Customers can provide their locations through:

- Central Location Service API

- MacromatiX

- HotSchedules

- Central Location UI (tbd)

- Any other Fourth product

The outlined approach for the Central Location Service requires that each product integrating with the service be able to both consume and emit location updates using messaging. As such, the following changes will be implemented in MacromatiX.

Components

Component	User Story
Store Default Zone > Configure Default Zones on MMS_Manage_Zones.aspx	US162776
Store Default Zone > Add new stores to default zones when create a store on MMS_Admin_Entity.aspx	US168904
Store Default Zone - Rework Labour functionality for zones	US169435
Store Default Zone > Add new stores to default zones on Entity Import	US169452
Store Default Zone > Add new stores to default zones when create a store on Mobile app	US169742

Configuration Settings

- ➢ Reporting - Exports - Fourth Analytics Stock History Count Type Exports with the following options: Daily, Daily Count, Weekly, Weekly Count, Monthly, Monthly Count.
- ➢ Reporting - Reports - Gross Sales Value Used By Reporting with the same type and options as Sales Value Used By Forecasting (v2), so when this configuration is enabled for the customer, they will have that report available. By default, this configuration will be disabled for the rest of the customers.

Emit New and Updated Location data to Central Location Service (F21493)

Release Version	Change Type	Module(s)
2023.4 Release	New Feature	CloudLink

Summary

MacromatiX has existing functionality used by customers to create and manage their organizational hierarchy and store locations. The mechanisms available for these tasks are 3 ways: trough MMS, mobile MxConnect app and Entity Import functionality.

MacromatiX considers all locations and various levels in the hierarchy as "entities", each with a unique identifier (Store Number) typically defined by the customer and an internal system-generated identifier (Entity ID). Entities in MacromatiX are defined at one of four levels in the hierarchy using an attribute named "Entity Type ID":

- 1 - Corporate (Top-level entity)

- 2 - Principal (high-level segment of the organization, such as Franchise groups, Corporate-Owned groups, or geographical region)

- 3 - Master (parent entity of store locations, often a specific Franchisee, Area Manager jurisdiction, or geographical area)

- 4 - Store (lowest level in the hierarchy, all store locations)

Every entity created in MacromatiX must be associated with a parent entity, except for the singular "Corporate" entity at the top of the hierarchy. Therefore, all applicable hierarchy entities must exist before store locations can be imported or added in the UI, so that the store can be properly linked to their parent entity. Once an entity is created, it cannot be moved to a different level of the hierarchy (i.e. from "Store" to "Master"), but can be moved to reside under a different parent.

The outlined approach for the Central Location Service requires that each product integrating with the service be able to both consume and emit location updates using messaging. As such, the following changes will be implemented in MacromatiX:

- **General**
  - Add the Fourth Canonical Location ID to the Entity data model.
  - Allow for the Fourth Canonical Location ID to be manually assigned to locations.
  - A new CloudLink Subscription Service for processing and routing messages from the Central Location Service.
- **Outbound Messaging**
  - Generation of CanonicalLocationUpdateRequested messages for entities added or modified in MMS.
  - Generation of CanonicalLocationUpdateRequested messages for entities added or modified in MxConnect.
  - Generation of CanonicalLocationUpdateRequested messages for entities added or modified through the MacromatiX Entity Import.

Each Fourth product maintains locations through various means and location details that are required or available to be defined may vary by product. This includes how locations are uniquely identified. To provide a consistent identifier across all Fourth products, the concept of a "Fourth Canonical Location ID" has been introduced. Every location provisioned through the Central Location Service is assigned a globally-unique Canonical Location ID.

In addition to ensuring each product can identify a location with a common ID, integration between MacromatiX and the Central Location Service will allow customers using any combination of Fourth products to create and manage their locations using a single entry point and have this data shared across all relevant products. Customers can provide their locations through:

- Central Location Service API
- MacromatiX
- HotSchedules
- Central Location UI *(tbd)*
- Any other Fourth product

The outlined approach for the Central Location Service requires that each product integrating with the service be able to both consume and emit location updates using messaging. As such, the following changes will be implemented in MacromatiX.

Components

Component	User Story
Add Event Support for Entity Updated by Import	US164682
Create Canonical Location Update Requested Event Export	US168027

Implement Canonical Location Updated Export logic and triggers	US168041
Central Location Service - End to End testing	US168973

Configuration Settings

> New configuration is added under Core > Entity > "Entity Import Location Identifier" and will provide dropdown with two options. The first option is Store Number (default) and second option is FourthLocationID.

LiveLink

LiveLink NP6 Interface Get Modifier's Relationship to Its Parent (F21402)

Release Version	Change Type	Module(s)
2023.4 Release	Enhancement	CloudLink

Summary

Changes are made in the POS integration with NP6 POS system by enabling clear tracking of the hierarchy of combo, sales items, and modifiers/condiments. With the change, the Combo and Combo Item relationship will be recorded in table tbTransactionSalesItemCombo. And the Sales Item and Modifier/condiment relationship will be recorded in tbTransactionSalesItemModifier.

Customers require information on the relationship between items sold in an order for the purpose of cost analysis and data analysis. That includes identifying which sales items are parts of a particular combo and determining which condiments or modifiers belong to which sales item. However, the current system treats all children and grandchildren of a combo equally, without distinguishing their hierarchy.

Related to customers using the NP6 POS integration.

Components

Component	User Story
A. Process Combo/Sales Item/Modifier Hierarchy in LiveLink NP6.	US163433

2023.4 Release Bug Fixes and Rapid Response/DTZ

MacromatiX Desktop (MMS)

➢ Specialized - Core - Bug on Fix D79714 - Multi Store User Receiving Order (D86562)