MacromatiX Release

2024.3

Released July 2024

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Introduction

This document communicates the major new features and changes in the 2024.3 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 2024.3 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

- AI Forecasting - Implement Improvements Identified
- MxConnect – Cost Of Goods Report
- MxConnect - Transaction Viewer
- MxConnect - Ordering Enhancements (Suggested Ordering)
- MxConnect – Stock count improvements (Review Count Screen)
- MxConnect – Help File Implementation
- MxConnect – Weekly Forecast Viewer
- Forecast Events Import
- 49 Defects Resolved

Release Summary

Desktop (MMS)		
	Features	**Defects**
Core	5	11
Financial		
Forecasting		
Inventory		
Production		
Reporting		
Workforce		
Total	**5**	**11**

Mobile (MxConnect)		
	Features	**Defects**
Core	16	28
Financial		
Forecasting		
Inventory		
Production		
Reporting		
Workforce		
Total	**16**	**28**

Additional Applications	
	Features
CloudLink	
LiveLink	
RDS	
Server Manager	**3**
Total	**3**

MacromatiX Desktop (MMS)

Defects (Q2 CY24) [F24150]

Release Version	Change Type	Module(s)
2024.3 Release	Enhancement	Core

Summary

Fixing issues found during Q2.

Components

Component	User Story
CloudLink Maintenance Improvements	US183706
CloudLink Simphony - Make Speed of Service, Cash Management, Control Daily Info processing and number of stores being processed in parallel configurable	US183709
CloudLink Simphony - Fixing bug in deduplication logic for Drawer Skims, Non Sales, Payments and Sales	US184122
CloudLink Simphony - Logging improvements and Out of Memory exceptions	US184586

MacromatiX Mobile (MxConnect)

Cost of Goods Sold Report in MxConnect - Store-Level initial report page [F14592]

Release Version	Change Type	Module(s)
2024.3 Release	New feature	Core

Summary

Introducing the Cost of Goods Sold Report in MxConnect.

- New permissions are added under the MMS_Admin_RoleSecurity.aspx page for Cost of Goods
- New report option is added under Operations tab for Cost of Goods
- When selected, the report is populated based on categories with the option Count to count filter to be selected
- When Count to count filter is selected the "+" button option is populated
- When "+" button option is selected, new Count to count pop up is populated with 4 fields to select, based on the functionality that exist in MMS
- When the user navigates to the view manager option to setup the report column's view, the following columns are available to select
    - Item Name
    - Item Code
    - Unit of Measure (Reporting Unit, reverting to Inventory Unit if Reporting Unit is not set)
    - Current Cost (Cost currently assigned to the item at the time the report is generated)
    - Opening Cost (Cost associated with the item at the time of the opening count or selected start date)
    - Closing Cost (Cost associated with the item at the time of the closing count, or selected end date)
    - Beginning Inventory Quantity
    - Beginning Inventory Value
    - Ending Inventory Quantity
    - Ending Inventory Value
    - Purchases Quantity
    - Purchases Value
    - Returns Quantity
    - Returns Value

- Transfers In/Out Quantity
- Transfers In/Out Value
- Waste Quantity
- Waste Value
- Actual Usage Quantity (Beginning + Purchases - Returns + Transfers In - Transfers Out - Waste - Ending)
- Actual Usage Value
- Actual % of Sales (Actual Usage Value / Actual Sales Value)
- Theoretical Usage Quantity (sum of inventory depletion through recipe item sales)
- Theoretical Usage Value
- Theoretical % of Sales (Theoretical Usage Value / Actual Sales Value)

Components

Component	User Story
Cost of Goods Sold Report - Create the initial report page	US117788
Cost of Goods Sold Report - Create Count to count filter dialog	US182438
Cost of Goods Sold Report - Build the columns for the view manager	US178402
Cost of Goods Sold Report - Build the columns for the view manager - Part 2	US183453
Cost of Goods Sold Report - List all the groups	US183454
Change on the filter for the apply date and automation	US184064
Cost of Goods Sold Report - Display the data on the report	US184780
Cost of Goods Sold Report - Create the initial report page	US117788
Cost of Goods Sold Report - Create Count to count filter dialog	US182438
Cost of Goods Sold Report - Build the columns for the view manager	US178402

Cost of Goods Sold Report - Build the columns for the view manager - Part 2	US183453
Cost of Goods Sold Report - List all the groups	US183454
Change on the filter for the apply date and automation	US184064
Cost of Goods Sold Report - Display the data on the report	US184780
Cost of Goods Sold Report - Build the columns for the view manager - Part 2	US183453

Configuration Settings

- New permissions are added under the MMS_Admin_RoleSecurity.aspx page for Cost of Goods

Mobile UX Improvements [F24094]

Release Version	Change Type	Module(s)
2024.3 Release	Enhancement	Core

Summary

- Add logic (new flag) for marking reports as explicitly supported in MxConnect
  - if the report is marked as supported - user should be able to generate the report
  - if the report is marked as not supported - user should not be able to generate the report

  For report and configuration in Mx Connect please reach out to your Account Manager
- Workflow Task Groups now use a bold font
- When there are inventory items with Zero cost when applying a stock count, an “Update Cost” dialog is now shown for users to enter the cost (may require security options to be enabled)

Configuration Settings

- New configuration setting is added under "Inventory Count - Exclude Zero Quantity Items From Missing Cost Prompt " under the Config manager in section Mobile -> Inventory. The config value should be true or false (default false).

When submitting a count or doing count correction, if item have zero cost and the config is turned on and the count quantity is 0, when showing the pop-up for missing cost, then **do not show that item in the popup**.

When submitting a count or doing count correction, if item have zero cost and the config is turned on and the count quantity is different then 0, when showing the pop-up for missing cost, then **show that item in the popup**.

Forecasting Hourly View and Event Promo Awareness [F23344]

Release Version	Change Type	Module(s)
Enhancement	Enhancement	Core

Summary

Changes to the Mobile Forecasting Engine and Sales/Transaction Forecast View

Enhancements to Sales and Transaction Forecast View

1. **Line Graph for Actual Sales**:
   - Display actual sales data up to the previous 15-minute interval to avoid misleading dips.
2. **Hourly Sales Table**:
   - Detailed hourly breakdown of forecasted and actual sales, and ticket averages.
3. **Line Graph for Actual Transactions**:
   - Similar to sales, show actual transactions up to the previous 15-minute interval for the current day.
4. **Hourly Transactions Table**:
   - Detailed hourly breakdown of forecasted and actual transactions, and ticket averages.
5. **System Adjustments Info Icon**:
   - Icon in the "System Forecast" column header. Clicking it shows a popup with details of all system adjustments in a table format.
6. **Manager Adjustments Info Icon**:
   - Icon in the "Manager Forecast" column header. Clicking it shows a popup with details of all manager adjustments in a table format, including adjustment time, type, service group, interval, sales item, adjustment amount/percentage, and user’s name.

Summary

These changes aim to improve data visibility and forecasting accuracy by centralizing and detailing adjustments and actual sales/transactions directly within the Mobile Forecasting page, reducing the need to switch between applications and enhancing decision-making for store managers.

Reason for the Change

1. **Improved Efficiency and Streamlined Operations**: Integrating a comparable hourly table view directly into the Mobile Forecasting page will eliminate the need to switch between applications, saving time and effort.
2. **Enhanced Decision-Making**: Adding a line graph of actual sales will help managers quickly identify sales trends and make informed forecast adjustments.
3. **Consolidation of Information**: Presenting summaries of both system and manager adjustments on

the main forecasting page will provide managers with a comprehensive overview, facilitating quick assessments and better decision-making.

4. **Optimized Forecasting Accuracy**: Centralizing all essential information for forecast adjustments will improve the accuracy of forecasts, positively impacting inventory management, production planning, and overall operational effectiveness.

Components

Component	User Story
Store Data for Applied System Adjustments.	US180774
Enhance Sales and Transaction Forecast View.	US180775

Forecasting Weekly View [F23343]

Release Version	Change Type	Module(s)
2024.3 Release	Enhancement	Core

Summary

1. Implementation of Weekly Views:
    - Users can now select a fiscal week for a store and switch between viewing "Sales" and "Transaction" metrics.
    - A line graph displays hourly manager forecasts and actual data for the selected week.
    - The weekly forecast table includes columns for each day, showing last year's data, system forecasts, manager inputs, and actual results.
    - Save and cancel buttons allow users to manage adjustments made to forecasts.
2. Daily View Interactions:
    - Double-clicking on a column header in the weekly view switches users to a daily view of the selected date, maintaining the chosen metric.
    - A back button facilitates returning to the previous daily view.
3. View Switching:
    - A new button enables users to switch between the daily and weekly views of the same fiscal week.
    - Users can navigate back to the previous weekly view from the daily view using a back button.
4. Menu Enhancements:
    - Added a "Weekly Forecast" menu item accessible to users with relevant permissions, defaulting to the current fiscal week.
5. Default View Settings:
    - When accessed from a workflow or daily view, the weekly view now defaults to the fiscal week corresponding to the selected date.
6. Adjustment Modes:
    - Users can toggle between adjusting in $ amounts or percentages.
    - Changes made in the weekly view prompt a save button to apply adjustments, with an option to cancel unapplied changes.
7. Logging Functionality:
    - Forecast adjustments made in the weekly view are logged for audit purposes.

These changes enhance functionality, usability, and flexibility in managing forecasts, improving user experience and data management capabilities within the system.

Reason for the Change

This initiative aims to transition store-level users from the older MMS system to the MxConnect. Currently, the Mobile forecast feature lacks a weekly view option, preventing users from making adjustments for an entire week. The MMS forecast page provides this weekly view along with forecast, actual sales, last year's data, and transaction numbers, allowing direct adjustments.

Components

Component	User Story
Addition of Forecasting Weekly View and Table	US180776
Manager Forecast Adjustment In the Weekly View	US180777
View Jump between Weekly View and Daily View	US180778
Weekly View Permission, etc.	US180783
Independent Adjustment in Weekly View	US180785

Security Permissions

- Introduction of a new permission: "Forecasting - Can View Weekly". By default, this permission is disabled

Additional Sales Item Filtering Options on the Forecast Pages [F23916]

Release Version	Change Type	Module(s)
2024.3 Release	Enhancement	Core

Summary

The Mobile Forecast system is being enhanced to improve the sales item selection process. New filters for Sales Item Group, Department, and Category have been added, along with a "BOM Only" checkbox and a fuzzy search combo box for inventory items. These filters will allow users to more precisely narrow down their search criteria.

The search engine will now display only sales items that match all selected filters and search text. In addition, during BOM Only check/uncheck, the selected inventory item and the queried results will be refreshed.

Additionally, the same filtering and search logic will be applied across various pages, including "Add Promotional Items," "Add Impacted Items," "Target Sales Item," "Source Sales Item," "Select Sales Item," and "Add Sales Items" in the view manager. These changes are designed to enhance usability and efficiency, making it easier for users to find and adjust sales items.

Reason for the Change

The current forecasting module in MxConnect allows store managers and head office users to adjust forecasts for sales, transactions, and specific sales items. However, users face difficulties when searching for and selecting sales items due to the high number of similar products with variations in names and categories. This challenge is particularly pronounced when dealing with multiple similar items, making keyword searches cumbersome and inefficient.

To address this, the proposed enhancement suggests adding filters to the Select Sales Item and Select Promotion Item dialogs. These filters will allow users to narrow their search by Sales Item Department, Category, Sub-recipe (BOM), and ingredient. This improvement aims to streamline the search process, making it easier and more efficient for users to find and adjust sales items.

Components

Component	User Story
Additional Sales Item Filtering Options	US180794 US183063
Update Sales Item Filter in Forecast - Promotions page	US180796
Update Sales Item Filter in Forecast - Sales Item Mirroring page	US180802
Update Sales Item Filter in Forecast - Sales Item page.	US180805
Update Sales Item Filter in Forecast - Weekly Sales Items page	US180806
Update Sales Item Filter in Hourly Product Mix page	US180807
Update Sales Item Filter in Forecast - Catering Order	US182894

Security Permissions

- Introduction of a new permission: "Forecasting - Can View Weekly". By default, this permission is disabled

Stock Count Review Color Coding [F23915]

Release Version	Change Type	Module(s)
2024.3 Release	Enhancement	Core

Summary

Here's a summary of the changes being implemented in the Mobile Inventory Count system:

1. **Variance Percentage Threshold Configuration**: The system will now use the configurable "Inventory Count - Variance Percentage Threshold" setting to display color indicators based on this tolerance rather than a fixed value.
2. **Customizable Color Settings**: New color settings in Inventory Count Settings will allow users to customize background colors for items within and outside the variance threshold. Users can also set font colors for Over Count Threshold and Negative On-hand Inventory.
3. **Color-Coded Review Count Page**: The review count page will display items with variance percentages within the threshold in green and those exceeding the threshold in red, based on default configurations.
4. **Row Shading Technique**: A row shading technique will be applied, assigning different background colors to alternate rows for better visual distinction and organization.
5. **Consistent Color Coding**: All lines will be color-coded based on the set criteria, regardless of the visibility of the variance quantity or amount columns in the table view.

These changes aim to enhance the visual distinction and usability of the inventory count process, making it easier for users to identify and manage items with significant variances.

Reason for the Change

In the current Mobile Stock Count system, the Review Count page's color coding is limited, only highlighting variance quantities in red for items exceeding a fixed 5% tolerance. To facilitate a smooth transition and enhance usability, an enhancement to the Review Count page has been made to include prominent color coding for items both within and outside the variance threshold. This change will help users quickly identify significant variances, regardless of the columns displayed, ensuring better inventory management and action-taking.

Components

Component	User Story
Stock Count Review Color Coding	US180808

Configuration Setting

- Added Count Review configurations in Mobile Settings page.

Received By on Order History Page [F23338]

Release Version	Change Type	Module(s)
2024.3 Release	Enhancement	Core

Summary

The Mobile Order History Summary page is enhanced with a new "Received By" column, displaying:

1. The full name of the user for manually received orders.
2. "Auto Received" for automatically received orders, with localization options.
3. The full name of the user for manually canceled orders.
4. "System" for orders rejected during the order confirmation process, with localization options.

These changes aim to streamline access to crucial order information, improving operational efficiency.

Reason for the Change

In the Mobile Ordering system, accessing detailed order information requires multiple clicks, which is inefficient and time-consuming. To address this, a "Received By" column has been added to the order history summary page. This enhancement will streamline operations by allowing store managers to quickly see who received the order without extra clicks, thereby optimizing store efficiency.

Components

Component	User Story
Received By on Order History Page	US180809

Ordering Enhancements [F23340]

Release Version	Change Type	Module(s)
2024.3 Release	Enhancement	Core

Summary

The Mobile Ordering system had received significant enhancements to improve the ordering process and provide detailed forecasting information. These changes include the addition of a read-only column for suggested quantities and a detailed panel for suggested ordering information.

A new configuration option, "Show Suggested Order Quantity as Reference," is added to the Mobile->Ordering settings. This will add a read-only column for suggested quantities next to the Order Quantity column, which will default to zero for new orders. An action item titled "Populate Suggested Quantity" will allow users to copy the suggested order quantities into the order quantity field. Additionally, all actions will be logged, and localization for column headers and action item text will be supported.

Another new configuration has been added, "Display suggested ordering detail". This will update the order detail page to feature a new "Suggested Ordering Detail" panel, providing information on forecasted usage quantities, on-hand and on-order quantities, safety stock, minimum and maximum order quantities, order quantity multiple, and calculated suggested quantity. The panel will also highlight the start and end times of the forecast period and the delivery date, with support for localized text.

These enhancements aim to streamline the ordering process, reduce manual input, and provide comprehensive forecasting details, enabling store managers to make more informed and efficient ordering decisions.

Reason for the Change

Currently, store managers manually calculate order quantities using Special Events reports and spreadsheets. To facilitate the transition and allow evaluation of MxConnect's suggested ordering system this feature has been added

Firstly, a read-only column will display the EBO's suggested quantities on the New Order Page while keeping the order quantity field pre-filled with zero, enabling manual adjustments. Secondly, supplementary information, such as forecasted daily usage and coverage period details, will be accessible on the New Order Page. These changes aim to preserve the current manual calculation method while helping store managers assess and build trust in the MxConnect's suggested ordering system.

Components

Component	User Story
Addition a read-only column for suggested quantities	US180810
Display Suggested Ordering Detail	US180811 US184057

Different Order Detail Report when submit an order and when print from history	US180837
Forecasting dates between once off order and scheduled order are different	US183869

Configuration Setting

- Implementation of a configuration option labeled "Show Suggested Order Quantity as Reference" within Mobile->Ordering. By default, this configuration will be inactive.
- Introduce a new configuration option labeled "Display suggested ordering detail" within Mobile->Ordering settings. By default, this configuration will be inactive.

Transfer Reason on the Transfer Level [F23341]

Release Version	Change Type	Module(s)
2024.3 Release	Enhancement	Core

Summary

A at streamlining the transfer process and improving efficiency, Users will now be able to select a reason at the transfer level instead of for each individual item, addressing the time-consuming nature of the current system where reasons must be assigned to each item separately.

Key changes include the addition of a "Transaction Level Transfer Reasons" list, which will allow users to select a transfer reason from a dropdown menu on the transfer detail page. This list will be customizable and displayed beside the Submit button. When this configuration is enabled, the item-level reason selector will be hidden, and the reason will be included in the transfer submit confirmation window for review and adjustment if necessary.

Moreover, the transfer reason will only be set by the store initiating the transfer, and it will be displayed in the header section on detail pages when receiving or approving transfers. A Reason column will be added to the Transfer Pending and Transfer History pages, ensuring that users can easily view the reason for each transfer. The Transfer Summary Reports will also be updated to display either the item level reason or the transfer level reason, prioritizing the item level reason if available. All new column headers and text introduced will be localizable, ensuring consistency and usability across different languages.

These enhancements aim to reduce the repetitive actions required in the transfer process, making it more efficient and user-friendly for store managers.

Reason for the Change

Currently, the Mobile Transfer system requires users to assign reasons for each item individually, which is time-consuming. To streamline the process, the ability for users to select a reason at the transfer level instead of for each item has been added. This change will enhance efficiency by reducing the need for repetitive actions during transfer transactions.

Components

Component	User Story
Transfer Reason at the Transfer Level	US180812
[Defect] - Transfer - Aligned issue will occur if reason column is not existing	US182708
RDS Changes	US185832

Configuration Setting

- A new "At Transfer Level" option is added to the "Allow Entry of Transfer Reason" configuration in the Mobile->Inventory section.
- A new list, name “Transaction Level Transfer Reasons”, is added to the List Maintenance page, replicating the existing "Adjustment - Transfer" list.

Waste History Page - Add Columns [F23339]

Release Version	Change Type	Module(s)
2024.3 Release	Enhancement	Core

Summary

The Mobile Waste History page in the Mobile EBO system has the following enhancements:

1. **Date Column Update**: The Date column will now include both the date and time of the waste occurrence.
2. **New 'Wasted By' Column**: This column will display the name of the user who recorded the waste. If the waste was recorded on POS, it will show the cashier's name; if recorded in BOH, it will show the full name of the user. The column name will also be customizable for localization.
3. **New 'Source' Column**: The waste history page will include this new column to show where the waste record has come from, and, the source descriptions will be localizable.

These changes aim to provide more comprehensive and accessible details on waste records, improving waste management and operational efficiency.

Reason for the Change

In the Mobile Waste Management system, there is a need to provide more detailed information on waste records. Currently, users can view basic details such as the date, item code, description, waste quantity, waste reason, and cost. However, critical information such as the exact time of waste recording, the user responsible, and the source of the waste entry is missing.

To enhance waste management and streamline access to comprehensive waste data, the following has been added

- Update the Date column to include both date and time of waste occurrence.
- Add a new "Wasted By" column to display the name of the user who recorded the waste.
- Add a new "Source" column to show where the waste was recorded (e.g., POS, MMS, MXC, Dynamic Production).

These enhancements aim to provide restaurant managers with detailed and accessible information for better waste management and more efficient operations.

Components

Component	User Story
Update the Date column to include both the date and time	US180813
Add a new column, 'Wasted By'	US180814

Add a new column, ‘Source’	US180815
RDS Change	US180816
Add Report Format selector to waste history page	US180834

Central Management of Wasted Items [F23342]

Release Version	Change Type	Module(s)
2024.3 Release	Enhancement	Core

Summary

Several changes are implemented to the Mobile Waste Management system to streamline the process of recording mandatory waste items. These changes include:

1. **Import Process**: Updating import processes to include the "MandatoryWaste" flag for Entity Item and Entity Sales Item Imports and setting the flag for new stores based on default settings.
2. **User Interface Changes**: Adding a "Mandatory Waste" field to multiple pages (Inventory Wizard, Entity Item Setup, Sales Item, Entity Management, and Default Setup for a New Store) to allow users to set and manage the mandatory waste flag.
3. **Mobile Waste Page**: Ensuring that items flagged as mandatory waste will always appear at the top of the waste recording screen, marked with a pinned icon.

These enhancements aim to centralize the management of frequently wasted items, ensuring consistency and efficiency across all stores.

Reason for the Change

Currently, users can designate certain items as favorites to save time, but they must manage these lists individually. To improve efficiency and consistency across stores, a feature has been added for central management that allows the Head Office to define mandatory waste items for each store or zone. These mandatory items will automatically appear on all users' lists within the designated store or zone, while still allowing users the flexibility to add additional frequently wasted items as needed.

Components

Component	User Story
Database Modifications	US180817
Import Process	US180818
Data Change from UI	US180819
Mobile Waste Page	US180820

Additional Columns on the Mobile Store Summary [F24005]

Release Version	Change Type	Module(s)
2024.3 Release	New feature	Core

Summary

This change is expected to enhance the efficiency and benefit all customers and end users. To align the functionalities of the MxConnect with the MMS Sales Summary, several key changes have been implemented:

1. **New Financial Group Type "Sales Summary":**
    - A new financial type called "Sales Summary" is added to the Financial Group Setup page. This will allow the inclusion of financial groups such as Donations, Cards, Petty Cash, Discounts, and Special Deposits in the Mobile Store Summary.
    - This change ensures the same KPIs available in the MMS Sales Summary can be incorporated into the Mobile Store Summary, enabling comprehensive analysis of sales and financial data.
2. **Adding "Sales Summary" Type Financial Group KPIs to Store Summary:**
    - All pre-defined KPIs and Sales Summary type financial groups will be listed in the View Manager of the Store Summary.
    - Users can incorporate any Sales Summary KPIs into active columns and position them as needed.
    - The columns will display values based on the mappings and rules associated with the respective financial group, ensuring consistency between the banking reconciliation page and the Store Summary page.
3. **Adding Additional KPIs to Store Summary:**
    - New predefined columns and expandable columns will be added to the Store Summary for a detailed breakdown of key metrics.
    - Fixed Predefined Columns:
        - **Gross Sales with Tax:** Includes sales with discounts and tax.
        - **Banking Deposit:** Represents banking deposits.
        - **Banking Variance:** Reflects banking variances.
    - Predefined Expandable Columns:
        - **Payment with Group:** Lists payment amounts by payment group.
        - **Discount with Group:** Displays discount amounts by discount type group.
        - **Category Sales:** Presents sales item sales categorized by sales item category.

These enhancements aim to provide restaurant managers with a comprehensive and consistent view of their store's sales and financial performance, aligning the MxConnect functionalities with those of the MMS system and improving overall efficiency and data accuracy.

The Mobile EBO features a Store Summary page similar to the MMS sales summary page but with additional KPIs and customizable configurations.

This alignment will ensure that restaurant managers have access to a comprehensive and consistent overview of their store's weekly sales performance, facilitating better analysis and decision-making. The enhancements will streamline the review process, allowing managers to access key sales data more efficiently and maintain consistency with the previous MMS functionalities.

Components

Component	User Story
Add new Financial Group Type “Sales Summary”	US180845
Add “Sales Summary” Type Financial Group KPIs to Store Summary	US180846
Add Additional KPIs to Store Summary	US180847 US184081

Mobile Transaction Viewer [F23371]

Release Version	Change Type	Module(s)
2024.3 Release	Enhancement	Core

Summary

The new Transaction Viewer in Mobile allows users to search and view POS transactions with enhanced flexibility and accessibility. Key features include a date range selector for specifying business days, a comprehensive filter bar with various options (such as payment types, discount types, promotion types, and more), and a customizable summary table that lists transactions based on selected filters. Additionally, the Transaction Viewer will have a detailed view section, breaking down selected transactions into header, detail, and total sections, providing thorough insights into each transaction.

To facilitate a smooth transition, new permissions are introduced, enabling users to access the Transaction Viewer, manage views, and create shared views. The page layout will dynamically adjust based on screen size, ensuring optimal usability across different devices. All text on the page are localizable to support diverse user languages and cultures.

Reason for the Change

A key feature in the current MacromatiX MMS is the Transaction Viewer (Electronic Journal), a robust sales analysis tool that allows restaurant managers and higher-level users to perform detailed audits of their accounts without needing remote access to the POS system. This tool provides a comprehensive view of transaction-level details for every sale, facilitating quick and easy retrieval of sales information.

To ensure that managers retain the same capabilities during and after the transition to the Mobile EBO system, the Transaction Viewer has been migrated to MxConnect. This will allow users to seamlessly search, view, and analyze sales transactions within a single, unified platform, maintaining operational efficiency and continuity.

Components

Component	User Story
Permissions and Configurations	US180838
View Manager	US180839
Filter Options UI	US180840 US184053
Search Functionality	US180841

Summary View	US180842 US184054
Detail View	US180843
Page Layout Responsiveness	US180844
Hardening	US184718

Configuration Setting

- Addition of a new permission, "Reporting - Transaction Viewer - Can Access," in the Mobile section. This permission will be activated for users with existing "Transaction Viewer - Can Access" permission to access the legacy page.
- Introduction of two new permissions in the Mobile section: "Reporting - Transaction Viewer - Can Access View Manager" and "Reporting - Transaction Viewer - Can Create Shared Views." These permissions will be disabled by default.

MxConnect Help Functionality [F24015]

Release Version	Change Type	Module(s)
2024.3 Release	Enhancement	Core

Summary

To Integrate into MxConnect a Help functionality similar to the one in the MMS system, The following changes are implemented:

1. **Help Icon Addition**: A Help icon is added to the upper right corner of the Mobile page, displaying the number of help topics linked to the page. Users can click, right-click, or long press the icon to access or select specific help topics.
2. **Editing Permissions**: Users with "Help - Can Edit" permission can update, delete, or add new help topics by right-clicking or long pressing the icon.
3. **Help Topic Configuration**: When configuring help topics, users must specify the title, language (culture), type (file or URL), and the open method (new tab, new window, or popup window).
4. **Audit Logs**: The system will create an audit log entry each time a Help topic is accessed to facilitate analysis and improve functionality or content.
5. **Consistent Help Content**: Help topics will be linked to the endpoint of the page URL, excluding parameters and query strings, ensuring users view the same content regardless of specific URL variations.

These changes ensure that users continue to have access to valuable support resources, aiding in employee onboarding, operational consistency, and overall efficiency during the transition to the Mobile platform.

Reason for the Change

In the MMS system, the Help feature allows authorized users to attach documents or include URL links on each page, serving as aids or training materials, migration of this feature ensures that users continue to have access to valuable support resources, aiding in employee onboarding, operational consistency, and overall efficiency when they Migrate from MMS to MxConnect

Components

Component	User Story
Help Icon function	US180848 US184055
Help Icon Configuration	US180849
Upload function	US180850

	US184056
Permission and Audit	US180851
Hide topic count if user doesn’t have permission	US185302

Configuration Setting

For this feature to be setup you will need to reach out to your Account Manager

Manager Release to Recount Cash in Cash Recon [F24308]

Release Version	Change Type	Module(s)
2024.3 Release	Enhancement	Core

Summary

To enhance Mobile Cash Management, the following changes have ben implemented:

1. **Introduction of Release Button**: A Release button will be added alongside the Modify button. The visibility of these buttons will depend on the CashUp - AllowManagerAccess permission and the configuration setting "Require password to release & modify cashier settlement". If the configuration is enabled, only the Release button will be shown. If the configuration is disabled but users have the required permission, only the Modify button will be shown. If the configuration is off and users lack permission, neither button will be visible.
2. **Release Button Functionality**: Clicking the Release button will prompt the user for their ID and password. If the credentials are valid and the user has the Cashup - CanAuthorise permission, the cash count will be released, and the Modify button will become visible for editing the cash count. An audit log will record the cash count release.
3. **Editing Released Cash Count**: If an un-authorized cash reconciliation is accessed from another device by a different user, they can edit the count and submit it.
4. **Email Notification**: An email notification titled "Cash Count Resubmitted" will be sent to subscribed contacts whenever a cash count is submitted after being released. The email will include details of the resubmitted cash count and can be localized for various languages.

Reason for the Change

One enhancement is the redesign of Mobile Cash Management, particularly the Drawer Count Down process, which has been streamlined from a two-step authorization to a single authorization. This change simplifies the cash reconciliation process and improves efficiency. Additionally, Mobile Cash now includes a manager permission feature, allowing authorized users to conduct cash recounts after authorization has been released.

Components

Component	User Story
Manager Release to Recount cash in Cash Recon	US180001
Patch Back to 2024.02	US180821

Server Manager

Forecast Events Import [F19689]

Release Version	Change Type	Module(s)
2024.3 Release	Enhancement	Core

Summary

The “Forecast Event Profile” Import is added to MacromatiX.
The “Forecast Event Schedule” Import is added to MacromatiX.

Customers who use the Production Management and Control system (Dynamic Production) to manage daily production, considering forecast sales based on past data. However, forecasts can be inaccurate during public and school holidays. To enhance forecasting accuracy and reduce manual input, an enhancement has been added to automate forecast adjustments for such events through an import feature. This enhancement would replicate forecast events across stores in the same zone, minimizing human error and benefiting all restaurant users.

Components

Component	User Story
Add Overwrite Manager Forecast option to Event Profile.	US163441
Add Forecast Event Profile Import.	US163442
Add Forecast Event Schedule Import.	US163443
Add Forecast Tables to RDS.	US163444

2024.3 Release Bug Fixes

MacromatiX Desktop (MMS)

- Running forecast task long time issue [D95207]
- Vendor Item not update when resolve unknow item [D96439]
- Two clicks required to create view on Operations View Managers & Users can claim global views from other stores [D88869]
- Data / API Integrations - Reporting - Cash Variance Review Report - Patchbacks [D67543]
- Sales Item mirror on Same item did not work as expected [D92903]
- NCR HR Web Bridge - Changing home store should successfully terminate employee in NCR for old store [D94838]

Mobile (MxConnect)

- [Cash Recon] Cash Count Shows Operation Failed [D93870]
- Menu button can't be hidden when first time login. [D94309]
- Partial receive order issues [D94663]
- Can normally receive the purchase order even if the batch quantity is inconsistent [D94666]
- Safe Count - After Dual Authorization Is Complete Only Single ""Authorized By"" is Showing [D94850]
- Has container qty missing issue [D94943]
- Can select the qty out of the range and successfully submit the order with safari (17.4) [D95455]
- Cannot show this translation when user with the Chinese(Taiwan) language [D95462]
- Unable to modify the cash count after releasing in mobile Cash Reconciliation page [D95509]
- Screen locked after count is deleted [D95619]
- Mobile deposit showing issues [D95757]
- Undefined issue when setting the updatable property. [D96210]
- Mobile translation issues [D96476]
- Can not normally receive the purchase order when the Manufacturing date is null or change it from null to other dates [D96477]
- Cannot normally edit the template name under forecast - weekly sales item page [D96698]
- Always gets error when first log into mobile [D97055]
- Can not display 'open' status drawer in mobile cash reconciliation page [D97162]
- Cashier Settlement - All Denominations are Copied from Total Count to Float Count, Only Coins / Bundles Should [D97163]
- Cashier Settlement - No Float Variance or Significant Variance Warning When Submitting Register & Float Count [D97164]
- Cash Recon - Recount Attempts Remaining Number Incorrect [D97289]

- Inventory Count History - US date format in the count name [D94111]
- Selected Display in e-MP&C Not Retained After Locking and Re-Logging Back in [D90165]
- Forecasting - Historical hours - Inflated values [D92677]
- Inventory movement report show no Variance $ when there is a variance [D90930]

Cloudlink

- Add descriptive error message when CanonicalLocationUpdated is received with non-existing currency in MX [D95135]
- POS - POS Integrations - Simphony Cloudlink [D95158]
- BusinessDate is stored into RealTime db with wrong date via IntervalSummary event [D95288]
- CurrentIntervalStart is stored into RealTime db with wrong date via IntervalSummary event [D96233]
- Simphony Integration - Cancelled sale shows TransactounCount = 1 [D91515]
- ARTS file import - sometimes have error [D91031]
- POS - POS Integrations - CloudLink - Polling Midnight - 12am [D95642]

Livelink

- LiveLink has some issue with the EPD discount type processing [D94112]

RDS

- RDS public.scheduledorder data discrepancy [D76421]
- RDS stored procedures failing [D92619]