Patheon® Release 11 Notes

Patheon Release 11 includes the following new features and enhancements. Click on one of the following to get more details on specific highlights of this release:

POS – Terminal Type Setup & Configuration
Customer Note Alerts
Support for WorldPay Tap to Pay
Essential Web App (EWA) Enhancements
WashCAP Enhancements
Wash Plan Subscription Enhancements

If you have any questions about this or past releases, please contact the Knowledge Center at 330.645.3299 or Knowledgecenter@drb.com

POS – Terminal Type Distinction Setup and Configuration

The Office and Lane POS terminal type distinction was created to better separate and route Customer Note Alerts.

Please Note: Upon this release, each existing POS with a Gate attached will be converted to a Lane POS.

Setting up Lane/Office POS

A new Office POS terminal type has been added as an option in the **Type** field for the **SITE HARDWARE** configuration. The Attended POS terminal type has been renamed to Lane POS and the OTT terminal type has been renamed to Tunnel Entrance.
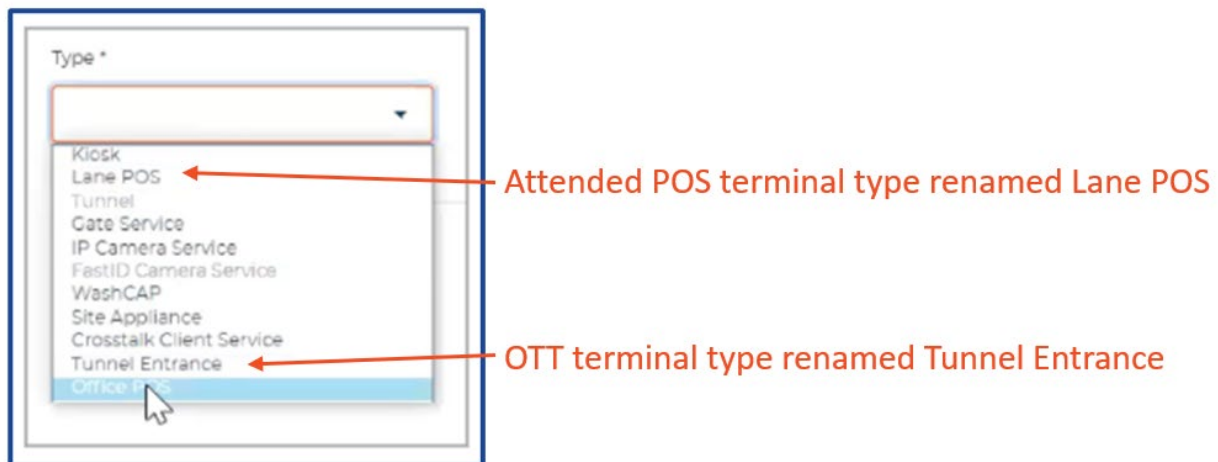
Configure Office POS

The new Office POS terminal type is similar to the previous Attended POS terminal type (renamed to Lane POS) except that it does not have configured gates and it can be used to manage multiple lines from one terminal.

- This terminal type is used for a terminal in the office or an attended cashier terminal that is not in a lane (i.e., in the lobby).

- The following fields are required when Office POS is selected as the terminal type: Name, Hostname or IP Address and Tunnel. In the PERIPHERAL CONFIGURATION section, the available peripherals are the receipt printer/cash drawer, barcode scanner and EMV/card reader.

Configure a Lane POS

The Lane POS terminal type (renamed from Attended POS) operates the same as the previous Attended POS terminal type. The only change has been to the name of the terminal type. This terminal type is used for a terminal in a fully attended lane or semi-attended lane (SAL).

- A main difference between the Lane POS terminal type and the Office POS terminal type is that the Lane POS terminal type must have a configured gate and can only provide services for one line.

- Semi-attended mode is only available on terminals configured with the Lane POS terminal type.

Customer Note Alerts

To ensure wash staff is aware when they need to have an important conversation with a customer, Customer Note Alerts are now available in Patheon.
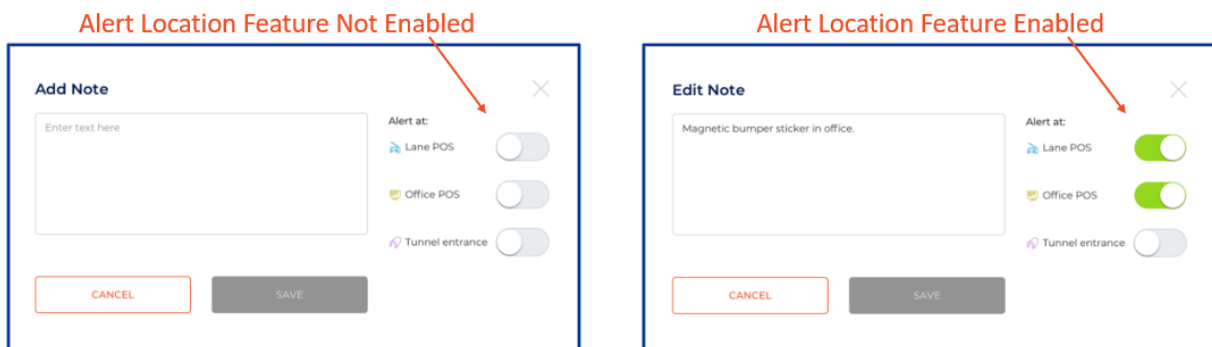
Using Customer Note Alerts

Customer Notes can be **Created**, **Viewed** and **Edited** in both the Patheon Portal and the POS.

When adding a customer note, you can now specify where you want the alert and corresponding note to be delivered. The three alert locations are:

- Lane POS - Lane POS will only show the alert IF the car is in that specific lane

- Office POS - Office POS will show the alert on all office POS's

- Tunnel Entrance – Alerts will show on the Tunnel Entrance (Loader) Terminal

From either the Patheon Portal or the POS, alert locations can be enabled by changing the toggle to ON for the terminal type(s) at which you want the note to appear as an alert.

Existing customer notes can also be edited to change the terminal type alert options associated with that note. It's important to note:

- Any user can change the terminal alert toggles

- However, only the author of the note or a user in a manager role can edit the customer note text.

Alert Types on the Customer View Panel

- If the note is configured to alert at any of the terminal types (toggle set to ON), a corresponding icon appears for that note in the new Alert column in the NOTES section of the CUSTOMER VIEW panel on both Patheon Portal and POS.

- If text is added for the note but no alert type options are selected when the note is saved, the note appears in the list of notes on the CUSTOMER VIEW panel with the value of No in the Alert column.

- The list of notes can be sorted by the Alert column. Notes with the most alert types selected (up to three) appear at the top of the list, followed by those with two alert types, then one alert type, and notes without any alerts set (No) are at the bottom of the list.

Available in both the Patheon Portal and POS, the new **Alert Filter** and **Alert Column** indicates where the notes will appear

- Lane POS
- Office POS
- Tunnel Entrance
- No Alert Type

Customer Notes at Attended POS Terminals

You can configure customer notes to appear on attended terminals and alert the cashier or tunnel loader to information related to the selected customer.

Customer notes that are configured to alert on **Lane POS** or **Office POS** terminals are displayed in a new Notes section on the Apply Plan modal.

Any customer notes associated with the selected customer that are configured to alert on that terminal type will appear on the Apply Plan modal.


- If semi-attended mode is **turned off** at a Lane POS terminal, the Apply Plan modal appears on the terminal automatically when the customer is identified by RFID or LPR.

- If semi-attended mode is **turned on**, a **confirmation pop-up notification** appears instead of the Apply Plan modal, even if the customer has notes configured to alert.

Confirmation pop-up notification
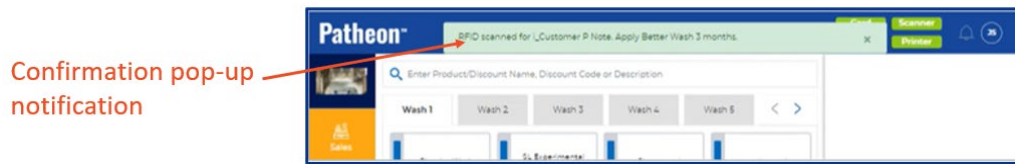
- The Apply Plan modal can be accessed manually on a Lane POS or Office POS terminal by navigating to the CUSTOMER DETAILS panel with a specific customer selected, scrolling down to the Plans section, and selecting the Apply Plan button.

In the Notes section of the Apply Plan modal, a **Keep alert?** toggle exists for each customer note. This toggle is set to **ON by default** and can be switched to OFF.



Keep alert? toggle default is **ON**
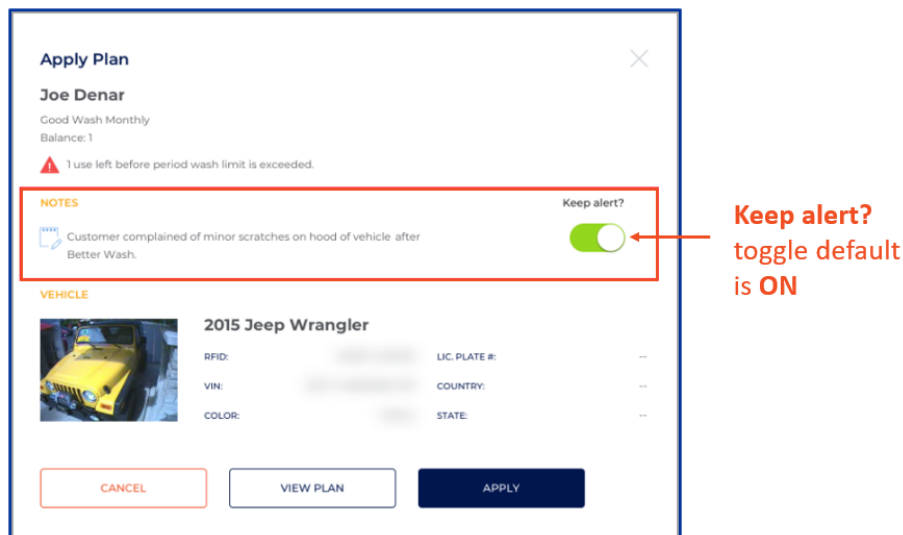
- The **Keep alert?** status of a note is only saved if the **APPLY** button is selected and the displayed plan is applied to the customer.

- If the Apply Plan modal is closed by using the **X** in the top corner of the modal or selecting the **CANCEL** or **VIEW PLAN** buttons, the changes made to any Keep alert? toggle options are not saved.

- In the Notes section of the **Apply Plan** modal, if more information needs to be displayed than space allows, the content of this section can be scrolled.

Customer Notes at Tunnel Entrance Terminals

Customer notes configured to alert on **Tunnel Entrance** terminals are displayed in a new customer notes section. When a vehicle in the queue is selected, this new feature is accessible by selecting the **NOTES** button from the **WASH QUEUE** panel.


Customer Notes on the Wash Queue panel
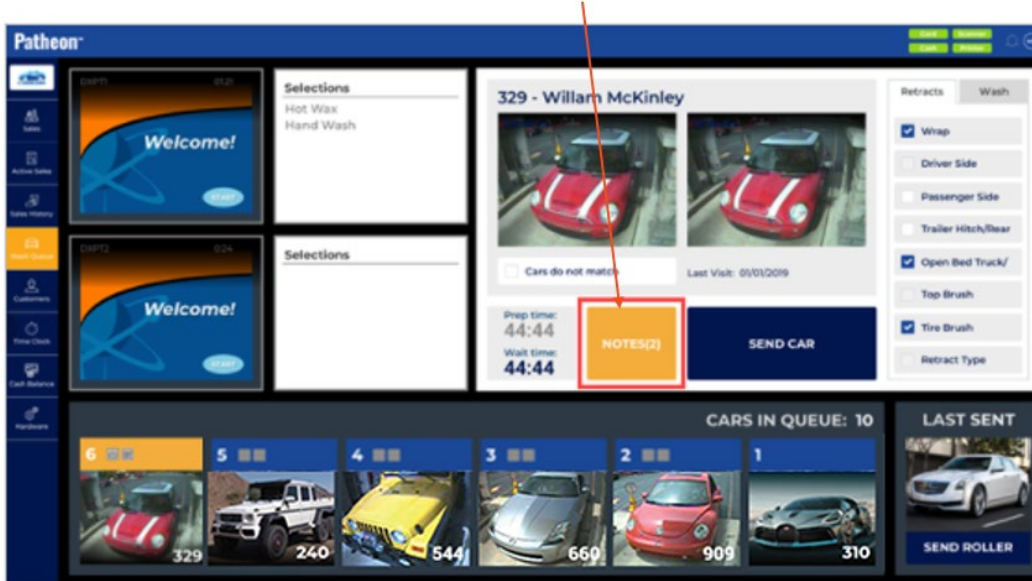
The **NOTES** button also shows how many notes are associated with that vehicle/customer.

- If there is any damage selected for the vehicle this is considered 1 note item in addition to any customer notes for the selected customer.
    - For example, if there is damage selected for the vehicle and there are two customer notes associated with the customer/vehicle, the button label will show as **NOTES(3)**.

- If there are no cars in the queue, the **NOTES** button is disabled.

If **NOTES** are available and the button is selected, a **NOTES** modal will appear.

A **Keep alert?** toggle exists for each customer note. This toggle is set to ON by default and can be switched to OFF.
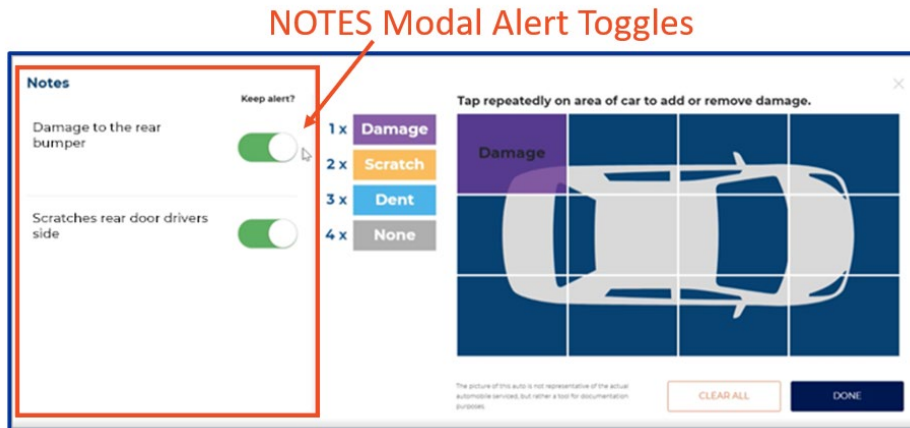
The **Keep alert?** status of a note is only saved if the DONE button is selected.

- If the Notes modal is closed by using the **X** in the top corner of the modal, the changes made to any **Keep alert?** toggle options are not saved.

- Also, the CLEAR ALL button only clears the options selected in the damage section of the modal. The state of the customer note **Keep alert?** toggle remains the same.
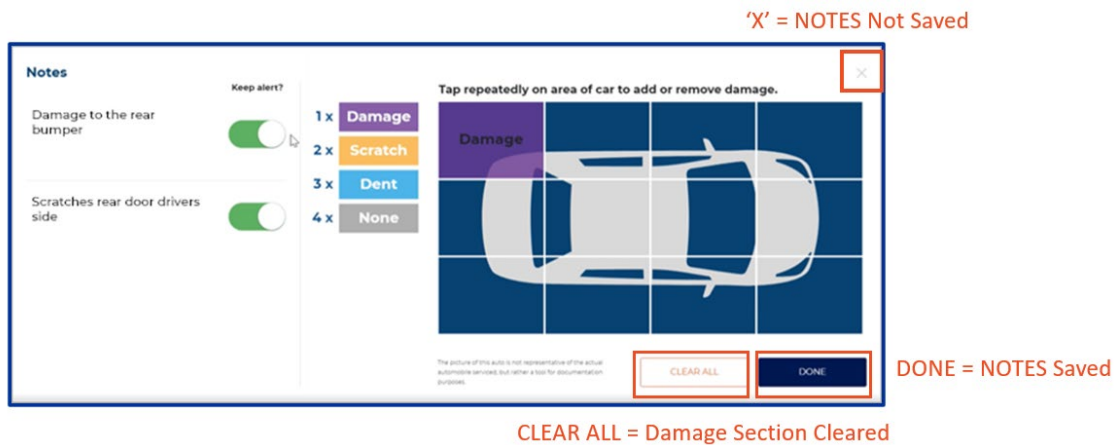
If more information needs to be displayed in the customer notes section of the Notes modal than space allows, the content of this section can be scrolled.

WorldPay Tap to Pay Support

Sites that use WorldPay for card processing can now enable and disable NFC/Mobile Payments on a per terminal basis for both cashier terminals and kiosk terminals.

The functionality is configured in the Patheon Portal Peripheral Configuration section. To make this change:

- Select the EMV/Card Reader setting and

- Switch the **Disabled** button to **Enabled**.
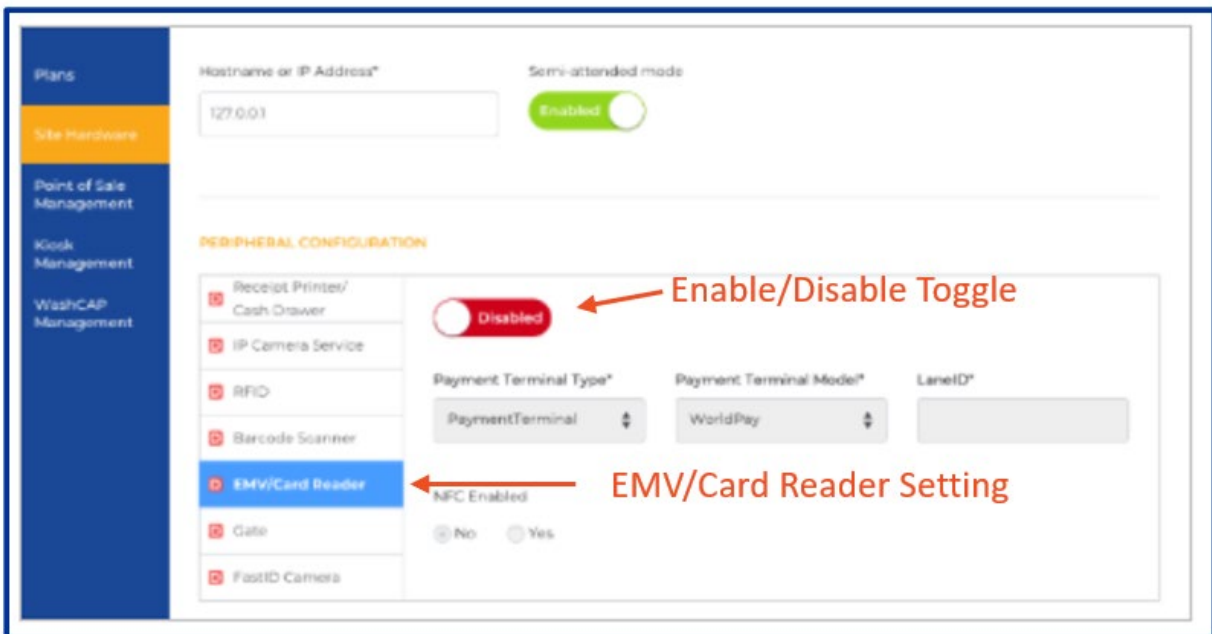
Please Note: NFC/Mobile Payments will work for the initial recurring Plan purchase, but the recharge will fail to process. Instruct consumer to insert their chip for recurring purchases.

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.

Enable Plan Cancellation in the Essential Web App (EWA)

Sites have the flexibility to decide if they want to allow their users to cancel plans using the Plan Cancellation option in the EWA or require users to call in or visit the site to cancel their plan.

The **Allow plan cancellation through app** option is found in the Patheon Portal (Customization>E-commerce>Plan Management).

This option is selected by default and is only visible if the E-Commerce feature is enabled for the client.
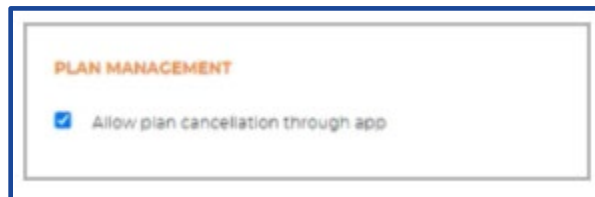
Please Note: Upon this release, the **Allow plan cancellation through app** option will be enabled for each E-Commerce feature enabled site. Sites that do not want to give consumers the ability to cancel plans through the EWA will need to disable this option.
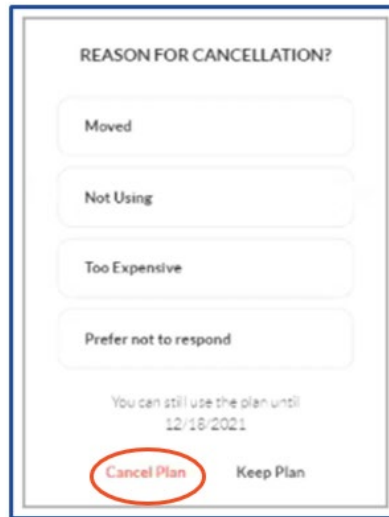
Cancel an Active Plan From the EWA

Consumers can now cancel an active time-based automatic reload plan through the EWA.

To do this, they would first navigate to an active plan card. Then they would select the three dots in the top right corner to open the plan card menu and select the **Cancel Plan** option.
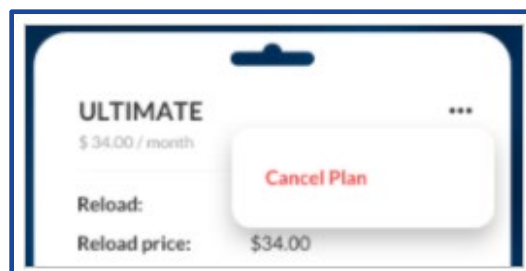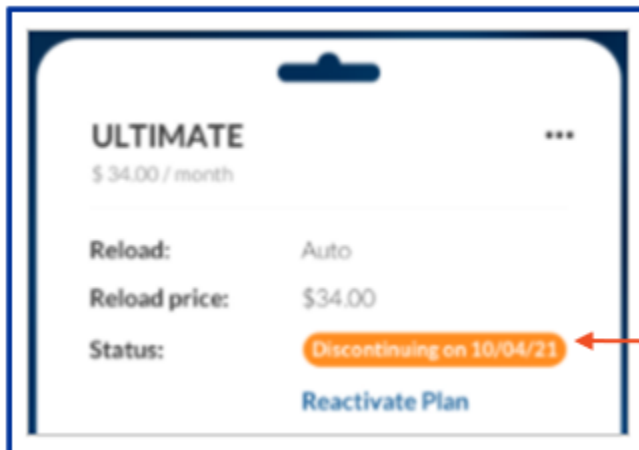
After selecting **Cancel Plan**, four options are presented in the **Reason for Cancellation** modal. Select one of the options and then select **Cancel Plan**, or simply select **Cancel Plan**; selecting a reason is optional.

If **Keep Plan** is selected instead of Cancel Plan, the **Reason for Cancellation** modal closes, and the plan is not canceled.

If **Cancel Plan** is selected, the plan status changes to Discontinuing, and the plan can be used until the date displayed on the EWA.

While in **Discontinuing** status, the Plan can be used until the date displayed.

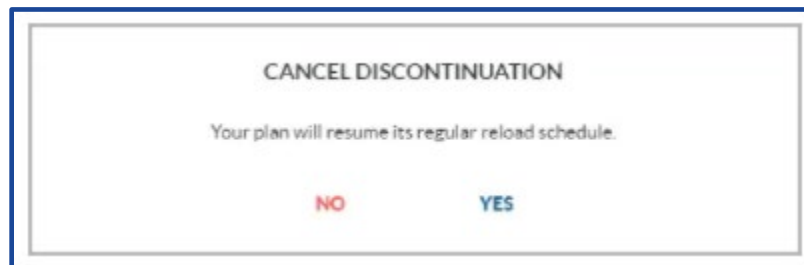## Reactivate a Plan in the Discontinuing Status

If a customer changes their mind, they can easily **Reactivate** their plan while it is in the Discontinuing status.

The **Reactivate Plan** option is available in two places:

- Directly under the Discontinuing status indicator on the active plan card and

- In the plan card menu, which is visible in the top right corner of the active plan card when the three dots are selected.
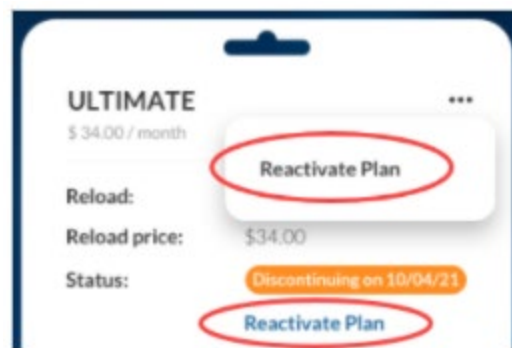

After selecting **Reactivate Plan**, a confirmation modal appears.

Select **YES** to reactive the plan and change the status to Active; select **NO** to keep the plan in a Discontinuing status.

POS – Wash Codes at Pump (WashCAP)

Wash staff can now manually enter a customer's wash code so the customer can redeem the code/service.

To accomplish this, site staff should open the standard code entry modal, enter the code, and select the **BARCODE** function.
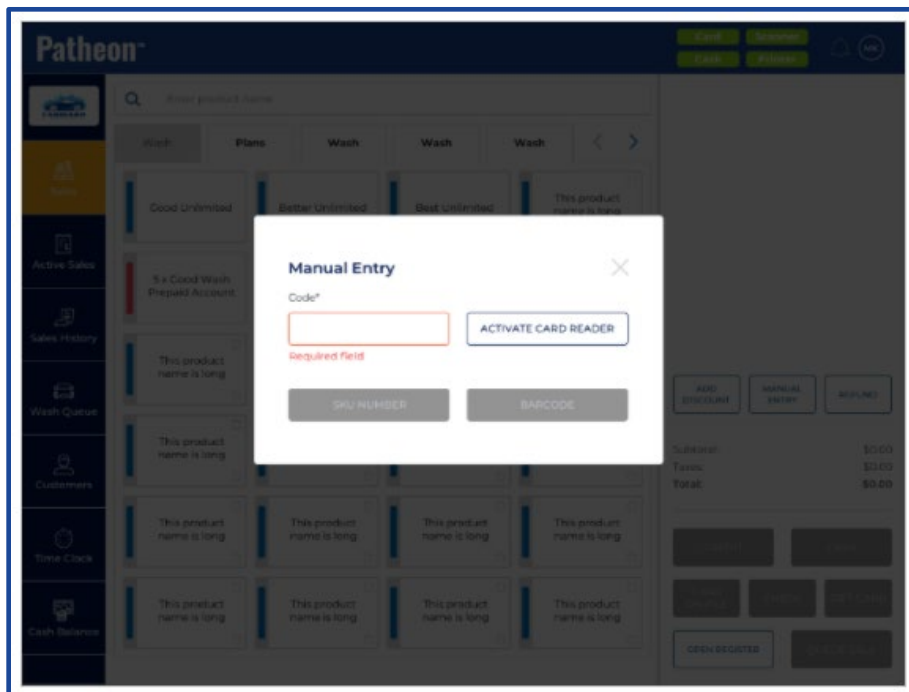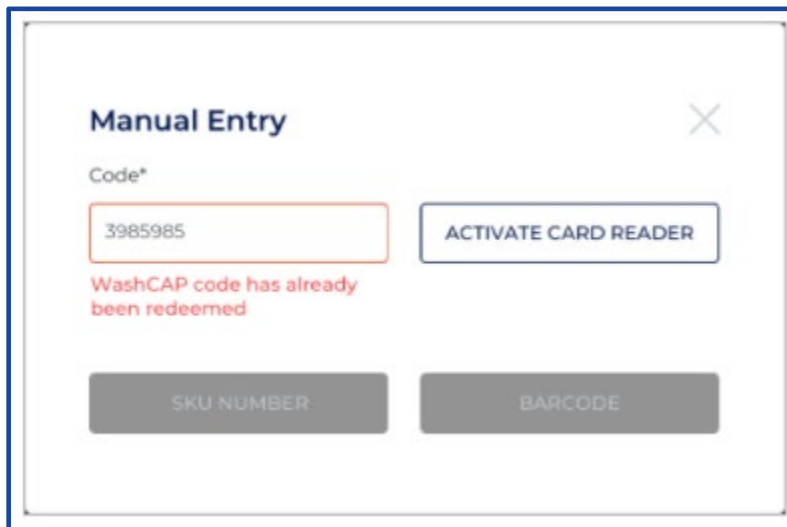

The system then searches for any match, including wash codes. If the wash code is valid and unused, the corresponding service name(s) are displayed and the attendant can confirm redemption by selecting **APPLY.**
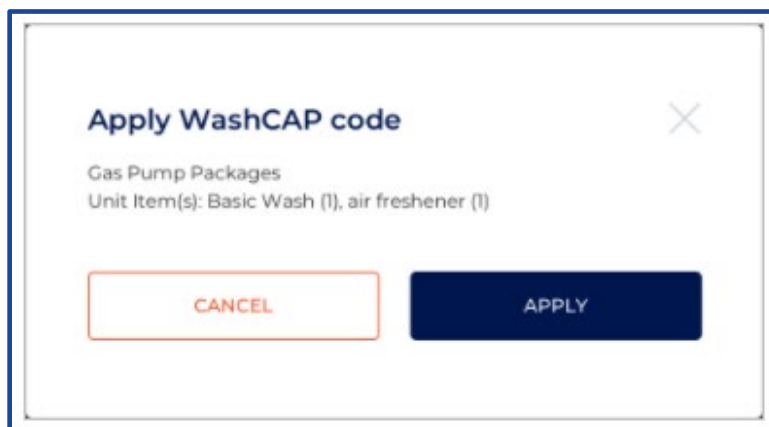
If the wash code was previously used, expired, not found or not unique, a corresponding message is displayed:

- WashCAP code has already been redeemed: Code is valid, but was redeemed in a previous sale.

- WashCAP code has expired: Code is valid, but has expired.

- No matching barcode found. Please try again: Code could not be found.

- The 'Code' box outline turns red, no message is displayed: Code is not unique and matches other codes.

Wash Plan Subscription Enhancements

Status Column Added to Automatic Reload Tab on Sales History Panel

Cashiers can easily determine whether a customer's plan renewal transaction failed or succeeded by using the new Status column visible on the Automatic Reloads tab on the **SALES HISTORY** panel on cashier terminals.

There are two values that can appear in this column:

- **Abandoned:** The renewal transaction failed.

- **Reloaded:** The renewal transaction succeeded.

The Advanced filter function also includes the ability to filter the list of sales by status:

- **None:** Display all reload transactions. Default value.

- **Successful**: Display only Reloaded reload transactions.

- **Failed:** Display only Abandoned reload transactions.

Proration of Wash Plan Subscriptions Sold at the End of a Month is Eliminated

Wash plan subscriptions sold on the 29th, 30th or 31st day of a month are now recorded on those days and are no longer pro-rated.

All reloads after the initial purchase will be billed on the 28th of every month.