Patheon® Release 14 Notes

Patheon Release 14 includes the following new features and enhancements. Click on one of the following to get more details on specific highlights of this release:
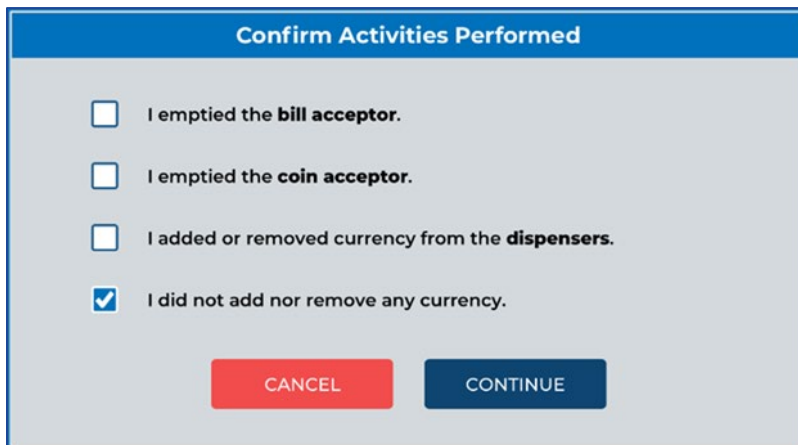
If you have any questions about this or past releases, please contact the Knowledge Center at 330.645.3299 or Knowledgecenter@drb.com

Cashier & Kiosk Cash Management Process Change

The Cash Management Process was updated to allow site managers to reconcile/update ending balance figures at a later date for cash drawers from cashier terminals and kiosk terminal acceptors and dispensers.

Please Note: When accessing the vault in the kiosk, you will now be presented with a Confirm Activities Performed dialog. These options track the activities taken with the currency in the vault.

An overview video of the new process can be found **here**

Gate Monitoring and Alerts

Gate and loop activity is monitored and alerts are sent when unexpected behavior occurs.

The following gate and loop alerts are sent to attended POS terminals and Patheon Portal as toast notification messages.

Alert Message	Applies To	Description
<Application Name (e.g., KSK1)> Gate Arm Stuck Closed	Kiosk SAL/Attended	The application sent a GateOpen command but no gate open event is received within 30 seconds. The timing is set on the transition from the Pull Forward screen OR SAL/Attended terminal command to OpenGate (excludes Diagnostics) and is cleared when a Gate Up event is received.
<Application Name (e.g., KSK1)> Gate Arm Stuck Open	Kiosk SAL/Attended	The gate is Open for more than 30 seconds. The timing is set when the Gate Up event is received and is cleared when the Gate Down event is received.
<Application Name (e.g., KSK1)> Gate Health Deterioration, Reset Suggested	Kiosk SAL/Attended	Gate hardware errors that do not take the device down will alert when there are <= 5 or more failures within the same calendar day.
<Application Name (e.g., KSK1)> Gate Opened or Closed Manually	Kiosk SAL/Attended	Gate is opened or closed manually (turning the key on the gate or web interface that is not via Patheon). This is set when a Gate Up or Gate Down event is received but no Gate Command sent within the last 120 seconds.
<Application Name (e.g., KSK1)> has been in use for extended time. Does Customer require help?	Kiosk	The Prox loop(s) have remained blocked for more than 120 seconds and the current consumer (kiosk lane) is not on the "PleaseWaitForGate" screen. The timing is set when the Proximity Loop Blocks and is cleared when Proximity Loop Unblocks or PleaseWaitForGate screen is displayed.
<Application Name (e.g., KSK1)> in use but FastID did not capture. Check FastID Loop	Kiosk	License Plate Recognition (LPR) is configured and there is a transition from Idle to Welcome, but the LPR loop didn't trigger.
<Application Name (e.g., KSK1)> in use but vehicle not detected. Check Presence Loop.	Kiosk	Prox loop didn't trigger, but there is a transition from Idle to Welcome (indicating a customer has pulled up).
<Application Name (e.g., KSK1)> Merge Loop Stuck Blocked	Kiosk SAL/Attended	The Merge loop(s) remain blocked for more than 120 seconds. The timing is set when Merge Loop Blocks and is cleared when Merge Loop Unblocks. Note: Only 1 merge loop should be blocked at a time to avoid collisions. Other gates will not open so long as any merge loop is blocked. Even in a 4-lane wash that is backed up, a merge loop block at any kiosk should be as long as it takes a single car to enter the wash.

XPT Performance Enhancements

We made backend enhancements to improve kiosk screen responsiveness and performance.

Introduction of Employee Security Codes

Employee security codes, in both barcode and magstripe formats, can now be generated, managed and used with employee cards.

Generating Employee Security Codes

Accessible from the Patheon Portal, the **Employee Security Codes** panel lists all previously generated employee security code batches and allows them to be downloaded as a CSV file.

The **Employee Security Codes** panel also provides access to the **Employee Security Code Generation** panel, which is used to configure and generate new employee security code batches.

From the Employee Security Code panel select the **Generate Codes** button to open the **Employee Security Code Generation** panel.

Employee Security Code Generation Panel

The ability to generate codes is only enabled for users with permissions to generate codes. If a user doesn't have permission, the function is disabled (gray).

The **Generate Codes** button at the bottom of the panel is inactive until all required fields are configured.

- Selecting the **Generate Codes** button starts the security codes batch generation process using the configured settings.
- Selecting the **Cancel** button immediately abandons security code generation and displays the **Security Codes** panel.

The information required to generate employee security codes includes **Name, Quantity, Code Length** and **Code Character Set**.

Employee Security Code Creation Requirement	Parameters
Name: The name for the security code batch	Maximum character length is 100
Quantity: The number of security codes that will be generated for each batch	Enter a value from 1-99,999 Maximum value is 99999
Security Code Length: The number of characters that make up each security code for the batch	Security code lengths can be 6-16 characters long. Select one of the 11 lengths from the drop-down. Note: The most recent value applied for employee code is selected by default.
Security Code Character Set: The character types that will comprise the security codes.	Select one of the three types from the drop-down: **Numeric:** Each security code in the batch will only consist of numbers, 0-9. **UppercaseAlpha:** Each security code in the batch will only consist of uppercase letter characters A-Z. **UppercaseAlphaNumeric:** Each security code in the batch will consist of a mix of uppercase letter characters, A-Z, and numbers, 0-9. Note: The most recent value used to generate a security code batch is selected by default.

Upon selecting the **Generate Codes** button, the **Security Codes** panel is immediately displayed and an animated processing icon appears in the right column while the security code batch is generated.

Security Codes Panel with Processing Icon

Animated processing icon is replaced with a download icon when the security code batch is done generating
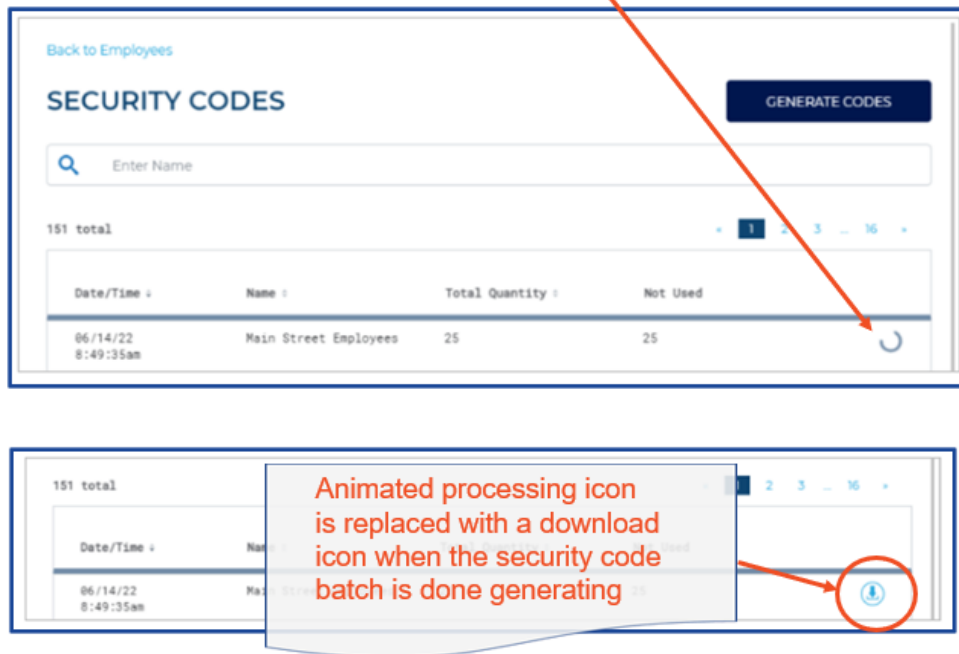
Downloading Employee Security Code Files

Employee security codes are downloaded as a CSV file. To begin the download process, select the "Download" icon in the corresponding row.

Employee security code files have a file name format of **Name-ENNNNN.csv**.

- **Name**: Batch name
- **E**: Barcode type identifier (Security)
- **NNNNN**: Number of security codes in the batch
- **csv**: File extension for comma-separated values files

Employee Security Code File Contents

Each Employee Security Code CSV file contains four data components: a barcode instance of the code, a magnetic stripe instance of the code, the raw code and whether the code is assigned to an employee.

Data Component	Explanation
Barcode Instance	Each employee security barcode in the file uses the following format: **$ECCCCCCCCCCCCCCC** **$:** Constant that identifies the code as barcode data **E:** Constant that identifies the code as an employee security code **CCCCCCCCCCCCCCC**: The raw employee security code
Magnetic Stripe Instance	Each employee security code is provided in the following magnetic stripe format: **DECCCCCCCCCCCCCCC** **D**: Constant that identifies the code as magnetic stripe data **E**: Constant that identifies the code as an employee security code **CCCCCCCCCCCCCCC**: The raw employee security code
Raw Code Instance	Each employee security code is provided in raw code format **CCCCCCCCCCCCCCC**: The raw employee security code
Use Status	Indicates whether the corresponding employee security code is assigned to an employee. **IN USE**: Code is assigned to an employee **NOT IN USE**: Code is not assigned to an employee

Examples of an opened employee security code CSV file in both a text editor application and a third-party spreadsheet application
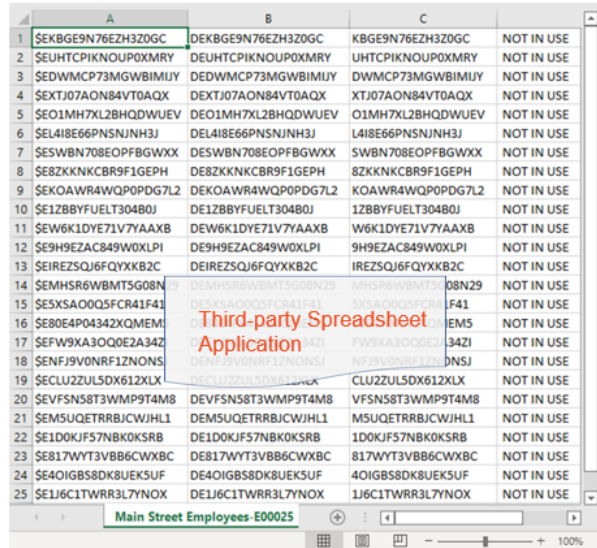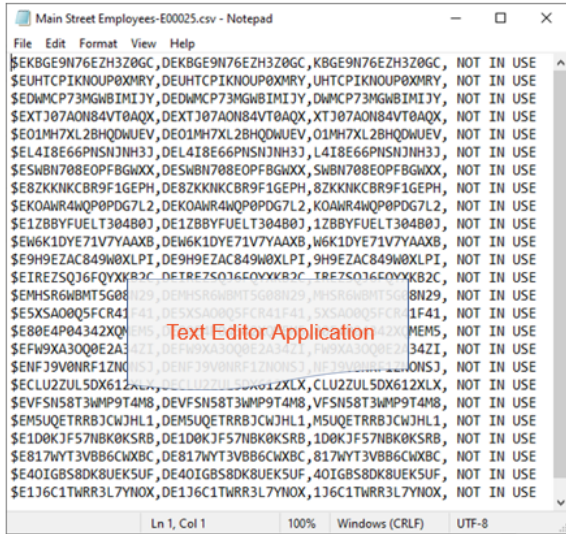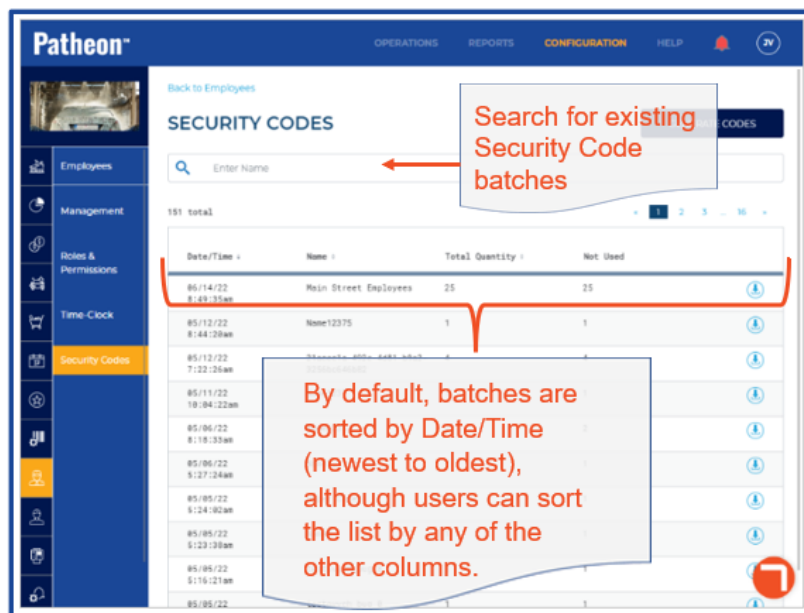
Search for Existing Employee Security Code Batches

Existing security code batches can be located by entering part or all its name from the **Security Codes** panel. The list automatically updates as each character is entered.

Clear the search field to display all security code batches in the list after performing a search.

Employee Security Code Panel

By default, employee security code batches are sorted by Date/Time. Although users can sort the list by any of the other columns.

- **Date/Time**: Batches are sorted by **Date/Time** by default, newest to oldest.

- **Name**: The "Name" field represents batch name.

- **Total Quantity**: The number of security codes in a batch.

- **Not Used**: The number of security codes in a batch that aren't currently assigned to an employee.

Please note: Patheon Portal prevents users from creating an employee security code batch with the same name as an existing one and will display an error message if an existing batch name is used.

Assign Security Codes to Employee Profiles

Security Codes can be assigned to existing employee profiles and added to new employee profiles. Security codes can also be reused/reassigned

To add/edit a security code to an existing employee's profile, access the Employee Configuration panel from the Patheon Portal (Patheon Portal >Employee> Select employee Name> Edit Credentials).

Add/Edit Security Codes for Existing Employees

When an employee's employment ends or they no longer require their assigned security code, it can be removed from their profile and assigned to another employee.

To reassign a previously used code, select **Yes** and then type the security code in the **Barcode** field for this employee.

When configuring a new employee from the Patheon Portal, security codes are assigned in the third step of the Employee Set-Up process. (Patheon Portal >Employee> Add Employee>Credentials (third step in the process)

Add Security Codes to New Employee Profiles

Ad-Hoc Custom Segments Builder

In addition to the standard customer segments introduced in Release 13 and accessible from the Segments panel, sites can now create **Custom Segments** to help identify select groups of customers.

Adding Segments

Custom Segments are created and configured on the **Add Segment** panel, which is accessed by selecting the **Add Segment** button on the **Segments** panel.
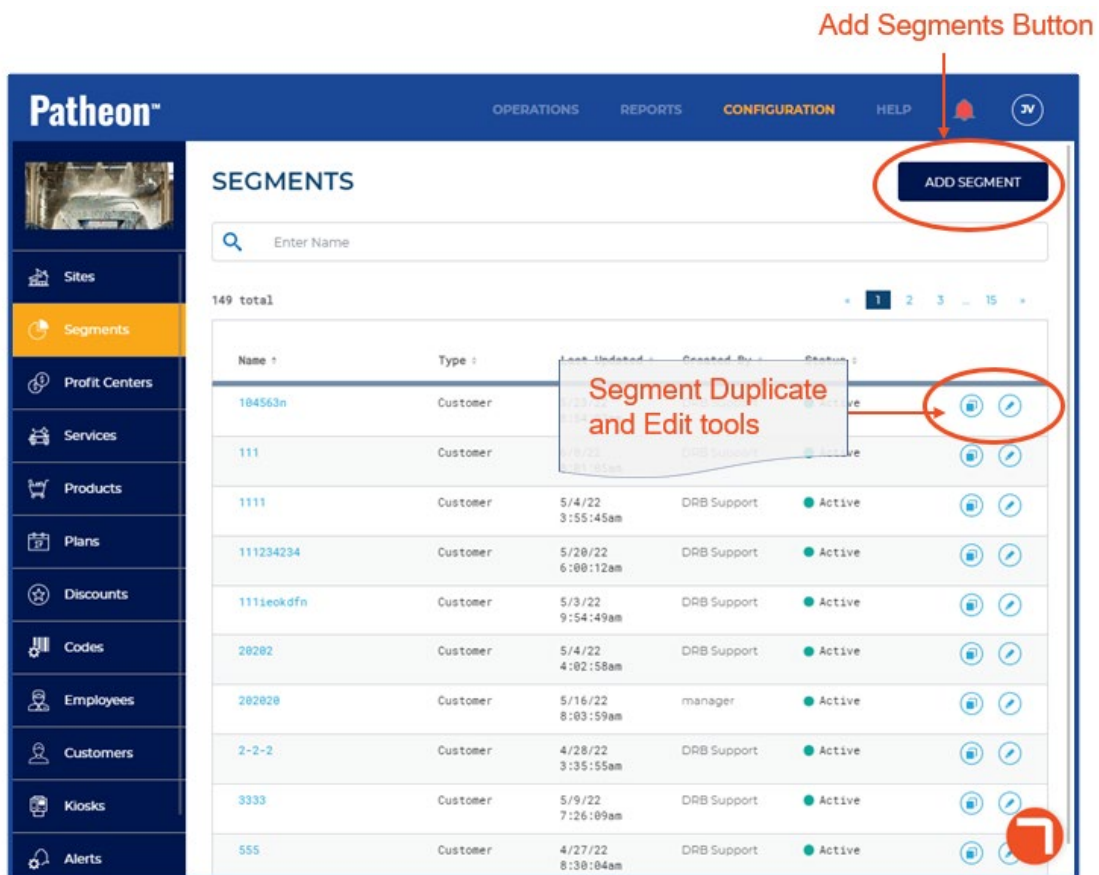
Custom Segments can also be created by duplicating and then modifying existing custom segment parameters.

Please note: Only **Custom Segments** can be duplicated. Standard Segments included with all Patheon systems cannot be duplicated or edited.

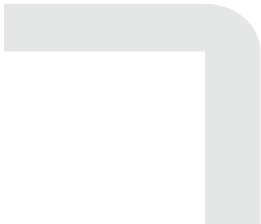When adding or editing a segment, you must include the name, short name and at least one (1) rule.

The Add Segment fields are defined as

Segment Field	Description
Name	Enter a unique name to identify the segment. **Max length is 128**
Description	Enter text that provides more information, such as how the site uses it, about the segment. **Max length is 2048.**
Short Name	Enter a shorter unique name to identify the segment. **Max length is 16.**
Type	Identifies the segment type. Customer - Only customer segments are currently available. This setting can't be changed.
Status	This setting controls whether the segment is available for use by any sites that belong to the organization. This setting can be changed after a segment is created and saved. **Active** - The segment is enabled and available for use. **Inactive** - The segment is disabled and unavailable for use.
Visibility	This setting controls whether the segment is available to all users at an organization, or just the user who created it. **Private** - Segment is only available for the user who created it. **Shared** - Segment is available for all users.

Segment Rules control which customers are included in the custom segment. Multiple rules can be selected for a segment. At least one rule must be configured.

Customer - Use the **Customer** rules to include customers based on email, name &/or phone.
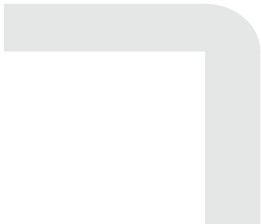
- **Has Email**
  - **True:** Include customers who have an email address recorded in their profile.
  - **False:** Include customers who don't have an email address recorded in their profile.
- **Has Name**
  - **True**: Include customers who have a name recorded in their profile.
  - **False**: Include customers who don't have a name recorded in their profile.
- **Has Phone**
  - **True**: Include customers who have a phone number recorded in their profile.
  - **False**: Include customers who don't have a phone number recorded in their profile.

Plan - Use the **Plan** rules to include customers based on plans.

- **Has no plan** - Include customers who do not have a plan.
- **Has plan** - Include customers based on specified plan activity.
- **Any** - Include customers with any plan activity.
- **Any active** - Include customers with an active plan.
- **Any inactive** - Include customers with an inactive plan.
- **Specific** - Include customers with the specified plan activity.
  - Closure Date
  - Name
  - Purchase Date
  - Reload Type
  - Sale Location
  - Status
  - Type
  - Vehicles

Transaction - Use the **Transaction** rules to include customers based on transactions.

- **Has no transaction** - Include customers with no transaction history.
- **Has transaction** - Include customers with the specified transaction activity.
- **Date**
  - Last Month
  - Last Three Month
  - Last Week
  - Today

- o Yesterday
- **Quantity**
  - o <
  - o <=
  - o =
  - o >=
  - o >
- **Transaction** - Select either Any or Specific.
- **Any** - Select to include any transactions.
- **Specific**
  - o **Contains:** Select either Product type or a Specific product.
  - o **Has Discount:** Select True or False.
  - o **Has Upsell:** Select True or False.
  - o **Payment method:** Select Cash, Check, Credit Card or Gift Card.
  - o **Status:** Select Abandoned, Cancelled, Purchased or Refunded.
  - o **Total:** Select <, <=, =, >=, or > and then enter an amount.
  - o **Type:** Select Redemption, Reload, Rewash or Sale.

Segment Settings and Entries

The **Segment Entries** panel displays a segment's settings and customer data entries. It is accessed by selecting an individual segment's name from the list.

The details of that segment's settings are listed in the **Segments Settings** portion of the panel.

The **Segment Entries** section of the panel contains the list of customers that meet the segment's parameters, as well as a search function that can be used to locate a specific customer or customers (by name) and an export function that can be used to create a CSV file of the customers and their select data.

Export Segment Entries

The **Export Entries** button can be used to create and download a CSV file of the segment's customers and their select data.

Please Note: The export function exports ALL customers that meet the segment's parameters even if only a subset from a search are displayed when the export is generated.

When exporting Segment information please note:

- **File Location** - Export files are automatically downloaded to the folder configured as the default location for downloads on the device from which it's generated. For example, on a Windows machine, the location might be similar to C:\Users\<username>\Downloads.

- **File Name** - The file name format and extension for export files is <Segment_Name>_YYYYMMDD.csv. For example, the export file name for an Active Members customer segment export file generated on June 9, 2022, would be Active_Members_20220609.csv.

- **CSV Data** - Data in the export file is provided in comma-separated value (CSV) format, which can be viewed in, or used with, a simple text editor, spreadsheet application or other third-party applications or services.

- **Data included in the CSV file:**
    - Id
    - Customer Name
    - Phone Number
    - Email
    - License Plate
    - RFID Number

Default Settings for Inactive Products, Discounts, House Accounts and Services

- The Products Site panel in Patheon Portal now includes a **Show inactive products** toggle that can be used to display inactive products; by default, it is not selected, and only active products are displayed.

- The **Services** panel in Patheon Portal now includes a **Show inactive services** toggle that can be used to display inactive services; by default, it is not selected, and only active services are displayed.

- The **House Accounts** panel in Patheon Portal now includes a **Show inactive house accounts** toggle that can be used to display inactive house accounts; by default, it is not selected, and only active house accounts are displayed.

- The **Discounts** panel in Patheon Portal now includes a **Show inactive discounts** toggle that can be used to display inactive discounts; by default, it is not selected, and only active discounts are displayed.

Wash Plan Subscription Renew Time Upgrade

So sites can more closely align payment processor reports with Patheon transaction reports, the Plans section of the **Site Details** panel now includes a Daily Reload Time Range setting to control when recurring transactions are submitted for processing.

Clarify Gift Card Activation

The Patheon Portal displays an error and prevents users from activating a prepaid card if it contains lobby products that aren't activated at any site.

A La Carte Sale Enhancement

Manual-application à la carte products can now be sold without requiring a wash service in the cart; tunnel-application à la carte products require a wash in the cart.

Essential Web App (EWA)

Patheon's Essential Web App (EWA) combines the features of a modern browser with the benefits of a mobile e-commerce experiences.
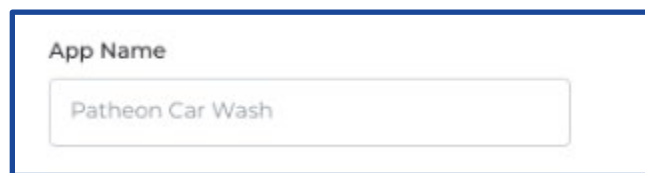
Customize App Name on the EWA Title Page and the Home Screen Icon

To reflect the name of your wash, you can now customize the name of the app that is saved to the home screen of a device and the name displayed on the EWA page title when viewed through a web browser.

From the **Patheon Portal**, select **Customization**>**E-commerce**. The **E-Commerce** panel appears.

In the **App Name** field, enter the desired name to use for the app. **Note**: If this field is not edited, or is left blank, **Patheon Car Wash** is used as the app name by default.
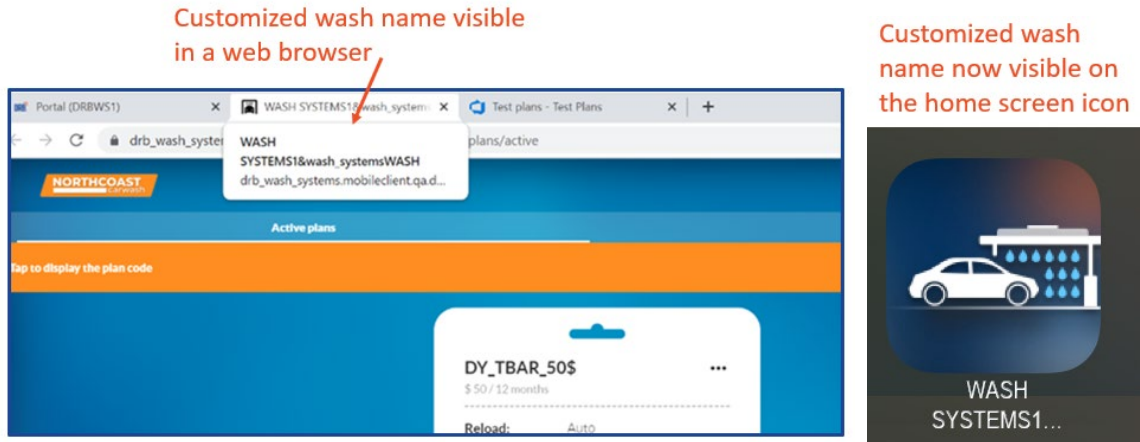
Then select **Save.**

App Name restrictions:
- Max characters: 30 including spaces
- Allowed symbols: alphanumeric characters, space and the following: - _ & '

The customized app name will now appear on both the web browser and the home screen icon.

New "Update in Progress" Error Screen

When a Patheon update is being deployed to a site or organization, use of the Essential Web App (EWA) is blocked and the new "Update in Progress" message appears on the device.

The message includes a **Reload** link. Selecting **Reload** attempts to direct the user to the main page of the app.