



# MacromatiX – Operations

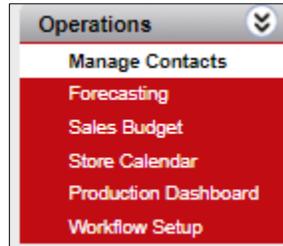
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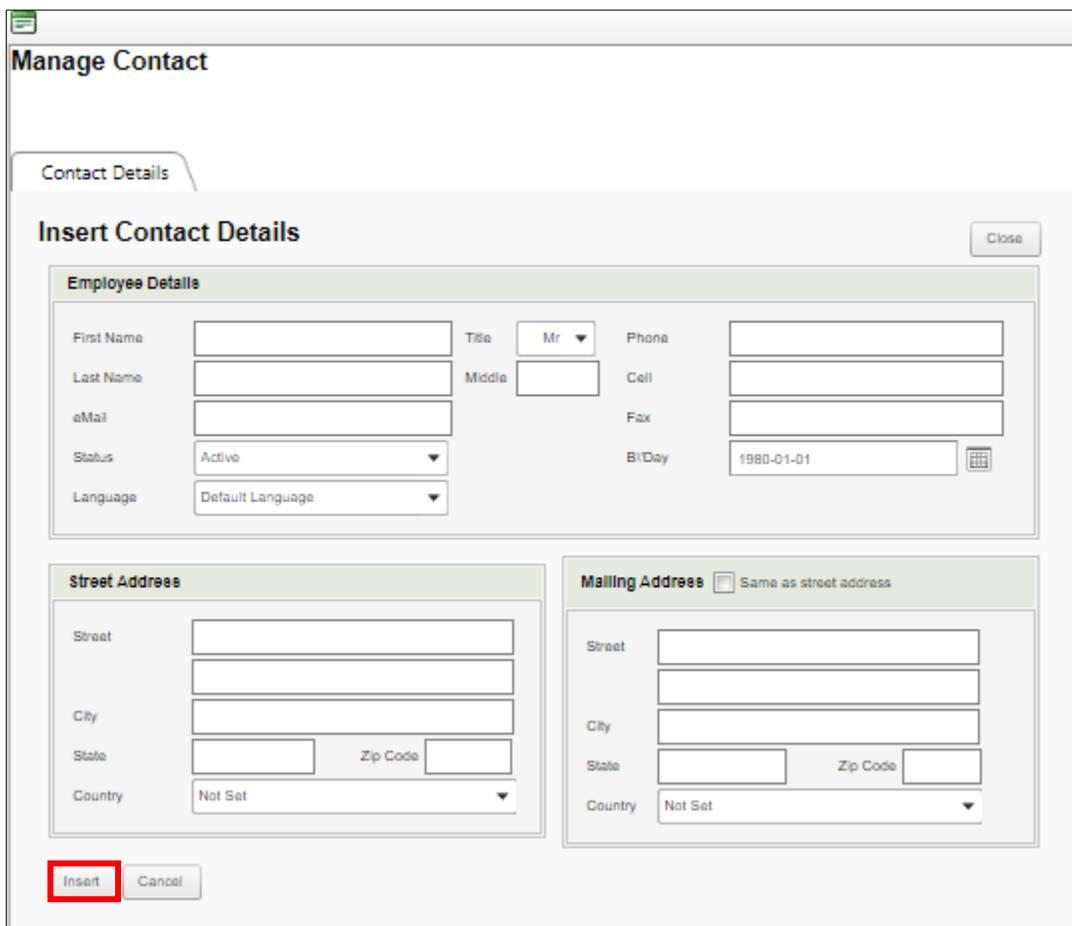
# Manage Contacts

## How to add a new contact

- From the Menu tab, select the **Operations** category.
- Select **Manage Contacts**.



- Select **Add new contact**.

A screenshot of a 'Manage Contact' form. The form has a title bar with a menu icon and the text 'Manage Contact'. Below the title bar is a tab labeled 'Contact Details'. The main content area is titled 'Insert Contact Details' and has a 'Close' button in the top right corner. The form is divided into several sections: 'Employee Details' (with fields for First Name, Last Name, eMail, Status, Language, Title, Middle, Phone, Cell, Fax, and BiDay), 'Street Address' (with fields for Street, City, State, Zip Code, and Country), and 'Mailing Address' (with fields for Street, City, State, Zip Code, and Country, and a checkbox for 'Same as street address'). At the bottom left, there are two buttons: 'Insert' (highlighted with a red box) and 'Cancel'.

- Enter the contact details.
- Select the **Insert** button.

To assign a specific person into a Zone, use the drop-down arrow to select the following:

- **Contact Type**
- **Zone Type**
- **Zone**

### Manage Contacts

**Search Criteria**

Contact Type:  [Add](#)      Zone Type:

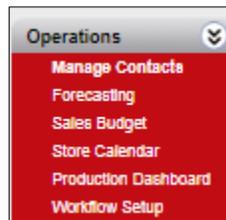
Search:       Zone:

Filter By Surname **A B C D E F G H I J K L M N O P Q R S T U V W X Y Z**

## Forecasting

A clear view of the Restaurant forecast provides the Restaurant Management Team the assurance that their inventory and labor schedule is properly aligned with expected sales.

- From the Menu tab, select the **Operations** category.
- Select **Forecasting**.



Time	Last Year	System Forecast	Manager Forecast	R	%
Day Totals	R0	R347	<input type="text" value="R347"/>		
+ 5:00 AM	R0	R0	<input type="text" value="R0"/>		

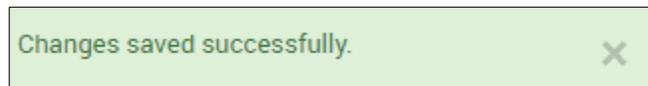
- **NB** the last year column and system forecast column can't be adjusted.
- The user can adjust the forecasting by editing the manager forecast column.
- Editing the **Day Totals** will drill down correctly as per hour ratios. Per hour sales can be edited if need be and can go down to 15-minute interval if needed.

## Editing a Forecast

- On the Forecasting – Sales page click on the calendar in the top right-hand corner.
- Manager edits can be made to overall sales by firstly choosing a method of adjustment: by Rand value or by percentage.
- Select the date - **NB** use the previous date.
- Select the metric - either sales or transactions.
- Edit the manager forecast column.
- Select Save.



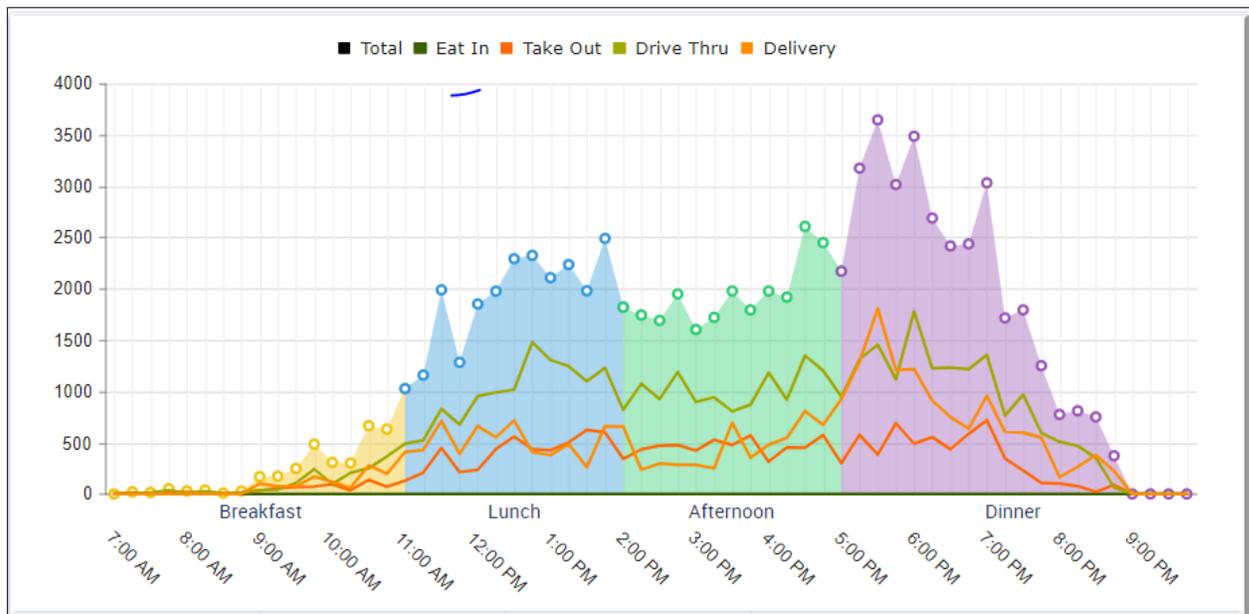
- A confirmation pop-up will appear.



- The forecast can be viewed as a table or a graph by selecting the graph widget button next to the history button.



- This is an example of a forecast as a graph, using different day parts.



## Day parts

- Breakfast, Lunch, Dinner.

The day parts can be viewed in a graph or a table layout.

- This is an example of a forecast in table layout.

Time	Last Year	System Forecast	Manager Forecast
Day Totals	R0	R82631	<input type="text" value="R82631"/>
8:00 AM	R0	R103	<input type="text" value="R103"/>
9:00 AM	R0	R1074	<input type="text" value="R1074"/>
10:00 AM	R0	R1905	<input type="text" value="R1905"/>
Lunch	R0	R22705	<input type="text" value="R22705"/>
11:00 AM	R0	R5454	<input type="text" value="R5454"/>
12:00 PM	R0	R8441	<input type="text" value="R8441"/>
1:00 PM	R0	R8810	<input type="text" value="R8810"/>
Afternoon	R0	R23239	<input type="text" value="R23239"/>
2:00 PM	R0	R7200	<input type="text" value="R7200"/>

- The user can change the view by selecting the graph widget button next to history to view the hourly filters

Time	Last Year	System Forecast	Manager Forecast
Day Totals	R0	R82631	<input type="text" value="R82631"/>
Breakfast	R0	R3168	<input type="text" value="R3168"/>
7:00 AM	R0	R86	<input type="text" value="R86"/>

- The user can edit the hourly forecasted values as per the business requirements.

Time	Last Year	System Forecast	Manager Forecast
Day Totals	R0	R82631	<input type="text" value="R82631"/>
Breakfast	R0	R3168	<input type="text" value="R3168"/>
7:00 AM	R0	R86	<input type="text" value="R86"/>

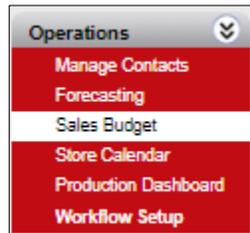
- The values can be edited in the **Manager Forecast** fields.

## Sales Budget

The Sales Budget is entered as per client's forecasted prediction.

### Editing the sales budget

- From the Menu tab, select the **Operations** category followed by **Sales Budget**.



Store Name: GAAP LAB

Fiscal Year: 2020

Report

Options

### Sales Budget - GAAP LAB - 2020

Show Last Year Budget

Week Number	Week Ending	Sales 2019	Sales 2020	Budget 2020	Budget % Variance	
> 1	2020-01-06	R 0,00	R 0,00	R 50 000,00	-100	<a href="#">Edit</a>
> 2	2020-01-13	R 0,00	R 0,00	R 0,00	0	<a href="#">Edit</a>
> 3	2020-01-20	R 0,00	R 0,00	R 0,00	0	<a href="#">Edit</a>
> 4	2020-01-27	R 0,00	R 0,00	R 0,00	0	<a href="#">Edit</a>
> 5	2020-02-03	R 0,00	R 0,00	R 0,00	0	<a href="#">Edit</a>
> 6	2020-02-10	R 0,00	R 0,00	R 0,00	0	<a href="#">Edit</a>

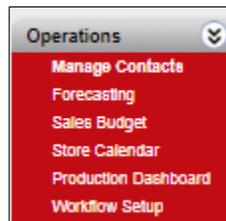
- Ensure that the store name is correct.
- Select the fiscal year.
- Select **Edit** on the right-hand side of the chosen sale budget line to update it.
- Enter the amount.
- Select **Update** to save.

1	2020-01-06	R 0,00	R 0,00	<input type="text" value="R 0,00"/>	<input type="text" value="0"/>	<a href="#">Update</a> <a href="#">Cancel</a>
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## Store Calendar

The Store Calendar is used by the manager to plan the daily, weekly or monthly activities in the store.

- From the Menu tab, select the **Operations** category followed by **Store Calendar**.



### How to add a new series

Not to be used at store level as a standard but can be used as a reminder.

**Store Calendar**

Zone Type: Accounting Export      Filter By: -- All --

Zone: All Stores And Zones

Store: KSA1224 BAMBANANI MALL

Today      Oct 2020      Day    Week    **Month**    Timeline

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	01 Oct	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16 [O] Digistics - All	17
18	19 [D] Digistics - All	20	21	22	23 [O] Digistics - All	24
25	26 [D] Digistics - All	27	28	29	30	31

- Right click on the selected calendar date.
- Either select **New Series** or **Adjustment**.



**Create New Series for Store**

Series: Vendor Price Update

Title: Creating an Order

Description: digistics

Workflow Injection:

Recurrence:

- Daily: Every 1 day(s)
- Weekly
- Monthly
- Yearly

Start Date: 2020-10-14

Does not end:

Ends on: 2020-10-09

Ends after:  1 occurrence(s)

Save Cancel

- Edit the **Title** and the **Description**.
- Select the **Recurrence**.
- Select the date and **Save**.
- Click on the **Order** button to proceed.

**Create New Series for Store**

Series: Order

Order Type: Projected Order

Vendor: Digistics

Standard Order:

Cut Off Time: 10:00

For Delivery: 3 days after order

Auto Create Order:

Auto Submit Order:

Auto Receive Order:

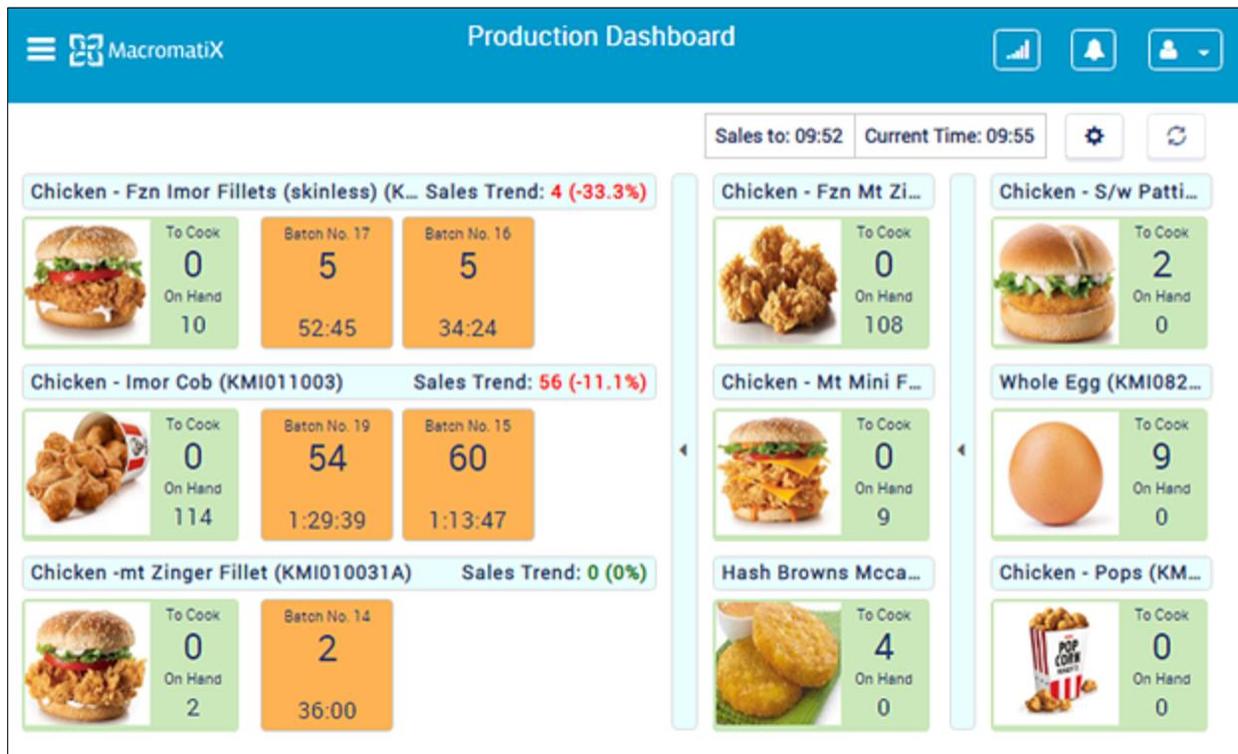
Save Cancel

- Set the **Cut Off Time** to 10:00 am. This can be changed as per the client's preference.
- Set **For Delivery** to 3, or as per the client's preference.

## Production Dashboard (MP&C)

Production dashboard shows an overview of the products the store sold and which products are available on hand.

- From the Menu tab, select the **Operations** category followed by **Production Dashboard**.



The production dashboard has indicators for the users to identify the stages in a colour format.



### Using the dashboard

#### To cook

- Select the stock item to cook i.e. Veggie Patty.

**COOK ITEM - Veggie Patty (mccain) (KMI061303)** ✕

Batch Size: 1 Required: 0

Select number of batches: Total Pieces:

1	2	3	4	3
5	6	7	8	
9	10	11	12	

Confirm Cook

Cancel

- Enter total quantity dropped.
- Select **Confirm Cook**.

**Veggie Patty (mccain) (KMI061303)**

	To Cook <b>0</b>	Batch No. 4 <b>3</b> 2:55
	On Hand <b>0</b>	

- The blue box will show the time and quantity of the item that is being cooked.

**Veggie Patty (mccain) (KMI061303)**

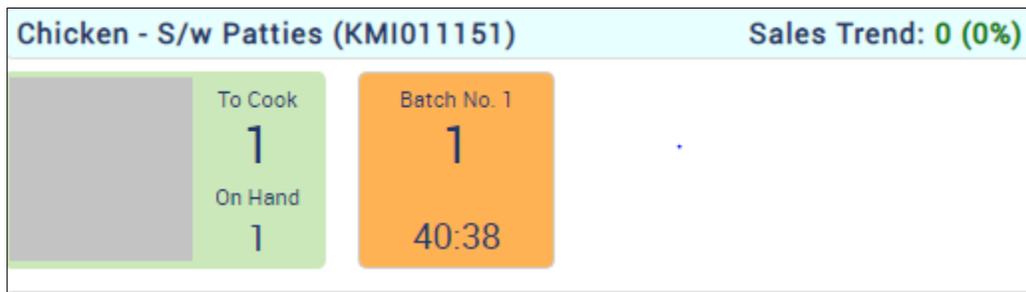
	To Cook <b>0</b>	Batch No. 4 <b>3</b> 20:09
	On Hand <b>3</b>	

- The status will change to orange as soon as the item is done cooking as it will indicate the shelf life of the item in a warmer.

**Veggie Patty (mccain) (KMI061303)**

	To Cook <b>0</b>	Batch No. 4 <b>3</b> 3:44
	On Hand <b>3</b>	

- The color will change from orange to red indicating that the product is nearing expiration.
- If the item was not sold by the time its shelf life is reached then a flashing red color will indicate that the item is now expired.



- Once the product is cooked the manager can re-select the item that has been cooked. (i.e. batch No. 1)

UPDATE BATCH - 1 - Chicken - S/w Patties (KMI011151)

Correct quantity: only use this if the batch was created with the wrong cook quantity, otherwise waste item or reset item to match the actual current on hold quantity.

Enter Cooked Quantity:

1

Wasted in batch: 0

Confirm Correct Cancel

Confirm Cooked  
Waste Item  
Correct Quantity  
Correct Time  
Confirm Complete  
Delete Batch  
Reset Item

- Select one of the available options on the left such as **Correct Quantity**, **Correct Time** etc.
- Select **Confirm Completion** should the product be sold out.
- **Delete Batch** if the manager may have projected incorrectly.

Note:

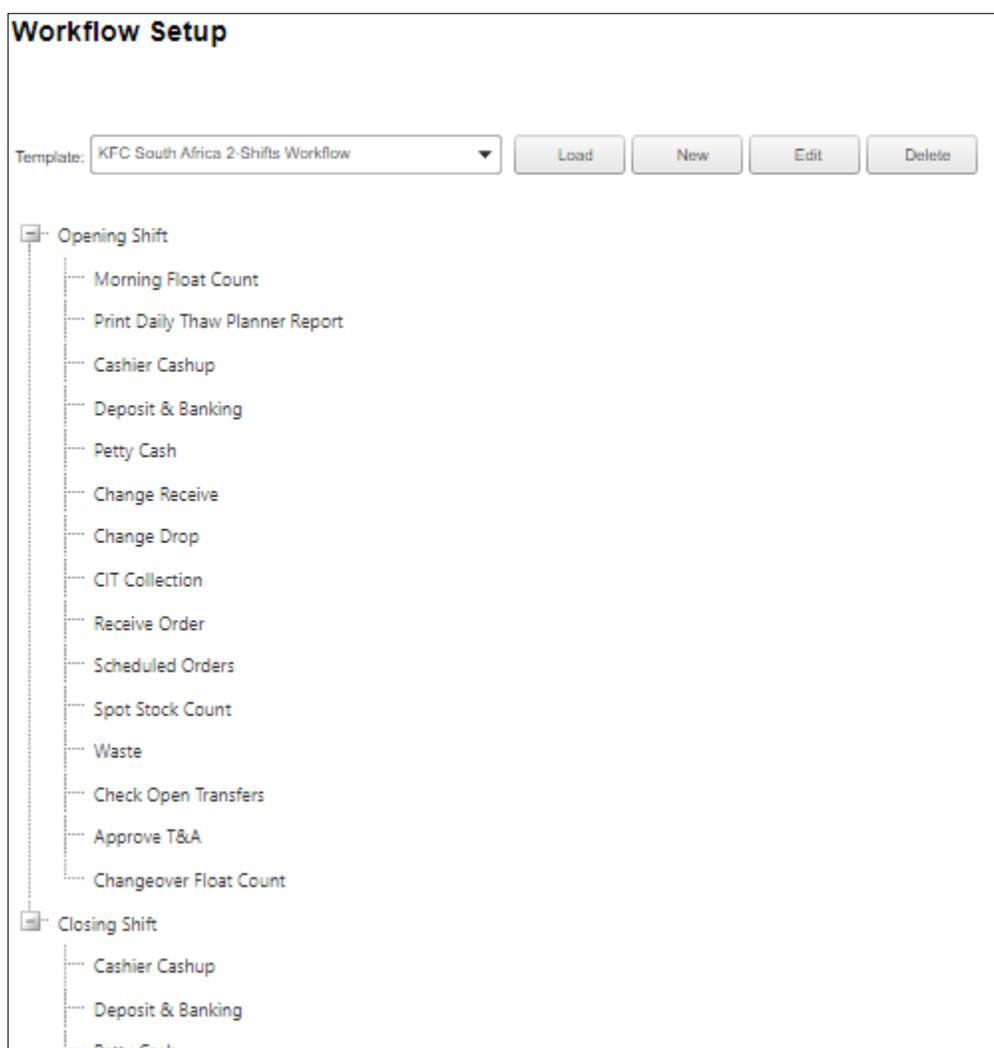
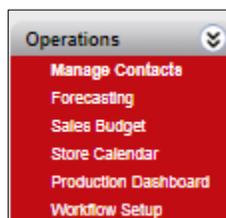
Managers are encouraged to only **Waste** the item at the end of a shift or day end and not through the production dashboard to avoid duplicating entries.

## Workflow setup

Workflow is the main way to access tasks that are required to be completed for the day.

This can be configured to have any tasks added to assist restaurants and management to have a structure during the day.

- From the Menu tab, select the **Operations** category followed by **Workflow Setup**.



- Workflow allows for different day paths such as **Opening Shift**, Shift Change and **Closing Shift**.
- Day paths can have required tasks that are data saving with shifts.

**Task Details**

Description:

Allow Repeat:

Disable Rollback:

Report in Dashboard:

Confirm Complete:

Allow Confirm Complete Override:

Allow Read-Only Access:

Run Once:

Disable After Complete:

Open In New Window:

System Action:

Action Link:

Incomplete Message:

ToolTip:

Start Time:

End Time:

Long running task check complete

- Under task detail an admin user can select the relevant configuration settings to assist with the workflow set up.

**Is dependent on:**

Drag dependent Task Here

**Overrides:**

Drag task to override here

**Zone**

Zone Type: Accounting Export

Zone: Export Zone for Lab Stores

Add

Zone Type	Zone
There are no zones associated with the selected task.	

- Drag any important task in to the **Is dependent on** box.
- Any tasks that requires management authorizations can be dragged in to the **Overrides** box.

**Schedule Task**

Daily    Every  day(s)

Weekly  
 Monthly  
 Yearly

Does not end  
 Ends on    2006-01-01  
 Ends after    occurrence(s)

Start Date: 2006-01-01

- Schedule Task is a program in MacroMatix that enables the user to automatically perform routine tasks.
- Schedule the task to run **Daily, Weekly, Monthly** or **Yearly**.
- **Does not end** means that the scheduled task will run indefinitely as the store continue to use the MacroMatix program.
- **End on** will stop the scheduled task on the specific set date.
- **Ends after** will end the scheduled task after the specific set date.