



Patheon® Release 20 Notes

Patheon Release 20 includes four feature enhancements. Click on one of the following links to get more details on specific highlights of this release:

[Attended POS User Improvements](#)

[Remove Tunnel Loader Navigations Restrictions](#)

[Display Out of Service Information at the Kiosk](#)

[Discount Code Builder Enhancements](#)

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



Attended POS User Improvements

Ability to Save Progress on POS Activity

When completing a transaction or other activity within in the POS, cashiers can now toggle to another tab without losing progress on their initial activity. This allows a cashier to perform other tasks (e.g., search/edit a customer, open/reset a gate) or allow a customer to perform a task (e.g., check their license plate) and then resume their activity without having to start over.

Prior to this release, if a cashier navigated away from an in-progress transaction or other activity, the system would cancel (abandon) the initial activity.

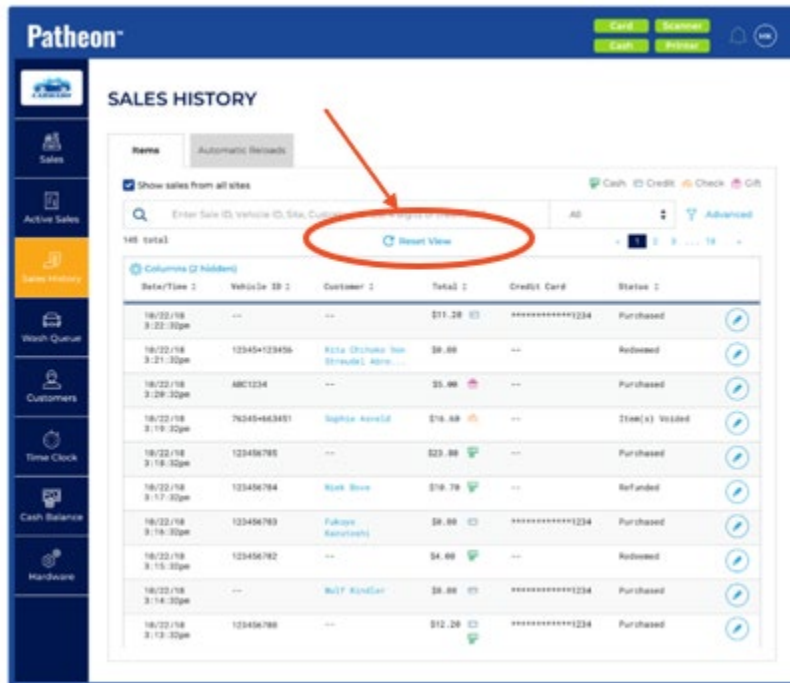
Additionally, cashiers can now release a transaction by selecting the **RELEASE SALE** function.

The cashier terminal panels that now retain their last state/view when cashiers navigate away from, and then return, include:

- SALES panel
- SALES panel with transaction in cart
- ACTIVE SALES panel
- CUSTOMERS panel
- SALES HISTORY panel
- CASH BALANCE panel

Reset View Available on Select Cashier Terminals

A **Reset View** function is now available on select cashier terminal panels.



This function allows cashier terminal operators to reset any changes that have been applied to the default view. The function is inactive/unavailable when the default view is displayed; it is active/available when any of the following changes have been applied to the default view:

- Entered a search term
- Changed search scope from 'All' to any other
- Applied any sorting other than default
- Applied any advanced filter
- Navigated to any page other than the first one



The function is available for the following panels:

- SALES HISTORY
 - Items
 - Automatic Reloads
- CUSTOMERS
 - Individuals.
 - House Accounts.
- CASH BALANCE

*The Clear All function, which previously reset Advanced filters, is removed.

Remove Tunnel Loader Navigation Restrictions

Tunnel entrance staff can now access the SALES panel, ACTIVE SALES panel, SALES HISTORY panel, CUSTOMERS panel, CASH BALANCE panel and HARDWARE panel from a tunnel entrance terminal.

Access to these point-of-sale panels enables tunnel entrance staff to quickly resolve common issues right from the tunnel entrance terminal, such as:

- Looking up a wash subscription customer and applying their plan (CUSTOMERS panel)
- Applying a rewash (SALES panel)

Note: The payment options available on the SALES panel reflect the peripherals connected to the tunnel entrance terminal. For example, the CASH payment function is grayed/unavailable if a cash drawer isn't connected to the tunnel entrance terminal, and the CREDIT payment function is grayed/unavailable if a payment card reader isn't connected to the tunnel entrance terminal.

The WASH QUEUE panel, the primary tool for tunnel entrance staff, remains available and accessible from the tunnel entrance terminal.

Kiosk - Display Out of Service Information

If a kiosk terminal is in an Out of Service state, an attendant can open the Quick Status panel and view detailed information about the Out of Service cause.

Note: Attendants can navigate to the Quick Status panel for any Out of Service cause, except for an IOModule failure.

View Out of Service Errors

A kiosk attendant can view the component(s) contributing to the Out of Service state from the QUICK STATUS panel.

The screenshot displays the 'Normal Operation Quick Status' interface. On the left is a navigation menu with options: Quick Status (selected), Reboot Terminal, Staff Screen, Maintenance, and Diagnostics. The main content area shows the following status information:

- Flow: Demo Flow
- Cloud Connectivity: OK
- Local Connectivity: OK
- Last Read LP#: ARX1777
- Critical devices are out of service: Gate
- Critical Devices are Out of Service: Payment Group: Cash: BillDispenser
- Application is not active

At the bottom, a legend indicates: Normal (checkmark), Warning (exclamation mark), and Critical (Out of Service) (cross). The footer shows 'Pathfinder 1.0.0 by DRB Systems' and the date/time '04/05/2019 9:04 AM'. An 'EXIT' button is located in the top right corner.



Out of Service Error Messages:

- Application is not active
- Critical Devices are Out of Service: RFID
- Critical Devices are Out of Service: Gate
- Critical Devices are Out of Service: IOModule
- Critical Devices are Out of Service: Payment Group
- Critical Devices are Out of Service: Payment Group
- Critical Devices are Out of Service: Payment Group: Cash: BillAcceptor
- Critical Devices are Out of Service: Payment Group: Cash: BillDispenser
- Critical Devices are Out of Service: Payment Group: Cash: CoinAcceptor
- Critical Devices are Out of Service: Payment Group: Cash: CoinDispenser
- Critical Devices are Out of Service: Payment Group: CreditCard: EmvTerminal
- Critical Services are Out of Service: SiteInit
- Critical Services are Out of Service: CardManager
- Critical Services are Out of Service: IdentityServer
- Critical Services are Out of Service: PeripheralRouter
- Critical Services are Out of Service: SiteDB
- Server Error: Network Issues
- Server Error: POS API Issue



Discount Code Builder Enhancements

Sites can now configure, generate and use a batch of codes for discounts. The new capabilities allow discount codes to be:

- Configured for a maximum number of uses, a specific date range and specific site(s).
 - These conditions are editable at any time and can also be activated or deactivated at any time.
- Created and assigned to any discount
 - The discount codes can be created at the time of creating the discount or later, after a discount is created.
- Exported to a file for print or digital use/distribution.

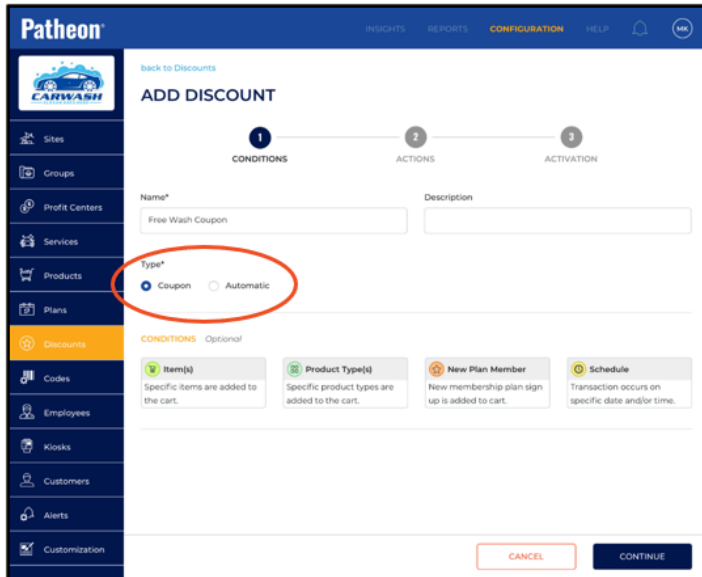
At the point-of-sale (cashier terminal or kiosk), an entered discount code will add the corresponding discount to the sale if all requirements are satisfied:

- The code is valid
- The code is active
- The discount is active
- The site is valid for the discount
- The discount requirements are valid for the shopping cart
- The maximum number of redemptions has not been exceeded
- The discount is not expired.

If any requirements are not satisfied, an error message is displayed at the cashier terminal or the kiosk and the discount is not applied to the sale.

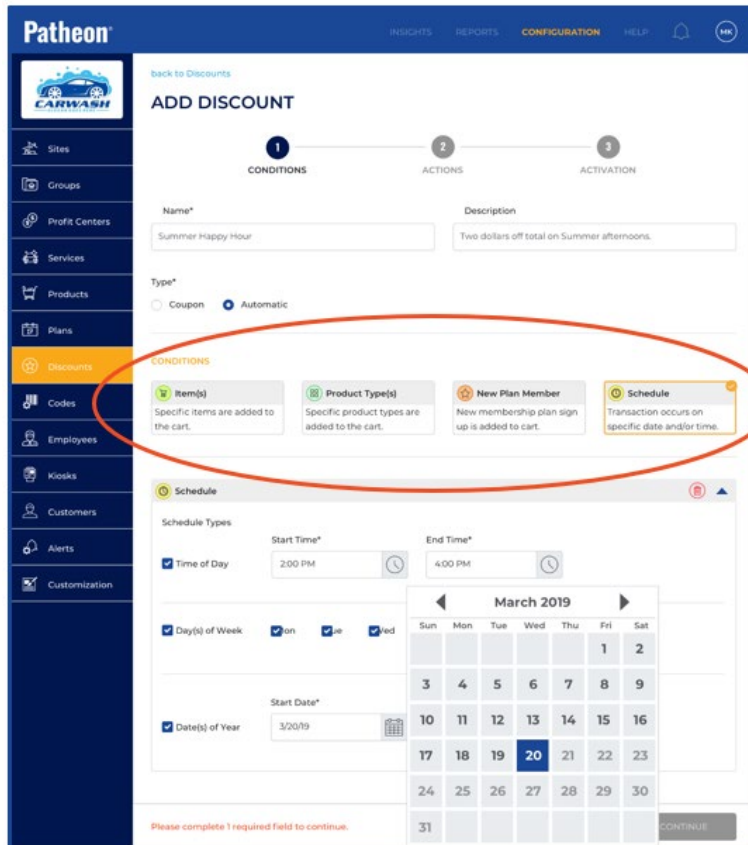
Portal - Discount Configuration Now Includes a Type Setting

When adding a new Discount, users must specify a Discount Type, either Coupon or Automatic. Note that once a Discount Type is configured and saved, it can't be changed.



The screenshot shows the 'ADD DISCOUNT' configuration page in the Patheon system. The page is divided into three steps: 1. CONDITIONS, 2. ACTIONS, and 3. ACTIVATION. The 'Type' field is set to 'Coupon' (indicated by a red circle). The 'Name' field contains 'Free Wash Coupon' and the 'Description' field is empty. Below the 'Type' field, there are four optional condition categories: 'Item(s)', 'Product Type(s)', 'New Plan Member', and 'Schedule'. The 'Item(s)' and 'Product Type(s)' categories are currently selected, while 'New Plan Member' and 'Schedule' are not. At the bottom, there are 'CANCEL' and 'CONTINUE' buttons.

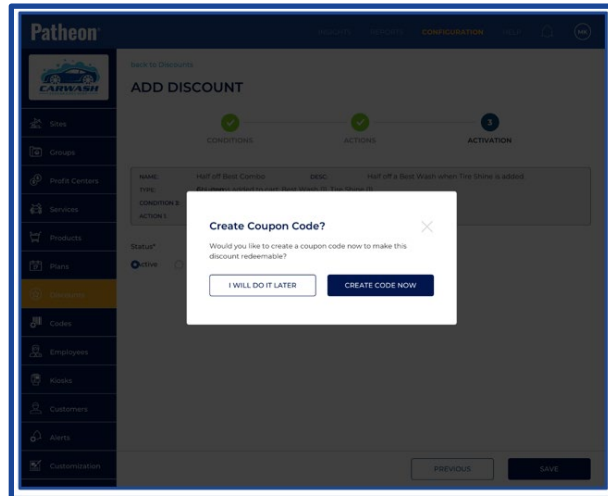
Coupon type discounts do not require a condition, although they can be configured with one.



The screenshot shows the 'ADD DISCOUNT' configuration page in the Patheon system. The page is divided into three steps: 1. CONDITIONS, 2. ACTIONS, and 3. ACTIVATION. The 'Type' field is set to 'Automatic' (indicated by a red circle). The 'Name' field contains 'Summer Happy Hour' and the 'Description' field contains 'Two dollars off total on Summer afternoons'. Below the 'Type' field, there are four optional condition categories: 'Item(s)', 'Product Type(s)', 'New Plan Member', and 'Schedule'. The 'Schedule' category is selected and highlighted with a red circle. The 'Schedule' configuration is expanded, showing 'Schedule Types' with 'Time of Day' checked (2:00 PM to 4:00 PM), 'Day(s) of Week' checked (Mon, Tue, Wed), and 'Date(s) of Year' checked (3/20/19). A calendar for March 2019 is displayed, with the 20th selected. At the bottom, there is a 'Please complete 1 required field to continue.' message and a 'CONTINUE' button.

Automatic type discounts do require a condition.

When adding a new discount, you can choose CREATE CODE NOW or I WILL DO IT LATER



Portal - "Batch Name" Replaces "Code Name" on a DISCOUNTS List

The "Code Name" column on the DISCOUNTS panel is replaced by a new "Batch Name" column.

All assigned batches for a corresponding discount are represented in an "Active Batches" column.

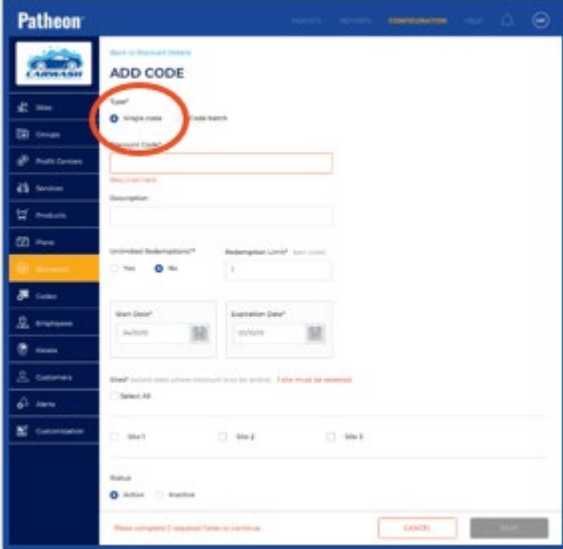
A screenshot of the Patheon 'DISCOUNTS' list. The page title is 'DISCOUNTS' and there are 'OPERATIONS' and 'REPORTS' tabs. A search bar is present with the text 'Enter Name or Type'. Below the search bar, it says '483 total'. The table has four columns: 'Name', 'Description', 'Active Batches', and 'Status'. The 'Active Batches' column is highlighted with a mouse cursor. The table contains three rows of data.

Name	Description	Active Batches	Status
test discount kt1	2	A AKKD batch ASDASD222 batch See More	Active
artitem1		N/A	Active
777coup		N/A	Active

Portal - Generate a Single Discount Code or a Discount Code Batch

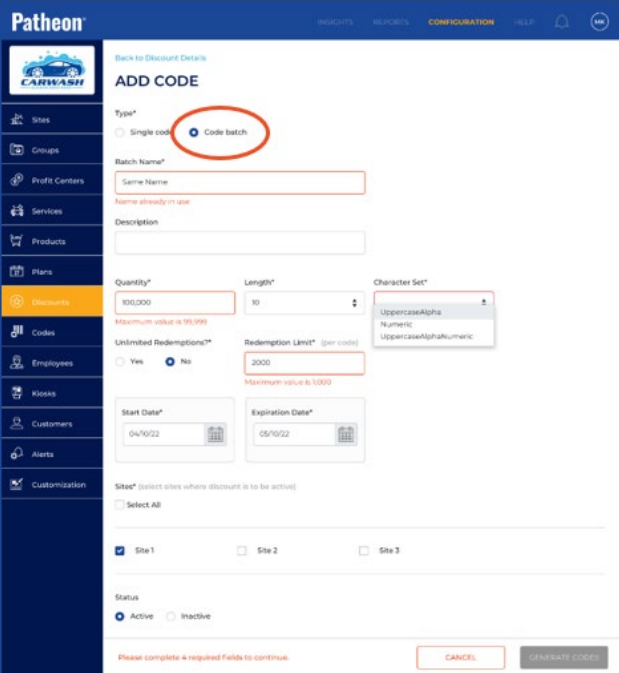
Sites can generate a Discount Code batch or Single code in Patheon Portal.

Generate a Single code



The screenshot shows the 'ADD CODE' form in the Patheon portal. The 'Type*' field has two radio buttons: 'Single code' (selected and circled in red) and 'Code batch'. Other fields include 'Batch Name*' (containing 'Same Name'), 'Description', 'Quantity*' (10), 'Length*' (10), 'Character Set*' (UppercaseAlpha), 'Unlimited Redemptions**' (No), 'Redemption Limit*' (2000), 'Start Date*' (04/10/22), 'Expiration Date*' (05/10/22), 'Sites*' (Site 1 selected), and 'Status' (Active selected). A 'GENERATE CODES' button is visible at the bottom right.

Generate Batch codes



The screenshot shows the 'ADD CODE' form in the Patheon portal. The 'Type*' field has two radio buttons: 'Single code' and 'Code batch' (selected and circled in red). Other fields include 'Batch Name*' (containing 'Same Name'), 'Description', 'Quantity*' (10), 'Length*' (10), 'Character Set*' (UppercaseAlpha), 'Unlimited Redemptions**' (No), 'Redemption Limit*' (2000), 'Start Date*' (04/10/22), 'Expiration Date*' (05/10/22), 'Sites*' (Site 1 selected), and 'Status' (Active selected). A 'GENERATE CODES' button is visible at the bottom right.

Portal - View the Discount Batch on a DISCOUNT CODES list

From the DISCOUNT DETAIL panel, sites can view all codes assigned to a discount or add and assign a new code batch.

The screenshot shows the Patheon interface for a discount detail. The discount is titled "HALF OFF BEST COMBO" and is active. It has two conditions: "ALL items added to cart: Best Wash (1), Tire Shine (1)" and "Coupon code added to cart: BESTCOMBO, [July Mailer batch]". The action is "Adjust value of Best Wash by \$5.00(USD)/\$6.00 (CAD); Adjust value of Tire Shine by 50%". Below this, the "DISCOUNT CODES" section shows a table with one code batch:

Date/Time	Name	Description	Quantity	Site Assignment	Status
07/22/22 11:16:05am	July Mailer	---	1000	Site 1	Active
05/12/22 11:36:05am	BESTCOMBO	---	---	Site 1	Active

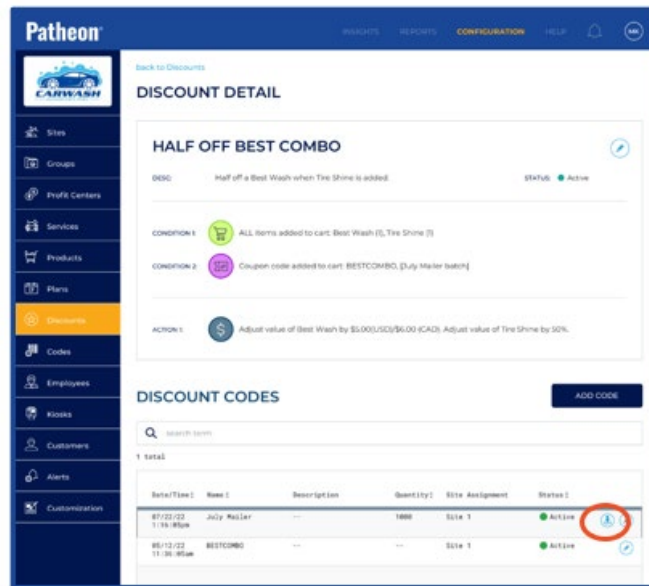
Portal - Edit An Existing Discount Code Batch

Sites can edit the settings for an existing discount code batch by selecting the Edit function (the pen icon) from the DISCOUNT CODES section of the DISCOUNT DETAIL panel.

The first screenshot shows the "DISCOUNT CODES" table from the previous image. A red circle highlights the "Edit" icon (a pen) next to the "July Mailer" code batch. A red arrow points from this icon to the second screenshot, which is the "EDIT CODE" form. The form includes fields for "Type" (Code batch), "Batch Name" (July Mailer), "Description" (Codes for use in July mailer), "Quantity" (1000), "Length" (8), "Character Set" (Upper/Lower/A), "Unlimited Redeemable" (No), "Redemption Limit" (1), "Start Date" (07/22/22), and "Expiration Date" (05/31/22). There are also checkboxes for "Site 1", "Site 2", and "Site 3", and a "Status" dropdown set to "Active".

Portal - Export a Discount Code Batch to a File

Sites can export a discount code batch using the corresponding Download function provided for each code batch in the DISCOUNT CODES section of the DISCOUNT DETAIL panel.



POS – High-Value Discount Security

All discounts, in particular high-value discounts, can be assigned to a single-use discount code. To prevent duplication, fraud and abuse, it can't be manually entered at a cashier terminal.

However, single-use discount codes are displayed and can be selected from the Discount tab at a cashier terminal. Once a single-use discount code is redeemed, it is no longer displayed/available on the Discount tab.