



# Patheon® Release 13 Notes

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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

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## POS

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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)



## 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.

The screenshot displays the Patheon web portal interface. The top navigation bar includes 'OPERATIONS', 'REPORTS', 'CONFIGURATION', and 'HELP'. The left sidebar contains various menu items, with 'Segments' highlighted in orange. The main content area is titled 'SEGMENTS' and shows a search bar with the text 'Enter Name'. Below the search bar, it indicates '13 total' segments. A table lists the segments with columns for Name, Type, Last Updated, Created By, and Status. The segments listed are:

Name	Type	Last Updated	Created By	Status
Suspended members	Customer	5/9/22 12:04:21pm	System	Active
Reloading Members	Customer	5/9/22 12:04:21pm	System	Active
Recurring Members	Customer	5/9/22 12:04:21pm	System	Active
Recently Inactive Members	Customer	5/9/22 12:04:21pm	System	Active
Non-Recurring Members	Customer	5/9/22 12:04:21pm	System	Active
Non Members with Frequent Visits	Customer	5/9/22 12:04:21pm	System	Active
Non Members	Customer	5/9/22 12:04:21pm	System	Active
New Members	Customer	5/9/22 12:04:21pm	System	Active
Members with Low Redemptions	Customer	5/9/22 12:04:21pm	System	Active
Members with High Redemptions	Customer	5/9/22 12:04:21pm	System	Active

A callout box with a white background and a red border contains the text: 'From the Portal, the **Segments** panel provides access to the individual segments. Select the **Segment** name from the list to view the individual segment settings.'

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

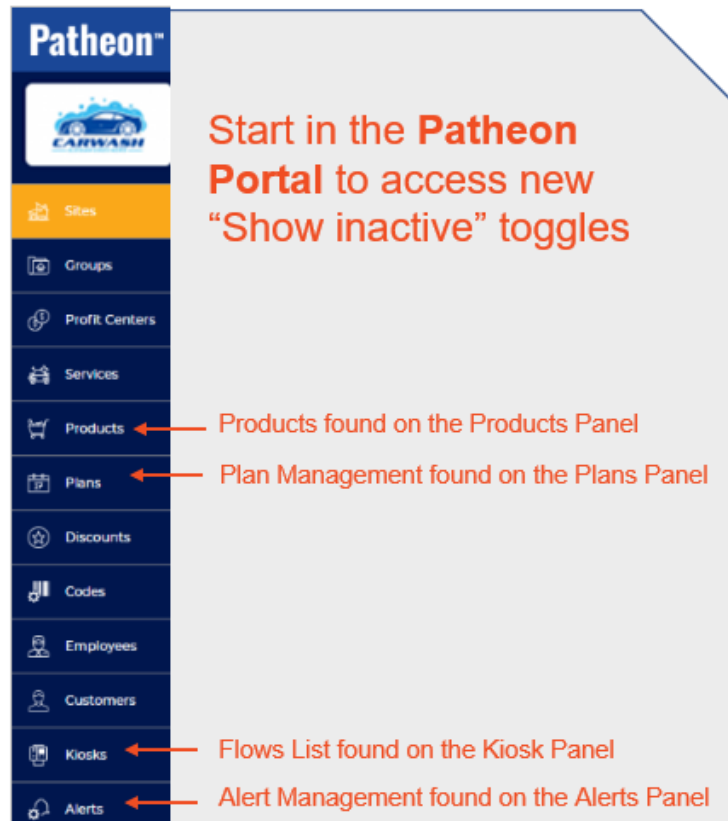


The initial pre-defined **Segments** are:

- 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.

**Customer Note (CN) Badges** are 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.

**From the Cashier Terminal begin on Automatic Reloads Tab of the Sales History Panel**

Date/Time	Sale ID	Plan	Customer Name	Amount	Status
18/22/18 3:22:32pm	123456789	Good Unlimited	Anna Banana	\$15.00	Reloaded
18/22/18 3:21:32pm	123456788	Better Wash	Anna Banana	\$25.00	Reloaded
18/22/18 3:20:32pm	123456787	Best Unlimited	Anna Banana	\$25.00	Reloaded
18/22/18 3:19:32pm	123456786	Meh Unlimited	Sidnee Oye	\$10.00	Reloaded
18/22/18 3:18:32pm	123456785	Good Unlimited	Bernd Pfefferberg	\$15.00	Abandoned
8/22/18 3:17:32pm	123456784	Good Unlimited	Shiraz Subaru	\$15.00	Reloaded
18/22/18 3:16:32pm	123456783	Good Unlimited	Morganne Fisherty	\$15.00	Reloaded
18/22/18 3:15:32pm	123456782	Good Unlimited	Su Xinyi	\$15.00	Reloaded
18/22/18 3:14:32pm	123456781	Good Unlimited	Nout Galatain	\$15.00	Reloaded

**A Receipt can be printed from the detail view of the corresponding transaction.**

**PRINT RECEIPT**

**A Clean Car is a Happy Car**

Recurring payment  
03/07/22 04:13 AM, Shift-1  
Sale#599903072241000

\* OFFLINE SALE RECEIPT \*

1 08\_TBAR2 30.00

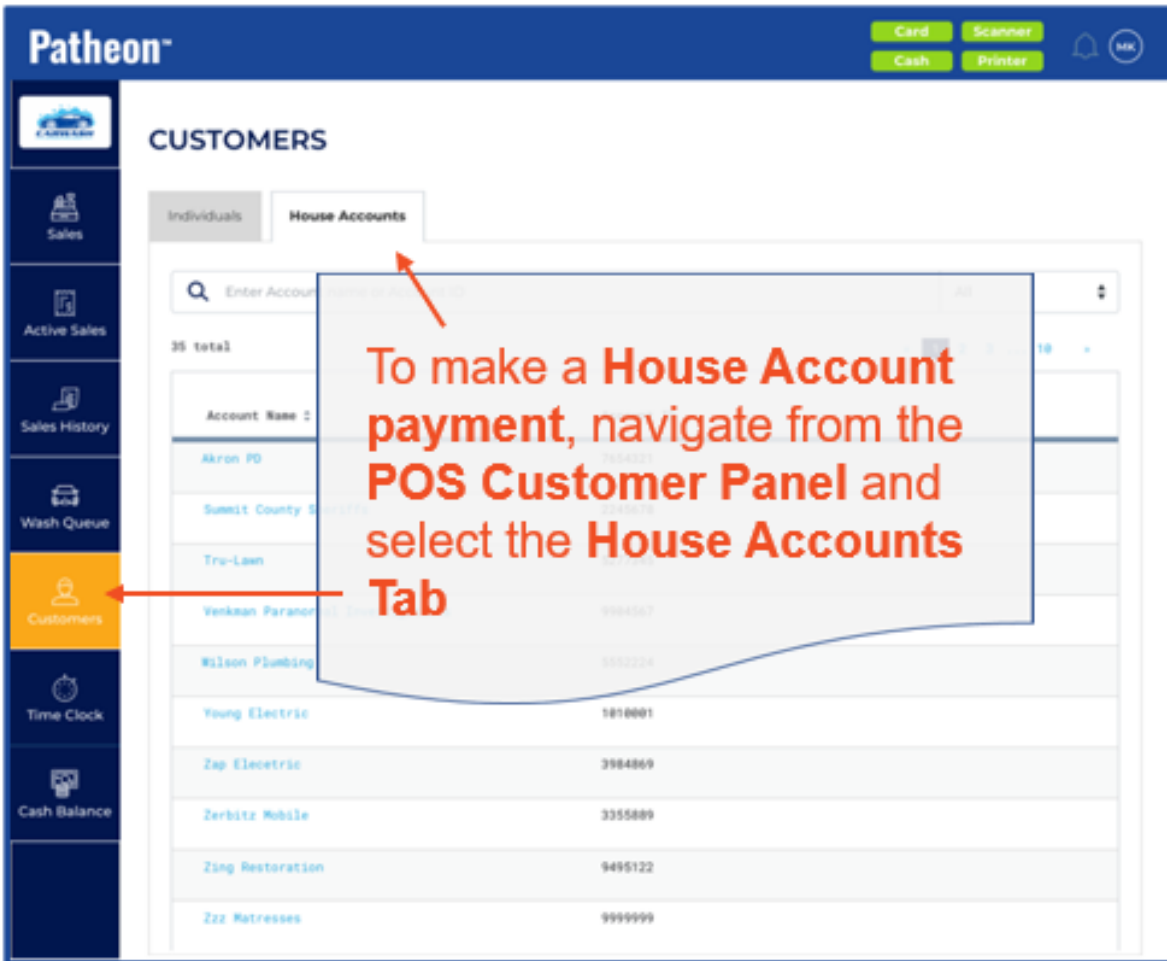
Subtotal 30.00  
Sales Tax 4.49  
Total 34.49

XXXX0006 32.02  
(Sale Appr #209140)

Entry N/A  
MID 874767109  
Invc:CNWGERHYJYEVNDAYTBIMMG7U  
Response 0/Approved  
Terminal ID N/A  
Transaction ID N/A

## 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.

