YELLOW DOG

SOFTWARE

VERSION 372

Last Updated: 12/27/2021

Table of Contents

Summary

This document provides detailed information on the new enhancements and features in Yellow Dog version 372.

Additional information including training videos and articles can be found on our Knowledge Base.

To schedule an upgrade please visit: https://help.yellowdogsoftware.com/contactupgrades

Support Information

Support Hotline: **757.663.7514** (9am – 8pm, EST Monday – Friday)

Emergency Support: **757.818.9360, option 2**

E-mail Support: Support@yellowdogsoftware.com

Click here to schedule a **one-hour training session**. Training is up to one hour and free of charge to any customers currently on support.

To access our **Knowledge Base**, click here.

Main Navigation and Client Enhancements

Main Landing Page Changes

When first logging into version 372, users will be presented with a new main landing page called Announcements. Here you can view the most recent announcement from the Yellow Dog team as well as all the previous announcements by navigating the right-hand menu. The windows here can also be resized depending on client preferences. Unread announcements will be identified with Gold Stars, once read these will turn grey.
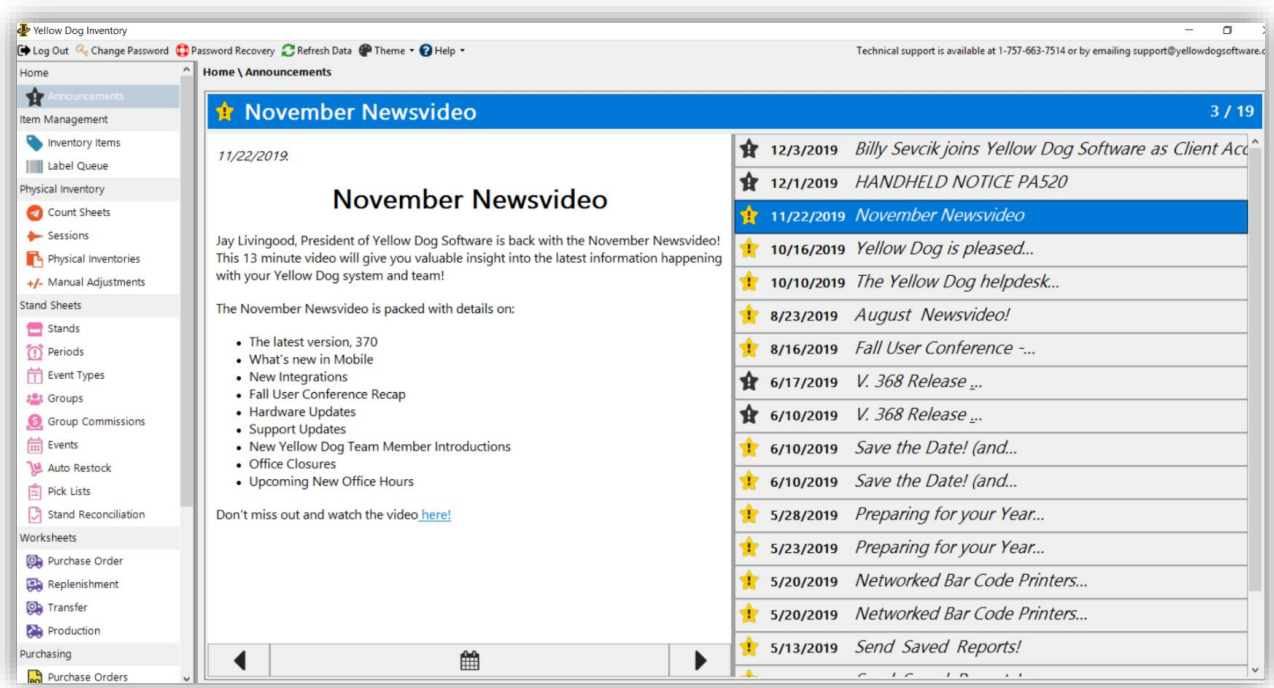
Additionally, we have also added Client ID information to the bottom right corner of Yellow Dog, so Users always have access to the client id for any mobile login needs.
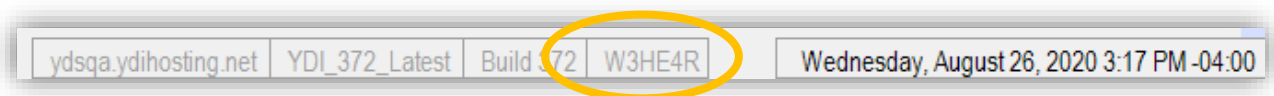
UTC

When upgrading to 372, each store in the database will be set up to their corresponding time zones following UTC (universal time coordinated). Reporting and adjustments for each store will take place in the corresponding time zone set for that store.

This detail is displayed right corner will always be configured to match the specific user's computer running Yellow Dog.


Themes

We now offer users the options of using our new "Dark Theme" or "YellowDog Theme" to change the overall color display of Yellow Dog. Theme selection controls the theme for the client folder. If multiple users access Yellow Dog from the same folder, they will share the theme.
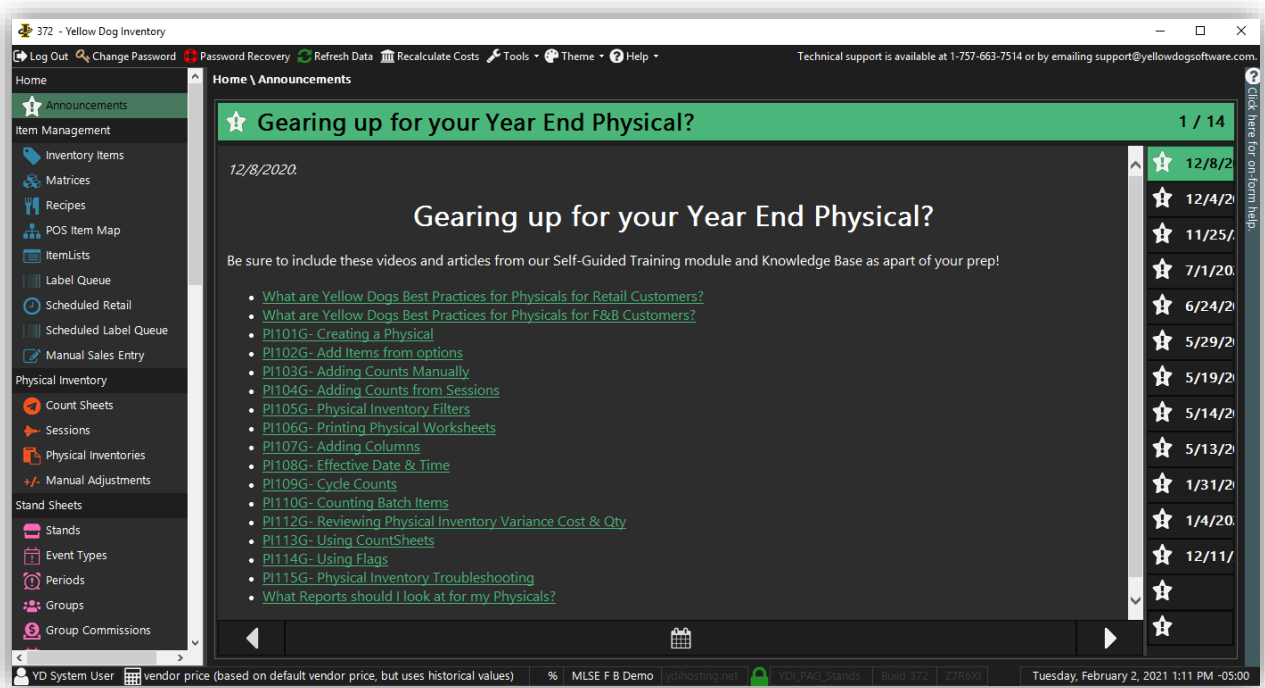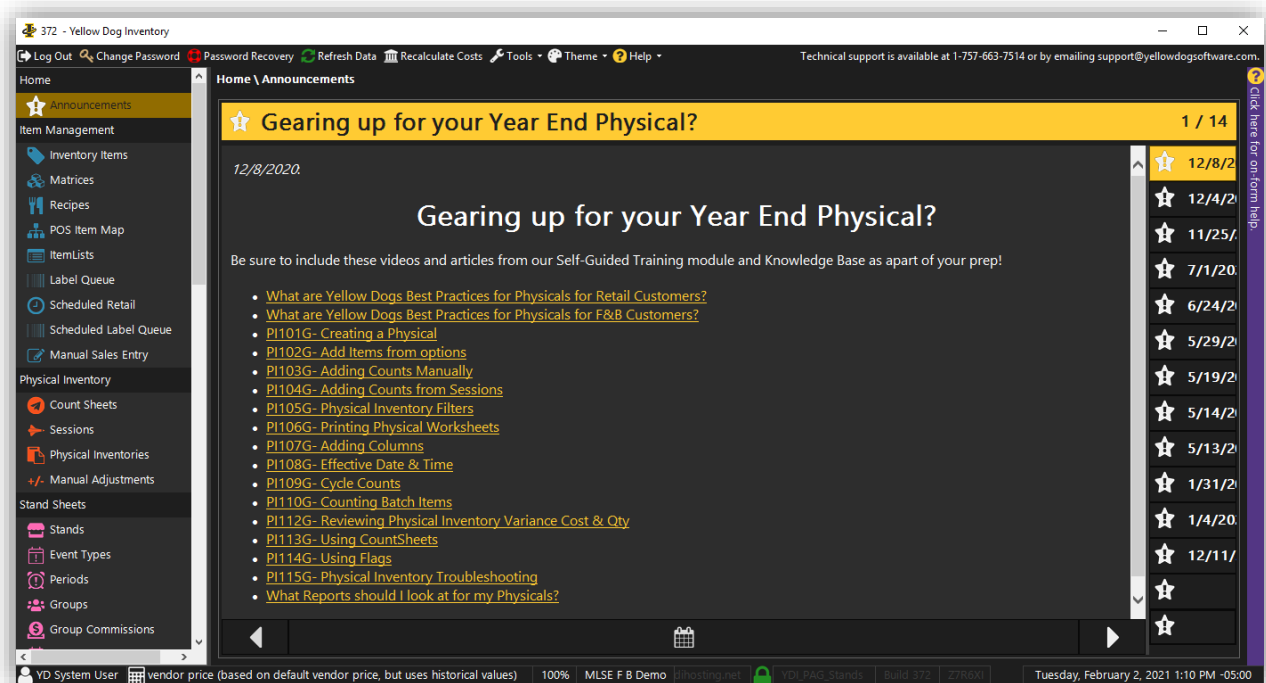
To enable, choose "Dark Theme" or "YellowDog Theme" from the Theme drop down on the top navigation bar. When changed, it will prompt the user to restart Yellow Dog for the new settings to apply.
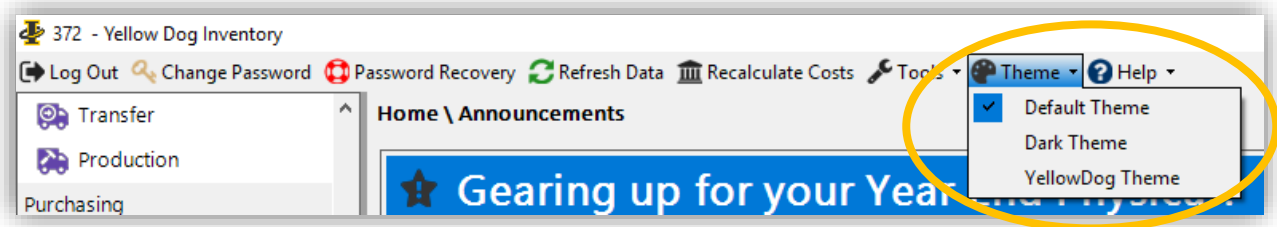
Special Characters
Special characters are now supported to be used in item descriptions, POS descriptions, and Web Properties which can then be pushed to a POS or Web Cart (as long as it is supported by the Third Party).

Retail Range and Starting Retail in Classic Inventory View
We have enhanced the retail data displayed in the Classic Inventory View. Now for clients that have different retail prices per store we will display a "Retail Range" to identify the min and max retail values across all stores. Additionally, we've also added a Starting Retail data field.

Users are still able to see store specific retail prices by using the store filter or navigating to the Stores Tab in the item Editor.

Item Management

Item Attributes

Item Attributes are user defined fields that are used to configure certain item properties that will be used in reporting, label making or in conjunction with Third Party Integrations. When configured under Common Setup, these attributes will be made available to all items for configuration. There are five data types of attributes that a user can create:

- Selection
- Number
- Text
- Boolean
- Integer
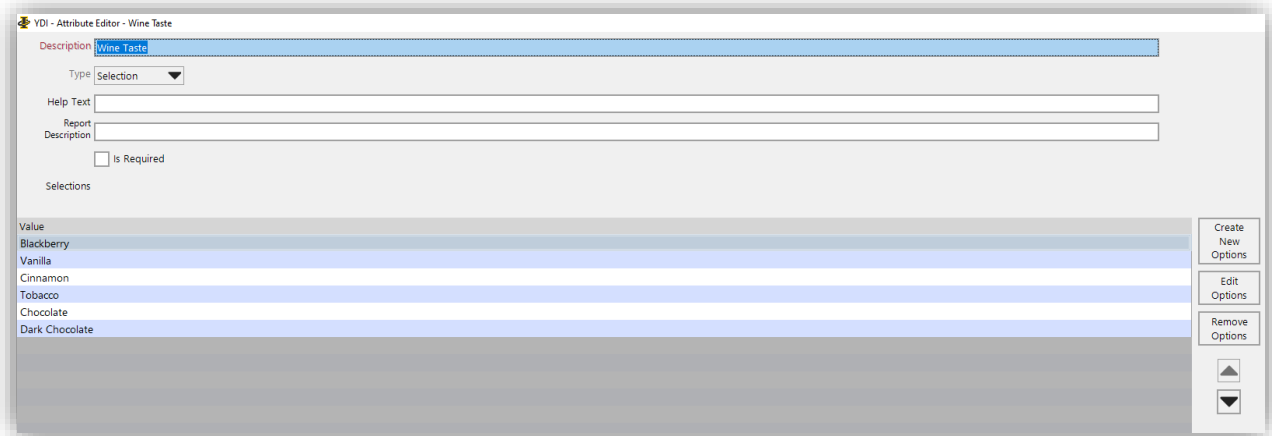
Creating a New Item Attribute

To create a new Item Attribute, navigate to the Common Setup section of Yellow Dog using the left-hand navigation.

1. Enter in the Attribute Description. This description will be used in reporting, print templates, item configuration and lists. There is a 32 max character limit.
2. Determine the type of attribute.
   o Text – Free range text input field
    o Integer – Free range integer input field
    o Number – Free range number input field
    o Selection – Allows users to select options from a defined list
    o Boolean – Allows users to mark the attribute as true / false by checking a box.
3. Enter in the Report Description. This is an additional text field that allows for Attribute column definition in reporting.
4. Determine if this Attribute should be a required field or not. When selected this field in the Item Attribute configuration will be highlighted red.
5. If the Attribute type is selection, options will need to be created.
    o Use the "Create New Options" button and enter in the Value
    o One selection Attribute can have up to 10 options to choose from
    o If an option is made in error, highlight and use the "Remove Option" button. Only options not already assigned to an item can be removed.
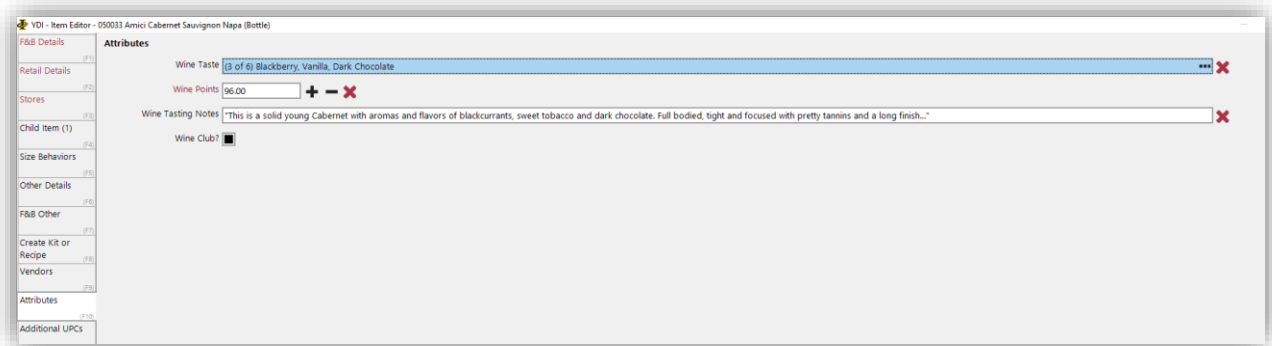
Removing an Item Attribute

To remove an Item Attribute, the attribute must not be assigned to any items in Yellow Dog. If previously assigned, the option to remove will remain greyed out.
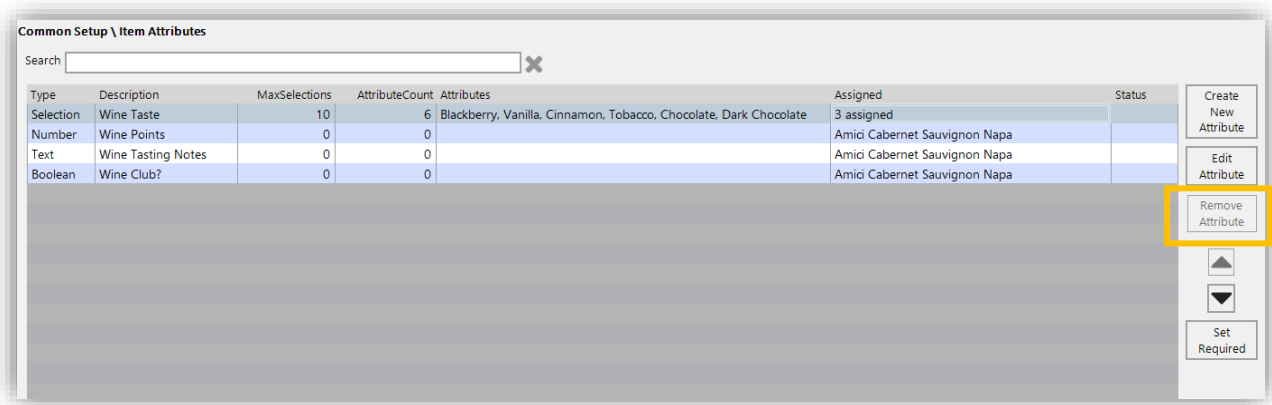
Assigning an Attribute to an Item

Once created in Common Setup, Attributes will be available for assignment in the "Attributes" tab of the Item Editor.

Note - All required attributes will have the Attribute Description in red text.

Starting Retail

Users can define a starting retail to compare current retail value against starting. This value is used in reporting to allow for comparison.
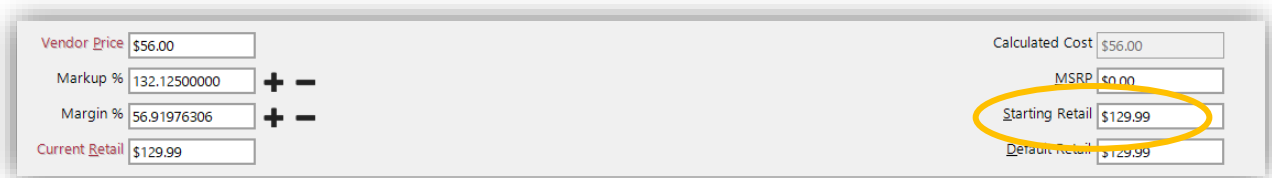
Size Behaviors

This new tab in the Item Editor allows for quick setup of item size behaviors that effect purchasing, POS and recipe behaviors.

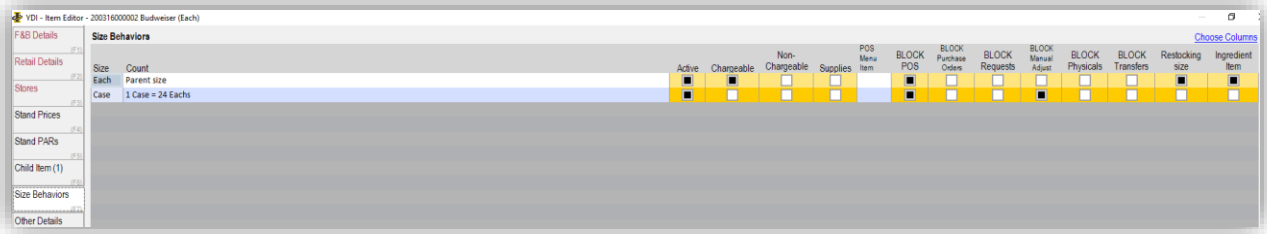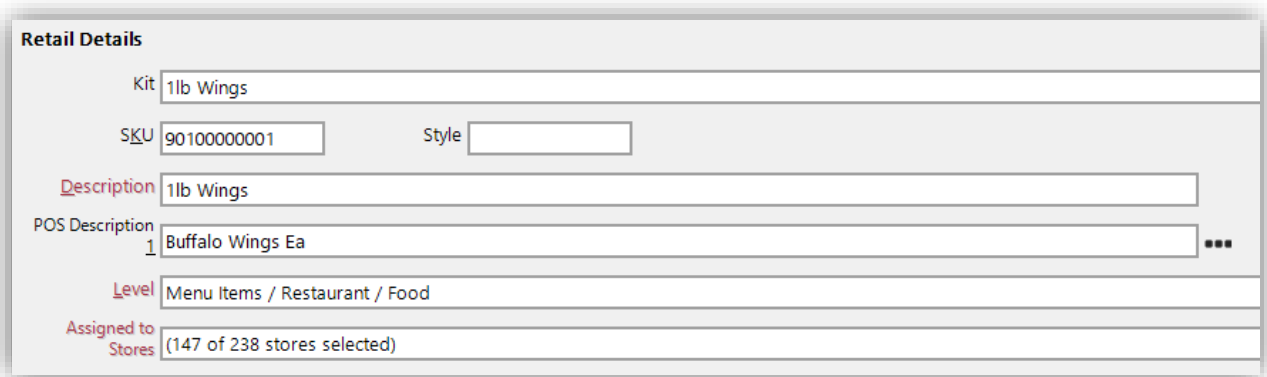Note: Some options are only available when the Stands Modules is enabled and will only be permitted for one size of a parent/child relationship.

Retail Details Tab - Store Assignment

Users now can set store assignment directly in the Retail Detail's tab of the item editor.

Store on Hand and On Hand Costs Total

Now in the Store's tab of the item editor, Total on Hand Cost and Total On hand summarizes are included.

The highlighted sub-totals allow Users to multi-select stores to get totals for only the stores chosen while still being able to see the totals across all stores.

							$8.53	$31.56	3.70	0	
SQS28 QS Stand 28	■	☐	No				$8.53	$31.56	3.70	0	
SQS29 QS Stand 29	■	☐	No				$8.53	$31.56	3.70	0	
SQS30 QS Stand 30	■	☐	No				$8.53	$31.56	3.70	0	
SQS31 QS Stand 31	■	☐	No				$8.53	$31.56	3.70	0	

	Total On Hand Cost	On Hand
	$26,587.80	3117.84
	$15,878.66	1862.00

Purchasing Enhancements

Email Invoice Ability

In version 370, we introduced the ability to email Purchase Orders to vendors. In version 372 we've expanded on that feature to allow the ability to email Invoices.

Users can set up the Vendor Email address that should be used to email invoices by navigating to the Vendor's contact tab. This is not a mandatory step as you will still be able to enter in email addresses manually when sending the invoice.

Contacts

Choose Columns

Name	Phone	Fax	Mobile	Email	Street	City	State	Zip	Country	Notes	Order From Contact	Return To Contact	Invoice To Contact	Stores
				jfields@yellowdogsoftware.com							■	■	■	300 Restaurant

YDI - Vendor Contact Editor - 875 Vendor

Stores (1 of 7) 300 Restaurant

■ Order From Contact   ■ Return To Contact   ■ Invoice To Contact
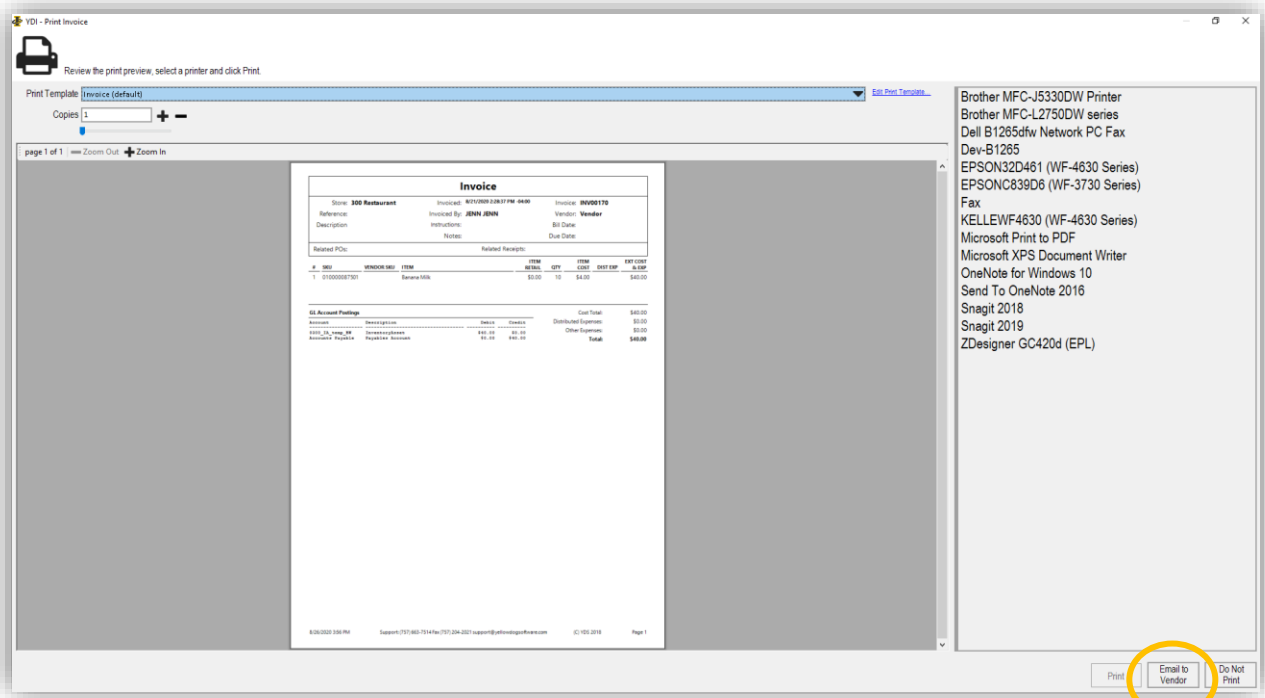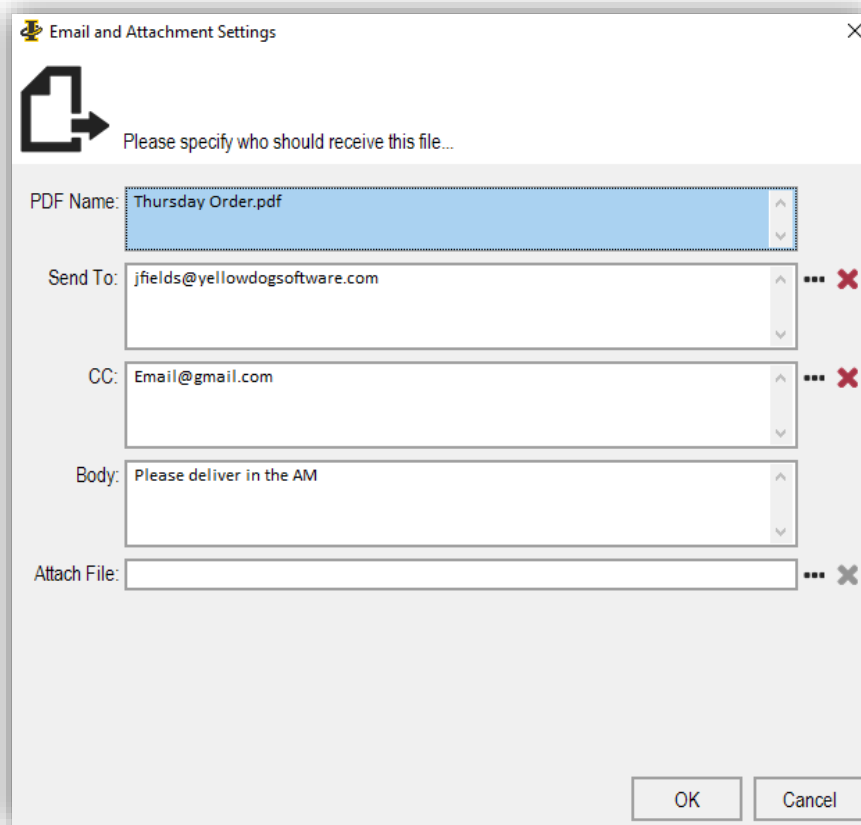
Contact

Phone

Fax

Mobile

Email jfields@yellowdogsoftware.com

Web / URL

After creating and committing an Invoice, the ability to Email to Vendor can be selected on the Print Invoice screen in the bottom right corner.

Once selected the following pop up will appear allowing you to set up the details of the email.

PDF Name – this will be the name of the pdf. Default can be change by typing in desired text.

Send To – Will auto populate if set up for the vendor as mentioned earlier. Email address can also be manually entered.

CC – Will auto populate with the User who committed the invoice's email information but can also be manually entered

Body – Allows freeform text to be sent to the vendor in the body of the email

Attach File – Allows the user to attach an

This is what it will look like when emailed.

Note: The subject of the email is broken down as Invoice – Site Name, Store Name.

Vendor Assignment Enforced

Purchasing documents can only be created for Vendors that are made available to the store.

To make a vendor available, navigate to the Stores tab for the Vendor you want to edit and use the Available column to mark all stores the Vendor is used.
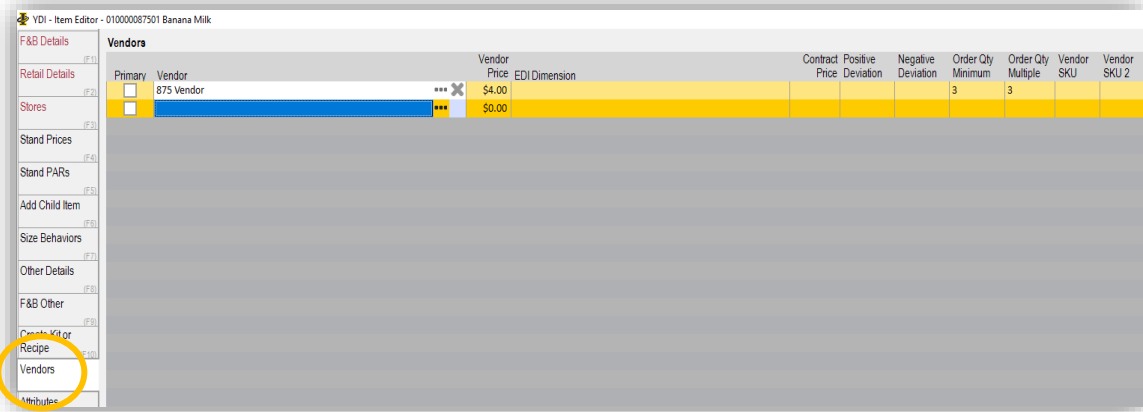

Minimum Order Quantity

New in purchasing is the ability to set vendor specific order quantities to be used when creating a PO.

To begin, open the item editor of an item and navigate to the Vendors Tab.

Here we've added **Order Quantity Minimum** and **Order QTY Multiple** data fields. The minimum should be the quantity the vendor requires for an order to be placed and the multiple is the multiplier the order amount can increase by.

For instance, a vendor's MOQ might be 3 and can only be ordered in multiples of 3 so if someone enters in 7 to be ordered, the PO will round it up to 9.

Once you have set up the item(s) with the MOQ, you can now use that in your Purchase Orders.

Simply create your PO as normal (you can even use an item list with quantities), enter in the amounts you need and once ready to review you can use the "Fix Order Quantity" to have the PO round all quantities using the MOQ you've set up.
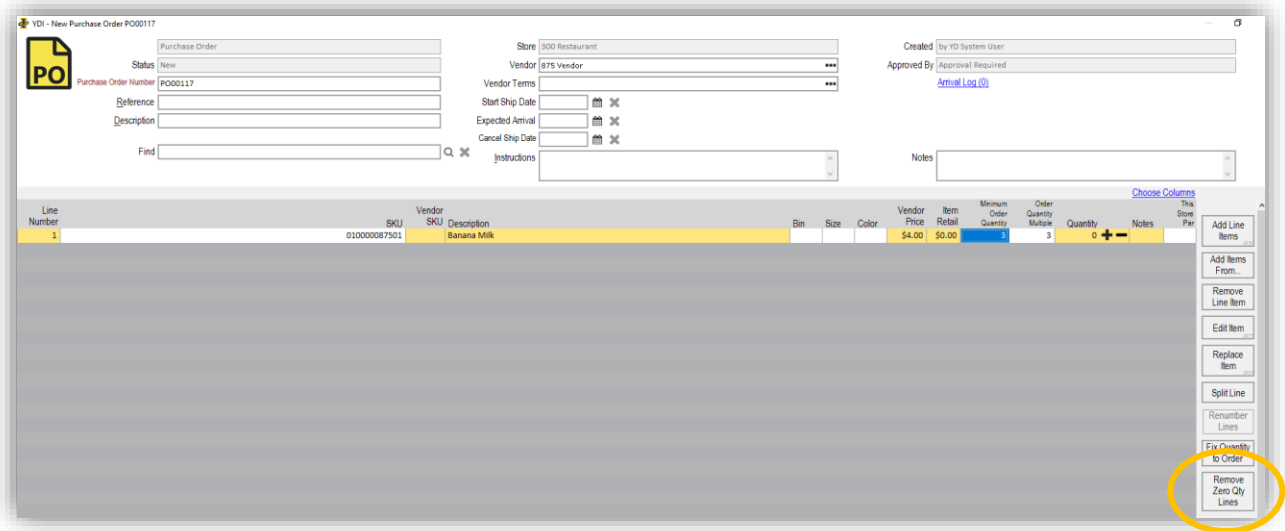
You'll be able to review all items and their new quantities before submitting the PO.
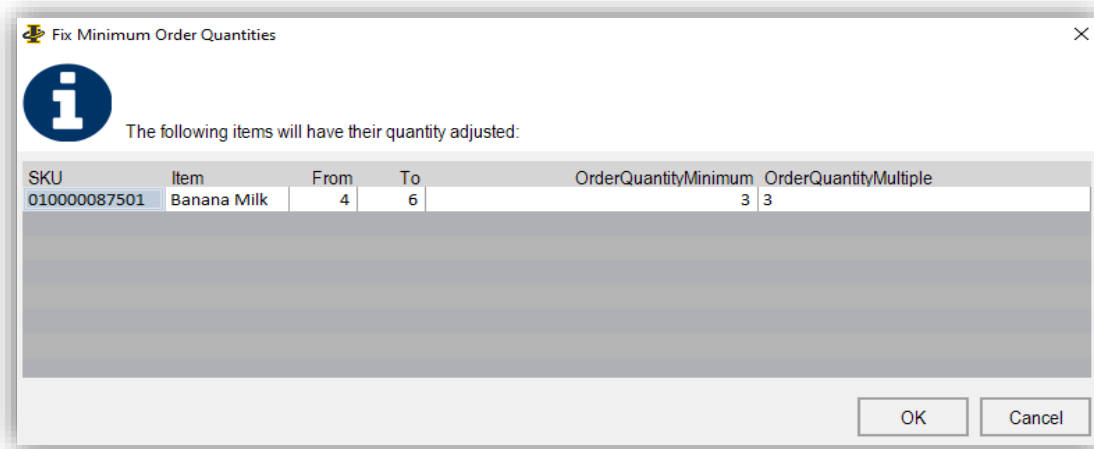
Additionally, if you try to commit a PO that has items that have a MOQ that you haven't met, you will receive the following notice and must correct the quantity before you are able to commit.
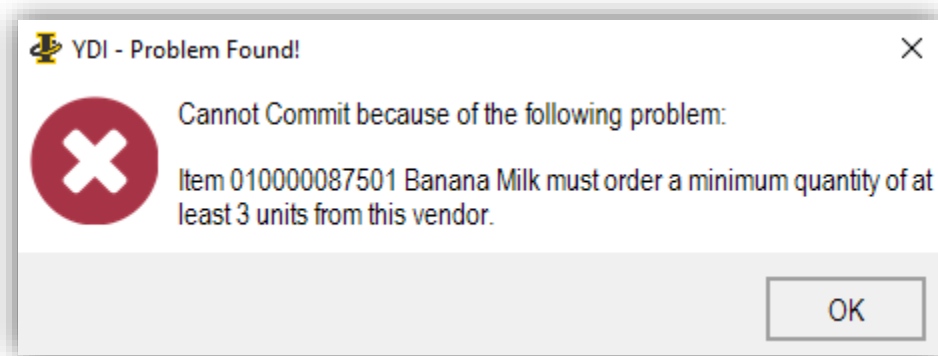
Bin Column added to Purchasing Documents

We have added the Bin field to Requests, Purchase Orders, Receipts, Invoice, Transfers, and Return to Vendors. With the addition of the Bin field, the purchasing document can also be sorted by that field.

Attached Files

We have added two enhancements to identify purchasing documents that have Attached Files.

We have added a "Attached File" column to the main purchasing screen for all document types. This column will display the number of attachments appended to each document. If there are none, this will be left blank.

Additionally, in each purchasing document, the "Attached Files" button at the bottom right will display in parenthesis the number of attachments already appended to the document.

If there are no attachments, you will see "Attached Files" without the identifier.

Purchase Order Retail Value

Purchase Orders will now display "Extended Retail Value" of the line item and "Total Retail Value" of the entire PO.
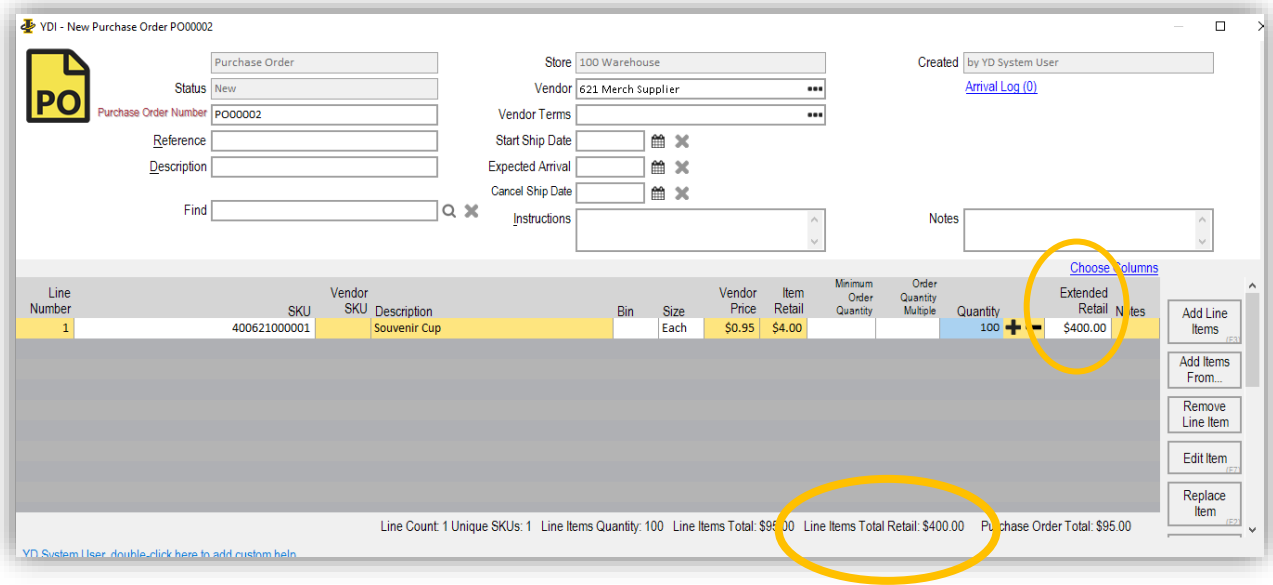
Fill to Par

When an item is added to a purchasing document that has a negative on hand and the Fill to Par option is selected, that item will be treated as thought the on hand in is 0 and the quantity will be building from 0 to Par.
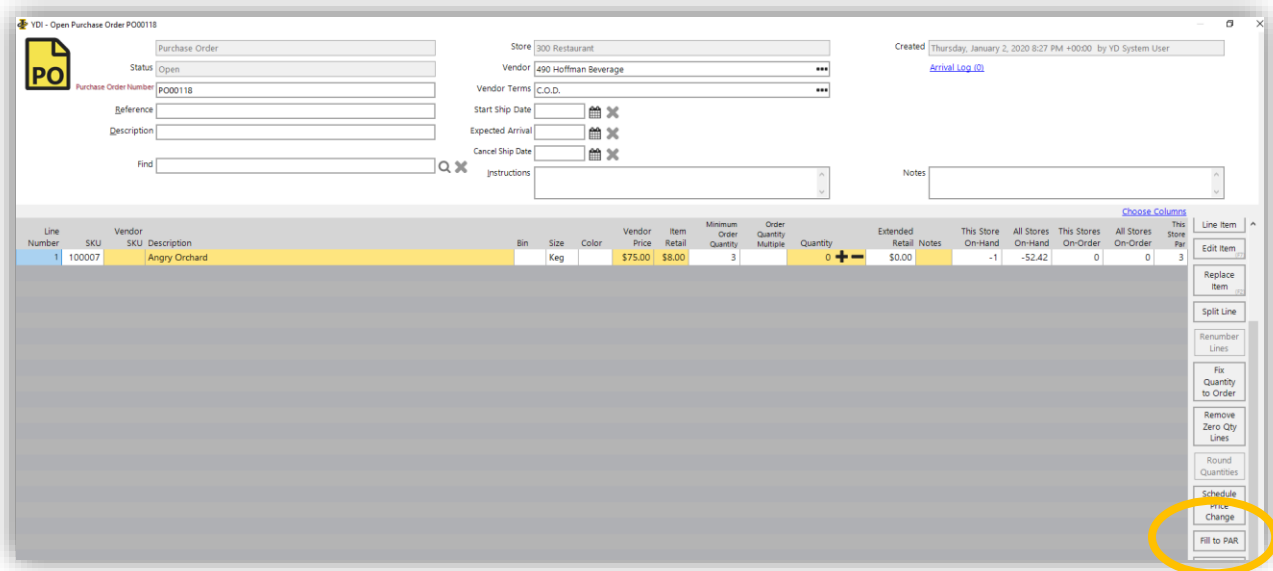
Order Guides

You can now create Order Guides in Yellow Dog by using the Count Sheets module.
Create your new Count Sheet and use the checkbox to "Exclude Count Sheet from Mobile App" which

will exclude the Order Guide from appearing in your Count Sheet options in YDMobile.
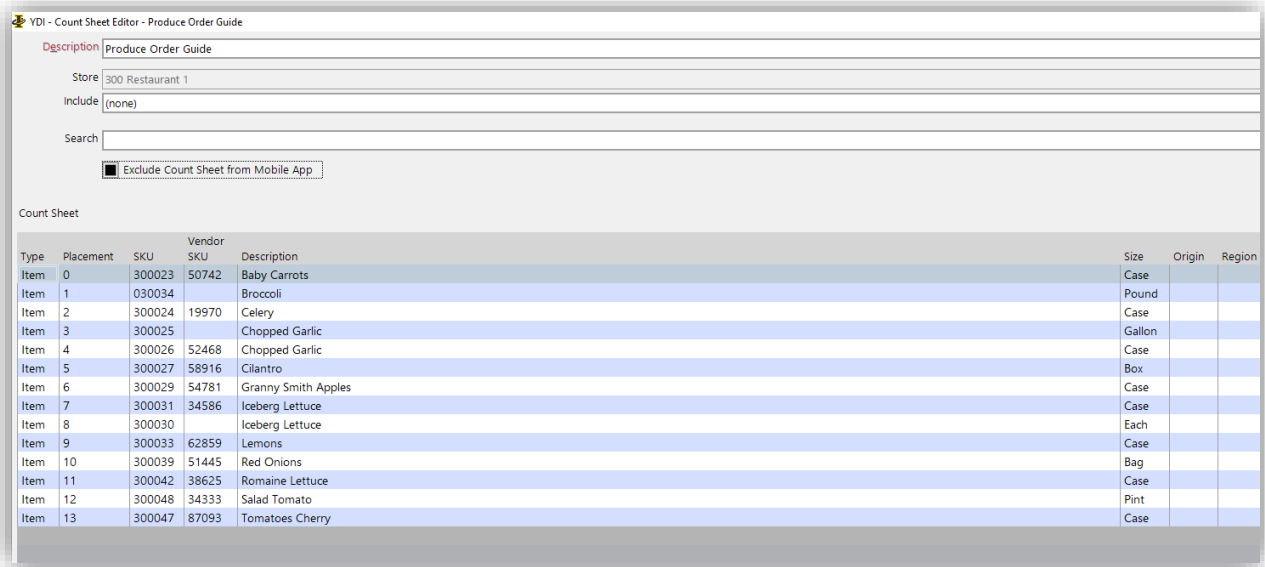
Once items have been added you can choose to print Order Guides at 25%-125% of PAR available. This will display the amount based on your PAR and the percentage you've chosen that you should build to.

Then you can use the sheet to take physical count of what is on hand and identify what you need to order.
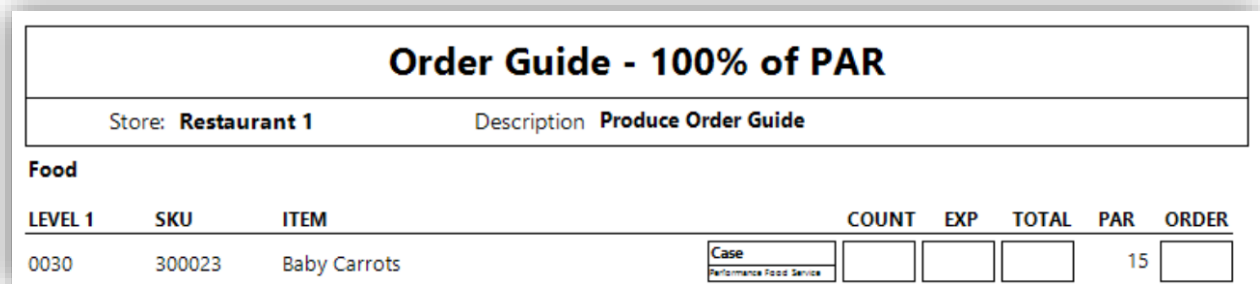
Employee Management Enhancements

Employee Search Bar
We've added a new search bar to the employee section of Yellow Dog. Keywords entered here will search for matches in the Employee Number, Name, Email and Employee Group.

System Setup \ Employees \ Employees

Search
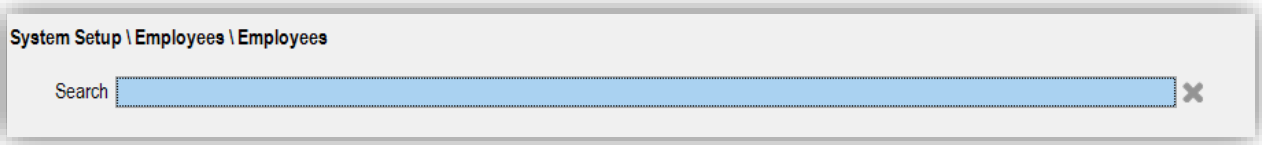
Physical Inventory Enhancements

Create New Count Sheets Based on...
Users now have the ability to copy count sheets from one store and use them in another.
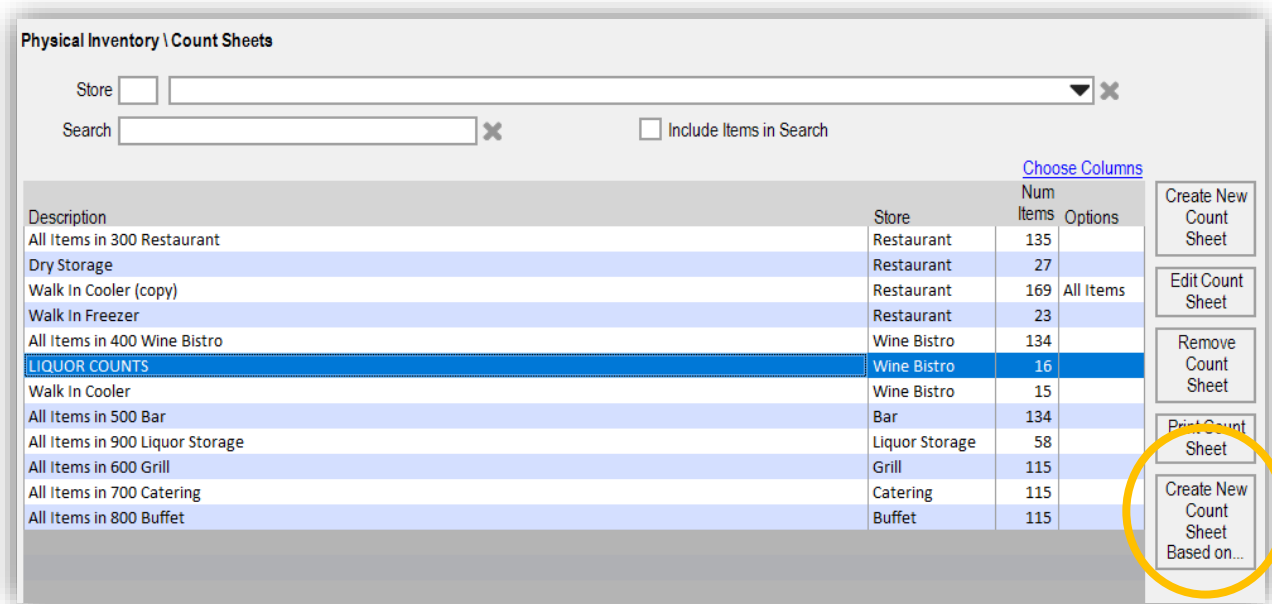
Simply select the count sheet you want to copy and then hit "Create New Count Sheet Based On...". You will then be prompted to choose the store that the Count Sheet should be copied for. Only items that are available to the store you selected will be included in the Count Sheet.

Resulting on Hand Report Addition
In the physical inventory editor, for uncommitted physicals we have also added the Resulting on Hand (for items on the physical only) and Resulting on Hand by Department (for items on the physical only) reports which will filter out any item that is not on the physical being edited.
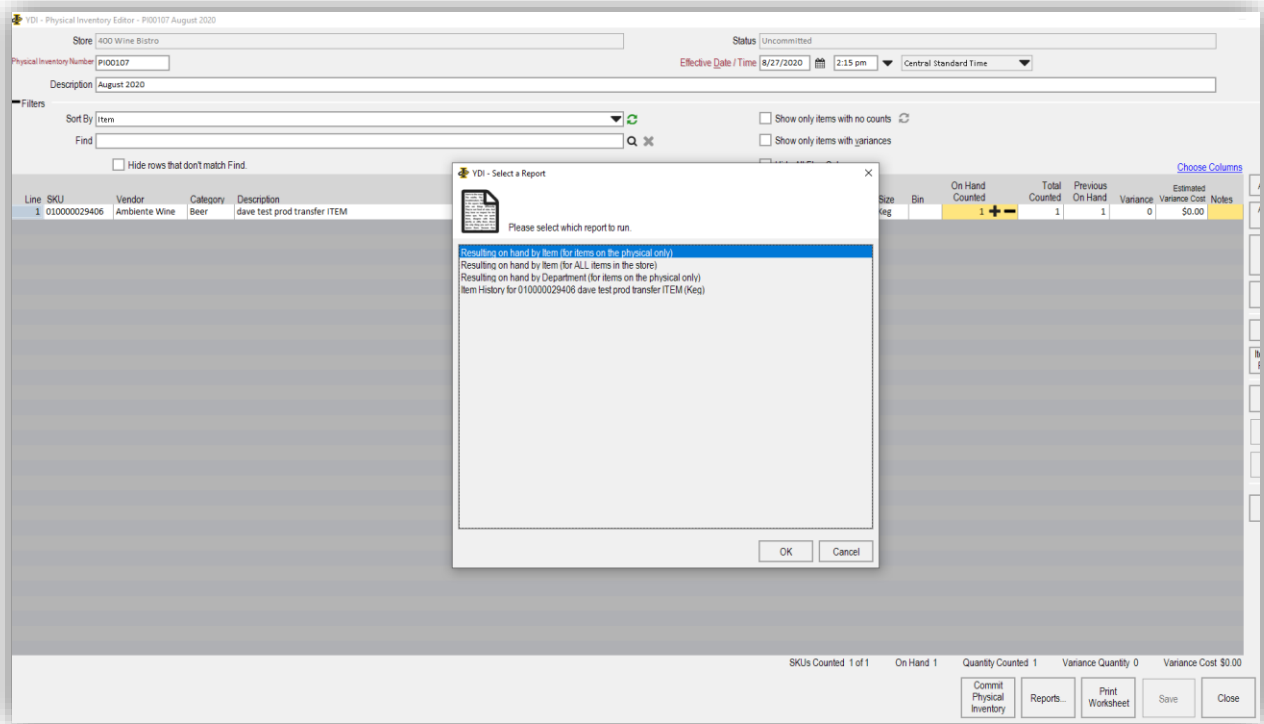
Report Enhancements

Saved Reports Enhancements

Saved reports can now be edited after they've been saved. Users can pull up the report details from the Saved Reports screen and change any filters or parameters needed, rerun the report to verify and then resave to update.
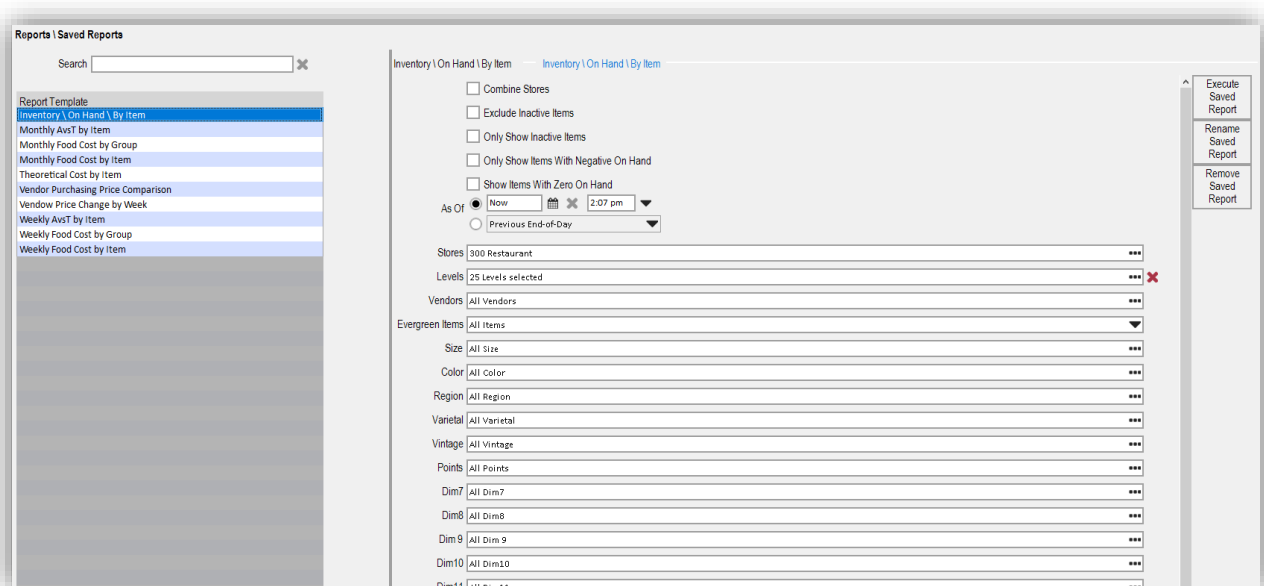
Inventory / Adjustments /Manual

This report now includes "Total Retail" which reflects the total retail value at the time of the adjustment.

Store	Level	SKU	Item	Size	Color	Date / Time	Quantity Adjusted	Total Retail	Calculated Cost Adjusted	Reference	Accounting
Restaurant	JENN	010000087501	Banana Milk			9/8/2020 4:54 PM -04:00	-4	($40.00)	($18.61)	Miscount	Physical Inventory Adjustment
Restaurant	JENN	010000013203	Strawberry Milkis	Can		9/9/2020 10:14 AM -04:00	-1	($3.00)	($1.99)	Miscount	Physical Inventory Adjustment
Restaurant	JENN	010000013203	Strawberry Milkis	Can		9/9/2020 10:18 AM -04:00	-1	($3.00)	($1.99)	transfer	Donation

YDI - Inventory \ Adjustments \ Manual
Date Time: Last 7 Days — Stores: All Stores
Levels: All Levels — Vendors: All Vendors
Manual Adjustment Accounts: All Manual Adjustment Accounts
*Sorted by Total Retail — change columns, sorting and*

Sessions Report

Scan Time has been added to the Session report so when reviewing a session, you can sort in the order it was scanned.

Store Code	Store Name	Level Codes	Department	Session	Upload Datetime	Scan Datetime	Status
300	Kiosk 1	400	Merch	EOM SUPPLIES	10/14/2021 12:17 PM -04:00	10/14/2021 4:03 PM -04:00	finalized
300	Kiosk 1	400	Supplies	EOM SUPPLIES	10/14/2021 12:17 PM -04:00	10/14/2021 4:03 PM -04:00	finalized
300	Kiosk 1	400	Supplies	EOM SUPPLIES	10/14/2021 12:17 PM -04:00	10/14/2021 4:03 PM -04:00	finalized
300	Kiosk 1	400	Supplies	EOM SUPPLIES	10/14/2021 12:17 PM -04:00	10/14/2021 4:04 PM -04:00	finalized

YDI - Session Report for EOM SUPPLIES
Session: EOM SUPPLIES
Sorted by Scan Datetime

Stands Module

Combined with a 2-Way POS Integration, the Stand Sheet Module can control pricing and PARs by event type giving you automated control on restocks and event-based pricing. Some core aspects of the Stands module include

- Managing Chargeable, Non-Chargeable and Supply Items
- Stand PAR and Price Management by Event Type
- Custom Periods for Sales Analysis (ex. Door Open to Puck Drop)
- POS Menu Item and Related Chargeable
- Back Office Stand Reconciliation with Tender Totals
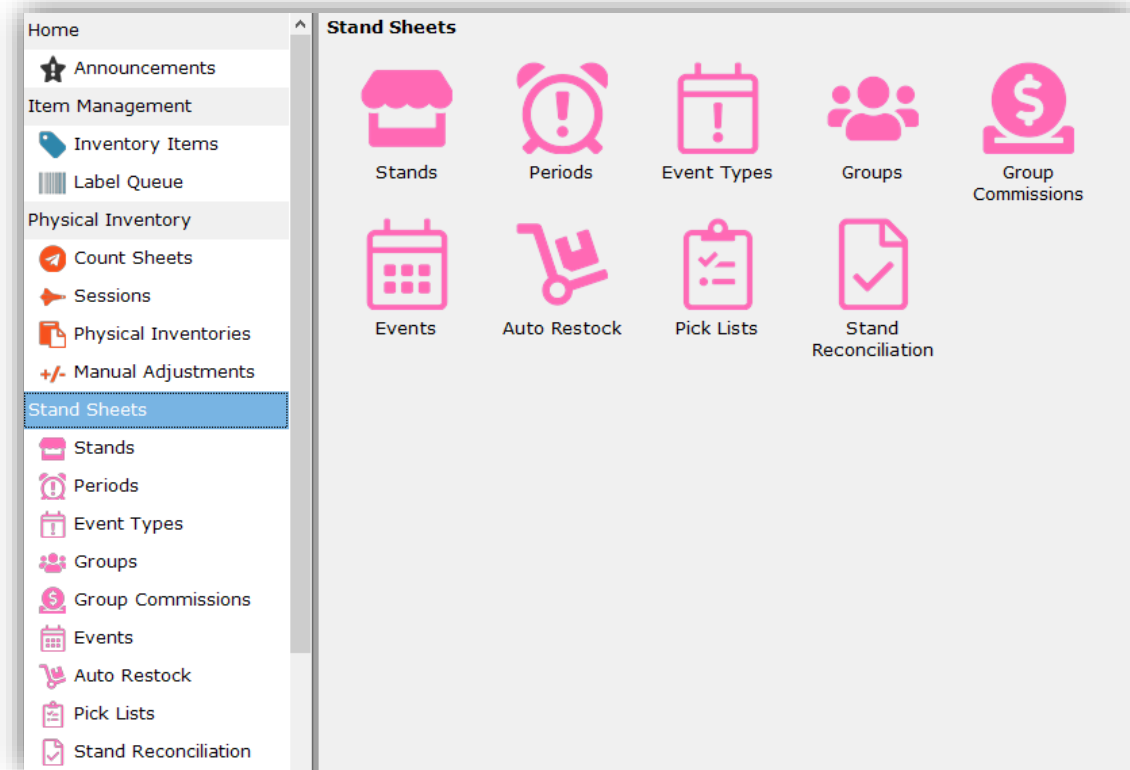
New Views in Inventory Items

When enabled, this module will also turn on additional views in the inventory items screen.

All Stands

Stand Items

The Stand Sheets module is an add-on feature that can be enabled during your implementation or by contacting Yellow Dog Support. To learn more head to our Knowledge Base or visit our [website](#).

Print Template Enhancements

There have been several print template enhancements to support new data fields including attributes and modules including stands.

Store Management Enhancements

The following are specific Store Management features that are usually set during the beginning of Implementation. Most will require specific permissions to make changes.

Store Editor Changes

There are several new options available that can be used to better define a store:

- Facility
- Store Group
- Store Type – Freeform text that can be used to note a specific description for the store type for example Kiosk or Stand
- Warehouse or Stand Check Box – this is used in conjunction with the new Stands Module as Stands and Warehouse locations have specific roles in the Stands workflows.

Facilities

The Facilities section of Stores, allows users to group together stores that share a physical location. For instance, you may have a Restaurant and Gift Shop that exist at one property and then two additional Restaurants and Gift Shops that belong to another.

Creation of new Facilities is done under System Setup and then later assigned to stores in the Store Editor.

Store Groups

Store Groups are another way to manage stores for reporting. When configured, this feature can be used for quick selection of specific stores for reporting since the Store filter on reports will also include Store Groups for selection.

Note that a store can only belong to one Store Group.
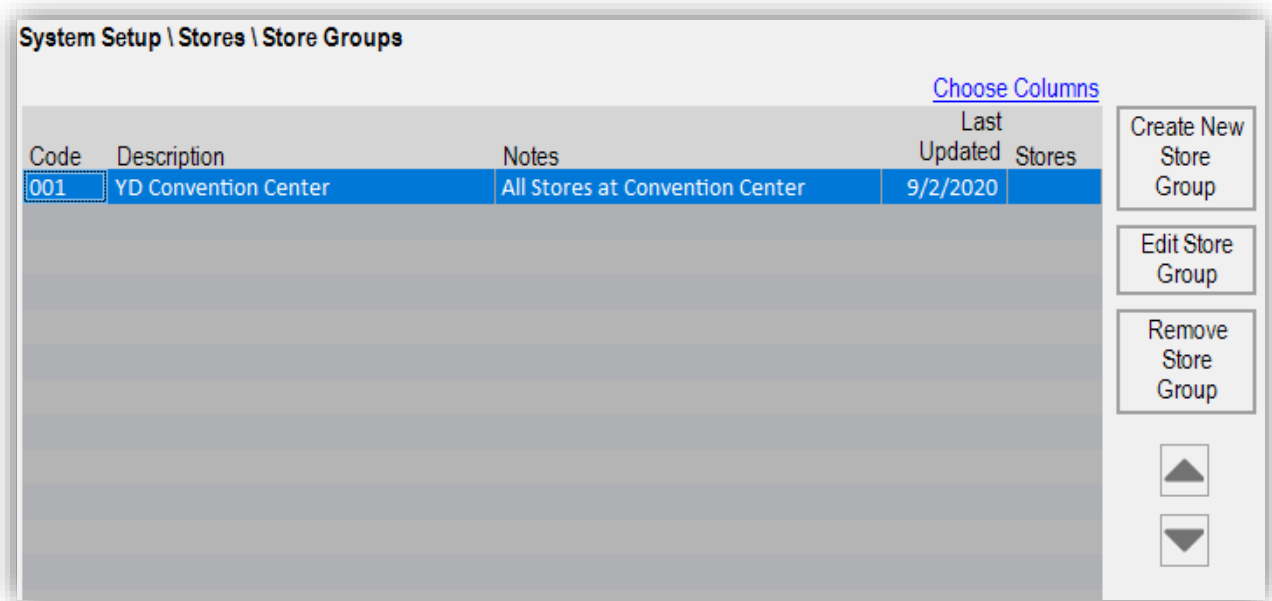
Store Groups are created in System Setup and later assigned via dropdown selection in the Store Editor.

Store Attributes

Store Attributes are user defined settings that designate store-wide behaviors for the POS. These behaviors can have different parameters such as "Read-Only", and be different types, such as text, numeric, selection, or Boolean (true/false).

Once an Attribute is created you can assign in the Attribute Tab of the Stores' editor.
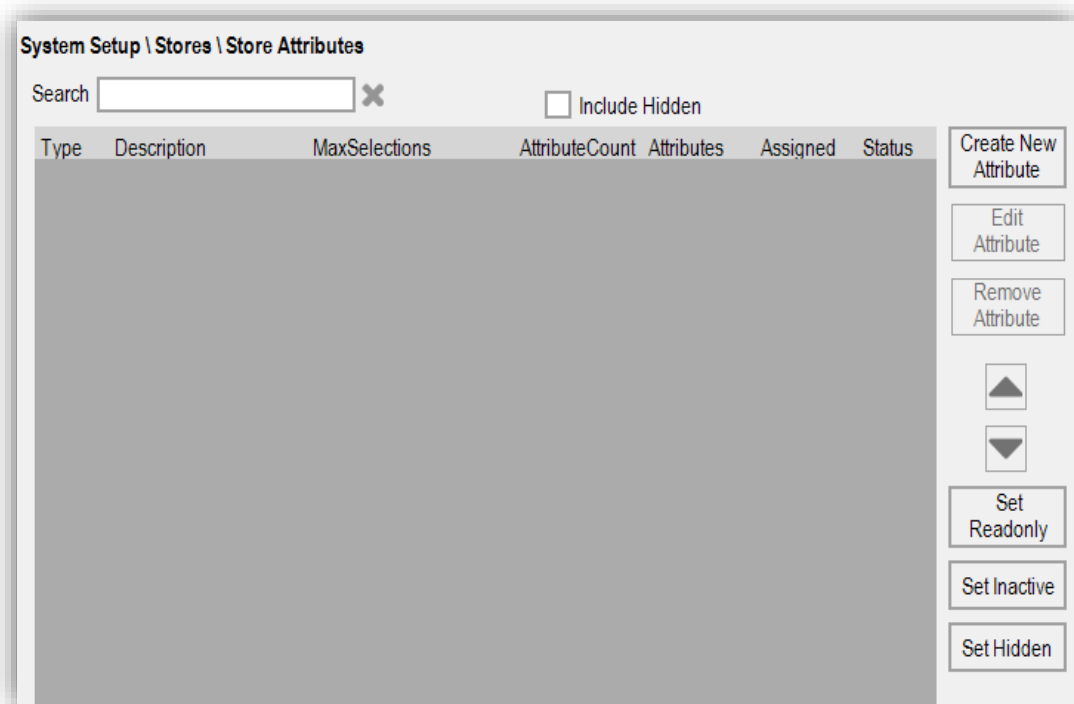
Note: Store Attributes are only compatible with specific POS systems.

Assigning a Warehouse

Stores can now be assigned a specific Warehouse that fulfils ordering needs. You can assign a store's warehouse by navigating to the "Warehouse" tab in the Store editor. Only locations configured as "Warehouses" will appear as options in this list.
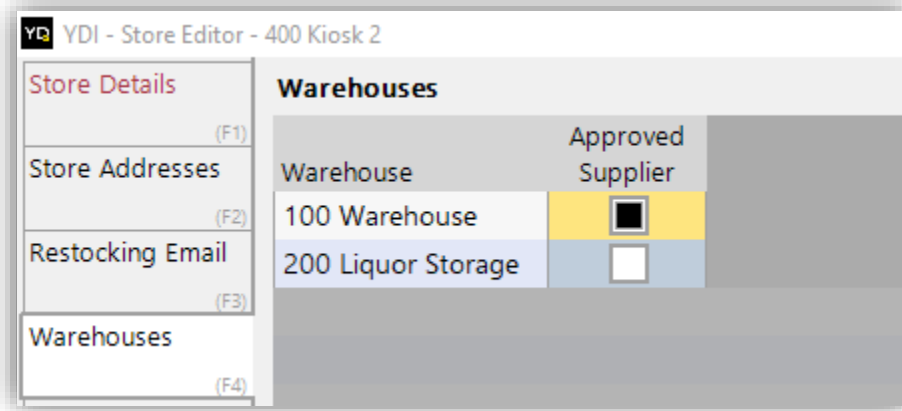
System Admin Enhancements

The following features and enhancements are all related to system administrative management. Most will require specific permissions to make changes.

POS Returns Cost Setting

System Administrators can now determine how POS returns cost is computed. Under System Setup \ Options \ Inventory, cost can be computed by using Default Vendor Price or the most Recent POS Sale Cost. Once configured, all POS Returns system-wide will follow the calculation method selected.

Negative on Hands & Default Item Sort

The configuration options for Negative on Hands and Default Item Sort have been moved to the System Setup \ Options \ Inventory.

System Setup \ Options \ Inventory

Maximum SKU Length `12` ✚ ━

Maximum Short Description Length `12` ✚ ━

POS Item Descriptions

POS Description 1 Maximum Length `22` ✚ ━

POS Description 1 Default `ItemDescription Size`

POS Description 2 Maximum Length `24` ✚ ━

POS Description 2 Default `ShortDescription`

☐ Allow Transaction Line Items to match based on Item Alias

Other Options

Valid Code Characters `$%+-./1234567890abcdefghijklmnopqrstuvwxyzABCDEFGHIJKLMNOPQRSTUVWXYZ`

☑ Do not update child item description when parent is edited (unless blank).

☐ Do not update child item vendors to match parent. Allow all child items to have different vendors.

☐ Consider UPCs to be globally unique.

☐ All items in a Matrix share the same Vendor SKU.

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

Negative OnHands `Purchase Price.      Multiply negative quantity * Purchase_Price`

POS Returns cost `Recent POS Sale Cost.   Multiply Returns Quantity * Most Recent POS Sale Cost`

Default Item Sort `By Item Description (default)`

Never Ask to Change Vendor Price on Invoices

This new optional setting when enabled will prevent the popup box during the Invoicing process when a vendor price is adjusted.
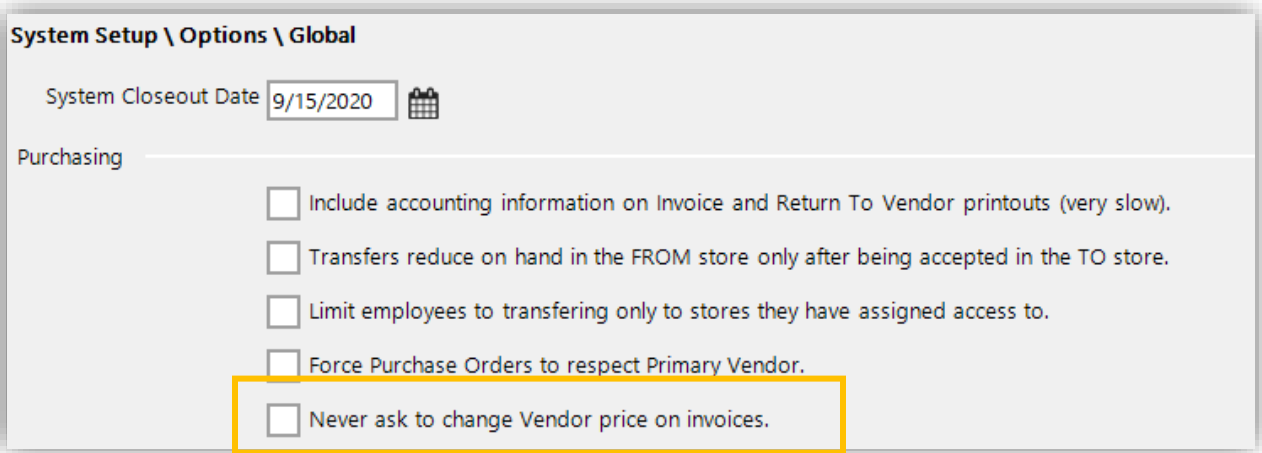
Hide/Remove Report Columns

This new setting allows users to control certain reporting columns to be either hidden or removed. The hidden check box will make either Retail or FB specific columns turned "off" by default so users can still review that data if they'd like by navigating to "choose columns". By selecting the "Remove" checkboxes, these fields will be completely removed and will not be generated when a report is ran.
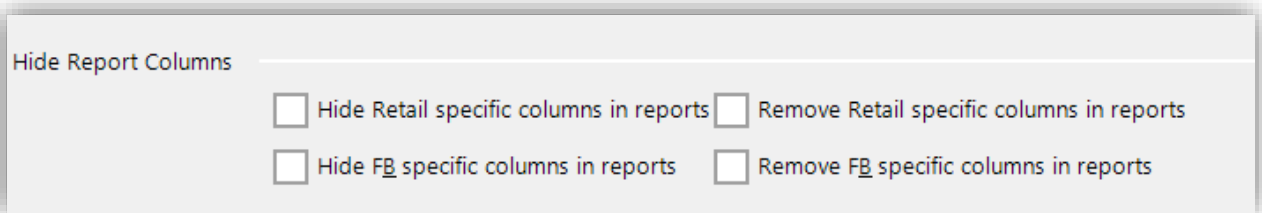
Stand Sheets Specific System Settings

In System Setting \ Options \ System there are not specific stand settings users can choose from.

The first is the ability to enable the Stand Sheets module and then determine if the integration configured in conjunction with Stands supports disabling Alcohol Sales. Additionally, Users can enable the ability to return product back to the warehouse after the event or keep it off if stands hold their own inventory between events.

Lastly, Users can defined how Chargeable Item sales are summarized for reporting and can choose from Dimension 1 (size) or Dimension 2 (color).

Stand Sheets

■ Enable Stand Sheets

☐ Integration supports dynamically disabling Alcohol sales

☐ Do stands return product back to the warehouse after events?

Sales by Chargeable Item
(Summary by #Dimension#)   Not Set ▼