Patheon® Release 10 Notes

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.
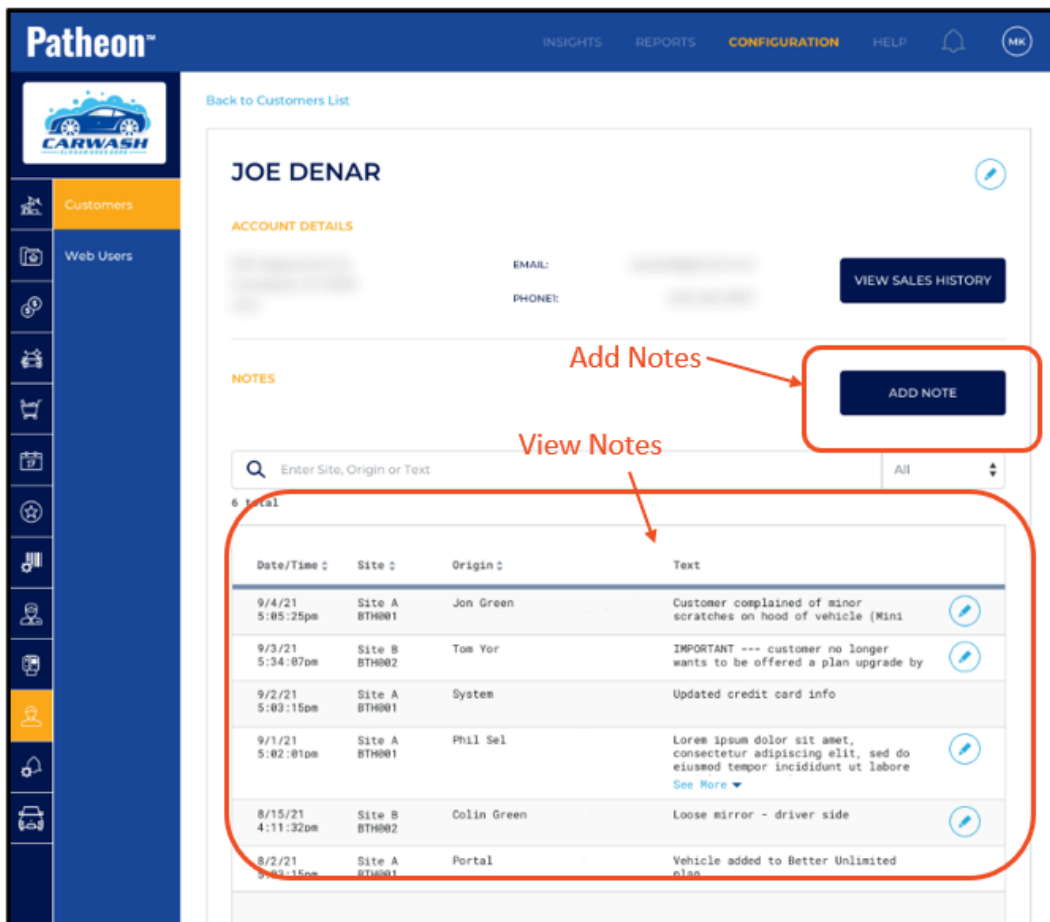
Customer Notes Feature Addition

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.

Adding Customer Notes in the Portal and POS
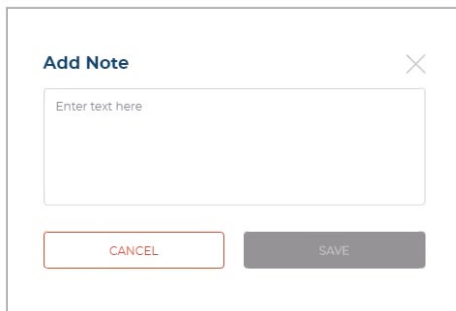
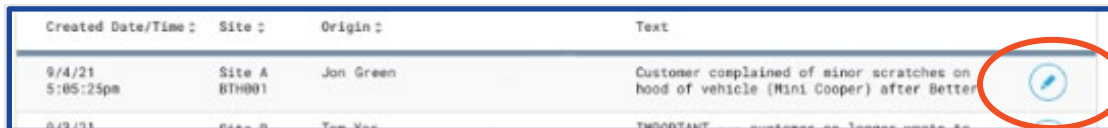Notes can be added for a customer by selecting the ADD NOTE button.

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.

Add Note   ✕

Enter text here

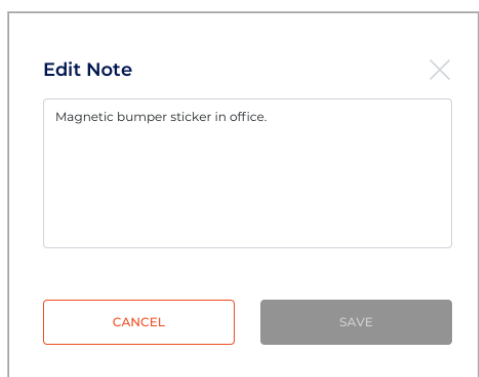CANCEL   SAVE

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	✏
8/2/21	Site B	Tom Vos	IMPORTANT customer no longer wants 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.

Edit Note   ✕

Magnetic bumper sticker in office.

CANCEL   SAVE

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.
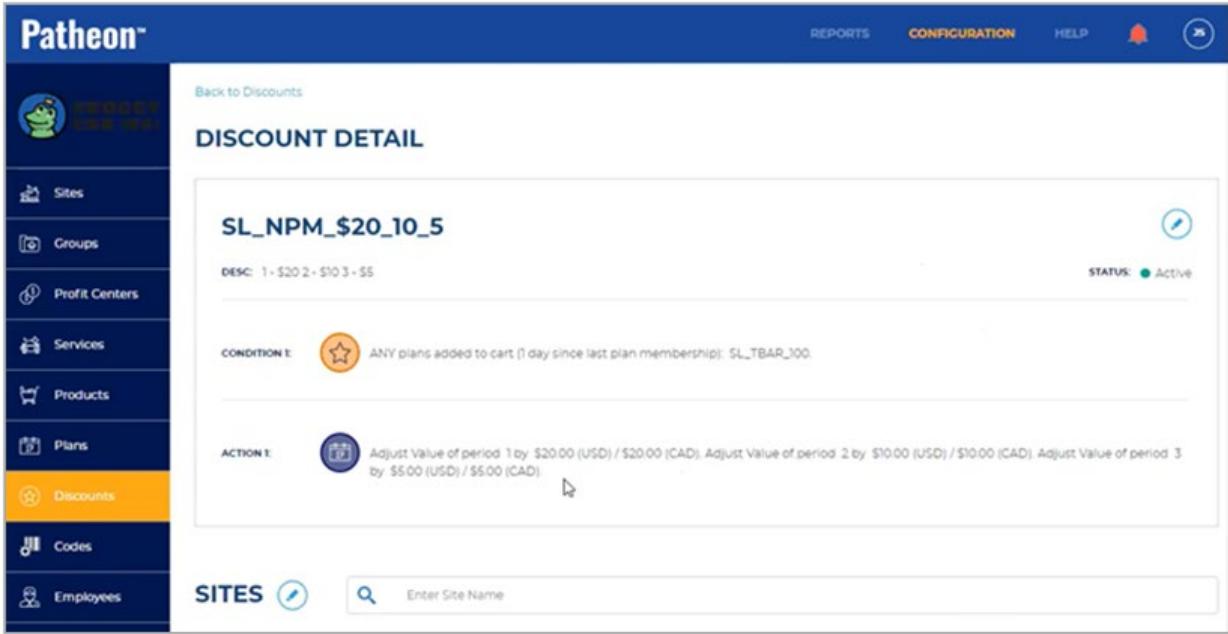
Patheon Essential Web App (EWA) Enhancements

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.

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.

Note: Once a customer has an active plan, the discount wouldn't apply if they attempted to purchase a second plan.
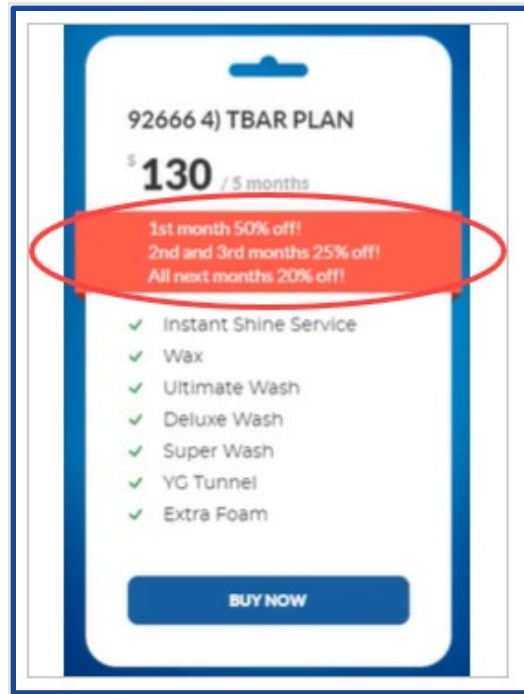
Display Reload Price for an Active Plan

The plan card for an active plan will now display the price of the next plan reload in the Reload Price field.
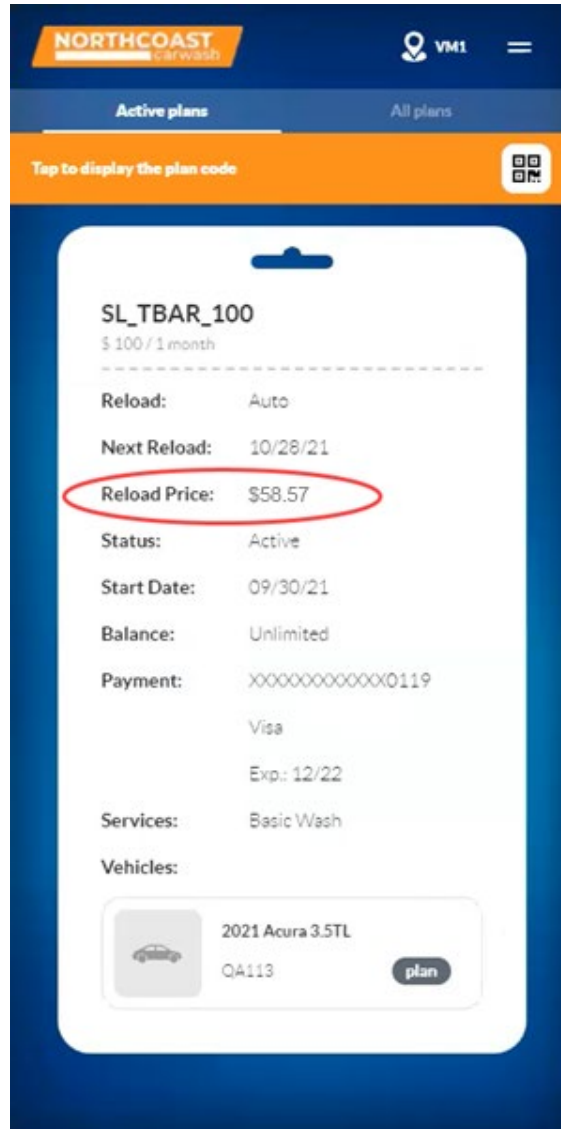
Promotional Text Now Available on Plan Cards

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.
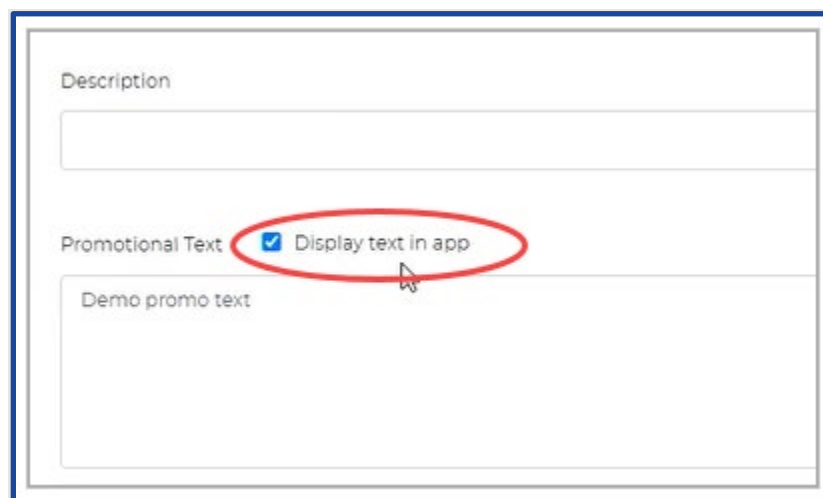
Format Promotional Text in the EWA

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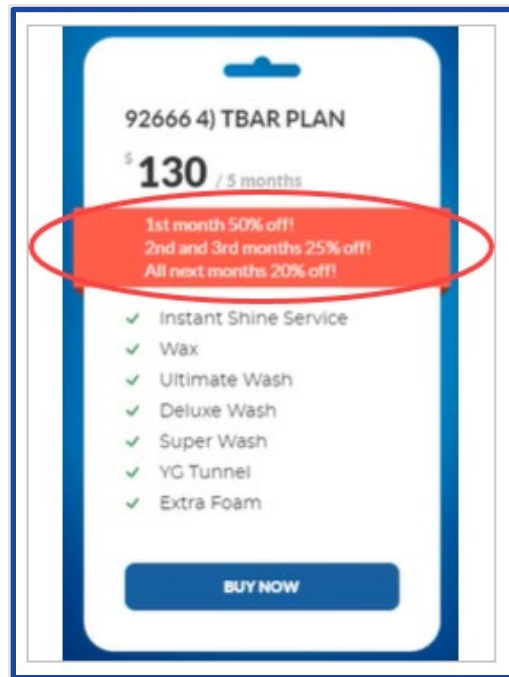
When first entering text into the Promotional Text field, the Display text in app option is selected automatically. This option determines if the text in the Promotional Text field is displayed on the plan card in the EWA for the selected Plan. The field can be toggled on or off per plan.

## 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
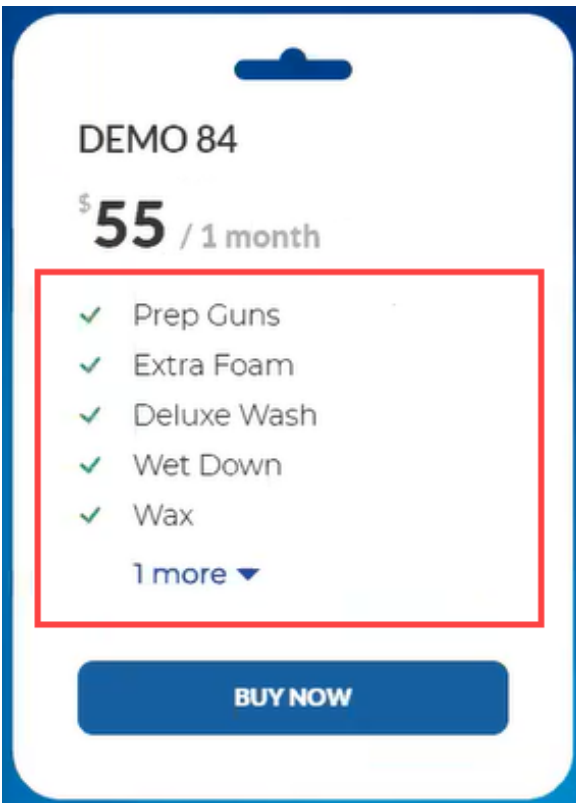
Plan Services on Active Plan Card
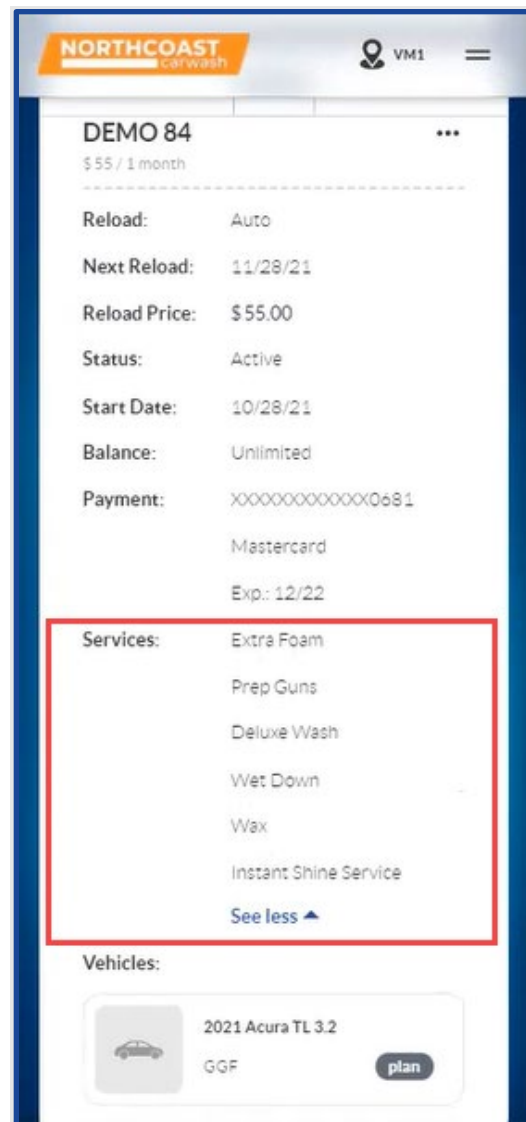
POS – Cashier Enhancement

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.
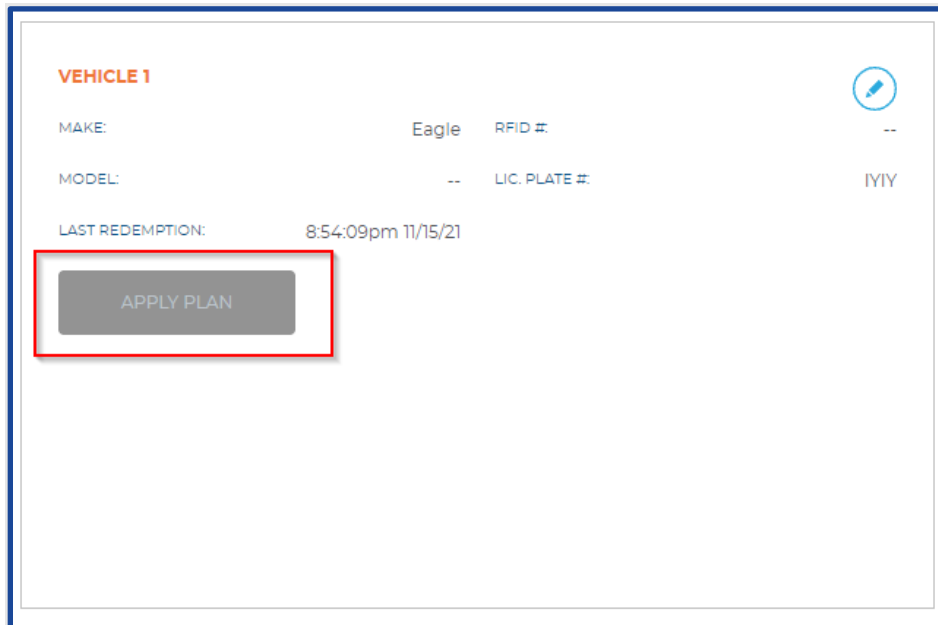
Bridge Serial / SRMB configured for the Appliance:

- 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 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

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.

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.