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What's New 376
Retail and F&B Focused

Released Winter 2024

Contents

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INTRODUCTION

This document will explore the latest enhancements introduced in version 376. Features specifically designed for Retail or F&B will be clearly marked.

The following information will be provided:

Where: Where the enhancement can be found in Yellow Dog Inventory.

Function: What the new feature does.

Enabling: This area will review how to enable the new feature. New features will either be:

1) Available Automatically – no additional steps required to enable the feature.
2) Admin User Enabled – requires Admin users to configure or grant permission.

So What?

> The "So What?" area will describe the purpose of the feature and how it will impact your use of Yellow Dog.

Themes

This document features screenshots from Yellow Dog Inventory, utilizing the "Classic Theme" for clear and easily interpretable examples. Please note that the default theme post-upgrade is set to the "Yellow Dog Theme". Should you wish to switch themes, simply select your preferred option from the "Theme" dropdown menu located on the top taskbar.

Customer Portal

All users should have an account on the Customer Portal. It's full of resources! The Customer Portal offers access to our comprehensive Knowledge Base with informative articles, and instructional videos. Additionally, you can submit and manage Support Tickets through the "My Area" section.

SIGN UP NOW   **Visit the Customer Portal at:**
portal.yellowdogsoftware.com , and click "Sign Up".

Additional Resources

Support Hotline: Reach us at 757.663.7514, Available 9am to 8pm EST, Monday to Friday.

Emergency Support: Dial 757.663.7514 and press option 1 for immediate assistance.

Submit Support Tickets: portal.yellowdogsoftware.com

Yellow Dog Website: yellowdogsoftware.com

Help Site: help.yellowdogsoftware.com

Webstore: shop.yellowdogsoftware.com

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376 ENHANCEMENTS
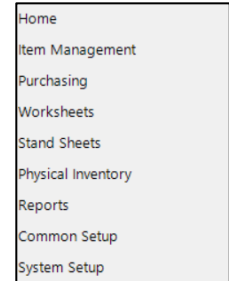
LEFT HAND NAVIGATION

New Module Order

Where: Left Hand Navigation

Function: The left hand navigation has been reorganized so most used modules are at the top.

Enabling: Automatically Available

This new module order will automatically present after upgrading.

So What?

> Modules are now in the order of most frequently accessed.
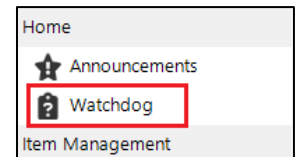
Advisor New Name: Watchdog

Where: Left Hand Navigation - Home \ Watchdog

Function: The Watchdog module allows you to run a report that identifies any concerns in your Yellow Dog Inventory so you can review and resolve.

Enabling: Available Automatically

The Advisor's new name "Watchdog" will automatically present.

So What?

> Same great report, different name.

SYSTEM SETUP

Stores List Filter

Where: System Setup \ Stores \ Stores

Function: The dropdown "Store Group" filters Stores by their assigned Store Group list for easier search ability.

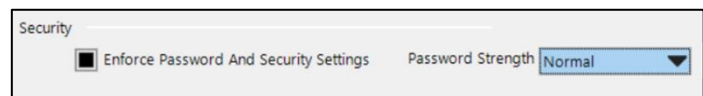**Enabling:** Available Automatically

This dropdown will automatically be present to uses that have access to view stores.

So What?

> Helpful when working with lots of stores.

Password Enforcement Options

Where: System Setup \ Options \ Global \ Security \ Enforce Password And Security Settings.

Function: Enforces password requirements for additional security. By default, Yellow Dog only requires passwords to be at least 2 characters. Password enforcement only applies to new or updated passwords. Instruct existing users to update their password after enabling the option.

When Enforce Password and Security Settings is enabled the password strength options are:

- <u>Very Weak:</u> Password must be at least 2 characters.
- <u>Weak:</u> Password must be at least 3 characters long. Cannot contain the username.
- <u>Normal:</u> Password must be at least 6 characters long and contain a number. Cannot contain the username.
- <u>Strong:</u> Password must be at least 8 characters long, contain a number, and contain a special character. Cannot contain the username.

Enabling: Admin User Enabled

Go to System Setup \ Options \ Global and check the "Enforce Password and Security Settings". After checking the option, use the "Password Strength" dropdown to select the strength.

So What?

> Additional security enhancement.

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Allow Fractional Quantities Bulk Update Option

Where : System Setup \ Options \ Inventory – Retail vs F&B Options \ Allow
Fractional Quanitties shouldbe the default behavior for new items.

Retail vs F&B Options

☐ Do not check other documents when adding items to a purchasing document (FB)

■ Show section on how item is sold at POS (Food and Beverage Details tab)

■ Turn this OFF if you do not want to print labels when receiving/invoicing items

☐ Enable Size Behavior "Block POS" as default for new item creation

■ Allow Fractional Quantities should be the default behavior for new items

Function: Enabling this option allows items to be added to a Purchase Order in fractional amounts
when items are pulled into by sales or PAR. We have introduced the bulk update option
so you can update the fractional quantity setting in bulk rather than only by item on the
"Other Tab" of the Item Editor.

Enabling: Admin Enabled

Go to System Setup \ Options \ Inventory and select the box "Allow Fractional Quantities
should be the default behavior for new items" found under the Retail vs F&B Options.

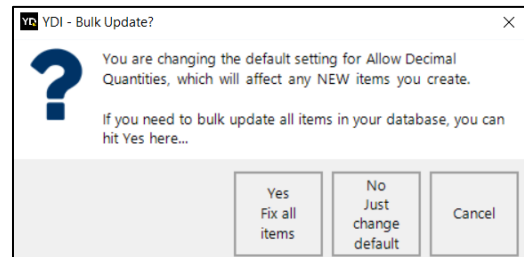To apply the fractional quantity option to only newly created items:

- Check the setting box
- Select "No just change default" on the
pop-up.

YDI - Bulk Update?

You are changing the default setting for Allow Decimal
Quantities, which will affect any NEW items you create.

If you need to bulk update all items in your database, you can
hit Yes here...

| Yes Fix all items | No Just change default | Cancel |

To apply the option to existing inventory items:

- Check the setting box
- Select "Yes Fix all items"
- Uncheck the setting box

To apply setting to existing items and all newly created items:

- Check the setting box
- Select "Yes Fix all items"
(leave setting box checked)

So What?

Used in F&B operations who process fractional quantities for items.

"Block POS" as Default for New Item Creation

Where: System Setup / Options / Inventory – Retail vs F&B Options / Enable Size Behavior "Block POS" as default for new item creation

Function: Turning on the option makes the size behavior "Block POS" automatically applied to newly created items.

Enabling: Admin User Enabled

Go to System Setup / Options / Inventory and check the option "Enable Size Behavior Block POS as default for new item creation" under the Retail vs F&B Option.

So What?

Prevents new items from automatically pushing to the POS.

Default Physical Type

Where: System Setup \ Options \ Global \ Physical Inventories \ Default Physical Type

Function: Sets the default Physical Inventory Type when creating a new physical inventory.

Enabling: Admin User Enabled

The setting will be automatically configured to "Standard Physical – Will set Closeout". Admin users can adjust the setting if need.

So What?

Forces the physical inventory type to be the default physical type unless the user has permission to change the from default when creating a physical.
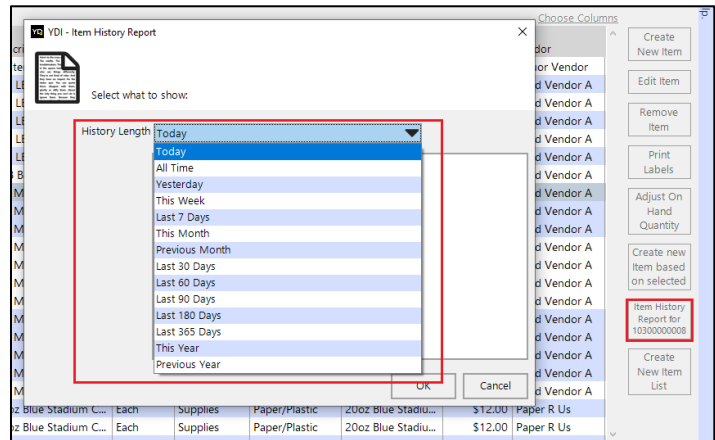
ITEM MANAGEMENT

Inventory Items

Item History Report - New Date Selection Option

Where: Item Management / Inventory Items / Item History Report for...

Function: When running the Item History Report from the Inventory Items screen, you will now be able to customize the date range for the report.

Enabling: Available Automatically

So What? | Allows users to customize the dates pulled when generating the Item History Report.
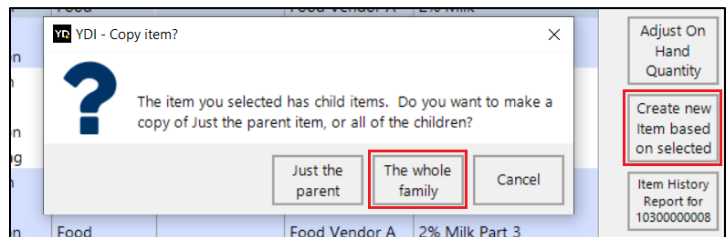
Copy Item Family

Where: Item Management \ Inventory Items

Function: After clicking "Create new item based on selected", users will have the option to copy the entire item's family (parent and child sizes).

Enabling: Available Automatically
This option will always display after selecting "Create new item based on selected".
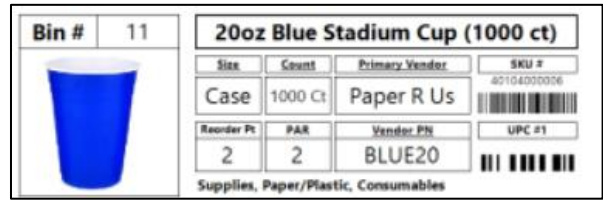

So What? | Saves time when creating similar item.

Item Lists

New Print Templates for Shelf Tags

Where: Item List Editor – Print Template Dialogue Box

Function: Selecting one of the new Item List Print Templates when printing Item Lists will provide shelf tags with pictures, on-hands, reorder points, PAR, max capacity, and bin for the items in the selected store.

- **Shelf Tags 4 Per Page – Sorted by Bin**
  Prints shelf tags for items in the Item List, sorted by their placement in the Item List.
- **Shelf Tags 4 Per Page – Sorted by Description**
  Prints shelf tags for items in the Item List, sorted by the Item Description.
- **Shelf Tags 4 Per Page – Sorted by Placement**
  Prints shelf tags for items in the Item List, sorted by the item's Bin.

Enabling: Available Automatically
These are new default print templates added to your library.

So What?

> Shelf tags can be printed directly from Yellow Dog to help you keep your inventory clearly marked and organized.

Placement Arrows

Where: Item List Editor

Function: Allows you to move items up or down on an Item List.

Enabling: Available Automatically
Items list will now always have placement arrows.

So What?

> Provides an easy way to custom the placement of items in Item Lists.

Interactive View: New Columns

Where: Item Management \ Inventory Items

Function: For user that have an integrated Shopify used as a Web Cart, the interactive view will now have additional columns available for shipping details.

Enabling: Available Automatically

Will be automatically available if the system is integrated with Shopify.

So What?

Faster way to enter shipping detail for Shopify items.

Interactive View: "Other" Dropdown

Where: Item Management \ Inventory Items

Function: Provides additional filtering options.

Enabling: Available Automatically

This is a fixed dropdown on the Interactive View.

So What?

Allow more options for filtering items when using the Interactive View.

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RECIPES

## Recipe Card for Scaling Print Template & Convert Unit Option

F&B Feature

Where: Print Recipe Dialogue Box

Function: When scaling a recipe use the "Recipe Card for Scaling" print template. The "Covert Units" checkbox is also available to convert scaled recipes quantities to the largest unit. For example, instead of 30 oz the recipe card would display 1 lb. 14 oz.

Enabling: Available Automatically

These are permanent enhancements in 376.
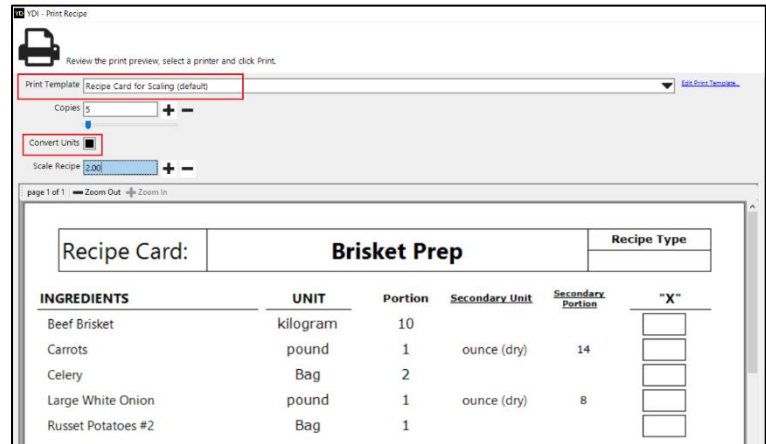
So What?

You can easily print out scaled recipes when prepping multiple batches of a recipe.

All Purchasing Documents

Bin Column

Where: All Purchasing Document Editors – Bin Column

Function: Allows you to update the bin in a purchasing document.

Enabling: Available Automatically

The "Bin" column will be displayed in all purchasing documents. If you do not see the bin column, use the "Choose Columns" hyperlink to add the column.

So What?

Makes updating bins faster when in purchasing documents.

Column Placement Automatically Saved

Where: All Purchasing Document Editors

Function: Saves updates to column placements. Columns order can be moved by dragging and dropping. Columns can also be added or removed by using the "Change Columns" hyperlink.

Enabling: Available Automatically

If the column placement is updated, the new placement will automatically apply to future documents.

So What?

Allow you to fine tune your display for maximum efficiency.

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10 Key Entry

Where: All Purchasing Document Editors - Add Item From…. \ add counts using 10 Key Entry

To use this feature, create a Purchase Order, Invoice, or Receipt and select "add items from" then choose "add counts using 10 Key Entry". The 10 Key Entry screen will present allowing you to add Vendor PNs, quantities, and costs for items.

Function: 10 Key Entry was created to be a simple and easy method to add items

Enabling: Available Automatically

This will always be available as an option when adding items in purchasing documents.

So What?

The 10 key entry function was designed for users who create Purchase Orders in vendor systems and then want to key them into Yellow Dog. This entry allows you enter the vendor part number and quantity in two steps saving you time and additional mouse clicks.

Purchase Orders

Export Purchase Orders

Where: Purchasing Editor – "Export" button
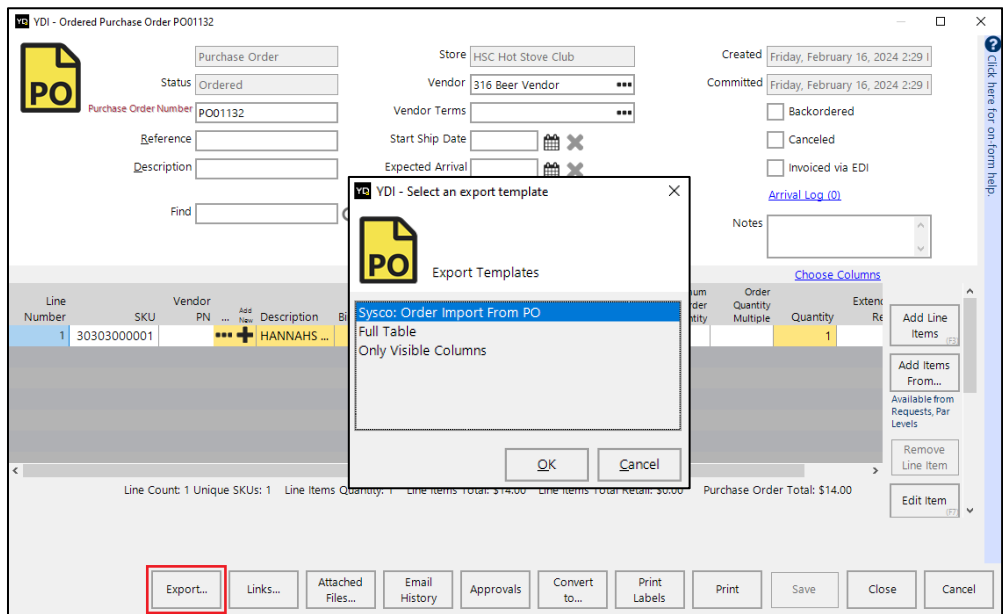
Function: Purchase Orders are now exportable via a csv file or copying to clipboard. By exporting the Purchase Order document, users can then import the document to a vendor's website. For example, Sysco has the option to import Purchase Orders.

There are three options for exporting Purchase Orders:

Sysco: Order Import From PO: exports the Purchase Order as a csv that is formatted for import into Sysco.

Full Table: exports all columns, including columns that aren't visible in the PO editor.

Only Visible Columns: exports only the columns users selected to be visible in the PO editor.

Enabling: Available Automatically

The ability to export will always be available in Purchase Orders.

So What?

Various 3rd Party ordering systems have import ability. Use these exports to help speed the selection of vendor products and quantities when ordering outside of the Yellow Dog Inventory system.

Requests and Purchase Orders

Select a target store for Add items from Sales and PAR

Where: Purchase Order or Request Editor

Click "Select Items From…" then choose to either add item from Sales or PAR.

Function: Allows a purchasing store to reorder for other stores based on sales or PAR.

Enabling: Available Automatically

The option to select a target store will always be available when adding items base on Sales or PAR.
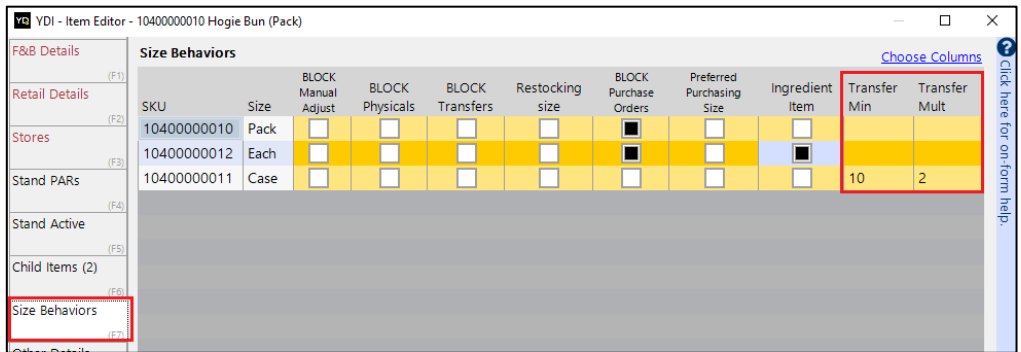
So What?

Simplifies the ordering process when ordering for other stores based on sales or PAR.
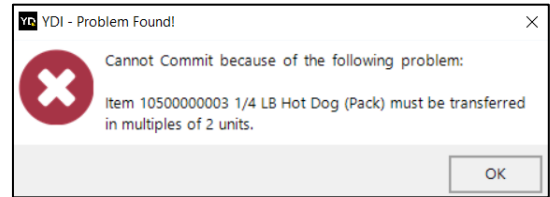
Transfers

Minimum Quantity & Multiple

Where: Item Editor \ Size Behaviors Tab – Transfer Min and Transfer Mult Columns

Function: The "Transfer Min" and "Transfer Mult" fields allow you to define the minimum transfer quantities and the multiple of that number that can be transferred. If the quantity entered in the transfers document does not meet the Minimum Transfer or Transfer Multiple, a popup will display when issuing the transfer and the transfer will not be able to be issued until the issue is resolved.
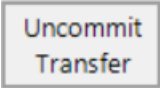

Enabling: Available Automatically

These new fields will always be available on the Size Behavior tab of the Item Editor.

So What?

Ensures that the right minimum quantity and multiple is being transferred.

Uncommit

Where: Purchasing / Transfers – "Uncommit Transfer" button

Function: Allows users to uncommit issued transfers.

Enabling: Admin User Enabled

An Admin user must grant the permission to "Uncommit Transfers in the Employee or Employee Group Editor. This permission is found in the Access Options section: Purchasing / Transfers / Uncommit Transfers.
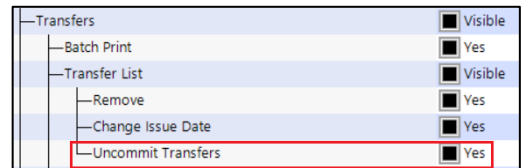
So What?

Allows you to uncommit transfers that were cancelled or incorrectly entered.

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Replenishment

Replenishment by Sales

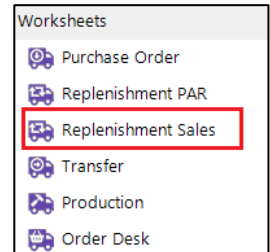**Where:** Worksheets / Replenishment Sales

Function: Allows you to create a replenishment worksheet based on sales from a chosen date range. Users can also select an event to pull sales from for replenishment.

- This is meant for a retail style workflow
- There is no item size conversion. To use this worksheet, the item size that you sell must be the item size that you purchase.
- Overnight maintenance is required to run for sales to pull into the document.

Enabling: Admin Enabled

An Admin user must grant the permission "Sales" in the Employee or Employee Group Editor. This permission is found in the Access Options section: Worksheets \ Replenishment Worksheets \ Sales.

So What?

Provides you with the ability to replenish based or sales if you prefer or if you do not have PARs and reorder points set.
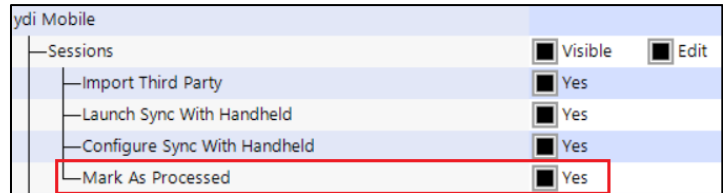
PHYSICAL INVENTORY

Mark Sessions as Processed

Where: Physical Inventories \ Sessions – "Mark as Processed" button

Function: Only employees with this permission can mark a session as processed.

Enabling: Admin User Enabled

An Admin user must grant the permission "Mark as Processed" in the Employee or Employee Group Editor under ydi Mobile \ Sessions \ Mark as processed.

So What?   Processed sessions are unable to be unprocessed. This option ensures that only employees with the proper permission can mark a session as processed.

Break or Bypass Physical Inventory Lock

Where: Physical Inventory Editor
Pop up appears when opening a physical that is currently being reviewed by another team member and provides the option to break or bypass the lock.

Function: Allows users with the permission to break or bypass the lock on a physical when the physical is currently open and being reviewed by another team member.
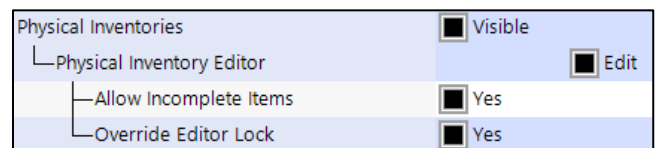
- Break Lock – The Physical Inventory lock is lifted for all users, and anyone can open the Physical Inventory.
- Bypass Lock – Only the user that bypasses the lock can open the physical.

If you break or bypass the lock, any changes made by other users may be lost.

Enabling: Admin Enabled

An Admin user must grant the permission to "Override Editor Lock" in the Employee or Employee Group Editor. This permission is found in the Access Options section:
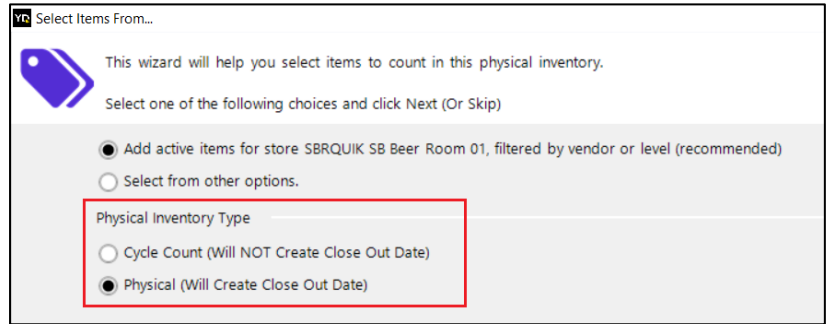(Physical Inventories \ Physical Inventory Editor \ Override Editor Lock).

So What?   You can open the Physical Inventory editor, even if someone else is currently reviewing the physical.

Physical Inventory Type Selector

Where: Physical Inventory "Select Items From…" prompt when creating a new physical inventory.

Function: Designates the physical inventory type (physical or cycle count).

Enabling: Available Automatically (but requires permission to change)

This section of the prompt will automatically display when creating a new physical inventory and the option will be set to the Default Physical Inventory Type assigned under System Setup \ Global.

Users can only change the Physical Inventory Type from the default setting if they have permission. An Admin user must grant the permission to "Change Default Physical Type" in the Employee or Employee Group Editor. This permission is found in the Access Options section: Physical Inventories \ Physical Inventory Editor \ Change Default Physical Type.

So What?

Allow you to change the default physical inventory type when creating a physical inventory.

REPORTS

Stores without any Sales

Where: Standard Reports \ Troubleshooting \ Stores without any Sales

Function: Identifies any stores that do not have any sales during a given time span.

Enabling: Available Automatically

This report will automatically be added to your standard report library.

So What?

> Allows you to easily identify any stores that have not received sales from the POS.

TP Location Assignment

Where: Standard Reports \ Troubleshooting \ TP Location Assignment

Function: List 3rd party location assignments.

Enabling: Available Automatically

This report will automatically be added to your standard report library.

So What?

> Used to verify POS revenue center mapping to stores.

Vendor Inactive Status in Description

Where: When filtering reports before generating, creating new items, and in purchasing documents there is now an (inactive) designation in the vendor description.

438 Food Vendor D (inactive)

Function: Users can quickly see if a vendor is inactive.

Enabling: Available Automatically

Inactive vendors will automatically have the (inactive) designation.

So What?

> Vendor inactive status is clearly displayed.

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New Columns and Filtering Options

Various Reports

Where: Various Reports (Ex. On Hand by Item Report)

Filter: Exclude Inactive Items/Only Show Inactive Items

Invoice Records by GL

Where: Standard Reports \ Accounts \ Invoice Records by GL

Columns: Vendor Code, Vendor Default Currency, Vendor Accounting ID, Vendor Customer Number, Related PO, Is GL Tax and Billed Date.

Sales by Item

Where: Standard Reports \ Retail \ Sales \ by Item

Columns: Gross Sales and Returns

Filter: Include POS Mapped Items

Sessions Report

Where: Standard Reports \ Physical Inventory \ Sessions

Columns: New columns for Calculated Cost and Total Cost.

Transfer Detail Report

Where: Standard Reports \ Purchasing \ Inventory Transfers \ Detailed

Filter: Allows users to only see transfers between selected stores.

Function: New columns and filter provides users with more options on how to filter and review reporting data.

Enabling: Available Automatically

Reports will automatically be updated with the identified columns and filters.

So What?

Select reports have been optimized with new columns and filters.

Saved Reports

Pre-Saved Reports

Where: Reports \ Saved Report

Function: A library of essential reports will be uploaded to your saved reports.

Enabling: Available Automatically

The library of essential reports will be uploaded to your Yellow Dog Inventory when you upgrade to 376.

So What?

CHECK IT OUT!

Easy access to essential reports. To download the Saved Reports Manual which details the purpose and suggested frequency to review each report, visit the Knowledge Base:

Retail
portal.yellowdogsoftware.com/portal/en/kb/articles/retail-saved-report-manual

F&B
portal.yellowdogsoftware.com/portal/en/kb/articles/fbsavedreportmanual

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