



# Patheon® Release 10 Notes

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Patheon Release 10 includes the following new features and enhancements. Click on one of the following to get more details on specific highlights of this release:

- [Customer Notes](#)
- [Patheon Essential Web App \(EWA\) enhancements](#)
- [POS – Cashier enhancement](#)
- [POS - Tunnel entrance enhancement](#)
- [Wash plan subscription enhancements](#)
- [Report enhancements](#)
- [Suds™ API](#)

If you have any questions about this or past releases, please contact the Knowledge Center at 330.645.3299 or [Knowledgecenter@drb.com](mailto:Knowledgecenter@drb.com).

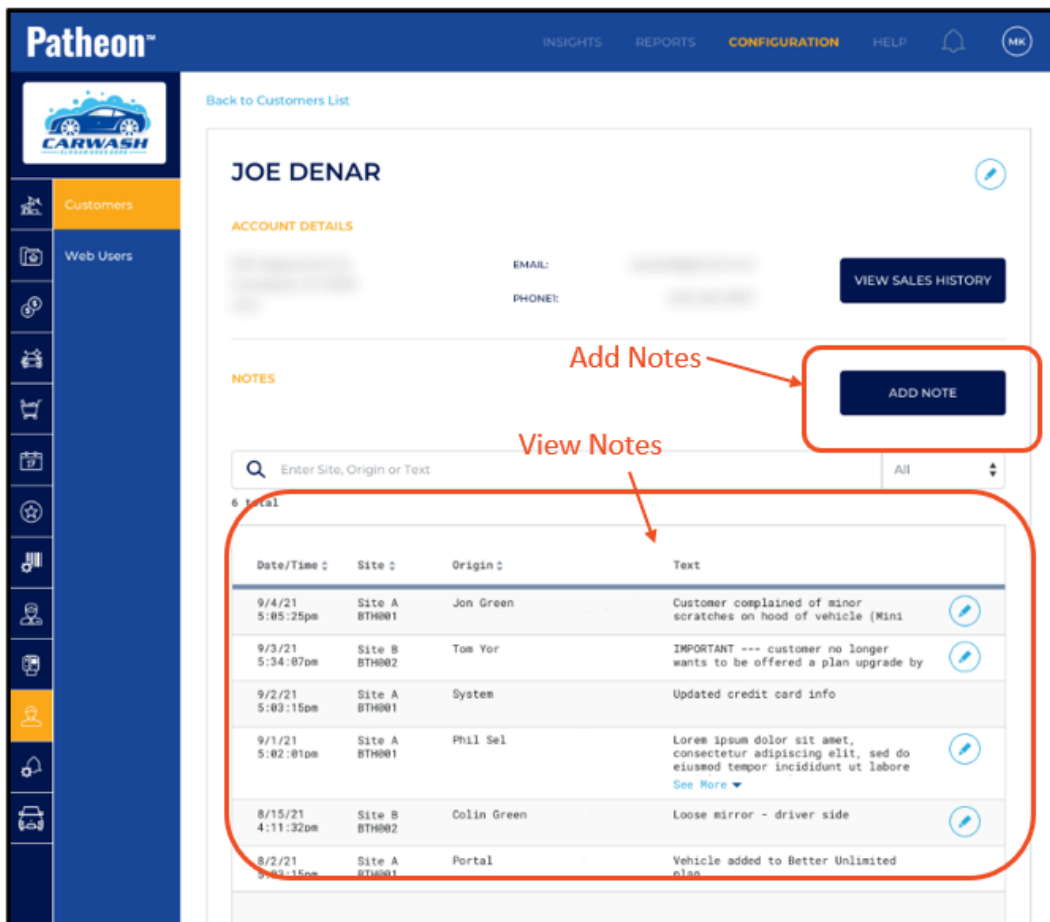
# Customer Notes Feature Addition

In order for Patheon users to function more efficiently and to create a better experience for their clients, Customer Notes are now available. They can be created, viewed, and edited in both the Patheon Portal and POS.

## View Customer Notes

The new Customer Notes section is accessible from the Customer View panel in the Portal and from the Customer panel on the POS.

The Customer Notes section looks and functions the same in both the Portal and POS.



Patheon

Card Scanner  
Cash Printer

Back to Customers

### CUSTOMER

**JOE DENAR**

ACCOUNT DETAILS

EMAIL: [REDACTED]  
PHONE: [REDACTED]

### NOTES

Enter Site, Origin or Text

6 Total

Created Date/Time	Site	Origin	Text
9/4/21 5:05:25pm	Site A BTH001	Jon Green	Customer complained of minor scratches on hood of vehicle (Mini Cooper) after Better
9/3/21 5:34:07pm	Site B BTH002	Tom Yor	IMPORTANT --- customer no longer wants to be offered a plan upgrade by associates.
9/2/21 5:03:15pm	Site A BTH001	System	Updated credit card info
9/1/21 5:02:01pm	Site A BTH001	Phil Sel	Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint <a href="#">See More</a>
8/15/21 4:11:32pm	Site B BTH002	Colin Green	Loose mirror - driver side
8/2/21 5:03:15pm	Site A BTH001	Portal	Vehicle added to Better Unlimited Plan

Annotations: "Add Notes" points to the "ADD NOTE" button; "View Notes" points to the notes table.

## Adding Customer Notes in the Portal and POS

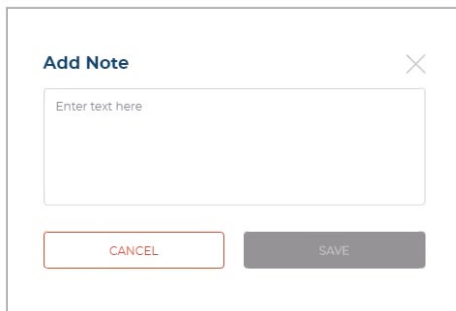
Notes can be added for a customer by selecting the ADD NOTE button.

NOTES

ADD NOTE

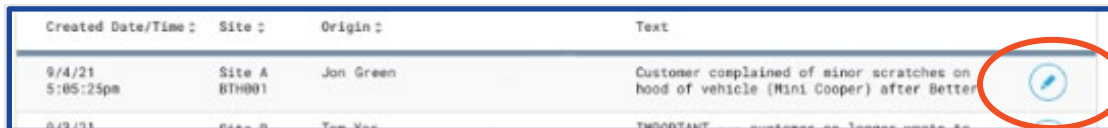
Once the Add Note modal appears, enter the text of the note into the modal and select SAVE.

The Add Note modal will close, and the new note appears in the Notes list for the selected customer.



## Editing Customer Notes in the Portal and POS

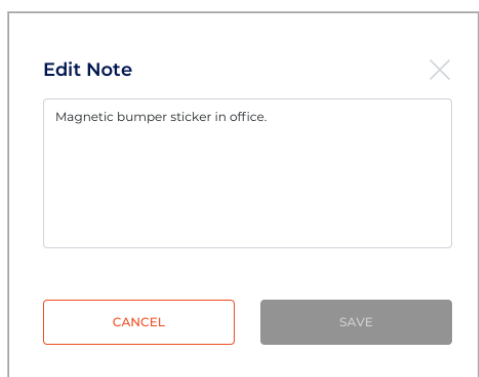
Existing customer notes can be edited by selecting the edit icon in the row for that note.



Created Date/Time :	Site :	Origin :	Text
9/4/21 5:05:25pm	Site A BTH001	Jon Green	Customer complained of minor scratches on hood of vehicle (Mini Cooper) after Better
8/23/21	Site B	Tom Van	IMPORTANT customer on Tuesday made to

An Edit Note modal will appear. Edit the text as needed in the modal and select SAVE.

The Edit Note modal will close, and the updated note will appear in the Notes list for the selected customer.



**Note:** Customer notes can be edited but they cannot be deleted. Edits can only be made by the person that originally created the note or someone in a manager role.

## Patheon Essential Web App (EWA) Enhancements

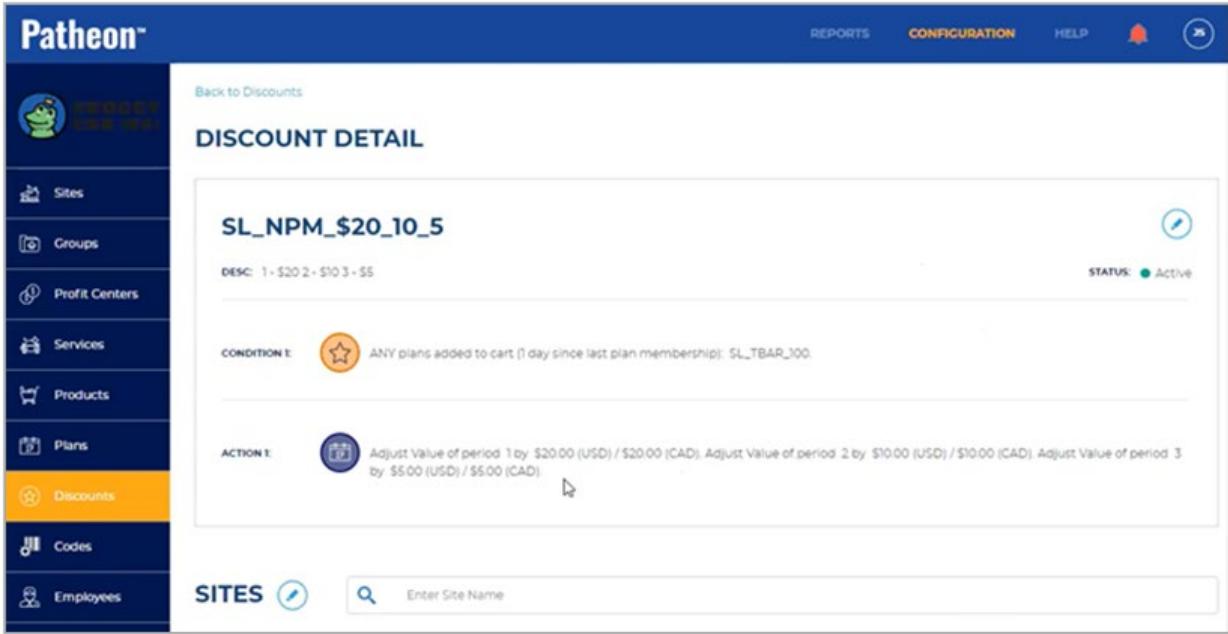
Patheon's Essential Web App (EWA) combines the features of a modern browser with the benefits of a mobile eCommerce experience.

### Apply New Plan Customer Discount on Plan Purchase

New plan customer discounts can now be applied to products in the Essential Web App (EWA).

To implement this, first create a new plan discount in the Patheon Portal and associate it with the EWA during the site selection step.

Once the discount is associated with the EWA (e-commerce) and published, it is active and available for use by new plan customers.



The screenshot displays the Patheon portal interface. The top navigation bar includes the Patheon logo, a user profile icon, and menu items for REPORTS, CONFIGURATION, and HELP. A left sidebar contains navigation options: Sites, Groups, Profit Centers, Services, Products, Plans, Discounts (highlighted), Codes, and Employees. The main content area is titled 'DISCOUNT DETAIL' and shows the following information:

- DISCOUNT ID:** SL\_NPM\_\$20\_10\_5
- DISCOUNT VALUE:** 1 - \$20 2 - \$10 3 - \$5
- STATUS:** Active
- CONDITION:** ANY plans added to cart (1 day since last plan membership); SL\_TBAR\_100.
- ACTION:** Adjust Value of period 1 by \$20.00 (USD) / \$20.00 (CAD); Adjust Value of period 2 by \$10.00 (USD) / \$10.00 (CAD); Adjust Value of period 3 by \$5.00 (USD) / \$5.00 (CAD).

At the bottom of the main content area, there is a 'SITES' section with a search input field labeled 'Enter Site Name'.

While using the EWA, when a new customer with no active plans selects the plan associated with a discount, the discount is automatically applied and is displayed on the EWA Summary screen.

SUMMARY	
VEHICLES	PAYMENT
ITEM	PRICE
SL_TBAR_100 1 Month	\$55.00
Subtotal:	\$55.00
Discounts:	-\$20.00
Tax:	\$2.27
<b>Total:</b>	<b>\$37.27</b>

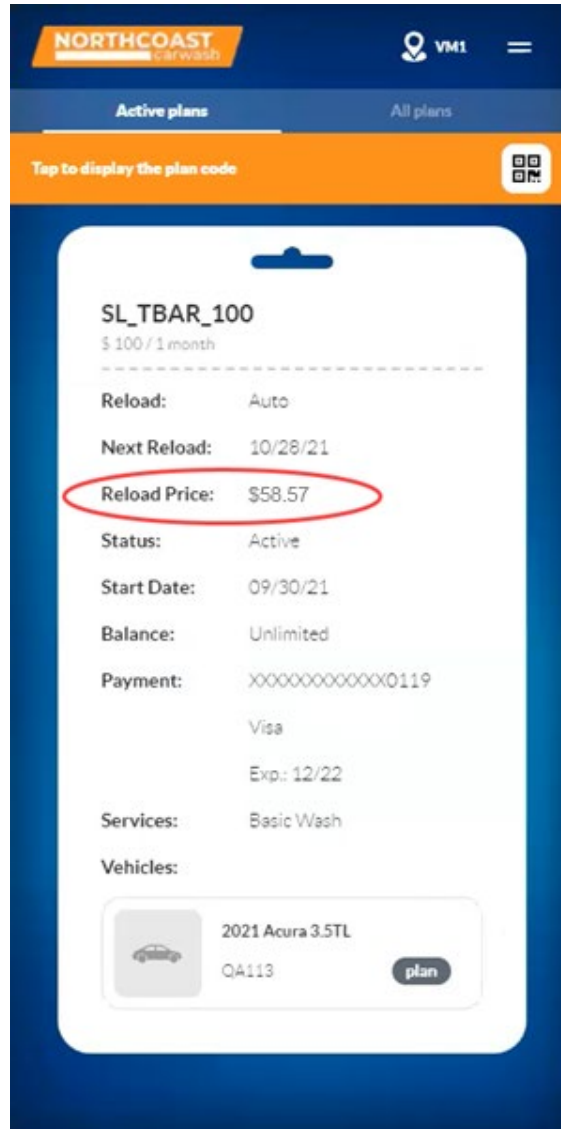
By clicking 'Next' button, you agree to our [Terms and Conditions](#).  
Your plan will be automatically charged at the end of each billing period. To cancel the plan contact the car wash office.

[BACK](#) [NEXT](#)

Note: Once a customer has an active plan, the discount wouldn't apply if they attempted to purchase a second plan.

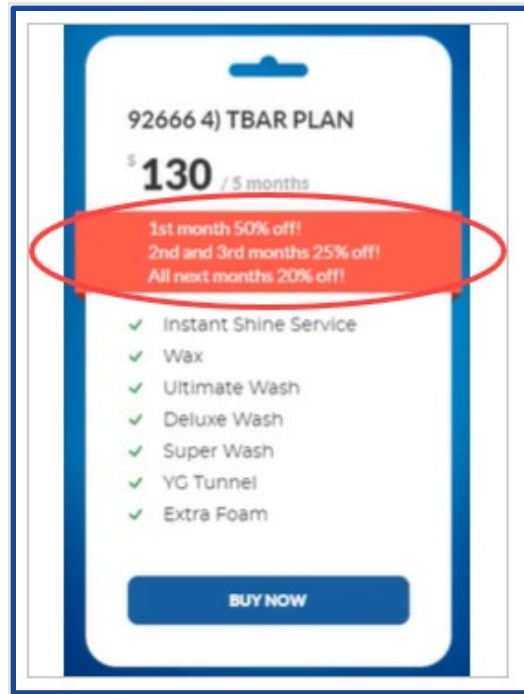
## Display Reload Price for an Active Plan

The plan card for an active plan will now display the price of the next plan reload in the Reload Price field.



## Promotional Text Now Available on Plan Cards

Promotional text can now be displayed on a highlighted ribbon at the top of a plan card in the EWA.



## Adding/Editing Promotional Text

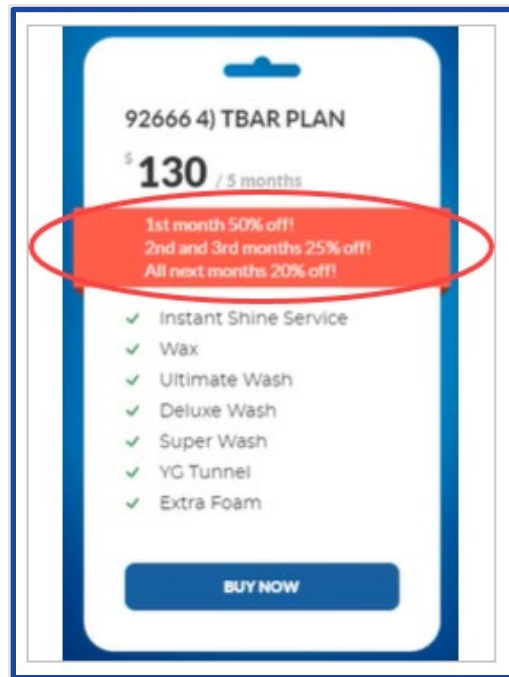
Promotional text can be added when creating or editing a membership plan in the Patheon Portal. The Promotional Text field is optional and is blank by default.

A screenshot of the Patheon portal's 'Membership' configuration page. The page has a blue header with the Patheon logo and navigation links for 'REPORTS', 'CONFIGURATION', and 'HELP'. A sidebar on the left contains navigation icons for 'Plans', 'Membership', 'House Account', and 'Partner Accounts'. The main content area is a form with the following fields: 'Plan Name \*' (required), 'Description', 'Promotional Text' (optional, with a 'Display text in app' checkbox), and 'TIMEFRAME' (required). The 'Promotional Text' field is highlighted with a red box.

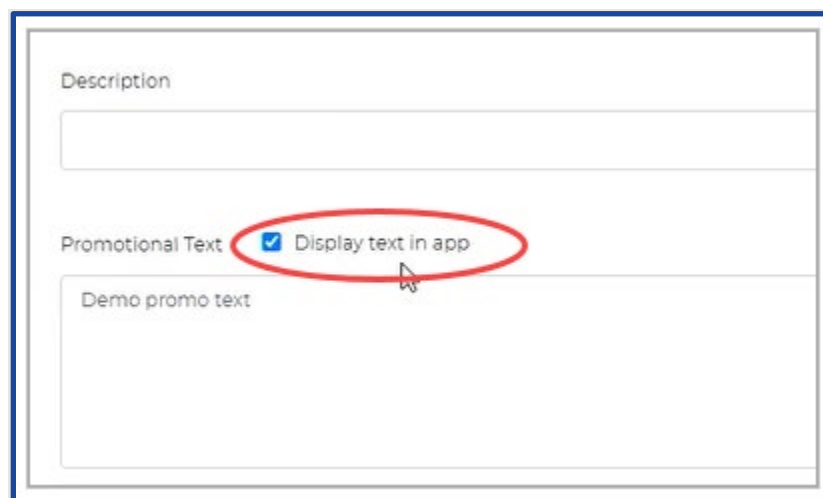


## Format Promotional Text in the EWA

The Promotional Text field can accommodate up to 1,000 characters. In the EWA the plan card expands vertically to display all the promotional text. Line breaks can be added to the text by using the Enter key on the keyboard.



When first entering text into the Promotional Text field, the Display text in app option is selected automatically. This option determines if the text in the Promotional Text field is displayed on the plan card in the EWA for the selected Plan. The field can be toggled on or off per plan.

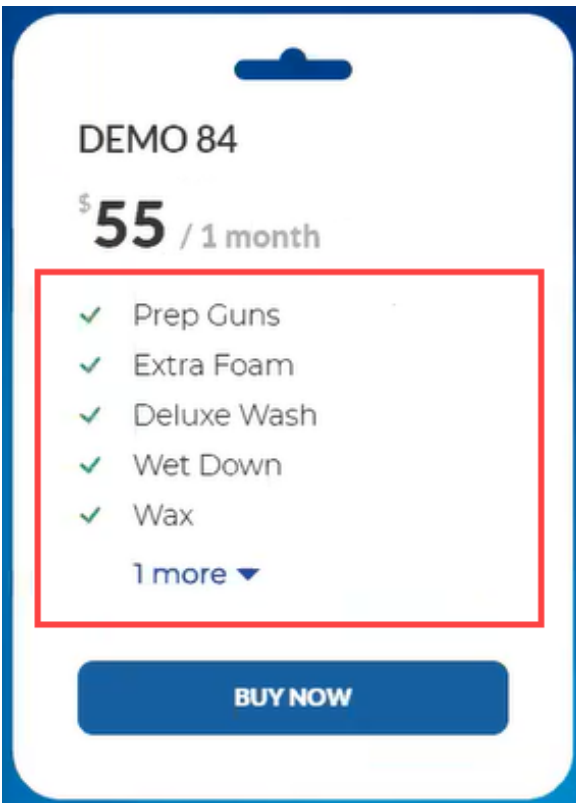
A screenshot of the Promotional Text field configuration interface. It shows a 'Description' field at the top. Below it, there is a 'Promotional Text' field with a red oval highlighting the 'Display text in app' checkbox, which is checked. Below the 'Promotional Text' field, there is a 'Demo promo text' field.

## List of Plan Services Now Displayed on Plan Cards

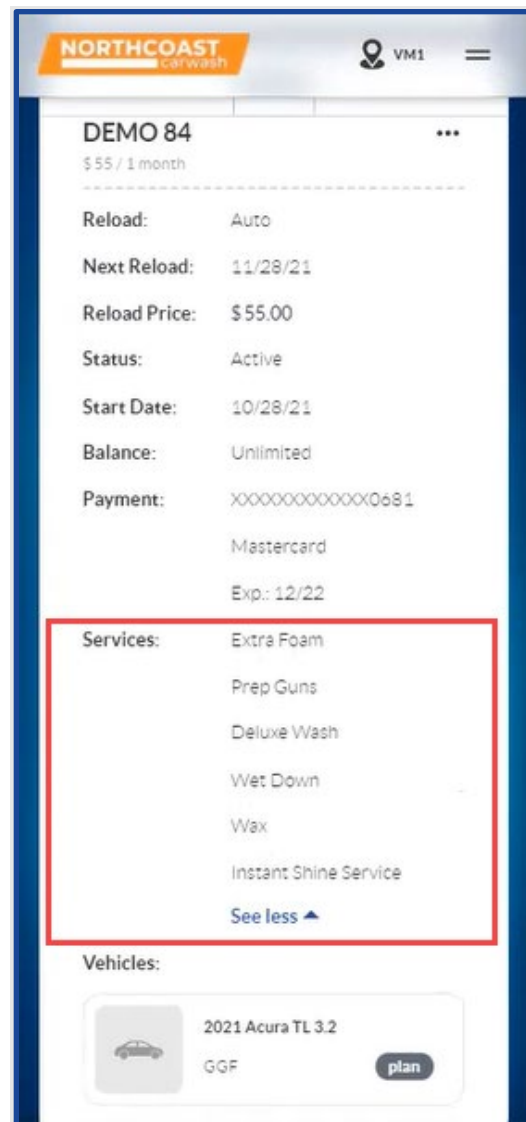
So customers can clearly see the plan options, the full list of plan services is now displayed on the Available Plans and Active Plan cards in the EWA.

If a plan has more than five services associated with it, the first five are displayed on the plan card followed by a drop-down indicator link. Selecting this link will allow customers to see the remaining services for the plan.

Plan Services on Available Plans Card



Plan Services on Active Plan Card



## POS – Cashier Enhancement

### New Plan Sales Now Default to The Card on File

New Plan sales at the POS now default to the customer's card on file so the cashier doesn't have to search for the current card.

## POS - Tunnel Entrance Enhancement

### Automatic Send

Sites can now automatically send a vehicle via input to TunnelWatch® or an SRMB so tunnel entrance staff do not have to manually send vehicles from the tunnel entrance terminal.

TunnelWatch IP ProgramCar event wired to input on TCS:

- When the TCS receives a signal, the vehicle in queue position 1 is sent and removed from the queue. The next vehicle is now moved into position 1.
- If the TCS receives multiple signals in a short period of time (for example, less than 3 seconds) before the vehicle in position 1 is removed from the queue, only the first vehicle is sent.
- If automatic send is enabled, tunnel entrance staff can still manually send a vehicle from the tunnel entrance terminal.
- If the queue is empty and no signal is detected, nothing is sent to the tunnel.

Bridge Serial / SRMB configured for the Appliance:

- When the SRMB receives a signal, the vehicle in queue position 1 is sent and removed from the queue.
- If multiple signals are received in a short period of time (for example, less than 3 seconds) before the vehicle in position 1 is removed from the queue, only the first vehicle is sent.
- If automatic send is enabled, tunnel entrance staff can still manually send a vehicle from the tunnel entrance terminal.
- If the queue is empty and no signal is detected, nothing is sent to the tunnel.

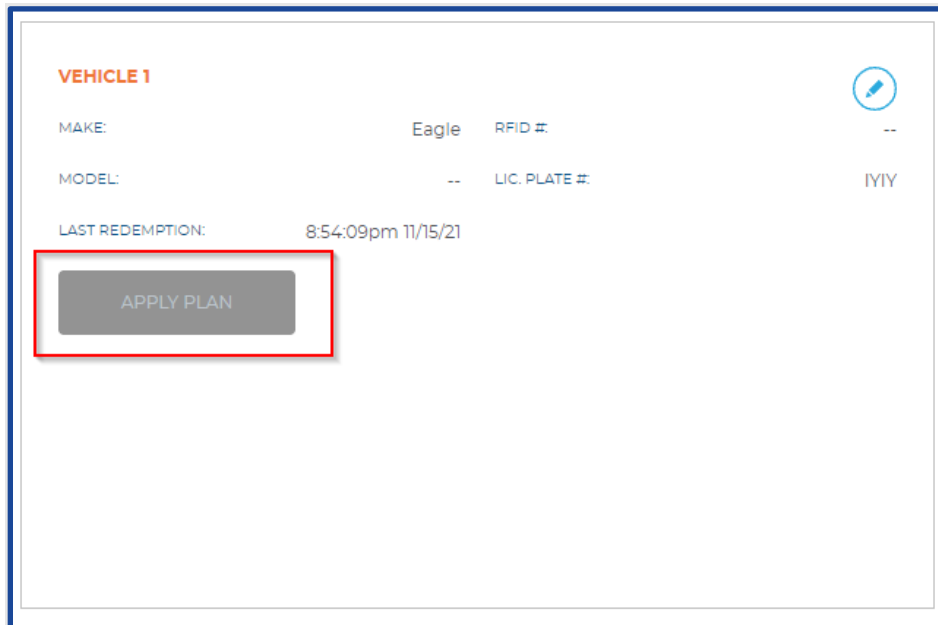
## Wash Plan Subscription Improvements

Wash Plans with an Active - Reloading status are considered active but carry certain restrictions because they have not yet renewed.

Customers can continue to wash their cars while in the Active - Reloading status. To ensure this happens, management of plans was changed at both the cashier terminals and the XPT®s to reflect the actions that can and cannot be executed.

### Cashier Terminal Changes

From the Active plans tab for a customer the APPLY PLAN button is disabled.



The screenshot shows a form titled "VEHICLE 1" with the following fields:

MAKE:	Eagle	RFID #:	--
MODEL:	--	LIC. PLATE #:	IYIY
LAST REDEMPTION:	8:54:09pm 11/15/21		

Below the fields is a grey button labeled "APPLY PLAN", which is highlighted with a red rectangular box, indicating it is disabled.

The following buttons were disabled or hidden on the PLAN DETAILS panel:

- Discontinue button disabled
- Suspend button disabled
- Add Another Vehicle button disabled
- The Name drop-down function is disabled from Change plan (upgrade or downgrade)
- Remove a Vehicle from a Plan button was hidden

The screenshot displays the 'PLAN DETAILS' interface. At the top, there is a 'Back to Customer' link and a 'PLAN DETAILS' header. The status is 'Active - Reloading'. The name is 'SK\_TBARS051'. In the top right corner, three buttons are visible: 'DISCONTINUE', 'SUSPEND', and 'TERMINATE'. The 'DISCONTINUE' and 'SUSPEND' buttons are highlighted with a red box, indicating they are disabled. Below this is the 'PLAN VEHICLES' section with a 'Vehicle 1\*' dropdown set to 'Eagle'. Underneath is the 'IDENTIFIERS' section, which includes a QR code, a 'CO IYIY USA' logo, and an 'RFID Number' field with a barcode. The 'ADD ANOTHER VEHICLE' button is also highlighted with a red box, indicating it is disabled. At the bottom, the 'RELOAD PAYMENT DETAILS' section shows two payment options: a Mastercard (\*\*\*\*2215, EXP: 05/23) and a Visa (\*\*\*\*0006, EXP: 12/25). At the very bottom, there are 'CANCEL' and 'SAVE' buttons.

Actions still enabled:

- Edit a plan's vehicle RFID code.
- Change the plan's payment card.
- Add a new payment card to the plan.
- Terminate the plan; a prorated refund is not available since the last period is fully used and there's nothing to refund.

XPT Enhancements

When an Active - Reloading plan is identified at an XPT, the plan is not applied and the XPT's expired plan workflow runs instead.

# Report Enhancements

To prevent double-counting of results, **Transfers - In** and **Transfers - Out** have been added to both the General Sales Report and the Plan Analysis Report.

Back to Financial Reports

**GENERAL SALES REPORT**

Generated By: Admin, DRB GENERAL SALES SUMMARY REPORT Generated On: 12/01/2021 01:20:46 PM Summary of Financial Performance \$0.00

Plans transferred in	14	\$563.00
Plans transferred out	14	\$0.00
<b>Unit-based Plans</b>		
Plans Discontinued	2	\$0.00
Plans Redeemed	75	\$396.50
Plans Reloaded	7	\$0.00
Plans Sold	39	\$0.00
Plans discontinued	14	\$566.00
Plans transferred in	4	\$0.00
Plans transferred out	4	\$0.00

Product	Car Count
basic wash	1
vqa Deluxe wash	1
Total	2

**PREVIEW PARAMETERS**

START DATE: 11/24/2021, 12:00 AM  
 END DATE: 12/1/2021, 11:59 PM  
 SITES: All selected (62)  
 CHANNEL: All  
 SUMMARY/DETAIL: Summary  
 RESET SUBMIT

Back to Financial Reports

**PLAN ANALYSIS REPORT**

Sites: \*\* ALL \*\* Start Date: 11/24/2021 End Date: 12/01/2021

Plan type	Start Count	Added	Transfer In	Transfer Out	Discontinued	Expired	Out of units	Terminated	Unpaid	Total	End
TIME-BASED AUTO RELOAD	4,614	52	12	13	11	0	0	26	33	70	4,595
010101010101010101010101	1	0	0	0	0	0	0	0	0	0	1
05_TBAR	1	0	0	0	0	0	0	0	0	0	1
05_TBAR_1	2	0	0	0	0	0	0	0	0	0	2
1 month	1	0	0	0	0	0	0	0	0	0	1
2021_Dlma_TBAR_RefYES	4	0	0	0	0	0	0	0	0	0	4
262 plan with daily limit	8	0	0	0	1	0	0	0	0	1	7
43079 plan	1	0	0	0	0	0	0	0	0	0	1
90321 TBAR PLAN	1	0	0	0	0	0	0	0	0	0	1
92666 1) TBAR Plan	2	0	0	0	0	0	0	0	0	0	2
92666 2) TBAR Plan	1	0	0	0	0	0	0	0	0	0	1
92666 3) TBAR Plan	1	0	0	0	0	0	0	0	0	0	1
92666 4) TBAR Plan	1	0	0	0	0	0	0	0	0	0	1
92666 plan 1	1	0	0	0	0	0	0	0	0	0	1
92666 plan 2	3	0	0	0	0	0	0	0	0	0	3

**PREVIEW PARAMETERS**

START DATE: 11/24/2021, 12:00 AM  
 END DATE: 12/1/2021, 11:59 PM  
 SITES: All selected (62)  
 RESET SUBMIT



## Suds API

For those customers with a Suds™ engagement, a new API is available that allows Suds to read code redemptions.

Contact your Suds Project Manager for more details.

