Patheon® Release 13 Notes

Patheon Release 13 includes the following new features and enhancements. Click on one of the following to get more details on specific highlights of this release:

- Portal
  - Non-Member Customer Record Tracking Enabled
  - Introduction of Customer Segments
  - Additional "Show inactive" Toggles Now Available
- POS
  - Customer Note Alert Enhancements
  - View Details and Print Receipts for Automatic Wash Plan Renewals
  - House Account Enhancements

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

Portal

Patheon's Portal allows you to configure and manage your car wash technology platform anytime, from anywhere.

Non-Member Customer Record Tracking Enabled

Identifying every vehicle that comes to your site, not just plan members, is fundamental to increasing your bottom line. Using License Plate Recognition (LPR), Patheon now creates and tracks **Non-Member Customer Records.**

Non-Member Customer Records are identified in Patheon as **Non-Members.** If the customer later decides to sign up for a plan, their **Non-Member** record is associated with their new plan and they become a **Member.**

Additionally with **Non-Member Customer Record** Tracking:

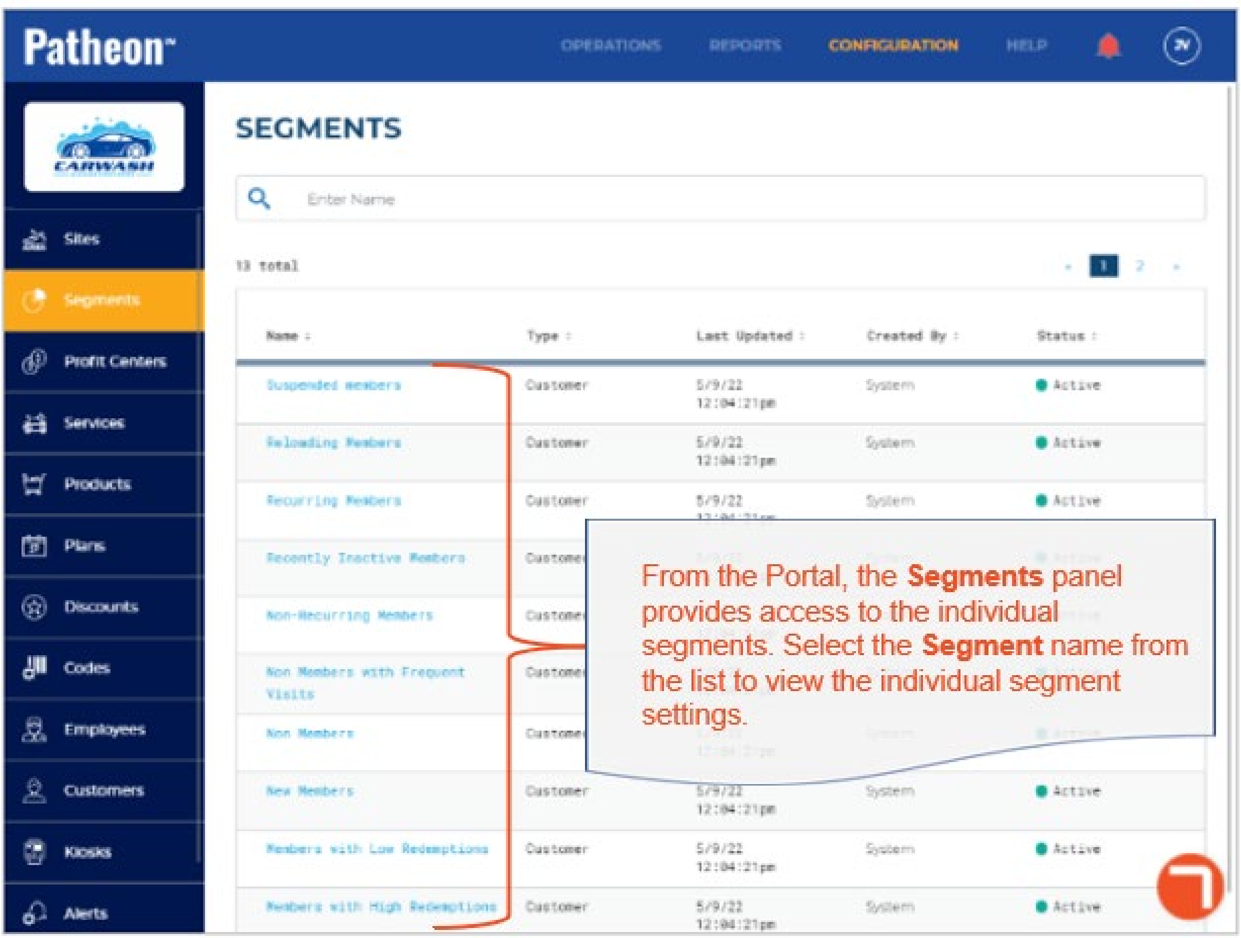
- Patheon users can view and sort **Non-Member** customers from both a cashier terminal and the Patheon Portal
- Retracts for **Non-Member** vehicles will be saved for future visits using LPR
- Notes and Alerts for **Non-Members** can be created, viewed and edited for future visits.

Introduction of Customer Segments

Customer Segments are the foundation for controlling the customer journey and doing more with your car wash data.

Segments provide a deeper understanding of existing car wash customers, both with and without plan memberships. **Segments** allow you to see your customers at a more granular level.

Accessed from the Portal, the **Segments** panel provides a place to view information for existing customers. You can view an individual segment's settings in the **Segment Settings** panel by selecting its name from the list.



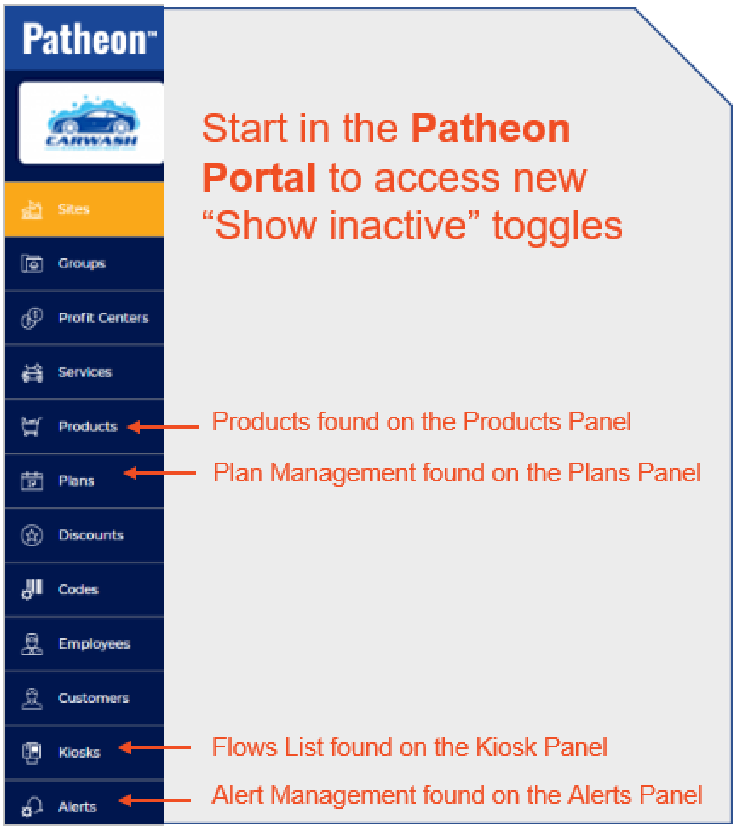
Over the next few releases, **Segments** will be enhanced with the ability to export customer lists and the introduction of a custom segment builder.

The initial pre-defined **Segments** are:

- Active Members
  - All customers who belong to a plan that has an Active status
- Discontinuing Members
  - All customers who belong to a plan that has a Discontinuing status
- Inactive Members (All Non-Active Members)
  - All customers who don't currently belong to a plan but belonged to one more than 90 days ago
- Members with High Redemptions
  - All customers who belong to a plan that have five or more plan redemptions within the last 30 days
- Members with Low Redemptions
  - All customers who belong to a plan that have two or less redemptions within the last 30 days
- Non-Members
  - All customers who have never belonged to a plan
- New Members
  - All customers who belong to a plan that was purchased within the last 90 days and has an Active status
- Non-Members with Frequent Visits
  - All customers who have never belonged to a plan but have visited three or more times within the last 30 days
- Non-Recurring Members
  - All customers who belong to a manual renew plan that has an Active status
- Recently Inactive Members
  - All customers who belong to a plan that changed to an Inactive status within the last 90 days
- Recurring Members
  - All customers who belong to a plan that has an Active status, and that has automatically renewed one or more times
- Reloading Members
  - All customers who belong to a plan that has a Reloading status
- Suspended Members
  - All customers who belong to a plan that has a Suspended status

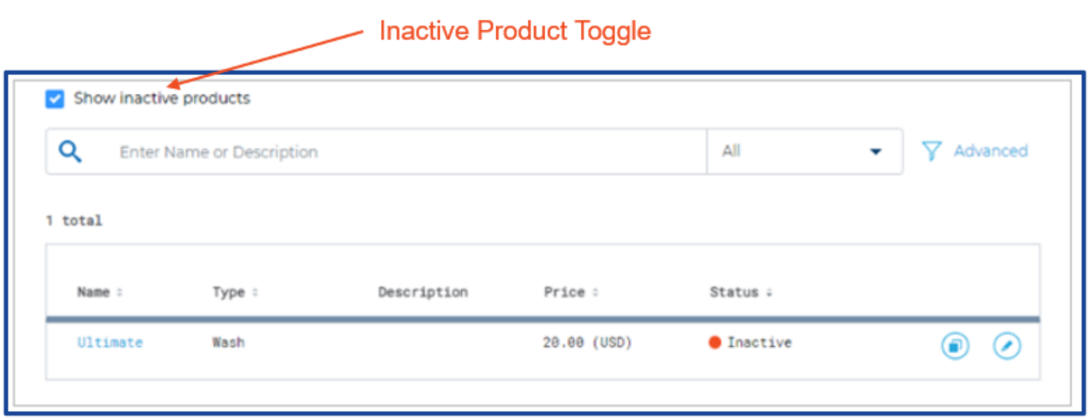
Additional "Show inactive" toggles are now available

To streamline the user interface, a "Show inactive" toggle has been added to the **Plan Management**, **Products**, **Flows List** and **Alert Management** panels accessed in the Portal.



By default, each list displays items with an **Active** status.

On each panel, the **"Show inactive"** toggle can be found directly above the search bar. To display only inactive items, select the **"Show inactive"** toggle.



POS

Patheon's POS application allows washers to process attended and unattended sales, review sales history, manage customers and manage the wash queue.

Customer Note Alert Enhancements

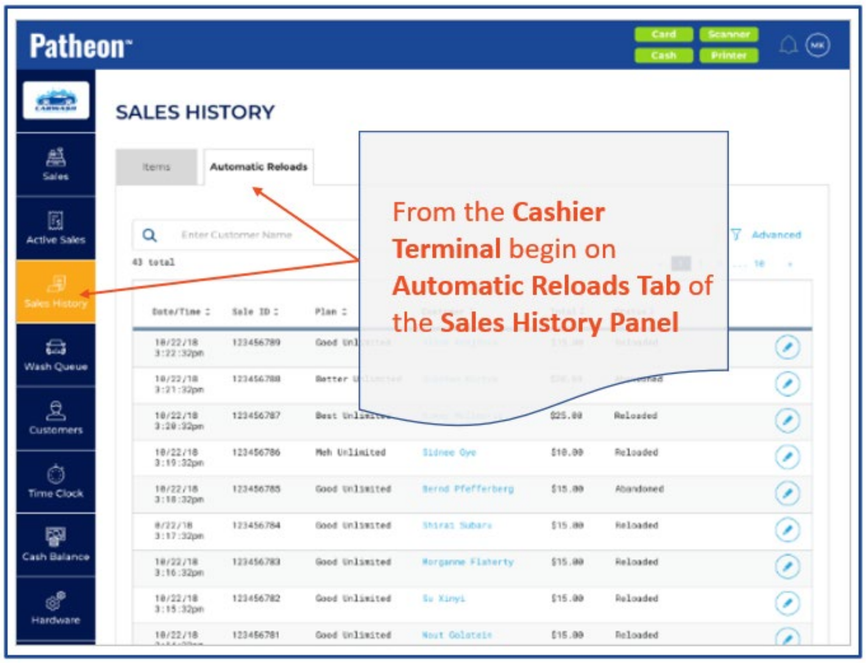
Customer Notes that are configured to alert on Tunnel Entrance terminals can now also be viewed from the Wash Queue panel on a Lane POS or Office POS terminal.

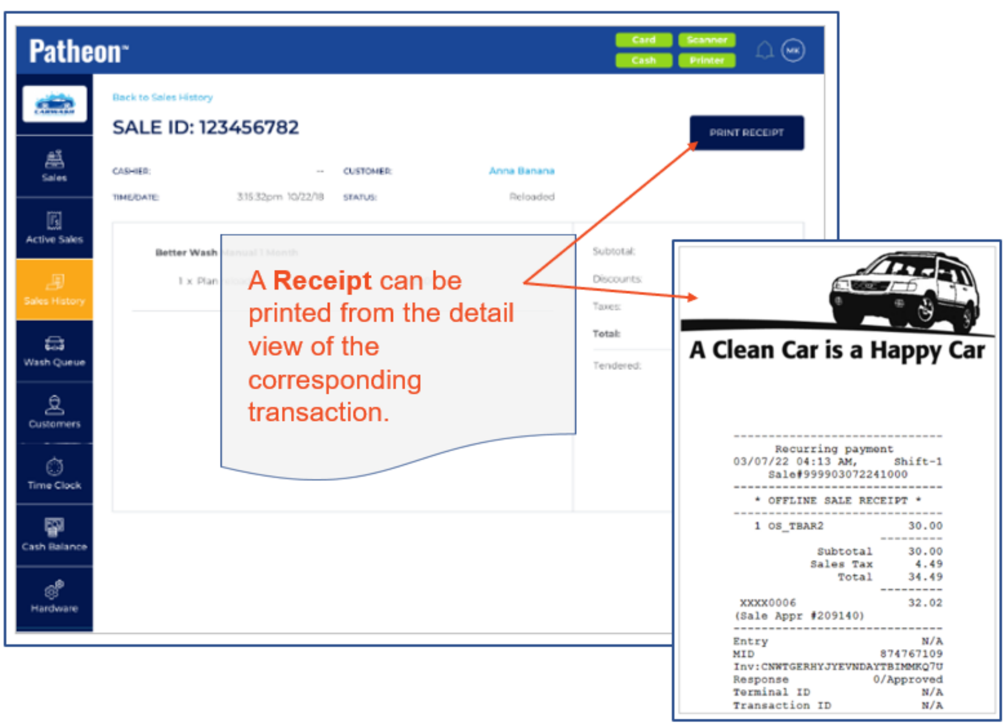
To ensure all wash staff members are aware of notes set to alert for a particular customer, a new **Customer Note (CN) Badge** is visible on the Wash Queue panel.

The badge is visible on the Wash Queue panel from both the Tunnel Entrance terminal and the Lane/Office POS terminal.

Enable View Details and Print Receipts for Automatic Wash Plan Renewals

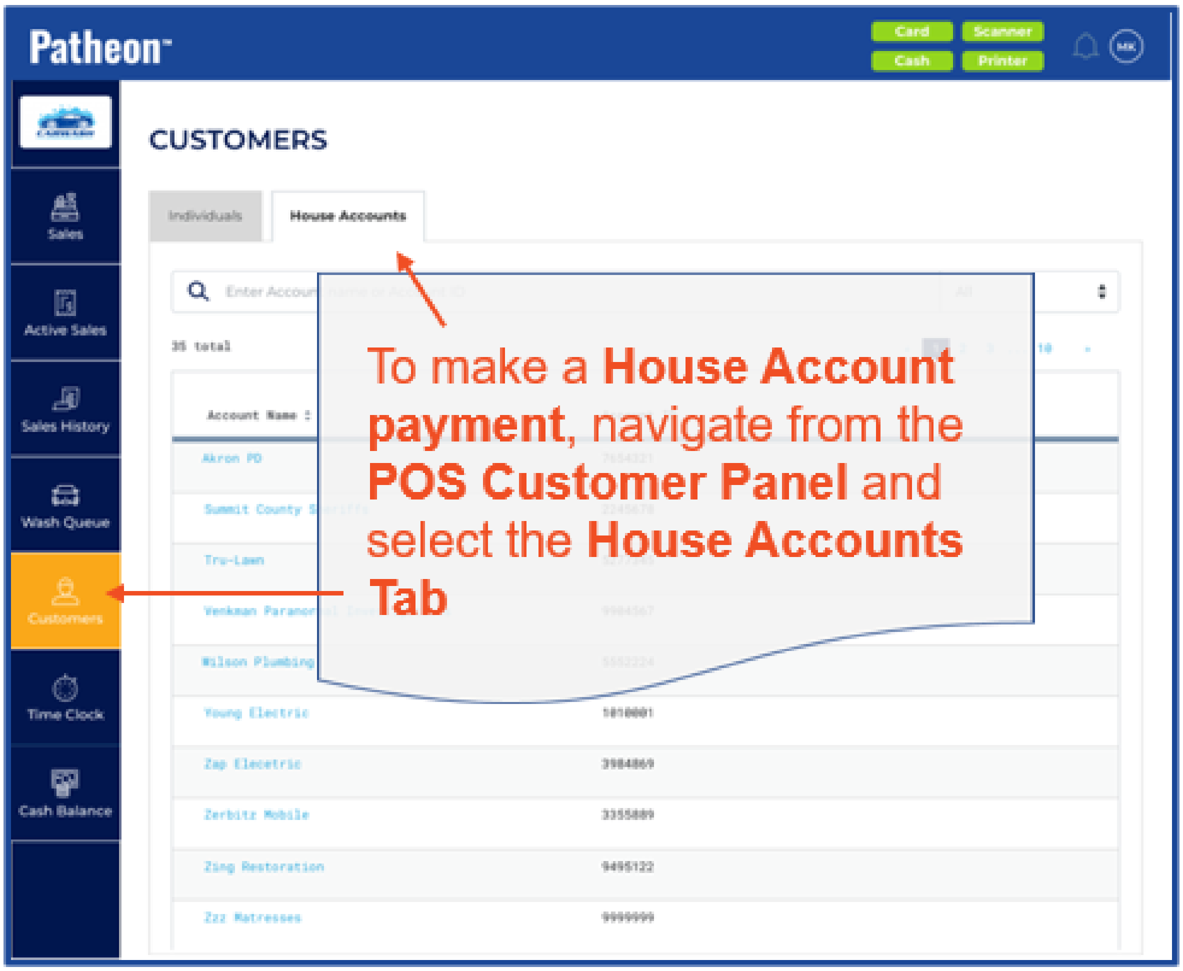
Site staff can now **view the details** and **print a receipt** of a customer's wash plan automatic renewal transaction from the **Sales History** panel on a cashier terminal.





House Account Enhancements

When a cashier applies a house account payment in the POS, the house account's current balance is now displayed in the cart.



Select the desired house account and open the Contact Details. Then select the Pay Balance button. A sale with the current house account balance is created and payment can be tendered.