

# Operations User Guide – Baseline

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## Mobile Promotions – Standard



### Version Control

Date	Update	Editor	Version
2.4.25	Operations User Guide – Promo's & LTO's 2025.1	MX-CG-RR-NZ	v1
14.4.26	Reviewed & updated for 2026.1	MX-CG-RR	v2


## Promotions

### What are Promotions in MacromatiX?

A promotion for a restaurant enterprise brand is a targeted marketing activity designed to increase brand awareness, attract new guests, and drive incremental sales by offering compelling experiences, discounts, or limited-time product features.

Promotions occur on newly introduced items, limited time items, or existing items.

Both Brand and Store promotions directly impact sales patterns during promotional periods. The MX Mobile Promotions modules allow businesses to create an adjustment to the forecast when promotions occur.

 By entering promotions in MX, the forecast will be more accurate to help Restaurants plan for the optimal levels of inventory on hand and production, which will reduce the risk of waste and shortages. An accurate forecast will also optimize labour planning.

In MacromatiX Mobile, there are **2 promotion modules** available:

- Standard Promotions & Limited Time Offers + Calculation Guide
- Promotion Campaign Forecasting



This Promotions guide will cover the **Standard Promotions** module for **Operations/Administrator roles** in MX Mobile as of 2026.1. The Promotions modules are traditionally not accessed by Restaurant Users.

For information on the following speciality topics, please contact MX Support or your regions Professional Services team for additional Mobile MX materials and guides:

- Promotion Campaign Forecasting
- Standard Forecast
- AI Forecast
- Forecast Manager
- Fourth iQ for MX

## Standard Promotions

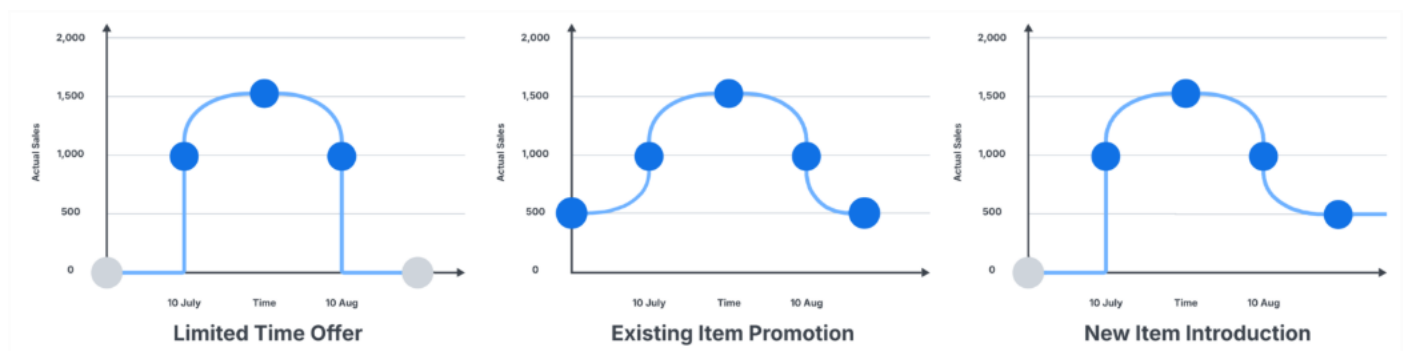


### Best practice recommendations for Standard Promotions

- ✓ Promotion item adjustments can be set for one, or for multiple restaurants or zones.
- ✓ Promotions can be set for new items, limited time offers, or existing sales items.
- ✓ Restaurant promotions directly impact sales patterns during promotional periods, so it's critical to enter these in MX to ensure the forecast is updated, which will influence orders to be more accurate, which will ensure optimal levels of inventory on hand and that production flows efficiently.

## Understanding Promotions – Types & Features

### Promotion curve of adjustments

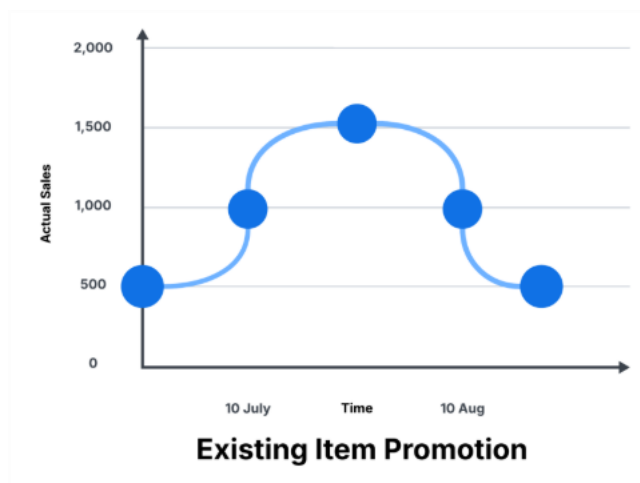


The above diagrams are for illustrative purposes only

**Limited Time Offer (LTO):** Item is for sale for a set promotional period only, often short, to increase rapid sales.



**Existing Item Promotion:** Item has been sold before but there is a promotional period to feature item.



**New Item Introduction:** Item has not been sold before and will continue to be a part of regular menu after the introduction.



## Summary of features

The following features are available in MX Mobile Forecast Promotions:

- Description field for the promotion.
- Date selection for the promotional period.
- Option to flag Limited time offer when promotional items are introduced only for the promotional period.
- Option to allow the adjustment to overwrite the Manager Forecast.
- Multiple items can be added to the promotion.
- Each item in the promotion can be assigned an adjustment increase as % with no limit.
- Items impacted because of the promotion can be assigned an adjustment increase or decrease %.
- Ability to restrict the Promotion module to Operations or Administrator roles.
- Promotions show their status for easy review: Pending, In Progress or Completed.

## Add a Standard Promotion

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**Step 1.** From the **Menu** select **Forecast** and choose **Promotions**.

**Step 2.** Select **ADD PROMOTION** and the left side of the page will show a blank template to complete.

 + ADD PROMOTION


**Step 3.** In the **Description** field, enter a description for the promotion.

Description\*

**Step 4.** From the **Period** selector, select the calendar icon or a date and choose a date range, then select **APPLY**.

**Step 5.** If this promotion is a *Limited Time Offer*, select the checkbox for this option.


Limited Time Offer

 For Limited Time Offers, promotional items are introduced for the promotional period only. They will have 0 forecast before and after the promotion. Sales Item Mirroring should be used to mirror the forecast of Limited Time Offer items from the sales history of existing Sales Items.

**Step 6.** If this promotion is designed to *Overwrite the Manager Forecast*, select the checkbox for this option.

- If the user chooses to overwrite the Manager Forecast, once the promotion is created or updated, the manager forecast will match the System Forecast
- If the user chooses *not* to overwrite the Manager Forecast, once the promotion is created or updated, the promotion adjustments will not be included in the Manager Forecast and the Manager Forecast will not match the System Forecast.

Overwrite Manager Forecast

 Note that this will overwrite the manager adjustments that were made for **applicable sales items** on the Forecasting - Sales Items page. However, *it will not overwrite Manager Forecast applied on the store level*, such as adjustments on the Forecasting - Sales, Transactions, or Weekly Forecasting pages.

**Step 7.** Select **ADD** to find an item/s for the promotion.

PROMOTIONAL ITEMS\* + ADD

DESCRIPTION (CODE)	ADJUSTMENT	

*Please add at least one promotional item*

A pop-up will appear with drop-down categories to filter your items, and a search field to type in an item.

Use the filters, the BOM Only checkbox, or enter an item in the search field and select **SEARCH**.

**Sales Item Group** ALL GROUPS ▾

**Sales Item Department** ALL DEPARTMENTS ▾

**Sales Item Category** ALL CATEGORIES ▾

**Inventory Item** Search items...  BOM Only

✕

SEARCH

BOM Only

If the **BOM Only** checkbox is selected, only sales items that have the included BOM Inventory item in its recipe will appear to select.

*i.e.* Select BOM Only > search for Chicken Tenders > Sales items with Chicken Tenders BOM in the recipe will only appear e.g. Chicken Tender Burger, Chicken Tender Salad Bowl etc.

**Step 8.** From the list of items that appear, select the box next to an item to add it to the promotion.

Grilled Chicken Wrap - 11100005

**Step 9.** Select **ADD ITEM**

ADD ITEM 1

**Step 10.** Enter an adjustment % in the **ADJUSTMENT** column. The % can be positive or negative.

To remove an added item, select the **BIN** icon.

PROMOTIONAL ITEMS\* + ADD

DESCRIPTION (CODE)	ADJUSTMENT	
Grilled Chicken Wrap (11100005)	10 %	
Vegetarian Wrap (11100006)	7 %	

**Step 11.** If there are items that will be impacted by the promotion, repeat steps 7-10 to **+ADD** items under the Impacted Items section.

IMPACTED ITEMS + ADD

DESCRIPTION (CODE)	ADJUSTMENT	

**Step 12.** Select either the **ZONES** or **STORES** category to make a list of zones or stores to appear. Select the box next to each store or zone to apply the promotion to.

ZONES

RESTAURANTS

ZONES

RESTAURANTS

*Please select at least one zone\**   *Please select at least one restaurant\**

**Step 13.** Select **SAVE** to complete the promotion. An acknowledgement of the impact of the promotion will appear for you to select **SAVE** or **CANCEL**.

Create Promotion
×

This promotion will overwrite forecasts which may exist during the promotional period.

SAVE
CANCEL

Once the promotion is created and saved, the forecast will be updated to reflect changes for applicable sales items, as well as changes applicable to the store level transaction number and sales \$. Calculation principles are explained below in the section the **Standard Promotions Adjustment Calculations**

Contact your Technical Administrator for your brand to discuss if Promotion Zones for the Forecasting Zone type need to be created in MX.

## Edit a Promotion

- ✓ If a Promotions status is Pending, edits can be easily made.
- ✓ If a Promotions status is In Progress, only certain edits can be made.
- ✓ Past dates cannot be changed.
- ✓ Stores or the Promotion items cannot be changed.

**Step 1.** From the **Menu** select **Forecast** and choose **Promotions**.

**Step 2.** Select a promotion from the list that appears on the left.

**Step 3.** Make edits to the promotion where applicable and select **SAVE** to confirm changes.

## View a Promotion

**Step 1.** From the **Menu** select **Forecast** and choose **Promotions**.

**Step 2.** The **Promotions** page standard layout is a split screen display.

On the left panel is a list of promotions, and on the right panel, are the details of the selected promotion.

- To review a promotion, select it, it will shade **blue** and display the details in the right panel.

DESCRIPTION	PERIOD	STATUS
Chicken Wrap Promo	3/06/2025 - 4/06/2025	Pending

- To look at a previous promotion, select a date from the calendar feature.
- ✓ Past promotions will show a **Completed** status.

Use the **Search** field to filter the promotions by a key word.

**Step 3:** When the promotion is **Pending** or **In Progress**, it can be seen on the **Daily Forecast** page via the **i** icon. Select the icon and a popup containing the promotion will appear.

SYSTEM FORECAST

System Adjustment <span style="float: right;">×</span>	
ADJUSTMENT TYPE	DESCRIPTION
Promotion Adjustment	Promotion Name: Chicken Wings Promo, Start Date: 2025-03-28, End Date: 2025-04-02, Sales Item Count: 5

## Delete a Promotion

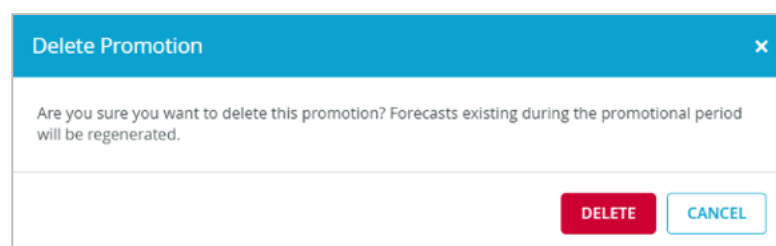
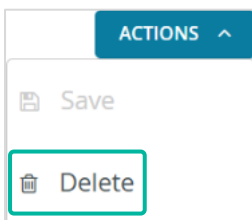
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**Step 1.** From the **Menu** select **Forecast** and choose **Promotions**.


**Step 2.** Select a promotion from the list that appears on the left.

- If the status of the promotion is **In Progress** > select the **Period** and change the end date to Today.
- If the status of the promotion is **Pending** > select **ACTIONS** choose **Delete**.

An acknowledgement of the impact of the deleted promotion will appear for you to select **DELETE** or **CANCEL**.



## Standard Promotions – Calculations

 This section is intended to illustrate how the Promotion impacts the forecasted sales quantities, transaction numbers, and sales \$.

The example below is based on a single day promotion as follows:

- Large Fries on April 20 has a system forecasted sales quantity of **96**.
- Large Fries promotion is created for April 20 with projected increase of **+100%**.

### Promotion Impact on Sales Item Quantity

Note that projected number of units sold will be rounded up after the adjustment is applied to the raw forecast of quantities sold in 15-minute intervals, which may result in the increase that's different to adding set % to the original system forecasted quantity of sales item units sold.

#### Example 1

##### Before promotion:

- Raw forecast for the quantity of Large Fries to be sold is even across the day, with 0.81 units to be sold per each 15-minute interval across 24 hours.
- Rounded up system forecasted quantity of Large Fries to be sold per each 15-minute interval is 1.
- A quantity of Fries to be sold per the whole day is  $1 * 96 = 96$ .

##### After applying 100% promotion:

- Raw forecast for quantity of Large Fries to be sold will be  $0.81 + 100\% = 1.62$ .
- Rounded up system forecasted quantity of Large Fries to be sold per each 15-minute interval will be 2.
- A quantity of Fries to be sold per the whole day will be  $2 * 96 = 192$ .

#### Example 2

##### Before promotion:

- Raw forecast for the quantity of Large Fries to be sold is 0.22 per each 15-minute interval.
- Rounded up system forecasted quantity of Large Fries to be sold per each 15-minute interval is 1.
- A quantity of Fries to be sold per day is  $1 * 96 = 96$ .

##### After applying 100% promotion:

- Raw forecast for quantity of Large Fries to be sold will be  $0.22 + 100\% = 0.44$ .
- Rounded up system forecasted quantity of Large Fries to be sold per each 15-minute interval will be 1.
- A quantity of Fries to be sold per day be  $1 * 96 = 96$ .

## Promotion Impact on Store Transaction Number

For the example 1 above, the following illustrates how promotion impacts the Store level Transaction Numbers:

### Before promotion:

- Raw forecast for Store Transaction Number is 100.11 per each 15-minute interval across 24 hours.
- Rounded up system forecast for the Store Transaction Number is 101 per each 15-minute interval.
- Forecasted Store Transaction Number for the whole day is  $101 * 96 = 9,696$ .

### After applying 100% promotion:

- Raw forecast for Store Transaction Number will be  $100.11 + 0.81 = 100.92$  per each 15-minute interval across 24 hours.
- Rounded up system forecast for the Store Transaction Number will be 101 per each 15-minute interval.
- Forecasted Store Transaction Number for the whole day will be  $101 * 96 = 9,696$ .

## Promotion Impact on Store Sales (\$)


For the example 1 above, the following illustrates how promotion impacts the Store level Sales (\$), assuming the Large Fries Sales Unit Price is \$10.00:

### Before promotion:

- Let's assume that raw Store Sales \$ forecast is \$200.20 per each 15-minute interval.
- This includes raw sales \$ forecast of Large Fries to be sold is  $0.81 * \$10.00 = \$8.10$  per each 15-minute interval.
- Rounded up Raw Store Sales \$ forecast is \$201.00 per each 15-minute interval.
- Forecasted Store Sales \$ for the whole day is  $\$201.00 * 96 = \$19,296.00$ .

### After applying 100% promotion:

- Additional Large Fries raw sales \$ forecast after promotion will be \$8.10 per 15-minute interval, therefore raw store sales forecast will be  $\$200.20 + \$8.10 = \$208.30$  per 15-minute interval.
- Rounded up Raw Store Sales \$ forecast will be \$209.00 per each 15-minute interval.
- Forecasted Store Sales \$ for the whole day will be  $\$209.00 * 96 = \$20,064.00$ .


 Note that Sales Unit Prices for the purpose of this calculation is taken from the Sell Unit Price field on the Sales Item management page (MMS\_Manage\_SaleItems.aspx), which is equivalent to the UnitSellingPrice field in the Sales Item Master import.

## Post Promotion Historical Sales Impact Reversing

For a promotion that is not a limited time offer, forecasting will reverse out the effect of the promotion from the historical transaction data as follows:

- For example, we generate forecast for Large Fries for Friday, May 16<sup>th</sup>.

- One of the previous Fridays that's used in the calculation of the forecast, April 25<sup>th</sup>, had a 20% increase Promotion configured for Large Fries, and actual quantity sold on the day was 1,000 units.
- In this case, actual sales quantity on April 25<sup>th</sup> will be decreased accordingly for calculation of the forecasted sales quantity for May 16<sup>th</sup> as  $1,000 / 120\% * 100\% = 833.33$ .

 The Promotion modules have a range of permission settings that can be tailored to suit each brand. Please review the Administration settings for your MX site or contact the MX Support or Professional Services for assistance with changes to permission and security settings.

## Promotion Info for Forecasting

### Forecast Filter panel

When reviewing the Forecast in Daily view, all users can review if a Promotion is applied.

- If an **i** icon is displayed in the **SYSTEM FORECAST** header column, it means an **Event** or **Promotion** has made an edit to the forecast for your Restaurant. Select the icon to review a record of what was applied/edited.

FORECAST FILTER	LAST YEAR	CATERING	SYSTEM FORECAST	MANAGER FORECAST
Total	\$0.00	\$0.00	\$5,995.00	\$5,995.00

System Adjustment
✕

ADJUSTMENT TYPE	DESCRIPTION
Promotion Adjustment	Promotion Name: Bonus Wrap Promo, Start Date: 2026-04-15, End Date: 2026-04-22, Sales Item Count: 2

### Using Promotions and Events Simultaneously

When Promotions and Events are configured for the same day(s) simultaneously, Promotions will be applied to the original forecast *first*, and then Events will be applied *after* Promotions, according to the raw/original forecast.

Please contact MX Support or your regions Professional Services team for any further questions, training requests or review of your promotions and event settings.

### Forecast Feature connected to Promotions: Independent Mode

#### Business Case

Currently, forecast adjustments can be executed based on transaction count (GC) or sales amount, where changes in one factor affect the other proportionally. This reciprocal adjustment cascades down to impact sales item forecasts and inventory item forecasts. However, there are instances where **a manager may want to exclusively adjust GC for specific promotions**, necessitating the ability to modify projected sales and forecasted transaction counts separately.

A new forecast feature was created in 2025 called Independent Mode. Independent Mode reduces the widespread impact of certain forecast edits. This is particularly helpful when a manager only wishes to adjust transaction count for a promotion, not sales, in the case of a Buy 1 Get 1 free promotion.

By default, this feature flag is set to 'not active'. It can be made 'active' at a brand Administration level and then managed by permission settings to allow select users access to this feature in the Forecast page.

If the Daily Forecast has Independent Mode activated, there will be a checkbox available on the Forecast.

Independent Forecast Adjustment

When a manager updates the value of the forecast and selects the checkbox for **Independent Forecast Adjustment**, a pop-up will appear to check if the manager wants to proceed, and an acknowledgement checkbox can be configured to confirm the action.

**Confirm Independent Forecast Adjustment**

I acknowledge:

By enabling independent forecast adjustment, you're opting to make isolated adjustments to either sales or transactions. This choice will not impact other forecasting types, sales item forecasts, or inventory item forecasts.

Are you sure you want to proceed with this independent forecast adjustment?

## Benefit

This mode enables a manager to make discrete adjustments to sales or transactions, isolating these modifications from other forecasting types, sales item forecasts, or inventory item forecasts. It provides a refined approach to fine-tuning sales and transaction forecasts accurately, catering to diverse business scenarios.

The key advantages include:

- ✓ **Selective Adjustment Capability:** Managers can opt to adjust GC exclusively for *specific promotions*, separating it from other adjustments.
- ✓ **Enhanced Flexibility:** Introducing an independent adjustment mode allows distinct adjustments to projected sales and forecasted transaction counts, enabling tailored forecasting strategies.
- ✓ **Isolated Effect:** Adjustments made in this mode won't affect other forecasting types or inventory item forecasts; this can ensure precision and maintain the integrity of the forecasts.



Please contact MX Support or your regions Professional Services team if you would like to discuss this feature.

# Audit Log

## What is the Audit Log?

The Forecast audit log tracks forecast related events, such as forecast generation, promotions, events, system and manager adjustments with the date, time and the information of the user which performed the action all recorded into the log.

## How to view the Audit Log

**Step 1.** From the **Menu** select **Forecast**, then select **Audit Log**.

**Step 2.** The **Audit Log** will appear and default to display the current days actions.

**Step 3.** Use the sort arrows on the headers to adjust the sort order.

AUDIT DATE	TITLE	AUDIT DETAILS	USER
Mon, 13 Apr 2026 2:00:04 PM	Generic Info	Found Metric Actuals for Entity: 1106 Business Date: 4/28/2026. System Forecast Generated. Inventory Forecast Not Generated.	System
Mon, 13 Apr 2026 2:00:07 PM	Generic info	Inventory Forecast Generated for Entity: 1106 Business Date: 4/28/2026	System
Tue, 14 Apr 2026 2:09:14 AM	Promotion Created	Id:68; Name:Bonus Wrap Promo,Start:2026-04-15,End:2026-04-22,UseZones:False,LTO:True,Overwrite:False; 1 Items:8745   1.5; 1 ImpactedItems:8743   0.8; 1 Entities:671;	systemadmin
Tue, 14 Apr 2026 2:09:59 AM	Promotion Updated	Id:68; [OLD] Name:Bonus Wrap Promo,Start:2026-04-15,End:2026-04-22,UseZones:False,LTO:True,Overwrite:False; 1 Items:8745   1.5; 1 ImpactedItems:8743   0.8; 1 Entities:671; [NEW] Name:Bonus Wrap Promo,Start:2026-04-15,End:2026-04-22,UseZones:False,LTO:True,Overwrite:False; 1 Items:8745   1.5; 1 ImpactedItems:8743   0.8; 1 Entities:1106;	systemadmin

**Step 4.** Use the **FILTER** to search actions or the check-box options to review log specifics.

**Audit Log Filters** ✕

Search text

Date Range

APR 13, 2026 - APR 14, 2026
▼

- Forecast Promotion Created
- Forecast Promotion Deleted
- Forecast Promotion Updated
- Forecast Reset