MacromatiX Release Notes

2026.4

Released Q4 2026

Customer Edition

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Introduction

This document communicates the major new features and changes in the 2026.4 MacromatiX Release. It also references issues that were addressed during this release. MacromatiX is a cloud-based operating system that provides operational efficiency, cost controls, and real-time visibility into restaurant operations that keep the manager in front of customers and focused on their experience, rather than stuck in the back office staring at spreadsheets.

Get instant insight into inventory and financials with in-depth, down-to-the-item reporting. Gain access to sales data, gross profit, cost of goods sold, loss prevention, and exception management with the ability to report down to the item level at individual stores. With MacromatiX, food is fresher, waste is reduced, and gross profits are increased.

About This Release

The 2026.4 release includes substantive changes to improve operational efficiency, strengthen integrations across Fourth products, and deliver performance and usability improvements for managers and corporate users. A few of the release highlights for MacromatiX Desktop, MxConnect (Mobile), and back-end services are detailed below.

Release Highlights

- ✓ **Fewer support requests with self-service cash corrections:** Store managers with the new permissions can now view and correct individual skim entries, and reverse deposits and dispatches, directly in Mobile, with a full audit trail. Corrections that once needed support to run a database script can now be completed in the store, keeping reconciliation accurate and quick. (Cash Management Flexibility Enhancements – F30068)
- ✓ **Standard Order Guides arrive in Mobile Ordering:** Stores can build curated guides of their most frequently ordered items, choose a guide when placing ad hoc or scheduled orders, and see which guide was used on every order. Enabled vendor by vendor, they mean faster ordering, less scrolling through long catalogs and more consistent orders between stores. (Mobile Ordering – Standard Order Guide Enhancements – F30181)

- ✓ **Support for hierarchies with more than four levels:** MacromatiX can now work with organization hierarchies that contain more than four levels, including hierarchy data received from CUP, users associated to above-store units, Unit Names of up to 128 characters, and multi-level support across Server Manager tasks, MxConnect and MMS pages, and reports. (F29827, F30383, F30381, F30382)
- ✓ **More of the weekly routine, completed in Mobile:** A new Cash Deposit page brings weekly deposit review and reconciliation into Mobile, and a new Export All to Excel button delivers every weekly report for a store in one workbook through the Download Center. (Mobile Cash Deposit Management – F30192; Export All Weekly Reports – F29997)
- ✓ **Smarter ordering and easier setup:** Vendor items can be limited by delivery day and date range so stores only order what can be delivered, and Item Group and Order Category filters can be used together to help managers focus on the items they own. UPT settings for suggest ordering can now be maintained through the Entity Item Import and defaults for new stores. (F29517, F30040, F29646)
- ✓ **Clearer production guidance:** Suggested cook quantities now follow each item's rounding precision, from tenth to whole batches, and a new option prints one label per cook batch to reduce label waste in busy trading periods. (Production Dashboard Rounding Precision Enhancement – F30400; Configurable Label Quantity Calculation for Cook Batches – F30470)
- ✓ **More complete COGS and inventory movement reporting:** The Mobile Inventory Movement and COGS reports now include Production BOM Make and BOM Usage, with new columns and updated usage and variance calculations for a fuller picture of production activity. (Enhancement of Mobile Inventory Movement and COGS Reports – F28281)
- ✓ **Flexible sign-in for restricted environments:** A configurable 2FA grace period and automated IDM bypass through the employee import reduce repeated verification prompts for store teams who cannot always carry a mobile device. (Enhanced Authentication Flexibility – F30253)
- ✓ **Stronger controls and less manual effort at period end:** Petty cash gains separate edit and delete permissions with detailed audit logging, and new Server Manager tasks can automatically lock the previous fiscal period and handle missing period closes. (F26906, US225232, F29799)
- ✓ **Faster onboarding and broader integrations:** CloudLink's new Historical Sales Processing Service helps seed reporting and AI Forecasting with sales history without slowing down live sales. This release also adds a file-based SAP integration, BYTE POS updates, Edify

forecast and transfer feedback exports, and an RDS procedure for long-term sales book retrieval. (F30371, F30317, F30316, F30318, F30319, F30012, F29475, F30337, F29975, F29262)

- ✓ **64 defects resolved:** This release includes fixes across ordering and scheduled orders, banking and deposits, production, POS integrations, authentication, and reporting.

Release Summary

Front-End Applications	Front-End Applications	Front-End Applications
	Mobile (MxConnect)	Desktop (MMS)
Administration	1	1
Core		
Financial	2	1
Forecasting		
Inventory	4	
Production	2	
Reporting	1	
Workforce		
Total	10	2

Back-End Applications	Back-End Applications
CloudLink	4
LiveLink	
RDS	1
Server Manager	3
Total	8

MacromatiX Mobile (MxConnect)

Administration

★ Enhanced Authentication Flexibility with Automated IDM Bypass and 2FA Grace Period (F30253)

Summary

Two enhancements provide greater authentication flexibility for store employees working in environments where access to mobile devices may be restricted.

Automated IDM Bypass through Employee Import

A new optional **BypassIDM** field has been added to the employee import file, allowing IDM bypass settings to be maintained centrally through the existing employee integration process instead of being updated user by user. The field is processed as follows:

- ★ **Y:** sets the user's BypassIDM value to True.
- ★ **N:** sets the user's BypassIDM value to False.
- ★ **Blank or not provided:** leaves the user's current BypassIDM value unchanged.
- ★ **Any other value:** rejects the employee record and records a validation failure.

Updates apply only to users included in the employee import file. Manual maintenance through the user interface remains available, and the current SystemAdmin behavior (BypassIDM = True) is unchanged.

Configurable 2FA Grace Period

A new **2FA Grace Period Hours** configuration allows eligible users to skip repeated 2FA verification when 2FA was already completed successfully within the configured period. At login, the system evaluates the timestamp of the user's last successful 2FA authorization:

- ★ If the previous successful 2FA occurred within the grace period, the 2FA step is skipped.
- ★ If there is no previous successful 2FA, or the grace period has expired, the user must complete 2FA.
- ★ Each successful 2FA authorization restarts the grace-period window.
- ★ Failed authentication attempts do not update the last successful 2FA timestamp.

The grace period applies to both MMS and Mobile login flows and does not bypass IDM identity and password validation. The system now maintains user-level LastLogOnTime, Last2FATime and LastLogonIP (reserved for future use).

Reason for the Change

Following the introduction of IDM and 2FA, a customer identified operational challenges for employees working in restricted environments, including military locations and TSM sites, where employees may not be permitted to carry mobile devices. These restrictions can make completing 2FA at every login difficult and can affect store login efficiency.

Automating the BypassIDM setting through employee import removes the need to configure affected users individually. The configurable 2FA grace period reduces repeated verification prompts after a user has completed 2FA, while IDM username and password authentication is still required. Together, these enhancements accommodate store-level operating conditions while keeping MacromatiX authentication aligned with a customer's security requirements.

Security Permissions

No new application security permissions or role assignments are introduced as part of this enhancement.

Configuration Settings

Configuration	Description
2FA Grace Period Hours (default)	0 hours, which disables the grace period. Users subject to IDM and 2FA complete 2FA at every login.
2FA Grace Period Hours (customer example)	8 hours

The employee import layout must support the new optional **BypassIDM** field:

Import value	Result
Y	Sets BypassIDM = True
N	Sets BypassIDM = False
Blank or omitted	Retains the existing value
Any other value	Rejects the employee record and logs a validation error

Employee records are not required to include the new field. If it is omitted or left blank, the employee's existing value remains unchanged.

Financial

★ Cash Management Flexibility Enhancements (F30068)

Summary

This feature delivers self-service enhancements to Cash Management, aimed at removing recurring corrections that previously required support intervention through database scripts.

- ★ **Skim visibility:** In Cash Reconciliation, the Skims total is now clickable and opens a window listing individual skim entries (timestamp and amount) instead of only a rolled-up total.
- ★ **Skim editing:** Users with the new **Cash Reconciliation – Can Edit Skims** permission can correct individual skim amounts from that window when the shift is not yet authorized or has been released for modification. Editing recalculates reconciliation and deposit totals, updates linked banking and control information records, and writes an audit record (timestamp, user, shift, original amount, new amount). Without the permission, the window is read-only.
- ★ **Deposit reversal:** Users with the new **Deposits – Can reverse deposit** permission can reverse an authorized deposit that has not yet been dispatched, from the Deposits – Deposit tab. Funds return to Available for Deposit, associated transactions are released, and an audit record is logged.
- ★ **Dispatch reversal:** Users with the new **Deposits – Can reverse dispatch** permission can reverse an already-dispatched deposit from the Deposits – Completed tab. The dispatch is reversed first, after which the deposit itself can be reversed (subject to the deposit reversal permission). Both actions are hidden from users without the corresponding permission.

Reason for the Change

Cash Management previously relied on manual database scripts to correct incorrect skim entries and to reverse deposits and dispatches after an error was found, delaying store operations and consuming support capacity. This feature gives store managers permission-controlled tools to make these corrections directly, with full audit traceability, reducing support workload and improving reconciliation accuracy and speed. It benefits any customer using Cash Management within MxConnect.

Security Permissions

Three new security permissions are introduced under the Mobile section of Security Group administration:

Permission	Access provided
Cash Reconciliation – Can Edit Skims	Allows editing of individual skim entries in the Skim Details window when the shift is not authorized or has been released for modification. Without this permission, the window is read-only.
Deposits – Can Reverse Deposit	Allows reversal of an authorized, not-yet-dispatched deposit from the Deposit tab. Without this permission, the reversal option is hidden.
Deposits – Can Reverse Dispatch	Allows reversal of an already-dispatched deposit from the Completed tab (required before the deposit itself can be reversed). Without this permission, the reversal option is hidden.

Existing permissions granting access to, and the ability to release or modify, cash reconciliations and to access the deposit screen remain applicable.

Configuration Settings

No new configurations are introduced as part of this feature. Existing Cash Up settings and Banking settings controlling skim usage in Cash Reconciliation and deposit behavior still apply.

★ Mobile Cash Deposit Management – Weekly View & Reconciliation Support (F30192)

Summary

A new **Cash Deposit** page is introduced in Mobile to support weekly deposit review and reconciliation. The page replicates the core functionality of the existing MMS Cash Deposit page while following the layout and interaction model of the Mobile Paid In/Out page.

Weekly Deposit View

A fiscal week selector lets users navigate between business weeks and load deposit records for the selected store and week. Users with access to multiple stores can select the store; users with one store have it selected by default. Deposit records are listed by shift with Shift, Deposit Amount, Deposit Time, Shift Manager, Shift Start, Shift End, and Edit and Delete actions.

Adding, Updating and Deleting Deposits

Users with the required permission can add a deposit by entering a Deposit Amount and Deposit Time; required fields are validated before submission. Each deposit row has an action menu to edit or delete the record. The **Shift Manager** field can also be edited directly in the grid and saves automatically. A **Refresh** button reloads the latest deposit data for the selected week.

Audit Logging

All deposit additions, updates and deletions, including inline Shift Manager changes, are logged with the user, action type, timestamp and affected deposit record.

Reason for the Change

Cash deposits are recorded at the POS at the end of each shift and integrated into MacromatiX for financial reports such as the Weekly Sales Report and Driver A/R Report. The existing MacromatiX Cash Deposit page lets store managers review, confirm and update deposits across shifts, but it was not available in Mobile, so users had to switch between Mobile, POS and the legacy interface. Adding the page to Mobile lets users complete deposit review and correction in one platform, supporting a customer's Move to Mobile initiative.

Security Permissions

Access to the page and its maintenance actions is governed by four role-based permissions:

Permission	Access provided
Can Access	Allows the user to open the Mobile Cash Deposit page and view deposit records.
Can Add	Allows the user to see the Add button and create deposit records.
Can Update	Allows the user to edit deposit details and update the Shift Manager field.
Can Delete	Allows the user to delete deposit records.

Configuration Settings

No new application configuration settings are introduced as part of this feature.

Inventory

★ Vendor Item Delivery Availability and Restriction Controls (F29517)

Summary

Vendor-item-level controls now determine whether an item is available for ordering based on the permitted days of the week for delivery, a temporary restriction or discontinuation date range, and the selected or scheduled delivery date of the purchase order. Vendor items remain orderable on all delivery days by default unless delivery-day restrictions are explicitly configured, preserving backward compatibility.

Vendor Item Import

The Vendor Item Import supports seven optional Boolean fields (OrderableMondayDelivery through OrderableSundayDelivery), consolidated and stored in the vendor item's delivery-day mask, plus **DeliveryRestrictionStartDate** and **DeliveryRestrictionEndDate**. If either restriction date is provided, both must be supplied and the end date must be the same as or later than the start date; invalid values produce import validation errors. If the new fields are omitted, the vendor item's existing values remain unchanged.

Inventory Item Wizard

In the **Set Vendors** step, users can maintain **Orderable Delivery Days** (Monday to Sunday checkboxes) and a **Delivery Restriction Range** (start and end dates). Both dates must be entered together, and the end date cannot be earlier than the start date.

Vendor Management Page

The **Vendor Price List** tab adds Orderable Delivery Days and Delivery Restriction Range columns, grid sorting, filtering for items with delivery days or restriction dates configured, and an **Export** action that exports the current grid view to CSV. Values can be viewed and edited directly in the grid, with the same date validation enforced.

Mobile Ordering

Mobile Ordering evaluates the new rules when creating a purchase order, using the order's selected or scheduled delivery date rather than the creation date. A vendor item is excluded from ordering when its delivery-day mask does not include the weekday of the delivery date, or when the delivery date falls within the restriction range (inclusive of start and end dates). Existing vendor-item ordering rules (restricted-order flag, introduction date, discontinuation date and order class) are unchanged.

Reason for the Change

Some vendor items, such as uniforms and cleaning products, are delivered only on specific days, and a customer may know in advance that certain items will be restricted or discontinued for a defined period. MacromatiX previously supported immediate restrictions or future discontinuation dates but did not support time-bound availability based on the item's delivery date. The new controls align vendor-item availability with supplier delivery schedules and planned disruptions, helping stores order only items that are deliverable for the requested date. Vendor items remain visible for stock counting and reporting where applicable.

Security Permissions

No new or modified security permissions.

Configuration Settings

Default Delivery-Day Configuration

The vendor-item delivery-day mask defaults to **127**, which enables all seven delivery days. No ordering restriction is introduced unless the delivery-day settings are explicitly changed. A mask value of **0** also indicates that no delivery-day restriction is configured.

Vendor Item Import Configuration

Update the Vendor Item Import file or integration mapping to support the seven weekday Boolean fields, DeliveryRestrictionStartDate and DeliveryRestrictionEndDate. The new fields are optional; when not supplied, existing values remain unchanged. Restriction dates must be supplied as a complete and valid pair.

Vendor-Item Maintenance

Authorized users can configure the delivery settings through the **Set Vendors** step of the Inventory Item Wizard or the **Vendor Price List** tab on the Vendor Management page. The settings apply only at the vendor-item level, not at the inventory-item or vendor-store-item level.

★ Enhancement of Mobile Inventory Movement and COGS Reports to Include Production BOM Make and BOM Usage (F28281)

Summary

The **Mobile Inventory Movement Report** and **Mobile COGS Report** now include inventory activity generated through Production BOM workflows, reflecting both finished Production BOM items produced and ingredient items consumed during production.

New Production BOM Columns

The following columns are available in the View Manager for both reports and can be selected, removed and reordered in store-specific and global views:

- ★ **Production BOM Make Qty:** quantity of finished Production BOM items produced.
- ★ **Production BOM Make Value:** inventory value of finished Production BOM items produced.
- ★ **BOM Usage Qty:** quantity of ingredient items consumed through Production BOM Make.
- ★ **BOM Usage Value:** inventory value of ingredient items consumed through Production BOM Make.

Existing and Default Report Views

Existing report views are not updated automatically. Customers can add the new columns to an existing view or create a new view containing them. The selected view affects only presentation; Production BOM activity is included in the underlying report calculations whether or not the columns are displayed.

Aggregation and Calculations

Production BOM Make and BOM Usage values align with existing movement types such as receiving, transfers, waste and usage, aggregate at item, category and report-total levels, and do not duplicate quantities already represented by other movement types. Usage and variance calculations are updated as follows:

- ★ **Actual Usage** = Beginning Inventory + Purchases - Returns + Transfer In - Transfer Out - Other Adjustments + BOM Make - Ending Inventory
- ★ **Theoretical Usage** = Sales + BOM Usage
- ★ **Variance Usage** = Actual Usage - Theoretical Usage

Waste remains configurable and may be included in or excluded from Actual Usage according to the existing system configuration.

Reason for the Change

A customer uses Production BOM Make functionality across Hub and Standalone store kitchens, and through the Edify integration this activity may be automated through MacromatiX APIs. These transactions produce finished Production BOM items, consume ingredient inventory, and record the related inventory movements and values. Previously, the Mobile Inventory Movement and Mobile COGS reports did not include Production BOM Make or BOM Usage movements, so production-related movements were not fully visible and the reports' actual usage, theoretical usage and variance calculations were incomplete. The enhancement provides more complete inventory visibility and more accurate usage and variance reporting across a customer's Hub, Spoke and Standalone locations.

Security Permissions

No new security permissions for this enhancement.

Configuration Settings

Report View Configuration

To display Production BOM activity as separate columns, manually update existing views or create new views containing Production BOM Make Qty, Production BOM Make Value, BOM Usage Qty and BOM Usage Value. Existing views remain unchanged after deployment. If the new columns are not added, Production BOM activity is still included in the Actual Usage, Theoretical Usage and Variance Usage calculations.

★ Dual Filter Support for Item Group and Order Category in Ordering (F30040)

Summary

A new **Both** option is added to the existing configuration setting **The type of category filter option on top of the order detail view**. Previously, the setting displayed either the Item Group filter or the Order Category filter, but not both. The setting now offers three options:

- ★ **Item Group:** displays only the Item Group filter.
- ★ **Order Category:** displays only the Order Category filter.
- ★ **Both:** displays the Item Group and Order Category filters simultaneously.

Order Category Filter Behavior

The Order Category filter defaults to **All Order Categories**, which includes items assigned to an Order Category and items without one, and lists all configured Order Category values (for

example FoH, BoH and shared categories). Selecting a specific Order Category displays only items assigned to that category.

Combined Filtering

When the setting is **Both**, users can apply either filter independently or apply both together to refine the item list, which updates dynamically. The dual-filter capability is available consistently on Order Placement, Scheduled Orders, Order Receiving and Order History.

The enhancement changes only the filtering and presentation of items. It does not change order structure, pricing, submission logic, supplier integrations or downstream order processing, and all selected items continue to be submitted as a single consolidated order.

Reason for the Change

A customer's store ordering responsibilities are divided between Front of House and Back of House managers, each responsible for ordering the items relevant to their activities. MacromatiX previously allowed item visibility to be filtered by either Item Group or Order Category, but not both at once, which limited a customer's ability to combine its existing product grouping with operational classifications for FoH, BoH and shared responsibilities. The dual-filter capability helps users focus on items relevant to their responsibilities, improves navigation and ordering efficiency, reduces errors caused by irrelevant item visibility, and preserves the existing Item Group structure while introducing role-based Order Categories.

Security Permissions

No new security permissions for this enhancement.

Configuration Settings

Review the existing setting **The type of category filter option on top of the order detail view** and set it to **Both** to enable the dual-filter experience:

Configuration option	Result
Item Group	Displays only the Item Group filter.
Order Category	Displays only the Order Category filter.
Both	Displays the Item Group and Order Category filters simultaneously.

The relevant Order Category values (for example FoH, BoH, and shared FoH and BoH responsibilities) must be configured before they can be selected in the ordering interface, and each applicable inventory item should be associated with an Order Category. Items without an assigned category remain visible when All Order Categories is selected but do not appear when a specific Order Category is selected. No changes are required to the existing Item Group configuration.

★ Mobile Ordering – Standard Order Guide Enhancements (F30181)

Summary

Standard Order Guide functionality is introduced within Mobile Ordering. The enhancement includes a new Mobile page for managing Standard Order Guides, guide selection during ad hoc and scheduled ordering, vendor-level configuration for phased enablement, migration of the Standard Order Guide report from Crystal Reports to SSRS, order-level tracking of the guide used, and new security permissions governing guide maintenance.

Mobile Standard Order Guide Management

A new **Standard Order Guide Management** page in the Mobile Inventory Order section lets store users create guides; update guide names, items, default quantities and item sort order; remove items; delete guides; and print guides. The page works within the currently logged-in store, has no store selector, and guides cannot be copied between stores. Items may be added as Inventory Items or Vendor Items depending on the vendor-entity configuration, and the page remains functionally compatible with the existing MMS Standard Order functionality.

Mobile Ordering Integration

After a vendor is selected during ad hoc order creation, a Standard Order Guide dropdown lists all guides available for the store and vendor, plus a default **Not Use** option. A corresponding dropdown is available in the scheduled-order grid. Selecting a guide is optional in both flows. When a guide is selected, all of its items are added to the order using the defined default quantity, or the suggested-order quantity when the default quantity is zero. Quantities can be modified before submission.

Order Traceability and Report

The guide name is stored on the order (tbTransactionSupplyOrder and tbTransactionSaleOrder), shown in Order History, and available in RDS. The Standard Order Guide report is migrated from Crystal Reports to SSRS, is accessible from Mobile and MMS, and keeps its printed output consistent with existing business use.

Reason for the Change

Mobile Ordering relies on vendor-item controls such as restricted-order flags, introduction and discontinuation dates and Order Classes. Maintaining these controls manually is time-consuming, and incomplete vendor integration and catalog synchronization can make it difficult to keep vendor-item catalogs consistently filtered, so store users may have to navigate lengthy vendor-item lists when creating orders. Standard Order Guides provide curated lists of frequently ordered items, making order creation faster and more intuitive, improving ordering consistency between stores, reducing the need to search large catalogs, and supporting a customer's transition from MMS to Mobile Ordering.

Security Permissions

New permissions control access to the Mobile Standard Order Guide Management page and its maintenance functions:

Permission capability	Access provided
View / Access	Allows the user to open the Standard Order Guide Management page and view guides for the current store.
Add	Allows the user to create Standard Order Guides.
Update	Allows the user to modify guide names, items, quantities and sort order.
Delete	Allows the user to delete Standard Order Guides.

Configuration Settings

Enable Standard Order

A new vendor-level setting, **Enable Standard Order**, is added to Vendor Management. When enabled, Standard Order Guide options are available in Mobile Ordering; when disabled, they are not displayed. The setting supports phased enablement based on vendor integration readiness.

Interaction with Use Order Class In Place Order

Enable Standard Order and **Use Order Class In Place Order** are independent vendor-level settings, and normally only one is expected to be enabled for a vendor. If both are enabled, Standard Order Guide behavior takes precedence and Order Class filtering is ignored during order creation.

Vendor and Item Configuration

Before users can create or use a Standard Order Guide, the vendor must be assigned to the store through vendor-entity configuration, Enable Standard Order must be enabled for the vendor, items must be available as Inventory Items or Vendor Items according to the vendor configuration, and a Standard Order Guide must be created for the relevant store and vendor.

Production

★ Production Dashboard Rounding Precision Enhancement (F30400)

Summary

The Dynamic Production (EMPC) calculation process now applies each production item's configured **Production Rounding Precision** consistently across forecast calculations, required-quantity calculations, buffer-time adjustments and quantity displays.

Production Rounding Precision Availability

The **Production Rounding Precision** setting is now always displayed on the Production Setup page (MMS_HO_ProductionManager.aspx). Previously it was available only when **Inventory_Production_ShowForecastConfiguration** was enabled, so rounding precision can now be defined for all production items. Supported options are Raw Value, Round to 1/10 Batch, Round to 1/4 Batch, Round to 1/2 Batch and Round to Whole Batch.

Forecast Quantity Rounding

Unless **Raw Value** is selected, forecast quantities are rounded upward to the applicable increment, based on the item's divisor and rounding precision. For example, an item with a divisor of 18 set to round to half a batch has an increment of 9, so a forecast quantity of 17 is rounded to 18. With Raw Value, the original calculated quantity is retained.

Rolling Rounding Adjustment

A rolling-rounding mechanism reduces cumulative forecast variance caused by rounding each production interval separately. The difference between the raw and rounded quantity is deducted from the raw forecast of subsequent intervals before further rounding, carrying forward until it has been fully offset. This keeps production quantities in practical increments while minimizing overproduction or underproduction across the day.

Required Quantity, Buffer Time and Quantity Display

Required Quantity and Hold Time calculations continue to use the forecast quantities produced by the Dynamic Production engine. Buffer Time calculations use the same item-

specific rounding precision. EMPC quantity displays now remove unnecessary decimal places: whole quantities display without decimals (10), one-decimal quantities display one decimal place (10.5), quantities with more than two decimal digits show a maximum of three decimal places, and trailing zeros are not displayed.

The enhancement does not modify historical forecast records, inventory transactions, inventory depletion calculations, or existing reporting calculations other than where displayed forecast and required quantities reflect the new rounding rules.

Reason for the Change

Suggested Cook Quantities on the Production Dashboard are calculated from forecast and production data. Items prepared using weight-based, volume-based or batch-based units may produce suggested quantities containing decimal values that are difficult for store users to interpret and execute, because production commonly uses predefined increments such as whole, half, quarter or tenth batches. The enhancement aligns Suggested Cook Quantities with item-level operational requirements and provides clearer production guidance, while preserving the integrity of underlying inventory transactions, depletion calculations, historical forecasts and reporting data.

Security Permissions

This feature does not introduce any new security permissions.

Configuration Settings

Review and configure **Production Rounding Precision** separately for each applicable production item. The applicable increment is determined using the item's configured divisor and the selected precision.

Configuration value	Behavior
Raw Value	Retains the original calculated forecast quantity without rounding.
Round to 1/10 Batch	Rounds upward to the applicable one-tenth batch increment.
Round to 1/4 Batch	Rounds upward to the applicable one-quarter batch increment.
Round to 1/2 Batch	Rounds upward to the applicable half-batch increment.
Round to Whole Batch	Rounds upward to the applicable whole-batch increment.

No change is required to Inventory_Production_ShowForecastConfiguration to make the rounding setting available; Production Rounding Precision is now displayed regardless of that configuration's value.

★ Configurable Label Quantity Calculation for Cook Batches (F30470)

Summary

A new item-level **Label Quantities** dropdown is added to the **Production Manager** page and can be configured independently for each production item. Two calculation methods are available:

- ★ **Count By Divisor** (default): preserves the existing behavior. Label Quantity = Cooked Quantity ÷ Item Divisor, rounded up to the next whole number. For example, a cooked quantity of 24 with a divisor of 8 produces three labels.
- ★ **One Label Per Batch:** E-MP&C prints exactly one label for each recorded cook batch, regardless of cooked quantity or item divisor. For example, a cooked quantity of 24 with a divisor of 8 produces one label.

Different production items can use different methods at the same time. Both existing and newly created production items default to Count By Divisor, so behavior does not change unless an item is explicitly set to One Label Per Batch.

The enhancement changes only the number of labels generated. It does not change label content or format, forecast and production calculations, cooked quantity recording, inventory transactions or balances, waste calculations, or reporting data. A new LabelQuantityMethod field is added to tbMPCV2TemplateItem to store the selected method.

Reason for the Change

E-MP&C calculates label quantities by dividing the cooked quantity by the item divisor and rounding upward, an approach designed for products managed as individual pieces such as Chicken and Zinger. A customer has expanded E-MP&C to side items such as Fries and Wedges, which may use smaller inventory units such as grams and can have much larger recorded cook quantities, so the divisor-based method generated an excessive number of labels for a single cook batch. The new method treats a recorded cook batch as one labeling event, simplifying label handling, reducing label waste and lowering the effort required during busy trading periods, while leaving production and inventory calculations unchanged.

Security Permissions

This feature does not introduce any new security permissions.

Configuration Settings

Review the **Label Quantities** setting for each applicable production item:

Setting	Calculation behavior
Count By Divisor	Divides Cooked Quantity by Item Divisor and rounds upward to a whole number.
One Label Per Batch	Prints exactly one label for each recorded cook batch, regardless of quantity or divisor.

The default value is Count By Divisor for both existing and newly created items. No behavior changes occur unless an item is explicitly configured as One Label Per Batch.

Reporting

★ Export All Weekly Reports and Download Center Navigation Enhancement (F29997)

Summary

A new **Export All to Excel** button is added to the MXConnect Weekly Reports page alongside the existing **Generate Report** button. After a valid store and reporting week are selected, it generates one consolidated Excel workbook, with each report on a separate worksheet for the same store and week, delivered through the Download Center. The workbook includes worksheets for:

- ★ Sales Summary Report
- ★ Gross Sales Report
- ★ Weekly Sales Report
- ★ Petty Cash Report
- ★ Master Voucher Food Report
- ★ Master Voucher Produce Report
- ★ Inventory Report

The existing Generate Report capability and Send to Download Center behavior remain unchanged.

Direct Download Center Navigation

A new **Go To Download Center** option is added to the Weekly Reports page, in the upper-left area consistent with the existing Report Portal design. It takes users directly to the Download Center, whether or not report generation has been started.

Reason for the Change

As part of the Move to Mobile initiative, a customer is transitioning store-level users from the legacy MMS system to Mobile EBO and MXConnect Weekly Reports. Previously, users had to generate each weekly report individually, which required repetitive actions and more effort than the existing MMS capability. The consolidated export provides closer functional parity with MMS by generating all supported weekly reports in a single operation, and direct Download Center navigation reduces the steps required to locate generated files.

Security Permissions

No new or modified security permissions for this enhancement.

Configuration Settings

No new system configuration settings are added for this enhancement.

MacromatiX Desktop (MMS)

Administration

★ UPT Configuration Automation via Entity Item Import and Default Settings (F29646)

Summary

This release enhances UPT configuration management for non-recipe items used in suggest ordering by introducing centralized UPT maintenance through the Entity Item Import and configurable defaults for newly created stores.

Entity Item Import Enhancement

The Entity Item Import supports three optional fields: **UPT** (Y or N), **UPTAutoCalc** (Y or N) and **AutoOrderType** (Usage Per Thousand or Build To Level). AutoOrderType is assigned only when it matches an active, auto-order-enabled record in tbOrderType; invalid or inactive values are rejected or recorded as import errors. Any field left blank or omitted retains the item's existing configuration. Imports support bulk updates across multiple stores and items, and successful and failed results are logged for audit and troubleshooting.

Inventory Item Management Wizard Enhancement

The Inventory Item Management Wizard now supports default values for UPT (new), AutoOrderType (new) and UPTAutoCalc (existing). These defaults are applied automatically to applicable inventory items when a new store is created manually or through an import. They apply only during new-store creation and do not overwrite configurations for existing stores. Authorized users can change the defaults at any time, and revised values apply to future stores.

UPT and AutoOrderTypeID are added to tbDefaultEntityItem to support the default-setting behavior.

Reason for the Change

UPT-based forecasting depends on three store-level settings that previously had to be maintained manually for every applicable item at each store. With hundreds of UPT items and continued store expansion, this was time-consuming, burdensome and prone to error, and inconsistent configuration can affect forecast accuracy, inventory availability, waste and store operations. The enhancement centralizes UPT maintenance and automates standard settings so that new stores can be onboarded without configuring each UPT item manually, configurations stay consistent across stores, and suggest ordering can operate with more accurate UPT settings.

Security Permissions

The feature does not introduce any new or modified security permissions.

Configuration Settings

Organizations using the Entity Item Import should update the import file or integration mapping to support the following optional fields:

Field	Required?	Valid values	Blank-field behavior
UPT	No	Y, N	Existing value remains unchanged.
UPTAutoCalc	No	Y, N	Existing value remains unchanged.
AutoOrderType	No	Usage Per Thousand, Build To Level	Existing value remains unchanged.

The AutoOrderType value must match an active, auto-order-enabled record in tbOrderType; otherwise the import record is rejected or logged as an error. Existing import files that do not provide these fields do not change the corresponding UPT values.

Review and configure the UPT, UPTAutoCalc and AutoOrderType defaults in the Inventory Item Management Wizard according to your organization's operational requirements. Changing the defaults does not update existing store configurations.

Financial

★ Petty Cash Permission Control and Audit Logging Enhancements (F26906)

Summary

This release introduces enhanced access controls and audit logging for petty cash transactions in MacromatiX Cash Management.

New Edit and Delete Permissions

Two new security permissions, **PettyCash_Can_Edit_Petty_Cash_Transactions** and **PettyCash_Can_Delete_Petty_Cash_Transactions**, allow authorized users to edit and delete existing petty cash transactions. Users without the appropriate permission are prevented from performing the action, and the edit and delete controls are hidden or disabled. The controls are enforced on both the MMS legacy petty cash page and the Mobile petty cash page.

Enhanced Audit Logging

When a petty cash transaction is edited, the audit log records the transaction ID, action type, user ID and username, date and time, fields changed, and before and after values. When a transaction is deleted, it records the transaction ID, action type, user ID and username, date and time of deletion, and full details of the deleted record. Audit information is stored in a persistent, queryable format and is available for reporting and audit purposes.

Reason for the Change

The previous petty cash process contained a control gap that could allow users to create temporary paid-out transactions, reduce the system-calculated banking deposit amount, complete reconciliation using the lower amount, and then delete the transaction, concealing discrepancies in banking deposits. By separating edit and delete access and recording every change, the enhancement closes this gap, prevents unauthorized modification or deletion, protects store-level cash assets, ensures petty cash transactions remain accurately reflected in banking deposits, and provides detailed transaction history for audit purposes.

Security Permissions

Permission	Access provided
PettyCash_Can_Edit_Petty_Cash_Transactions	Allows a user to edit existing petty cash transactions.
PettyCash_Can_Delete_Petty_Cash_Transactions	Allows a user to delete existing petty cash transactions.

The permissions are independently controlled, so a user can be granted edit access, delete access, both, or neither, through standard role and permission management at role or user-group level.

Default assignment: To maintain backward compatibility, all users who currently have the **PettyCash_CanAccess** permission automatically receive both new permissions when the feature is deployed.

Recommended post-deployment review: Administrators should review the two new permissions after deployment and revoke edit or delete access from roles or user groups that do not require them under the organization's internal control policies.

Configuration Settings

No new application configuration settings are added in this feature.

CloudLink

★ Byte POS Integration – Deprecated Fields Remediation (F29475)

Summary

The MacromatiX Byte POS integration now processes supported replacement fields instead of Byte POS event fields deprecated by Yum. The remediation applies to the following event types:

- ★ **pos.Order.V2:** processing uses BelowLineItems.orderFees instead of the deprecated BelowLineItems.fees field.
- ★ **pos.CashManagerBusinessDay:** deprecated identifiers are replaced, and processing moves from cashmanagerbusinessday.start_time to created_at_time_iso.
- ★ **pos.CashManagerTill:** processing is updated to accommodate the supported event identifiers instead of deprecated identifiers.
- ★ **pos.CashManagerAuditEvent deletion events:** deprecated V1 order-based product fields (product_name, pos_code, unit_price, quantity and product_id) are replaced with the supported order_bundle and order_product structures.

Functional behavior is equivalent to the previous integration. Existing validation logic, queue management, processing outcomes and downstream data flows are expected to remain unchanged. This is a technical update; there are no changes to store workflows, business processes, user interactions or reporting logic.

Reason for the Change

Yum announced the deprecation of several fields in the Byte POS event schema, some of which were used by the MacromatiX Byte POS integration for core event processing and validation. The integration must move to the supported replacement fields to remain compatible with the current schema, reduce the risk of defects when the deprecated fields are removed, protect data integrity and reporting, and support uninterrupted store and end-of-day operations as a customer's Byte POS rollout continues.

Security Permissions

No new or changed security permissions are required for this enhancement.

Configuration Settings

No new configuration settings are required.

★ BYTE POS Integration – Discount Type Code and Description Enhancement (F30337)

Summary

A new CloudLink BYTE POS configuration, **Discount Type Include Promo Code and Description**, controls whether the integration transfers both the BYTE promotion reporting code and promotion name for separate storage in the MacromatiX Reporting Data Store.

- ★ **Disabled:** the integration continues to use appliedPromotions.name as the discount or promotion PLUCode, preserving existing behavior.
- ★ **Enabled:** CloudLink builds the PLUCode as appliedPromotions.code + ">><<" + appliedPromotions.name. The MMS Polling Engine recognizes the delimiter and stores the value before it in tbDiscountType.Code and the value after it in tbDiscountType.Description. If the delimiter is not present, the transaction is processed using the existing logic.

The BYTE promotion code and promotion description are therefore stored as separate values instead of both fields containing the same value. The new logic applies only to transactions processed after the configuration is enabled, and existing tbDiscountType records are not updated. Other BYTE POS customers see no change unless the configuration is enabled for their integration.

Reason for the Change

A customer is migrating from the Compris POS platform to the Yum BYTE POS platform, and discount and promotion data must remain consistent across both platforms to support downstream reporting, analytics and data warehouse processes. Under the Compris integration, tbDiscountType.Code and Description contain separate values, whereas under the current BYTE integration both contain the same value even though the BYTE payload provides both a code and a name. Storing them independently lets downstream systems, including Snowflake, aggregate discount transactions from Compris and BYTE by a common discount identifier. Because the BYTE promotion code can occasionally be missing or blank because of BYTE configuration issues, the promotion name remains available as a fallback so affected discounts stay identifiable and the source issue remains visible.

Security Permissions

No new or changed user security permissions are specified for this enhancement.

Configuration Settings

Setting	Value
Configuration name	Discount Type Include Promo Code and Description
Configuration type	Checkbox
Default value	Unchecked
Customer deployment requirement	Manually enable following deployment

The checkbox is unchecked by default to preserve existing behavior for current BYTE POS customers. When unchecked, CloudLink populates the PLUCode with appliedPromotions.name and the MMS Polling Engine uses its current logic. When checked, CloudLink sends the concatenated code and name separated by the ">>><<" delimiter, and the MMS Polling Engine stores the two parts in tbDiscountType.Code and tbDiscountType.Description for transactions processed after the setting is enabled.

★ SAP Integration for Order, Receipt, and Inventory Data Transmission (F30012)

Summary

MacromatiX now provides an automated, file-based integration to SAP ByDesign for a customer. The integration transforms operational data generated by MacromatiX into SAP-compatible messages and submits them through the applicable SAP APIs. Five independent processes are supported, each with its own execution, scheduling, monitoring, configuration and error handling, and a master orchestration process can run all five sequentially:

★ Send Purchase Orders: Warehouse Transfer Requests

★ Send Purchase Orders: Direct Vendor Purchase Orders

★ Send Goods Receipt Data: Warehouse

★ Send Goods Receipt Data: Direct Vendor

★ Send Monthly Inventory Count Data

Purchase Order Processing

For warehouse transfer requests and direct-vendor purchase orders, the integration reads XML files from the configured inbound folder, extracts the order reference using the

configured XPath, performs an SAP pre-validation check when enabled, prevents duplicate submission when the order already exists in SAP, transforms the XML into an SAP-compatible SOAP payload using a process-specific XSLT, submits it to the configured SAP endpoint, archives processed or previously submitted files, and moves failed files to the configured processed folder once retries are exhausted.

Goods Receipt Processing

For warehouse and direct-vendor goods receipts, the integration retrieves the required SAP delivery and logistics references before submitting the receipt. If mandatory reference information cannot be retrieved, processing stops and no partial submission is attempted. The direct-vendor process also supports purchase-order retrieval, creation of an Inbound Delivery Notification, CSRF token retrieval and final goods-receipt posting.

Monthly Inventory Count Processing

When a monthly stock count is submitted, MacromatiX generates the export file, which the integration transforms into the required SAP payload and submits to the SAP stock-count API. If a stock count is edited and resubmitted, more than one export may be generated because deduplication is not applied to this process at the MacromatiX level.

Monitoring and Error Handling

Each process provides operational logging, configurable retry handling, API-response validation and dated file archiving. Processed files move to a dated archive folder, and files that remain unsuccessful after the configured retries move to a dated processed folder for investigation. No MacromatiX database schema changes are required.

Reason for the Change

SAP remains the system of record for a customer's enterprise resource planning and supplier communication, so operational transactions initiated in MacromatiX must be transmitted accurately and consistently to SAP. The integration maintains existing SAP-driven processes, improves data consistency between MacromatiX and SAP, reduces manual data entry and associated errors, provides timely inventory visibility at store and Head Office levels, and ensures purchase orders, goods receipts and stock-count transactions are available to SAP for downstream processing.

Security Permissions

The integration operates as a system-to-system integration rather than a new user-facing function. It does require technical credentials for communication with SAP, which can be configured separately for SOAP submission APIs, purchase-order pre-check APIs, goods-

receipt reference lookup APIs and other process-specific SAP endpoints. The SAP APIs and credentials must be available and provisioned for the relevant integration scenarios.

Configuration Settings

The integration is controlled through a shared JSON configuration file with a separate section for each process, allowing common processing conventions while each process keeps its own paths, mappings, APIs, credentials and retry controls.

Configuration area	Description
File and folder settings	Inbound, archive, processed or failed-file and log folders, XSLT file path, and input file pattern for each process.
API settings	SOAP submission endpoint, purchase-order pre-check and goods-receipt reference lookup endpoints where applicable, dynamic API URL parameters, API method and content type, authentication credentials, and SOAP action and envelope handling.
Retry and timeout settings	Maximum retry attempts, delay between retries and request timeout. Every failed attempt is logged, and the source file moves to the processed folder when all attempts fail.
Data extraction and mapping	XPath expressions for order numbers and identifiers, JSON-path mappings for values returned by SAP reference APIs, and process-specific XSLT mappings.
Pre-check configuration	Optional purchase-order duplicate checking. When enabled, an order that already exists in SAP is not resubmitted and is archived with the duplicate outcome logged.
Execution	Each process can run independently, and a master orchestration script runs all processes sequentially, through Windows Task Scheduler or the CloudLink PowerShell Script Service.

★ CloudLink Historical Sales Processing (F30371, F30317, F30316, F30318 & F30319)

Summary

CloudLink introduces a centralized **Historical Sales Processing Service** for configuring, requesting, monitoring and controlling historical sales processing. The service provides the orchestration and operational-control framework, while downstream handlers perform the

destination-specific processing. Three processing types are supported: **Data Lake Export**, **MX Sales Summary** and **MX Transaction Detail**.

Requests, Monitoring and Control

Users can create batch requests containing multiple stores, date ranges and processing types. Each batch records the requester, ticket number, business reason or comments, creation date and requested processing groups. A consolidated review screen shows the processing type, store, start date and end date before submission, and the system validates overlapping date ranges, duplicate requests and existing processing history.

Submitted batches generate individual tasks at the Store and Business Date level, and each processing type keeps its own status (Queued, In Process, Paused, Success, Failed, Cancelled and Back-Off). Depending on batch status, users can edit, delete or submit an open batch; pause, resume or cancel processing; cancel individual unprocessed tasks; filter task details by status; and review outcomes and errors. All requests and status changes are auditable.

Historical Sales Processing Engine

A new background engine retrieves historical sales data from the configured Cloud POS platform and routes it to the requested handlers. Oracle Simphony V2 is supported initially, and the framework is designed for future CloudLink POS integrations. POS data for each Store and Business Date is retrieved once and reused across handlers, each handler maintains its own outcome so a failure in one does not fail the others, and the engine checks for new work every ten minutes by default.

Data Lake Export

Historical Simphony V2 sales are transformed into Sales Volume and Sales Item Volume exports using the existing Data Lake schemas and business rules, generated in Parquet format, and uploaded directly to the configured AWS S3 destination without passing through the MacromatiX polling engine, SQL database or reporting database. POS PLUs are mapped to MacromatiX Sales Item IDs through a dedicated REST API with results cached in CloudLink, unmapped PLUs are recorded in diagnostics, and a request succeeds only when both exports are generated and uploaded.

MX Sales Summary

A Sales Adjustment Import file is created with one summarized record for each Store and Business Day (store number, business date, gross sales, tax, discounts and related adjustments, transaction count and a configured adjustment reason). It is processed by the existing MacromatiX import process and supports historical reporting and year-over-year

analysis when transaction-level detail and inventory depletion are not required. The adjustment reason must match an existing MacromatiX Adjustment Reason.

MX Transaction Detail

For historical sales that need full transaction-level detail for inventory depletion, detailed reporting and cash management, data is transformed into the same sales-message structure used by Oracle Simphony V2 live polling and published to a dedicated historical sales queue, isolating historical traffic from live store sales ingestion. Handler success confirms that messages were generated and published; it does not mean downstream MacromatiX processing has completed.

Queue Throttling and Back-Off

When a request includes MX Transaction Detail, the engine checks the historical queue before retrieving POS data. If the queue exceeds its configured threshold, the entire request enters Back-Off status and all of its processing types are deferred to a future cycle, which avoids unnecessary POS calls, protects downstream capacity and keeps the outputs of a request synchronized.

Reason for the Change

CloudLink's polling architecture is optimized for continuous, near-real-time transaction processing. Historical sales were previously processed through the same transaction-level workflow, including the MacromatiX polling engine, SQL database, reporting database and subsequent Data Lake distribution. Using that workflow for months or years of history creates significant processing and storage overhead, can extend implementation timelines, and competes with live sales ingestion and downstream workloads. Different use cases need different levels of detail: long-term reporting can use summarized daily sales, AI Forecasting can receive data directly through the Data Lake, and only scenarios that need inventory depletion or detailed reporting require full transaction processing. The new framework separates historical processing from live sales and provides destination-specific paths, supporting faster onboarding, reporting initialization, year-over-year analysis and AI Forecasting data seeding.

Security Permissions

Newly created security permissions are documented within each user story of the features.

Configuration Settings

Configuration area	Description
POS data retrieval	CloudLink POS type (initially Oracle Simphony V2), endpoint URLs, credentials, API keys, authentication settings, and an optional reference to an existing CloudLink polling-service configuration.
Data Lake Export	Fourth AMS S3 endpoint, bucket and path information, authentication credentials, connection validation, service-type mappings, and the MacromatiX POS type or POS title used for PLU-to-Sales Item resolution.
MX Sales Summary	Target location and path validation for generated Sales Adjustment Import files, delimited file format, and the existing MacromatiX Adjustment Reason used for historical sales.
MX Transaction Detail	Dedicated historical sales queue destination, queue throttling settings, queue threshold and automatic Back-Off settings.
Processing scheduler	Configurable polling interval. Default is 10 minutes; when no eligible tasks exist, the service waits for the interval before checking again.

LiveLink

None

Server Manager

★ Auto-Lock Previous Fiscal Period (US225232)

Summary

A new Server Manager task, **TaskLockPreviousPeriod**, is added alongside the existing TaskLockPreviousBusinessDay task, giving customers a configurable way to automatically lock the previous fiscal period once it has fully elapsed.

- ★ Lock frequency is configurable as **Daily**, **Weekly** or **Monthly**.
- ★ A configurable buffer (**Days After End of Period to Auto-Lock**) controls how many days must pass after a period ends before it becomes eligible to lock, independent of how often the task is scheduled to run.
- ★ For a Monthly lock, one lock record is created per weekly fiscal period end-date within the month (rather than one per calendar day), so a single week can be unlocked and corrected without unlocking the entire month.
- ★ Only a fully elapsed previous period is locked; the current, still-open fiscal period is never touched.
- ★ Stores on a standard corporate fiscal calendar or a custom fiscal calendar are supported.
- ★ The task raises the existing day-lock queue event, so customer-configured Admin Workflows or XSLT exports keyed on a period lock continue to fire as they do for other lock methods.

Known limitation: As with the existing lock tasks, this task does not prevent re-locking a date that a customer has manually unlocked for correction. If the correction is not completed before the next eligible run, the date can be re-locked.

Reason for the Change

Testing with the customer showed that the existing TaskLockPreviousBusinessDay task locks dates within the current fiscal period prior to the run date, which does not meet the requirement to lock only the fully elapsed previous fiscal period. This was previously handled with a manual, hand-run SQL script. The new task replaces that script with a supportable, reusable Server Manager task that is configurable per customer. It is not scheduled or enabled by default for any customer.

Security Permissions

No new security permissions are introduced as part of this story.

Configuration Settings

Two new configuration settings are available under **Operations → Period Close** in the Configuration Manager in MMS:

Configuration	Description
Auto-Lock Period Frequency	Sets how often the previous fiscal period is evaluated for auto-lock: Daily, Weekly or Monthly.
Days After End of Period to Auto-Lock	Number of days after a period ends before it becomes eligible to be auto-locked.

The task must also be enabled per customer through the **Service Method Tasks** tab and scheduled in Server Manager. It does not run for any customer until scheduled.

★ Automated Period Close Handling for RPC Inventory Reporting (F29799)

Summary

Automated handling is introduced for missing period-close records used by **Raw Product Cost (RPC)** reports and exports, ensuring a valid period close is available for each business day when a store has not completed the Close Business Day process.

A new event-driven task closes (locks) the inventory period for a business day, using its execution timestamp as the period-close time. The task supports activation by configurable business events (such as POS day close, stock-count completion or banking close), activation by one or multiple upstream tasks, and immediate or delayed execution.

A scheduled service-method task is also deployed in a customer's environment. It runs daily at **9:00 AM local time**, evaluates all open stores and checks whether a period close exists for the previous business day. When one is missing, it queues the event-driven period-close task for that store; when a valid period close already exists, no action is taken.

Reason for the Change

RPC reports and exports use period close or lock timestamps to establish the inventory activity range for each business day. In most markets, completing the Close Business Day task ensures that timestamp exists. One customer follows an operating model that allows

stores to begin a new business day without closing the previous one, so a period-close record may be missing and RPC data can be inconsistent or incomplete. The automated process addresses this without requiring its stores to change their workflow.

Security Permissions

No new or modified user security permissions for this feature.

Configuration Settings

The solution supports configuration of one or more triggering business events, one or more upstream tasks, immediate or delayed execution timing, and a daily scheduled service-method task at 9:00 AM local time for that customer. The scheduled service checks for the previous business day's period close and queues the event-driven period-close task only when a record is missing.

★ Edify Integration Enhancements – Forecast Export and Transfer Receive Feedback (F29975)

Summary

Two integration enhancements are introduced between MacromatiX and Edify: the existing forecast export now includes the store's total daily sales forecast, and a new event-driven export sends transfer receive and cancellation results back to Edify.

Sales Forecast Enhancement

The Forecast Export API now includes the store's **total daily sales forecast** alongside the existing production BOM forecast. The value matches the Manager Forecast shown on the MacromatiX Sales Forecast page for the store and business date. The forecast payload version moves from 1.0 to 1.1 with a new **totalSales** element containing amount and currency. Exports are generated separately for each Hub, Spoke and Standalone store, each containing only that store's own forecasts; production BOM forecasts are not aggregated across stores.

Transfer Source Tracking

A new **Source** field is added to tbTransactionTransfer (and to RDS) and populated when a transfer is created: **MXC** (Mobile Transfer), **Import**, **API** (API without a specified source) or **Edify** (initiated by Edify). When a source is supplied in an API payload, that value is used.

Transfer Receive Feedback Export

A new event-driven export sends detailed results to Edify when an Edify-initiated transfer is received or canceled. MacromatiX checks the transfer's Source first: if it is Edify, the export is generated and sent; otherwise no export is generated. The JSON payload includes transfer-level information (MacromatiX and Edify transfer IDs, sending and receiving store numbers, status, sent, received or canceled date and time, the user who received or canceled the transfer, comments and reasons, and temperature readings) and item-level details (item code and description, original and received quantities, shortage quantities, transfer and shortage reasons, and shortage action or type). The payload is delivered to an Edify-provided API endpoint using a linked Transfer Delivery Method, and failures are logged and surfaced through existing integration error handling.

Reason for the Change

MacromatiX provides production BOM forecasts to Edify, and Edify returns real-time production and inventory transactions such as Production BOM Make, Hub-to-Spoke transfers and waste. Edify also needs the store's total sales forecast so production managers can review and validate forecast demand within Edify. In addition, shortages, waste or returns identified when a transfer is received may require the Hub to produce more stock for a Spoke, which previously required Spoke stores to request additional transfers manually. Sending detailed transfer outcomes back to Edify lets it use current receive, shortage, waste and return information in production decisions, improving coordination and reducing manual intervention across a customer's Hub-and-Spoke production model.

Security Permissions

No new or modified MacromatiX user security permissions.

Configuration Settings

The following setup is required for the transfer feedback export:

- ★ Configure a **Transfer Delivery Method** for the export.
- ★ Configure the Edify API endpoint.
- ★ Configure the authentication credentials supplied by Edify.
- ★ Enable delivery for Edify-initiated transfers upon receipt or cancellation.

The export applies only when the persisted transfer Source value is Edify. Transfers originating from Mobile Transfer, imports or other APIs do not generate this export. Existing shortage reasons, shortage actions and transfer-adjustment rules remain governed by the current MacromatiX transfer receive configuration.

RDS

★ RDS-Based BIR Sales Book Data Retrieval Stored Procedure (F29262)

Summary

A new stored procedure, **custom.getbirsalesbookreportData**, is introduced in the Mx.Database.RDS.Redshift project. It retrieves BIR Sales Book information from the Reporting Data Store rather than from historical transactions held in the operational MX SQL database, and accepts the parameters storeid, startdate, enddate and registernumber.

With equivalent parameters, the base output is functionally equivalent to the existing SQL stored procedure, including column structure, data types, business logic, calculations, record counts and values, excluding the newly introduced SCD and PWD columns.

Additional SCD and PWD Data

The output adds separate sales and tax calculations for Senior Citizen Discount (SCD) and Persons with Disability (PWD) transactions, each with five columns: NetSales, VatAmount, VATableSales, VATExemption and VATExemptSales (for example SCDNetSales and PWDNetSales). These provide a more detailed breakdown of net sales, VAT amounts, VATable sales, VAT-exempt sales and VAT exemptions to support BIR compliance reporting and audit transparency.

Historical Data Retrieval

The procedure can retrieve historical sales data for all periods retained in RDS, including periods whose supporting transactions are no longer available in MX SQL, without depending on that data being present in the operational database. This enhancement introduces the RDS data-retrieval capability only; no change is made to the existing MacromatiX report page or its user workflow.

Reason for the Change

Philippine Bureau of Internal Revenue regulations require a customer to retain sales and accounting records for at least ten years. Since MacromatiX was implemented in 2020, the MX SQL database has accumulated approximately seven years of high-volume transaction data and grown beyond 8 TB, contributing to reporting performance degradation. To improve performance and long-term sustainability, historical transaction data is planned to be purged while retaining two years of operational data, with the complete history remaining available in RDS. The new stored procedure provides a standardized way to retrieve that history directly from RDS, supporting continued regulatory compliance and audit readiness.

Security Permissions

No new or modified user-facing security permissions for this feature.

Configuration Settings

No new user-configurable application settings are documented for this feature.

Tech Stability

★ System Stability Issues Resolution (F30179)

The MacromatiX platform received behind-the-scenes improvements to reliability and security. A fix prevents the application from failing to restart after the nightly refresh when the database is busy, and the refresh time is now adjustable per customer. A security update was applied to a third-party component used in application screens, and background messaging services were moved to a newer supported technology ahead of Microsoft retiring the legacy version on September 30, 2026. System logging was expanded so issues can be diagnosed faster, and unused internal code and data were removed to keep the platform easier to maintain.

2026.4 Release Bug Fixes

Defect ID	Description
D113332	The reason is not overwritten when an item is fully received
D116186	Customer sales report change logic
D117575	PM Adjustment screen in mobile is not updating
D118192	Workflow issues (a store can finish the next day's workflow when the current day's workflow has not been completed)
D120177	Unable to close cashier following 26.1 deployment
D120897	Mobile Weekly Forecast Screen Layout issue
D122052	Index issue
D122618	[DocUpdate] Shipping Confirmation with split delivery
D122636	Byte Integration - Item tax incorrect
D122689	[Foreign Currency] Total deposit is incorrect when failed to authorize
D123052	[QA] Key Indicators Card - Banking Deposit Quantity issue
D123053	The Expected Deposit and Deposit Variance are not correct after authorize changeover deposit
D123131	Prep & thaw Adjust
D123185	Page header is incorrect when jump from Credit Memo History to Order page
D123236	Food Processing Dashboard - Posting Prep Quantity is very slow
D123246	TreeView: Double-click to expand child nodes
D123260	Missing order from QU
D123283	TDL Vendor Integration - Error when placing an order when Create Electronic Order File is on
D123285	TDL Vendor Integration - Unable to Edit order after submission
D123286	Refactor inventory detail rows to flat structure
D123375	Staging version 2026.3 mobile review count display issue

Defect ID	Description
D123462	Production dashboard cook batch qty display issue
D123468	Credit memo issue
D123473	Mobile Pin settings issue
D123692	Submit order occurs error
D123709	QA - Inventory Movement and COGS - Export data issue
D123752	Add Pospassword to employee web service
D123803	Order receive detail page displays zero original qty for all items
D123839	The root node in TDL Order files does not meet requirement
D123841	TDL Vendor Integration - Add on order - 2 issues
D123842	Production dashboard batch reset qty issue
D123967	Scheduled Order Cut off early
D123968	TDL integration - cannot resend Quatro order
D124002	[QU] POS Integration - Transaction has incorrect Shift Number
D124073	Production Adjust Calculation incorrect Production Module
D124081	Staging 2026.03 - Inventory Report in MMS categories out of order
D124186	[QU] Giftcard Cashout
D124243	Order Catalog import - empty introduction date
D124324	Byte integration - Removing discount seems to have messed up the transaction
D124368	Food Processing Dashboard - Printable Report - Ran Out and Pending Use The Same Icon
D124373	Mobile has error when authorizing the banking close
D124375	2FA login issue
D124562	Angular defect: Scheduled Orders list is not sorted
D124586	[Qu] Credit Card Payment include tips

Defect ID	Description
D124592	Need to send label name for print label with dynamic field
D124599	Mobile order detail item qty display issue
D124603	Mobile item sorting does not follow the travel path when ordering
D124978	Issues with Ordering / Invoices / Reports
D124979	Non-sales item refund calculation issue
D125045	2026.3 - MXConnect Petty Cash Screen Broken
D125104	Staged ordering transmitted status not behaving as expected
D125292	Paired item has no forecast value when ordering
D125295	Access mobile site hit 500 error code
D125327	Error message when clicking 'edit' button on splash page
D125435	Shipping Confirmation failed if item's receive unit is the same as the purchase unit
D125461	PO file is automatically generated when the order is submitted with the 'auto receive' option marked
D125502	The first review count bypasses the config (which normally forces all items to be submitted) issue
D125554	Duplicate sales item issue
D125555	Draft order detail - Last 7 Business Days usage should not include the current date
D125629	Mobile create and delete future schedule order won't delete actioniteminstance
D125700	Survey order appearing on dropdown
D125723	[QA] Schedule Order Auto Submit issue - cutoff time is using Store Time, but Submit is using Server Time
D125760	[QA] Ordering notification message UI issue
D125916	SAP Issue track