



# Patheon® Release 19 Notes

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Patheon Release 19 includes the introduction of two new Patheon Insights dashboards. Click on the links to get more information about the two new dashboards:

[Patheon Insights](#)

[Plan Reload Dashboard](#)

[Essential Web App Sales Dashboard](#)

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)

# Patheon Insights

Built on a powerful business intelligence engine, Patheon Insights provides interactive dashboards and narratives. You can easily filter, export, share and embed insights into other documents or web pages. Patheon Insights puts your data and metrics in one place, so you no longer need to cross-reference reports.

## Plan Reload Dashboard

Easily review plan renewals and ensure your site's plans are set up for success. The interactive dashboard allows users to see everything from reload patterns and trends to total plans declined per day.



## Widgets

Dashboards are organized into widgets, with each providing a specific KPI, metric or trend.

The Plan Reload Dashboard widgets include:

- **Total Reloaded Plans** – This widget displays the total number of successfully reloaded transactions for the selected filters.
- **Reloaded Plans by Home Site** – A donut chart that provides successful reloaded transaction by site.
  - This widget can be used to filter the dashboard for specific sites.
- **Active Plans by Status** – A donut chart that provides a quick view of all active plans, sorted by the status of each plan (Active, Reloading, Suspending, Discontinuing).
- **Reloaded Plans by Product** – A donut chart that provides the Reloaded Plan by the product Name.
- **Total Reload History** – A column chart of the site’s historical reload transactions by day for the selected filter options.
- **Total Declined Plans** – This widget includes two calculations. The main calculation displays the total plans that had at least one decline for the selected filters. The secondary calculation provides the total number of declined transactions and will likely be larger than the main calculation because each plan generally has multiple attempts.
- **Total Declined Plans Per Day** – This column chart displays the total declined plans for each day in the filtered date range.
- **Total Discontinued Plans** – This widget displays the total number of plans that have ended in the filtered date range due to the consumer requesting plan discontinuation. *Please note: This number will not match the total Discontinuing plans on the General Sales Report (GSR) as the GSR count reflects when the consumer **requests** to leave the plan as opposed to when the subscription ends.*
- **Total Discontinued Plans Per Day** – This column chart provides the total discontinued plans for each day in the selected date range.
- **Total Unpaid Plans** – This widget provides the total number of plans that have ended due to non-payment.
- **Total Unpaid Plans Per Day** – This column chart provides the total number of plans ended due to non-payment for each day in the given date range.
- **Reload Revenue** – This widget provides the total revenue from successfully reloaded plans for the selected filter parameters.
- **Reload Revenue by Day** – A column chart that breaks down total recharge revenue by day.

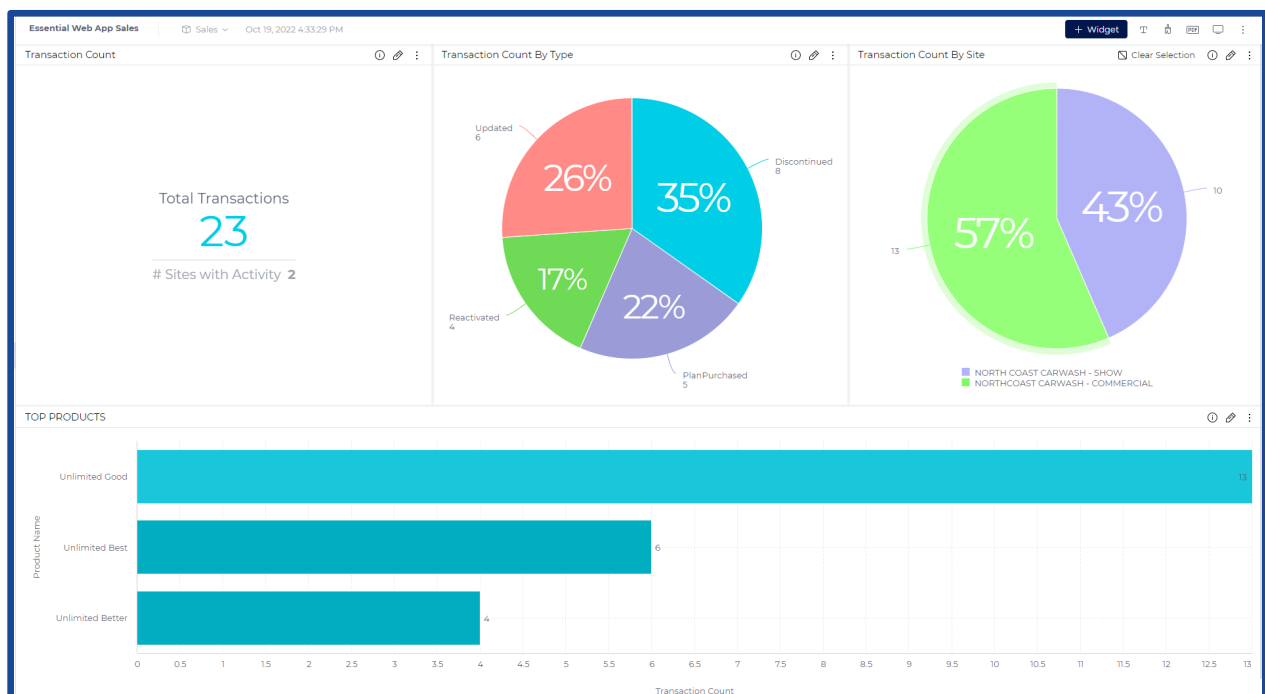
## Filter Options

Four filter options are available for the Plan Reload Dashboard:

- **Operating Site of Plan** – Users can filter the dashboard to the ‘Home site or First Sale site’ for their plans.
- **Date filter** – Users can choose from a set of smart filters or choose their own date range with the provided date filter option.
- **Plan Name** – Users can choose to review their plan reload data by a specific plan or plans
- **Plan Status** – Users can filter on plan status, including Active, Reloading, Suspending or Discontinuing.

## Essential Web App Sales Dashboard

The Essential Web App Sales dashboard allows the car washer to review what consumers are purchasing in their Essential Web App (EWA). The dashboard allows users to see if their EWA is increasing site revenue. If they are a multi-site organization, they can drill into which sites’ consumers are using the EWA and which are not.





## Widgets

Dashboards are organized into widgets, with each providing a specific KPI, metric or trend.

The Essential Web App Dashboard widgets include:

- **Total Transactions** – This widget contains two calculations:
  - The first calculation is a count of the total completed EWA transactions completed for the selected filter criteria.
  - The second calculation displays the total count of sites that have completed EWA transactions for the selected filter options.
- **Transaction Count by Type** – This pie chart displays the transaction count by the transaction type. The chart provides both the percentage of total transaction count and the total number of transactions for each transaction type.
- **Transaction Count by Site** – This pie chart breaks out the total completed transactions by location.
- **Top Products** – This bar graph displays the top ten products sold on EWA in descending order.

## Filter Options

Four filter options are available for the Essential Web App Dashboard:

- **Site Name** – Users can filter the EWA transactions for a specific site or set of sites.
- **Date** – Users can filter the EWA transactions based on the date the transaction was completed.
- **Transaction Status** – Users can filter the dashboard on the status of specific transactions.
- **Product Name** – Users can filter the dashboard for specific products.