

MacromatiX Release

2025.1

Released January 2025

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Introduction

This document communicates the major new features and changes in the 2025.1 MacromatiX Release. It also references issues that were addressed during this release. MacromatiX is a cloud-based operating system that provides operational efficiency, cost controls and real-time visibility into restaurant operations that keep the manager in front of customers and focused on their experience, rather than stuck in the back office staring at spreadsheets. Get instant insight into inventory and financials with in-depth, down-to-the item reporting. Gain access to sales data, gross profit, cost of goods sold, loss prevention and exception management with the ability to report down the item level at individual stores. With MacromatiX, food is fresher, waste is reduced, and gross profits are increased.

About This Release

The 2025.1 release includes substantive changes to improve the MacromatiX user experience. A few of the release highlights for MacromatiX Desktop and MxConnect (Mobile) are detailed below

Release Highlights

- ★ Mobile Usability Improvements
- ★ TECH: QTS Migration Support
- ⚙ 57 Defects Resolved

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

Mobile (MxConnect)		
	Features	Defects
Core	14	
Financial		
Forecasting		
Inventory		
Production		
Reporting		
Workforce		
Total	14	

Additional Applications	
	Features
CloudLink	2
LiveLink	2
RDS	
Server Manager	2
Total	6

MacromatiX Desktop (MMS)

NCR HR WebBridge Export Support [F25201]

Release Version	Change Type	Module(s)
<u>2025.1 Release</u>	<u>Enhancement</u>	<u>Core</u>

Summary

The employee import must trigger the Server manager HRBridge tasks when employee information is received via the MacromatiX employee import.

These events must be triggered when

- a new employee record is created in the HRIS system imported into MacromatiX
- when an existing employee record is updated and imported into MacromatiX via the employee import
- when an existing employee record is terminated. The system must use the appropriate HRBridge call to ensure that the employee records in Aloha are correctly updated.

On a daily basis, all employee records from all restaurants are being interfaced from the HR system to MMX, meaning that also non-changed records are included in the HR MMX interface.

MMX should only trigger the HR Bridge API to MMX for the updated users (new users, edited users, terminated users).

Upon delivery of the feature in Q3 2024 for Employee Termination and Reinstatement Issues raised for the integration with NCR's HR WebBridge solution, it was discovered that automatic exports to NCR are triggered upon changes to employee records. This export is failing, as it is not being provided the proper parameters and exporting was not in scope of the feature in Q3.

Components

Component	User Story
[SPIKE] Identify environment to test the changes	US189922
Changes to employee triggering the HR Web Bridge export	US189898

MX-RME Integration - New/Existing client setup and E2E testing [F25587]

Release Version	Change Type	Module(s)
<u>2025.1 Release</u>	<u>Enhancement</u>	<u>Core</u>

Summary

Finish the testing of the integration with RME system along with the support of Professional Services and Solution Consultants teams.

Components

Component	User Story
End to End testing - Existing client setup	US190040
[QA] MX -> RME: Export UOM conversions at recipe level	US190808
[Release version] End to End testing - Existing client setup	US191852
RME Defect bucket	US193055
End to end testing - New client setup	US180865

MacromatiX Mobile (MxConnect)

Centralised Forecast UI > Consume Adjustments - Macromatix - Lock Forecast [F24709]

Release Version	Change Type	Module(s)
<u>2025.1 Release</u>	<u>New Feature</u>	<u>Mobile, Core</u>

Summary

Enabling users of Central Forecast Management (CFM) to be able to lock adjusted forecasts that are imported so that manager adjustments in MX can't be performed and need to use CFM.

- When a forecast is locked (not read only), all manager adjustments in the Mobile UI are read-only as if the user didn't have permission to perform manager adjustments.
- We should not display any locked indicator if it is read-only, due to not having permission, the behavior should keep like it is now
- When a forecast is locked (not read only), an indicator displays in the Mobile UI indicating the forecast is locked - locked indicator (icon should be existing) should be located next to the left side buttons
- Locking is enforced in Sales, Transaction, Sales Item, Weekly Forecast and Weekly Sales Items views
 - In both Graph and Detail/Tabular View

Components

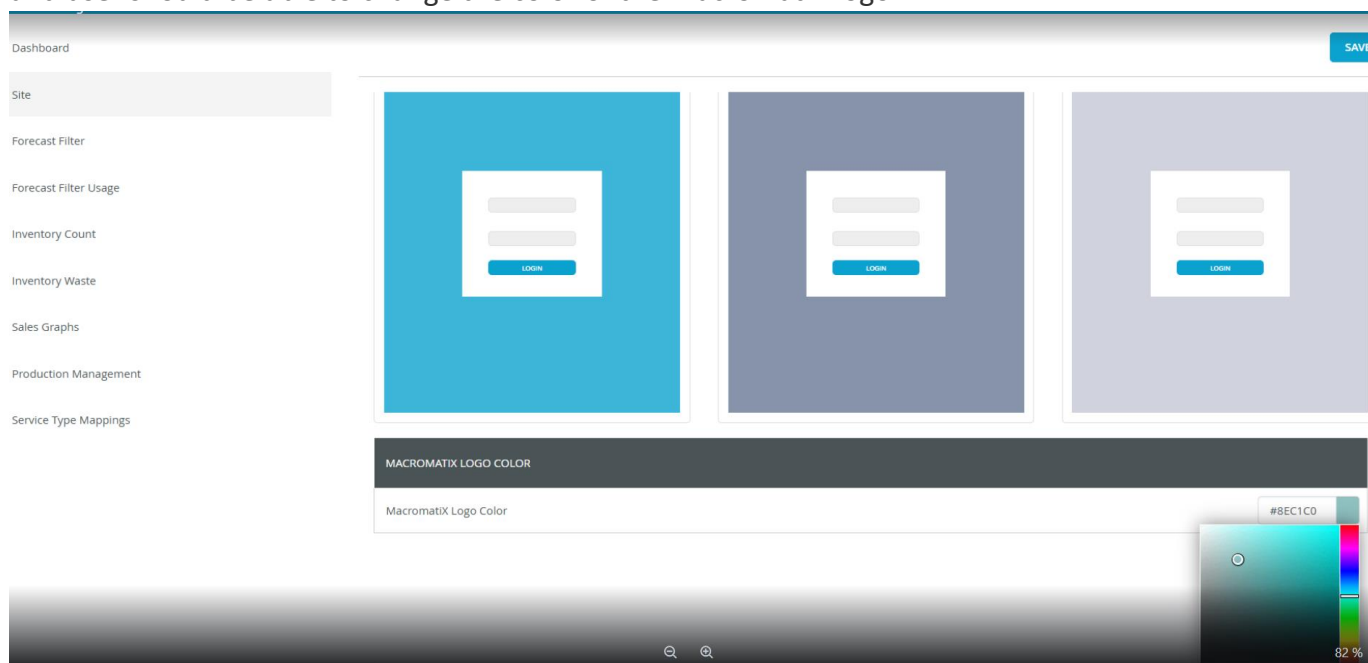
Component	User Story
Lock Forecast - UI - Read-only manager adjustments	US180895
Follow up on End to End testing - CFM Transmit Adjustments	US190574
Lock Forecast - UI - Read-only manager adjustments - Weekly Sales View [reest]	US191392

Mobile General Usability Improvements (Q4 24) [F25095]

Release Version	Change Type	Module(s)
<u>2025.1 Release</u>	<u>New Feature</u>	<u>Mobile, Core</u>

Summary

- Start the change on Update Style/Colors for new UX Standards, which is involving changing all the elements in the mobile application from blue to black/grey color. Postponed functionality for now.
- New Logo color section is created under Site option in MxConnctet. default color should be white and user should be able to change the color of the MacromatiX logo.



Components

Component	User Story
SPIKE How many pages are referencing the global stylesheet	US190160
Update Style/Colors for new UX Standards - Pages referencing the global stylesheets [Postponed]	US192472

Update Style/Colors for new UX Standards - Pages not referencing the global stylesheets [Postponed]	US188568
[DEV] Update Style/Colors for new UX Standards - Pages referencing the global stylesheets	US187842
Add Style/Configuration to control the color of a prominent element in the page banner on a global level [3]	US178688

Configuration Settings

- New config under HO_ConfigurationManager under the Mobile - System - "Logo color".

Add label

Mobile Inventory Usability Improvements [F24669]

Release Version	Change Type	Module(s)
<u>2025.1 Release</u>	<u>Enhancement</u>	<u>Mobile, Core, Financial</u>


Summary

- Within the "Count History" listing of Inventory Counts for the selected date range, a warning icon is displayed for any Inventory Count that has unsubmitted "Count Corrections"
- Display right-aligned in the "Apply Date" column
- Upon clicking/tapping the warning icon, the user is presented with informative text "**Warning: Count Correction In Progress**"
- The text displayed in the pop-up can be localized.
- Counts that do not have unsubmitted corrections do not display the warning icon.
- The warning icon is consistently displayed in the "Count History" list view and in the "Count Detail" view.
 - i.e. If the count has unsubmitted edits, the icon displays in both places. If the count does not have unsubmitted edits, the icon is not shown in either place.

BATCH#	TYPE	NAME	USERNAME	LAST MODIFIED BY	APPLIED
4877651	Daily	Daily Count - Period	systemadmin	systemadmin	Thu, 2 Jan

- A new security permission is available for "Mobile Ordering - Can Add Restricted Items During Receive" and new vendor entity configuration is available to enable/disable adding restricted items on receive.
 - Given that a user has the permission to add restricted items during receive and the vendor is configured to allow users to add restricted items for receiving, upon viewing an order's detail within the Receiving view in MxConnect, the user has the option to add items.
 - Within the set of available items to add to the order, restricted items are available for selection.
 - With or without the permission, users are not able to add restricted items to orders when placing them initially. Restricted items can only be added during receiving.
 - With or without the permission, if the vendor is not configured to allow restricted items be added upon receive, then the restricted items are not available for selection within the "Add Item" dialog in Order Receive detail.
 - Only for orders placed within Mx or also for shipping confirmation orders.


- Upon initiating the receive an order, display a message on screen indicating something to the effect of "Receiving order. Pressing 'Back' or 'Refresh' may result in duplicate data." - TBD
- Spacing is consistent between tiles in the Dynamic Production dashboard


Production Dashboard
Lakehaven

DISPLAY ALL ITEMS ▾

Last Sale (Time): 3:00 AM
Current Time: 11:37 PM

To Cook
Ran Out
Cooking
Holding
Near Expiry
Expired



To Cook


0

On Hand

0

Required

0



To Cook


0

On Hand

0

Required

0



To Cook

0

On Hand

0

Required

0

- The user is able to recover scheduled orders within MxConnect
- Redirect to Count History page after submitting count

Components

Component	User Story
Duplicate quantity is received during slow network connections and browser refreshes	US187885
Allow Users to add ""Restricted Items"" when Receiving Orders	US194026
Display a warning that a count has been edited	US194025
""Bump to Today"" For Create transfer functionality	US185452
WARRANTY: Dynamic Production - Consistent Spacing Between Tiles	US187957
MxConnect Scheduled Order Skipped cannot be reverted	US188210
DEF011 - Blank Screen After Submitting the Count	US188058

Configuration Settings

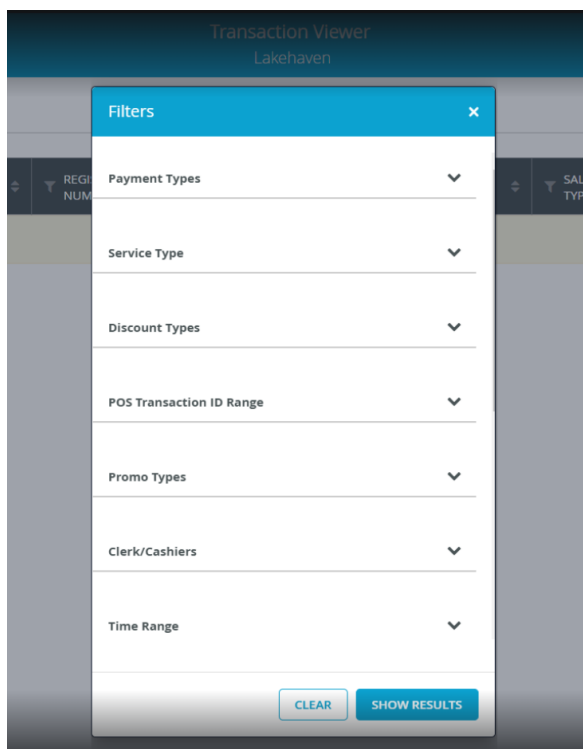
- New vendor entity configuration is available to enable/disable adding restricted items on receive.
- New security permission is available for "Mobile Ordering - Can Add Restricted Items During Receive".

Mobile Reporting Usability Improvements [F25096]

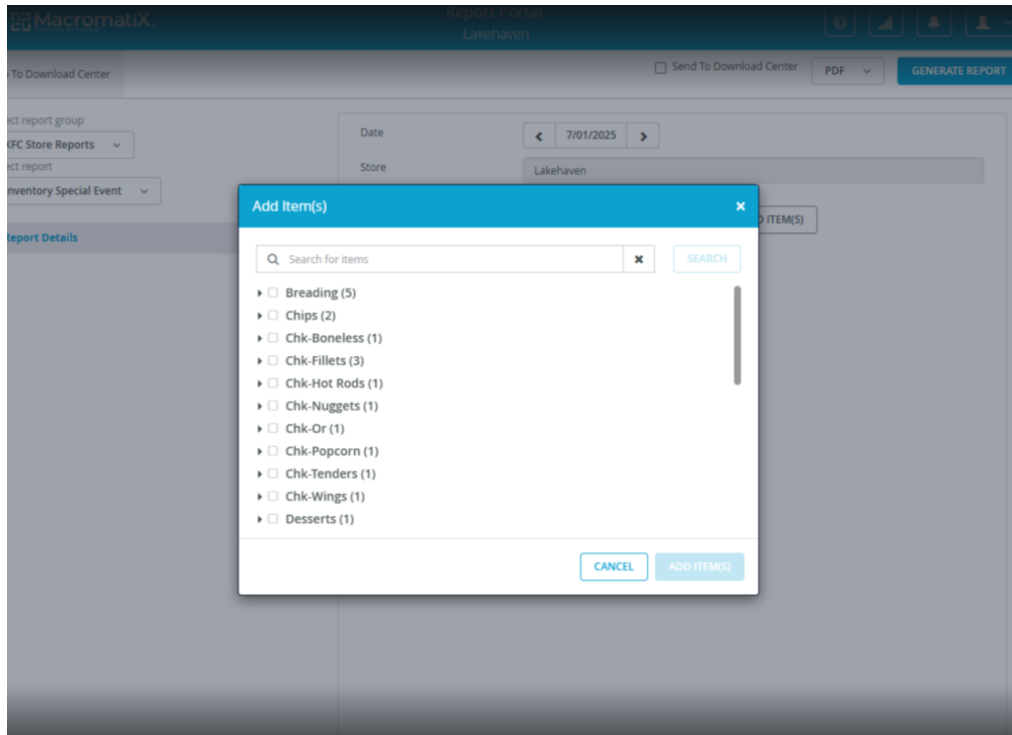
Release Version	Change Type	Module(s)
<u>2025.1 Release</u>	<u>Enhancement</u>	<u>Mobile, Inventory</u>

Summary

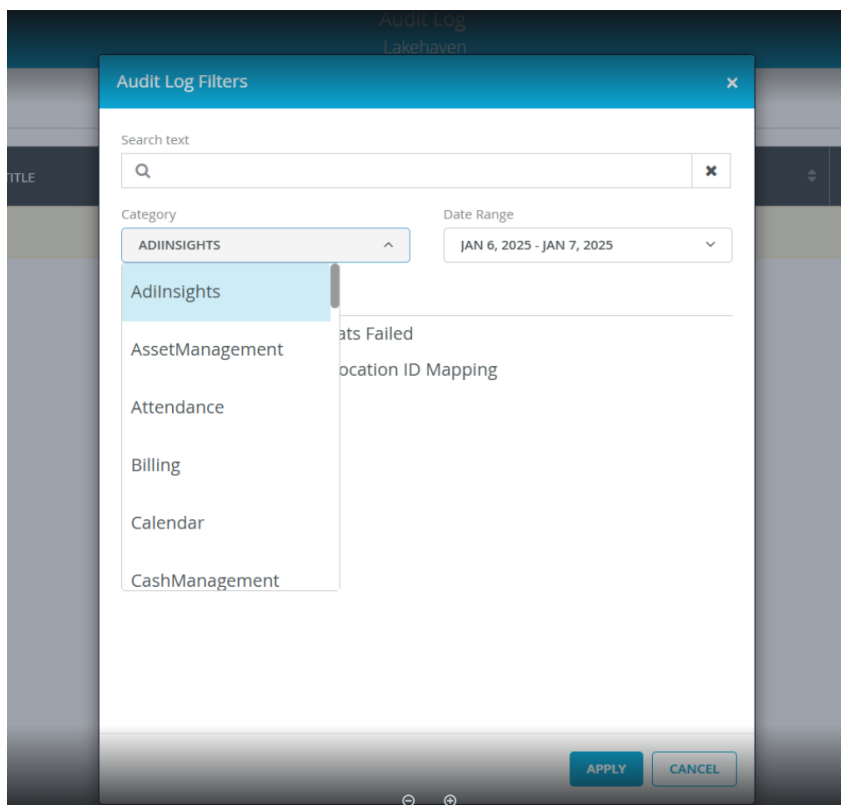
- Times listed in the Audit log are shown in user's local time
- Align the options in this Count Type selector in MXConnect to respect the customization using custom names for their count frequencies in the Localization and Translation Setup in MMS
- Hourly Product Mix have the currency sign to Net Sales, so that it would be consistent with other money values in mobile pages, but also to make it possible to easily distinguish this report from when it is showing sold units instead of money values
- New design for the styling of the following filters on the Transaction viewer page to be consistent with the rest of the pages on mobile:



- Button "Add Items" is introduced on the Report Portal page, when we click on "Selected Items" option. The following window is displayed with the availability to select items, based on their groups.



- Audit Log Filter Categories are sorted in alphabetical order



Components

Component	User Story
MxConnect Audit Log in UTC vs MMS Audit Log in local store time	US194330
REQ031 - MxConnect Report Portal Count Type selector values incorrect for Stock Count Worksheet Report (ID 1295) [Check if it can be closed]	US188706
Hourly Product Mix - Add Currency Sign to Net Sales	US187882
Transaction Viewer - UX Standards Alignment	US191860
REQ030 - Using Item Groups in MxConnect Report Portal	US191857
SPIKE - Deletion as sales % KPI showing odd time buckets.	US187887
DEF012 - MxConnect Audit Log - Filter Categories are not sorted in alphabetical order	US188057
SPIKE: Transaction Viewer - UX Standards Alignment	US187280

MXConnect next delivery date for scheduled orders [F24918]

Release Version	Change Type	Module(s)
<u>2025.1 Release</u>	<u>Enhancement</u>	<u>Mobile, Production</u>

Summary

The Scheduled Order page in MXConnect is enhanced with a new "Next Delivery Date" column. Key changes include:

1. **Configuration Option:** A new "Show Next Delivery Date on Scheduled Order" configuration is added under Mobile → Ordering.
2. **New Column:** The "Next Delivery Date" column displays:
 - The next schedule's delivery date from the same vendor (and order class, if applicable).
 - A blank value if it's the last schedule.
 - The date in orange if an order for the next schedule is already submitted.
3. **Localization:** The column header and date format supports regional settings.

Enablement of quick access to both the current and next delivery dates directly on the Scheduled Order page to streamline order calculations and improve coordination with external ordering systems. This enhancement provides users with more accessible and actionable delivery information, simplifying inventory ordering processes and improving operational efficiency.

Components

Component	User Story
A. Add Next Delivery Date to Scheduled Order.	US190074

Configuration Settings

- A new "Show Next Delivery Date on Scheduled Order" configuration is added under Mobile → Ordering.

Generate Order PDFs in MXConnect [F24998]

Release Version	Change Type	Module(s)
<u>2025.1 Release</u>	<u>Enhancement</u>	<u>Mobile, Reporting</u>

Summary

The MXConnect platform is being enhanced to allow users to generate PDF reports for placed, received, and historical orders directly from the Order Details page. Key changes include:

1. **Generate Report Action:** Users can now generate purchase order PDFs for submitted orders and receipt reports for completed orders.
2. **Custom Report Mapping:** Default reports can be replaced with custom reports using predefined configurations.
3. **Localization Support:** The "Generate Report" action text and error messages are fully localizable.
4. **Deprecation of Crystal Reports:** MXConnect no longer supports Crystal Reports; users will receive an error if specified.
5. **Parameter Support for SSRS Reports:** The system supports generating reports using either Transaction Number or Order ID parameters.

This feature addresses the need for manual order sharing when electronic purchase orders (EDI) fail to reach suppliers. By enabling PDF generation for orders, restaurant users can efficiently retrieve and share order details with stakeholders, ensuring seamless communication and order management.

Components

Component	User Story
A. Generate Order Report from Order Detail.	US190075

Configuration Settings

- Default reports can be replaced with custom reports using predefined configurations by reaching out to your Fourth Account Manager

Forecast Weekly Sales Adjustment by Units Per Thousand Guest [F25101]

Release Version	Change Type	Module(s)
<u>2025.1 Release</u>	<u>Enhancement</u>	<u>Production, LiveLink</u>

Summary

The Weekly Sales Item Forecast page in MRMS is being enhanced with the following updates:

1. **UPT Adjustment Feature:** Users can now input a UPT (Units Sold Per Thousand Transactions) factor for each item directly on the forecast page, and the system will automatically calculate adjusted forecast quantities for each day based on forecasted transaction counts.
2. **Auto Save Improvements:** The save process is updated to asynchronous handling, ensuring adjustments are reliably saved without delays or data loss.
3. **Manual Submission Option:** A new "Finish" button allows users to manually save all adjustments, replacing auto-save functionality when enabled.

The current manual process for adjusting sales item forecasts is time-consuming and prone to errors. By automating UPT-based adjustments and improving the save functionality, these updates aim to enhance forecasting efficiency and reliability. The manual submission option provides additional flexibility, ensuring adjustments are saved only when finalized. These changes reduce administrative overhead, improve accuracy, and streamline inventory forecasting for stores.

Components

Component	User Story
A. Enhancements to Weekly Sales Item Forecast.	US190076 , US191849
Staging will prompt a failure message when quickly input the value in different boxes in mobile weekly sales item page	US189028

Configuration Settings

- Enable UPT (Unit Sold Per Thousand Transactions) Adjustment:
 - This configuration is added to Operation -> Forecasting.
 - By default, it is turned off.
- Enable Auto Save in Weekly Sales Item Forecast:
 - This configuration is added to Operation -> Forecasting.
 - By default, it is turned on.

Accurate Food Traceability and Batch Management [F25350]

Release Version	Change Type	Module(s)
<u>2025.1 Release</u>	<u>Enhancement</u>	<u>RDS</u>

Summary

The changes are being made to improve the accuracy of food traceability and batch management.

1. Batch Validation: MMX will now verify that the batch quantity matches the received quantity for items marked with the "RequireBatchDetail" flag. This flag will prevent the receipt of any order where the batch quantity and received quantity for flagged items do not match.
2. Batch Deletion: When a user deletes a batch during order receipt, MMX will flag it as deleted and set the batch quantity to zero, without deleting the record. This change ensures that batch details are retained for credit memos.
3. Batch Editing: If a user modifies the batch number, manufacturing date, or expiration date of the original batch, the system will flag the original batch as deleted and create a new batch record with the updated details.
4. Batch Addition: When a store user adds batch information, the batch details from the vendors shipping data will be automatically pre-filled to save time and reduce manual data entry.
5. Purchase Order Detail Report: This report is updated to exclude batch records flagged as "IsDeleted".
6. Order Receive Acknowledgment (ACK) Export: This export is also updated to exclude batch records marked as "IsDeleted".
7. Create Credit Memo from PO Task: This task is enhanced to accurately track batch details for items with discrepancies.
8. Near Expiry Report: This report is updated to exclude batch records flagged as "IsDeleted".

There have been instances where batch details in order acknowledgment and credit memo documents were inaccurate due to users deleting batch information during order receiving. These enhancements will require users to enter valid batch details for all food items and ensure that the batch information sent to the vendor accurately reflects the items received or credited due to shortages

Components

Component	User Story
A. Enhancing Batch Management.	US190077 , US191422
Auto-created credit memo importing failure issue with no batch number info	US189030
Credit memo file miss batch detail when short receiving the purchase order	US189027

PIN Authorization in Cash Management [F24983]

Release Version	Change Type	Module(s)
<u>2025.1 Release</u>	<u>Enhancement</u>	<u>RDS</u>

Summary

The Mobile Cash Management system is enhanced with the following updates:

1. **Extended PIN Authorization:** PIN authorization is now available across all Mobile Cash Management modules, including Cash Recon, Petty Cash, Safe Count, Daily Recon, and Deposits. It supports single, dual, and multiple authorizations.
2. **Improved User Experience:** Users can toggle between PIN and password authorization.
3. **Session Timeout Enhancement:** Users with PIN authorization can log back in using their PIN after a session timeout instead of requiring a full username and password.

The Mobile EBO offers a streamlined, intuitive interface with enhanced compatibility for desktop and mobile devices, significantly outperforming the older system.

Currently, PIN authorization in MXConnect is limited to single authorizations on some cash management pages, forcing users to rely on passwords for dual or multiple authorizations. This is inconvenient for tasks like reconciliations and deposits, as usernames and passwords are harder to remember and cumbersome to input, especially on mobile devices.

To address these challenges and enhance the user experience, an improvement has been implemented, including extending PIN authorization to all Mobile Cash Management modules and scenarios, enabling PIN-based re-login after session timeouts, and adding autocomplete functionality for faster username entry. These changes aim to streamline cash management processes, reduce user frustration, and support a smooth transition to the new Mobile EBO platform.

Components

Component	User Story
A. Enhance PIN Authorization in Mobile Cash Management	US190078 , US191845

Additional fields in Ordering Modules [F24329]

Release Version	Change Type	Module(s)
<u>2025.1 Release</u>	<u>Enhancement</u>	<u>RDS</u>

Summary

The **Order and Return Notes** feature for has been enhanced to improve communication and auditing in the MacromatiX Mobile Ordering system. The key changes include:

- **Order Placement:** Users can now enter notes when submitting an order for a vendor with the "Allow Entering Notes" configuration enabled.
- **Return Logging:** Users can enter notes when logging a return for a vendor with the "Allow Entering Notes" configuration enabled.
- **Order Review:** Notes entered during order submission or returns will be displayed in the order detail view when users review placed orders, receive orders, or view order history. If both order notes and return notes exist, all notes will be shown.
- **Purchase Order Export:** The stored procedure for exporting orders is updated to include order notes in the returned dataset. For vendors requiring this information in the EDI file for integration, customers will need to update the XSLT to include the data point in the export.
- **Purchase Order Detail Report:** The purchase order detail report is updated to display order notes if available.

Restaurant users currently place purchase orders and log returns through the MacromatiX Mobile Ordering system. To enhance communication and auditing, they would like the ability to add notes to each order and return, providing comments, reasons, additional requests, and other relevant information. An enhancement has been added to the MacromatiX Mobile Ordering system to allow users to input notes when placing or returning orders, and to view these notes when reviewing order details during receiving or from the order history.

Components

Component	User Story
Allow Entering Notes in Mobile Ordering.	US190079 , US191846

Configuration Settings

- A new configuration option, "Allow Entering Notes," has been added to the vendor management page. By default, this setting is disabled for all vendors.

[MX] Food Processing Dashboard Phase II [F25152]

Release Version	Change Type	Module(s)
<u>2025.1 Release</u>	<u>Enhancement</u>	<u>RDS</u>

Summary

A new **Food Processing Report** has been developed, offering a tabular view that mirrors the data displayed on the Food Processing Dashboard.

Improvements have been made to enhance the usability of the Food Process Configuration and the Food Processing Dashboard.

Additionally, several issues from the Phase I development of the Food Processing Dashboard have been resolved.

Numerous clients in the Quick Service Restaurant (QSR) and Limited-Service Restaurant (LSR) sectors, who use Fourth's solutions, require an intelligent system to optimize their food processing activities, including thawing, preparation, and production. The current tools, such as legacy Prep & Thaw reports in the MX Desktop application (MMS) and customer-specific reports in MX Connect, are limited in functionality and do not fully address the comprehensive needs of these processes.

To bridge this gap, there is a need for a more dynamic and efficient solution. The development of a comprehensive Food Processing Dashboard within the MX Mobile platform (MX Connect) aims to enhance restaurant operations by providing real-time, visual insights into thaw, prep, and production activities. This dashboard will suggest optimal quantities based on forecasted usage and shelf time, helping restaurants improve food freshness, reduce wait times, and minimize waste. By offering an interactive and accessible tool, the new dashboard will streamline food processing, ultimately benefiting both Fourth and its restaurant clients.

Components

Component	User Story
E. Food Process Report	US185917 , US193024
Phrase 1 Feedback - Configuration Page	US192370 , US193218
Phrase 1 Feedback - Dashboard Page	US192454 , US193026
Phrase 1 Feedback - Others	US192570

Configuration Settings

- Enhanced Food Process Configuration MMS_HO_FoodProcessManager.aspx page.

[MX] Mobile Warranty (Q4 2024) [Q4 2024]

Release Version	Change Type	Module(s)
<u>2025.1 Release</u>	<u>Enhancement</u>	<u>RDS</u>

Summary

Addressed the below 18 warranty items in this release.

To ensure good quantity of the feature delivered and the product.

Components

Component	User Story
[Defect – Daily Recon] Shift's variance of daily recon is different from cash recon	US173773
Tablet can not access MMS and Splash can not display images well in Android tablet mode	US174898
[Defect] - Petty cash - In tablet Portrait and Pinned mode, align issue will exist if expand detail in Authorized tab.	US176799
[Defect] Import - If receive unit has value in shipping confirmation import, some issues will occur.	US178981
[Defect – Cash Recon] Even without submitting, there would be money in the cash counted field	US180299
[Defect - Forecast] When setting an event as inactive, sales do not change	US182621
[UX] Transaction Viewer	US185574
[2024.3 Warranty] No Suggest Order Quantity and Suggested Ordering Detail for UPT Item	US187021
[Defect – Dynamic Production] On hand displays 15 decimal places when the inventory unit is different from the production unit	US188067
[Defect – User Setup] Changing the type and department on mobile can not sync to MMS	US188556
Always update banking transactions on daily recon to ensure wait banking is updated to the latest data.	US189493
Inventory Activity report Report viewer Download PDF, Excel Format Issues	US192322
[Defect - Daily Recon] Date navigation between different pages is incorrect	US192324

Component	User Story
[Defect] - Banking deposit - Unable to slide right on tablet	US193211
Cash recon - Starting cash can be updated when authorized.	US194272
[Defect] - Vendor import issue for xml	US194682
[Defect] - Banking deposit Dispatch mode - PIN Auth section UI issue	US194794

Configuration Settings

No configuration required

CloudLink

MacromatiX/Redcat Integration Performance Improve [F24211]

Release Version	Change Type	Module(s)
<u>2025.1 Release</u>	<u>Enhancement</u>	<u>CloudLink</u>

Summary

This release introduces improvements to the integration process between the Redcat POS system and MacromatiX inventory management system, focusing on synchronization efficiency, data accuracy, and duplication prevention:

1. Improved Synchronization Efficiency:

- Added configurable parameters to enable variable frequency data retrieval for current-day and past-day sales.
- Implemented time-range queries leveraging updated Redcat APIs for precise data extraction.
- Enhanced ARTS export to support parallel processing for optimized performance.

2. Data Accuracy Enhancements:

- Introduced version control for transactions to accurately manage POS transaction modifications and prevent duplicate entries in MacromatiX.
- Updated ARTS export and import mechanisms to support versioning.

The Redcat integration has faced significant delays in syncing sales data between the Redcat POS and MacromatiX inventory systems, particularly during peak hours from 6 PM to 8 PM, where delays can reach 20–30 minutes. These delays undermine the effectiveness of the Production Dashboard, making real-time stock monitoring and inventory management challenging. The root cause lies in the current integration process, which involves time-consuming data queries from Redcat's API, retrieving two days' worth of data and accounting for 80% of processing time.

Additionally, modifications to transactions in Redcat often lead to duplicate entries in MacromatiX, causing inventory depletion errors and operational inefficiencies. This issue arises from the inability to detect and reconcile changes in finalized transactions effectively.

To address these challenges, this release introduces real-time synchronization mechanisms to reduce integration delays, ensure sales data is reflected in MacromatiX within five minutes, and optimize the data querying process. Furthermore, enhancements to transaction reconciliation logic will eliminate duplicate entries, improving inventory accuracy and operational reliability. Together, these changes aim to streamline integration, support peak-hour operations, and enhance the overall customer experience.

Components

Component	User Story
A. Performance Enhancement.	US190068 , US191424 , US191848
B.1 Reverse and Reprocess Modified Transaction. (CloudLink)	US190069 , US191425
B.2 Reverse and Reprocess Modified Transaction. (ARTS Import)	US190072 , US191426 , US190071

ConfigurationSettings

- Introduced a configurable parameter named "Delay Times for Past-Day" within the Redcat Integration settings in CloudLink.

[Symphony Integration] Condiment Logic Update [F24152]

Release Version	Change Type	Module(s)
<u>2025.1 Release</u>	<u>Enhancement</u>	<u>CloudLink</u>

Summary

Modify the Condiment Logic in CloudLink Symphony Integration so that any condiment without a prefix will still be processed if its Family Group is included in the configuration.

The CloudLink Symphony Integration was previously updated to retrieve and process condiment prefixes from the POS system, enabling accurate inventory depletion for condiment modifications. Under the current logic, any default condiment without a prefix is ignored to streamline inventory tracking.

However, the integration has encountered issues with this approach when integrating with aggregator platforms, which does not support the 'Prefix' capability present in Oracle POS. Consequently, condiments from these aggregators are incorrectly categorized as default condiments and ignored by the integration, leading to inventory inaccuracies.

To address this, an exception is being added to the CloudLink Symphony Integration. This exception will ensure that condiments belonging to specific Family Groups are processed correctly, even if they lack a modifier prefix. This change ensures compatibility with the aggregators and maintains accurate inventory management for the Symphony integration.

Components

Component	User Story
A. Update Condiment Logic	US190067

Configuration Settings

- Introduced a new configuration called 'CondimentFamilyGroupList' within the Symphony integration. This configuration will specify which Family Groups condiments belong to and ensure they are processed even if they lack a prefix. The default configuration is set to '1996, 2996, 3996, 5996, 6996, 7996.'

Server Manager

Banking Refresh (F24916)

Release Version	Change Type	Module(s)
<u>2025.1 Release</u>	<u>Enhancement</u>	<u>CloudLink</u>

Summary

The Banking Refresh process is being enhanced with the following updates:

1. **Automated Banking Summary Updates:** A new step in the Sales Adjustment Import automatically refreshes the banking summary for stores and dates impacted by sales adjustments, eliminating the need for manual updates.
2. **Event-Driven Banking Refresh:**
 - Introduction of a "Sales Adjustment Imported" event to trigger banking updates.
 - A new event-driven task handles banking refresh operations, including unlocking, updating reconciliation data, and reauthorizing banking summaries with audit logs.

Currently, users must manually unlock and reauthorize store banking summaries to reflect updated sales after sales adjustments. This time-consuming process delays cash reconciliation. By automating banking summary updates and introducing event-driven tasks, the enhancements streamline the workflow, improve operational efficiency, and reduce manual intervention.

Components

Component	User Story
A. Raise Sales Adjustment Imported Event.	<u>US190081</u>
B. Add Banking Refresh Event-Driven Task.	<u>US190082</u>

Add Payments to Sales Adjustment (F25752)

Release Version	Change Type	Module(s)
<u>2025.1 Release</u>	<u>Enhancement</u>	<u>CloudLink</u>

Summary

The Sales Adjustment functionality is being enhanced with the following updates:

- 1. Payment Type Integration:**
 - A new optional "Payment Type" field is added to the Sales Adjustment Import and the Sales Summary page.
 - Adjustments can now be assigned to specific payment types, ensuring accurate revenue reporting.
- 2. Record Creation and Updates:**
 - Adding a sales adjustment creates transaction payment, discount, and control info records.
 - Deleting a sales adjustment removes all associated records.
- 3. Event-Driven Banking Refresh:** Adding or deleting adjustments triggers an event to update banking reconciliation, ensuring accurate updates to sales, tax, payments, and variances.
- 4. Immediate Sales Summary Updates:** Adjustments instantly update Gross Sales, Net Sales, Tax, and Discount columns, while banking-related columns refresh after the Banking Refresh task completes.

The existing sales adjustment process lacked the ability to allocate adjustments to payment types, leading to inaccuracies in payment-based revenue reporting. This enhancement addresses the growing need to accurately report eCommerce and delivery refunds, particularly as these channels expand. By integrating payment types and automating updates to the banking reconciliation, the new functionality improves reporting accuracy, streamlines processes, and ensures financial data reflects real-world transactions.

Components

Component	User Story
A. Updates to Sales Adjustment Import	US192820 , US193027
B. Updates to Sales Adjustment on the Sales Summary Page	US192821

2025.1 Release Bug Fixes and Rapid Response/DTZ

- [MX] Highlight the row when change store (D103409)
- Workflow refresh issue (D100838)
- MxConnect cash gap - Cannot use Starting float from POS (D101490)
- MxConnect cash dispatch - Bank Recipe Number does not show on UI (D103810)
- MxConnect cash - Virtual cashier shows float in auto close (D101489)
- MxConnect Cash - Unable to Update Expected deposit amount by Cashier Release & Modify (D101247)
- MxConnect Cash - Data display issue on report (D101248)
- Unable to see vendor in Schedule order list after New Vendor Import (D103235)
- Shipping confirmation import fail if it has unknown catch-weight item when (D102912)
- MxConnect Safe Count - The default date is incorrect (D100250)
- Webserver has many error message related to type 'Mx.BusinessObjects.WorkFlowErrorException' (D103283)
- Web server has consistent Error in CashReconciliation (D102368)
- Mobile will prompt the lazyload error message when changing the customer account for one on account sale record (D102261)
- Mobile rpc report not use specific rpc report queue (D103774)
- Mobile has duplicate safe count records (D101904)
- Mobile cannot save 0 safe count record (D102080)
- Received purchase order does not receive order ack file (D100841)
- Received date issue when there is a delay receiving a purchase order (D98276)
- Combo Items and Modifiers are not indented in Mobile transaction Viewers (D101183)
- Check qryMMSCashManagement_GetOpenCashupDay (D102085)
- Show double tax amount with the discount items in transaction viewer page (D98919)
- Improve performacnce on stored procedure named 'qryMMSPOSCustomFunction_BIR_InsertPOSRelatedInformation' (D100054)
- System will receive the qty of SUM (shipped qty+order qty) for those auto-received orders if user stay in receive order page (D100637)
- Labour Productivity Daily Sales Export wrong formatting (D102040)
- Labour Productivity Daily Sales Export SQL exception (D102039)
- Safe Counts - Authroze dialog display ""must enter a comment"" when have variance but can authorize (D100644)
- MxConnect cash - Safe float initialisation incorrect (D93704)
- Degraded Performance & Display suggested ordering detail Option (D101725)
- RT-3442 - Data on production adjustment does not update when selecting a trend by day date. (D103464)
- RT-3430 - MXC MP&C adjustment page missing a button to make data show (D103375)

- REQ049 - Align Daily Summary (Night Banking) screen in MxConnect with MMS (D102414)
- REQ042 - Workflow Task ""Review P.O.J."" is trimmed incorrectly in MxConnect (D100239)
- REQ024 - MxConnect Weekly Forecasting - Transactions drop-down (D100235)
- QST001, QST002, QST003, QST004 - MxConnect Forecasting Questions (D99467)
- MxConnect Deposit from Cashier Close includes Float (D100836)
- DEF028 - MxConnect Help Administration from tablet device (D99851)
- DEF024 - MxConnect Weekly Forecasting - 3 or more touches required to open date, sometimes multiple touches results in no action (D99801)
- DEF018 - MxConnect Cashier Close - Float count section scrolls towards right while entering the numbers (D99637)
- DEF002 MxConnect Cashier Close - Number of Attempts Warning Displayed Instead of Variance Warning (D99183)
- COL007 - Deposits & Banking - No Save Button (D100528)
- COL004 - MxConnect Cashier Settlement - No 'counted by machine' box in float count (D100527)
- Scroll Bards Inside MxConnect Pop-Up Modal Dialogs in 2024.4 (D101954)
- VMI Scheduled Order Details - Populate Suggested Quantity Irrelevant (D100359)
- COL008 - MxConnect Petty Cash - Not Displayed in Assigned Cashier Reconciliation (D100874)
- Incorrect order of operations when adding items for report (D102068)
- Display different types of the same item under the same group in the Food Process Dashboard Report. (D103720)
- Deposit complete tab UI display issue (iPad mini) (D103728)
- Cash count cash variance is incorrect when first time page loaded (D100635)
- D102507: FU Error on PM adjustment on MP&C page
- D101901: Vendor Receive Order on Inventory Movement page not showing received value
- D99409: Historical Sales for 9 months for select group of Stores
- D101492: 2024.4 - Change Store - The requested operation failed
- D102038: NCR Employees Export SQL exception
- D102693: Encryption - Report Portal Scheduled Reports Error
- D100780: Report Portal Scheduled Reports Error
- D103860: FU - Input string was not in a correct format - MMS_Stores_CashUp6
- D102500: The key 'MxCertificateSubject' does not exist in configuration