



Patheon® Release 17 Notes

Patheon Release 17 includes the following new features and enhancements. Click on one of the following to get more details on specific highlights of this release:

[Handling of Customers in Reloading Status](#)

[From a Cashier Terminal](#)

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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

Handling of Customers in Reloading Status

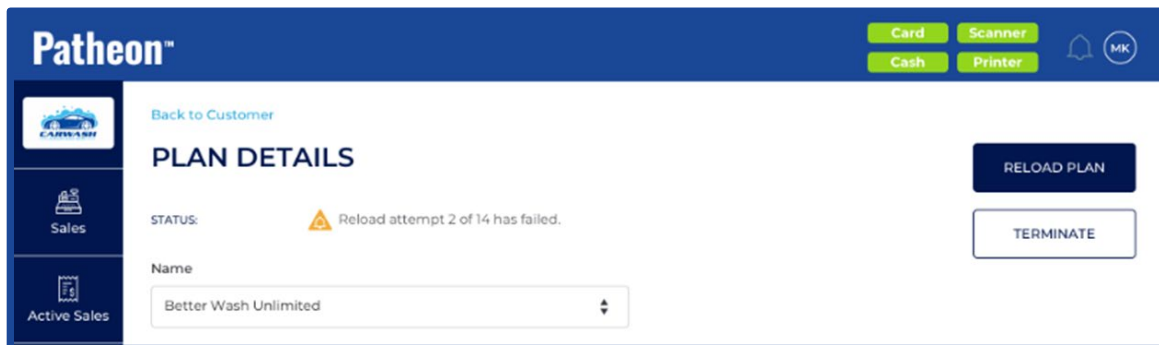
Customers whose wash subscriptions are in a Reload status (the system previously attempted to renew the plan, but failed) can renew their plan, on-demand, when they visit a site - from a cashier terminal or a kiosk terminal.

Customers simply provide a new payment card; the renewal transaction is immediately submitted, and the customer can use their wash plan

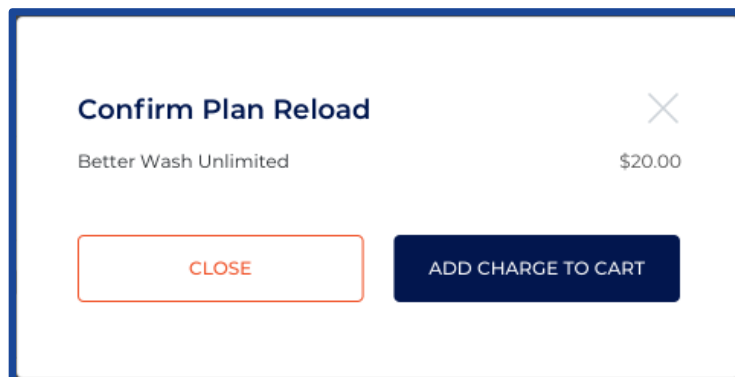
The wash/site receives payment, and they don't have to wait for their regular nightly automated renewal submissions.

Renew Subscription from a Cashier Terminal

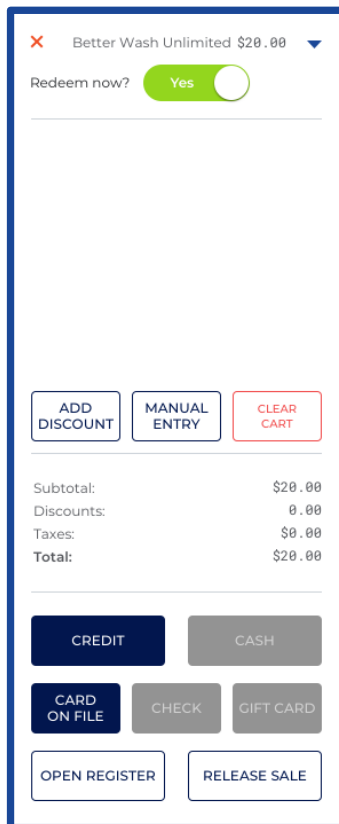
Cashiers can renew a customer's wash subscription with a Reload status by selecting **RELOAD PLAN** from the **PLAN DETAILS** panel.



Select **ADD CHARGE TO CART**.



The system calculates the renewal charge and adds a renewal item to the cart.



- Only **CREDIT** and **CARD ON FILE** payment methods are available.
- Select **CREDIT** to activate the payment card terminal, and then direct the customer to tender the sale to a payment card.
- Select **CARD ON FILE** to view a list of the customer's saved payment cards and then select the card the customer prefers.

If the payment is successful:

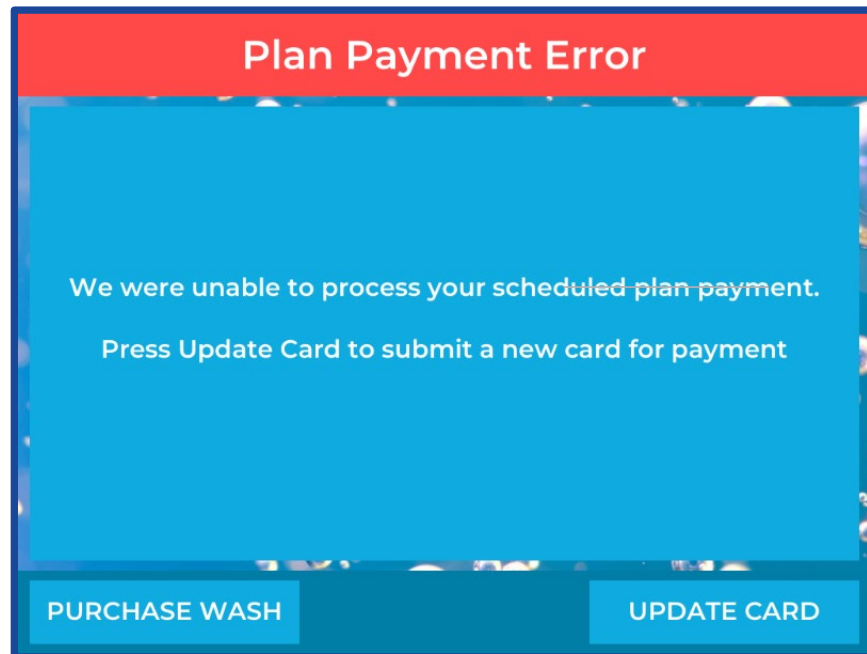
- The plan status changes from Reload to Active on the **PLAN DETAILS** panel
- The payment card used to tender the renewal (whether a new payment card or card on file) is saved and assigned to the wash subscription for future renewals
- The customer can redeem their subscription wash

If payment fails, an error is displayed and the cashier can

- Request a different card
- Try a different Card on File payment card (if multiple cards are saved)
- Abandon the transaction

Renew Subscription from a Kiosk Terminal

Customers can renew their wash subscription with a Reload status by selecting **UPDATE CARD** from the Plan Payment Error screen displayed when they arrive at a kiosk terminal.



Customers can select **UPDATE CARD** to activate the payment card terminal and then tender the sale to a payment card.

Alternatively, customers can select **PURCHASE WASH** and skip renewing their subscription.

If their payment is successful:

- The plan status changes from Reload to Active on the **PLAN DETAILS** panel
- The payment card used to tender the renewal is saved and assigned to the wash subscription for future renewals
- The customer can redeem their subscription wash

If their payment fails, an error is displayed and the customer can:

- Request a different card
- Try a different Card on File payment card (if multiple cards are saved) or
- Abandon the transaction

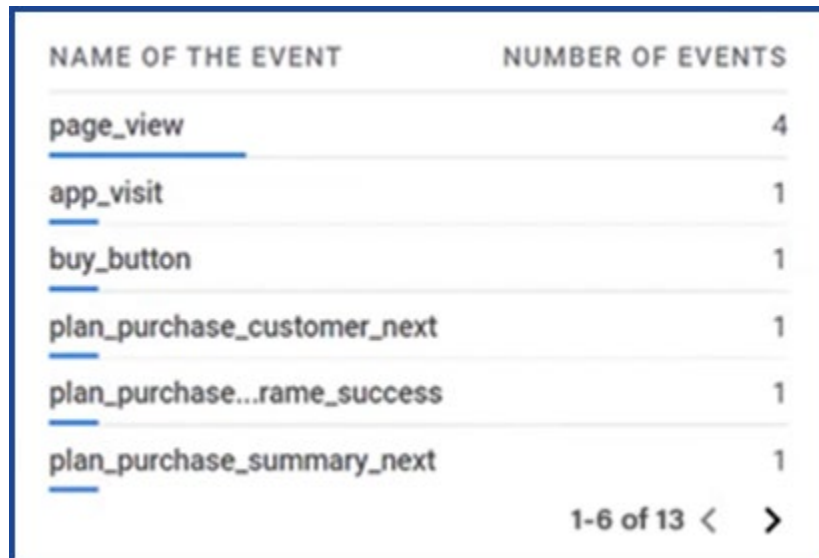
Essential Web App (EWA)

Patheon's Essential Web App (EWA) combines the features of a modern browser with the benefits of a mobile e-commerce experience.

Google Analytics now Enabled for the EWA

Google Analytics custom events have been added throughout the EWA purchase flow to track the user's actions.

When these events are triggered in the app, they are tracked and can be viewed in your organization's Google Analytics account.

A screenshot of a Google Analytics interface showing a table of custom events. The table has two columns: 'NAME OF THE EVENT' and 'NUMBER OF EVENTS'. The events listed are 'page_view' (4), 'app_visit' (1), 'buy_button' (1), 'plan_purchase_customer_next' (1), 'plan_purchase...rame_success' (1), and 'plan_purchase_summary_next' (1). The table is framed by a blue border. At the bottom right of the table, there is a pagination indicator '1-6 of 13' with left and right arrow symbols.

NAME OF THE EVENT	NUMBER OF EVENTS
page_view	4
app_visit	1
buy_button	1
plan_purchase_customer_next	1
plan_purchase...rame_success	1
plan_purchase_summary_next	1

1-6 of 13 < >

Events tracked by Google Analytics include:

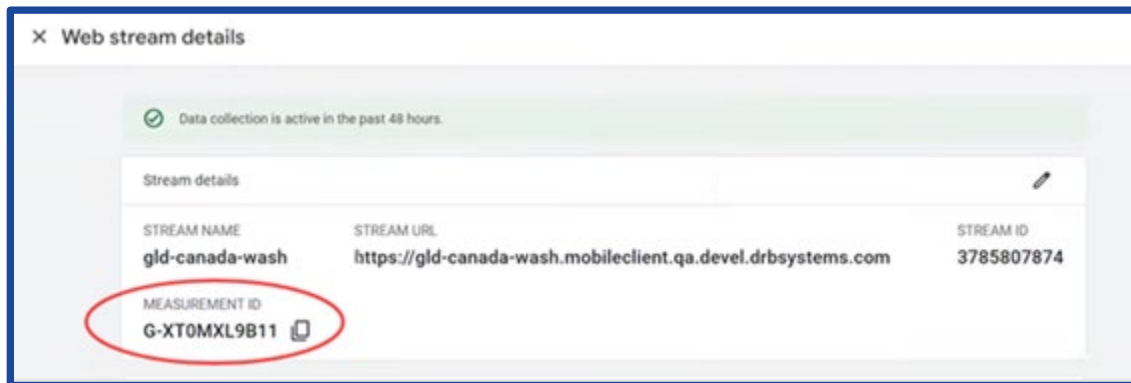
Name of Event	Event Definition
app_visit	The initial arrival to the EWA app before redirecting to the Auth0 page.
buy_button	The Buy Now button has been selected on any plan card.
plan_purchase_close	The plan purchase flow has been exited by selecting the X in the top right corner.
plan_purchase_customer_next	The Next button has been selected after filling out customer details Profile information during plan purchase.
plan_purchase_payment_iframe_success	Payment entered through iframe was successful at purchasing a plan.
plan_purchase_summary_next	The Next button has been selected on the Summary step of the plan purchase.
plan_purchase_summary_terms	The Terms and Conditions link has been selected on the Summary step of the plan purchase.
plan_purchase_vehicle_next	The Next button has been selected on the Summary step of the plan purchase.
purchase_payment_iframe_close	The payment iframe was closed by selecting the X in the top right corner.
purchase_payment_iframe_open	The payment iframe is opened so new credit card information can be added.
site_selected	<p>A physical site has been selected at the very beginning before plan options are displayed.</p> <p>We do not discern between exact sites; the action is just a fact of the user actively choosing any site and continuing.</p> <p>Also, this is only tracked at the beginning of the purchase flow and not when a site is selected from the title bar.</p>
vehicle_add_conf	The Add button has been selected on the Add Vehicle modal after entering vehicle information.
vehicle_add_init	The Add Vehicle option has been selected on the Vehicles step of the plan purchase.

Adding a Google Analytics Tag to your EWA (E-commerce Site)

If the organization would like to use Google Analytics to track statistics related to the use of their app, they can assign a Google Analytics tracking ID to their EWA (E-commerce Site).

Step 1: Find your Measurement ID

The **Measurement ID** can be found in the user's Google Analytics account under **Admin>Data Streams**.

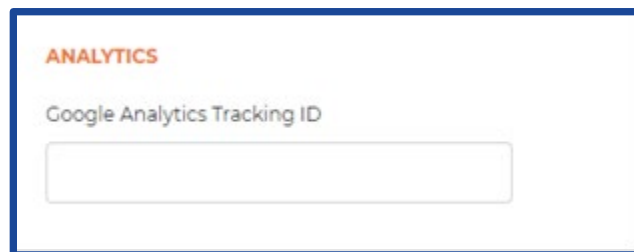


Verify the **Stream URL** associated with the **Measurement ID** is correct and matches the URL of your EWA.

Step 2: Add the Measurement ID to your EWA

In Patheon Portal, select **Customization>E-commerce**. The **E-COMMERCE** panel appears.

Under **ANALYTICS**, in the **Google Analytics Tracking ID** field, enter the **Measurement ID** provided by Google Analytics.



The screenshot shows the 'ANALYTICS' section in the Patheon Portal. The label 'ANALYTICS' is in orange. Below it, the text 'Google Analytics Tracking ID' is displayed above a text input field.

Portal: Plan Discount Support of Zero Period Discounts

It is now possible to enter \$0 or 0% as a discount value for any period.

This functionality allows sites to offer their customer a discount for the second or third reload period without having a discount entered for Period 1 (new plan sale).

The screenshot displays the Patheon portal interface for configuring discount plan reloads. The left sidebar lists various management categories, with 'Discounts' currently selected. The main panel shows the 'Discount Plan Reloads' configuration. At the top, there are two action buttons: 'Adjust Value' (for terms or cart total) and 'Discount Plan Reloads' (for plan reloads). Below this, the 'Discount Plan Reloads' section is active, showing two periods. 'PERIOD 1' is configured with a 'Percent' discount type and a value of '0'. 'PERIOD 2' is configured with a 'Fixed' discount type, a 'Discount Value (USD)' of '0', and a 'Discount Value (CAD)' of '0'. A 'Remove' button is located next to the CAD field, and an 'Add Period' link is at the bottom of the list.

For example, a site can charge full price for the initial plan sale and then apply the discount to the first renewal.