Patheon® Release 29 Notes

Patheon Release 29 includes the following feature enhancements. Click on one of the following links to get more details on specific highlights of this release:

POS Kiosk
- [Smart Widget Enhancements](#)

POS
- [Enable Open Price Gift Cards](#)

Patheon Dashboards
- [New Current Statistics Dashboard](#)
- [New Sales Comparison Dashboard](#)
- [New Multi-Site Comparison Dashboard](#)
- [Improved Rewash Analysis Dashboard](#)

If you have any questions about this or past releases, **please have your location code available** and contact the Patheon Support Team in the Knowledge Center at our new number **330.645.4201** or Knowledgecenter@drb.com

POS Kiosk

Smart Widget Enhancements

Enhancements for **Smart Widgets** have been introduced. The enhancements allow for greater design and style flexibility of the **Smart Widgets**.

Please note: The ability to update **Smart Widgets** begins on Tuesday, June 27.

[Click here to learn more about the Smart Widget enhancements](#).

POS

Enable Open Price Gift Cards

Open Price Gift Cards can now be configured in the Portal and sold at cashier terminals.

Open Price Gift Cards offer Patheon sites increased revenue options by providing consumers more flexibility and customization options to select the gift card denomination of their choice at the time of sale.
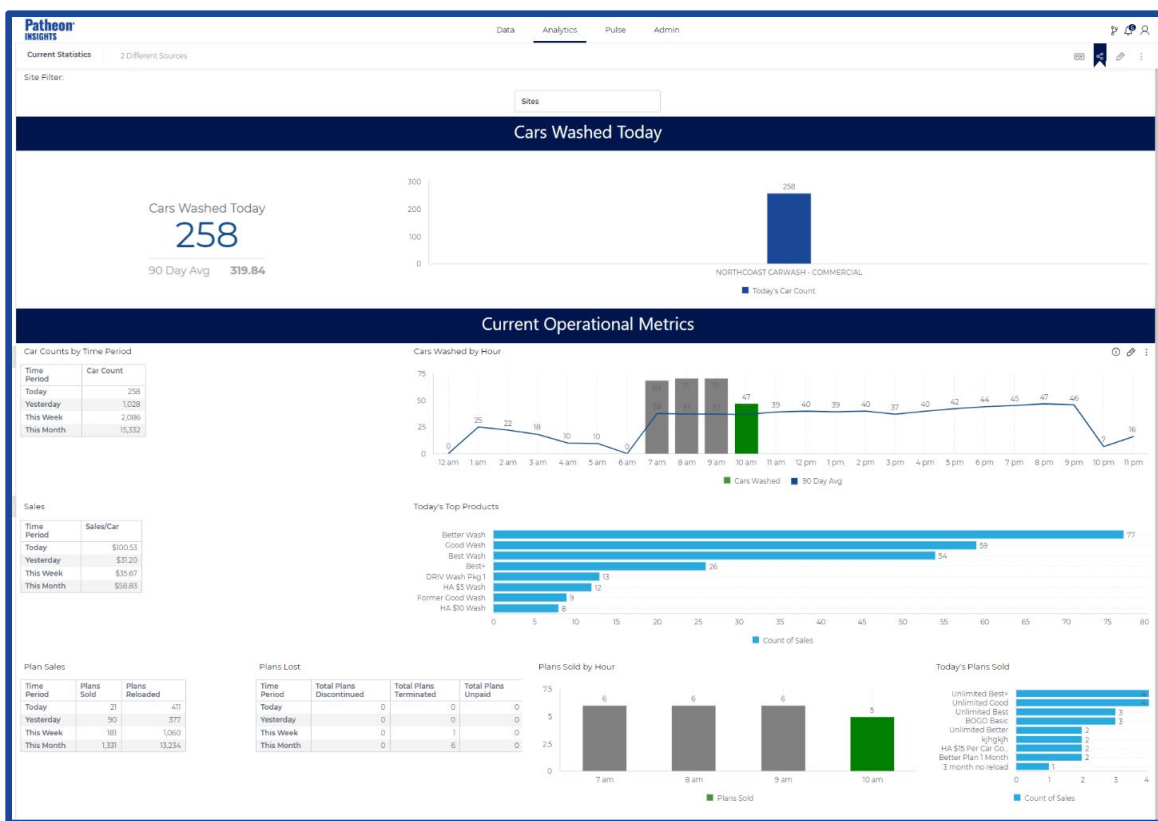
[Click here to learn more about Open Price Gift Cards](#).

Patheon Dashboards

New Current Statistics Dashboard

The new **Current Statistics Dashboard** provides data, such as hourly car counts and total car counts, for the current day, current hour, and previous hour.
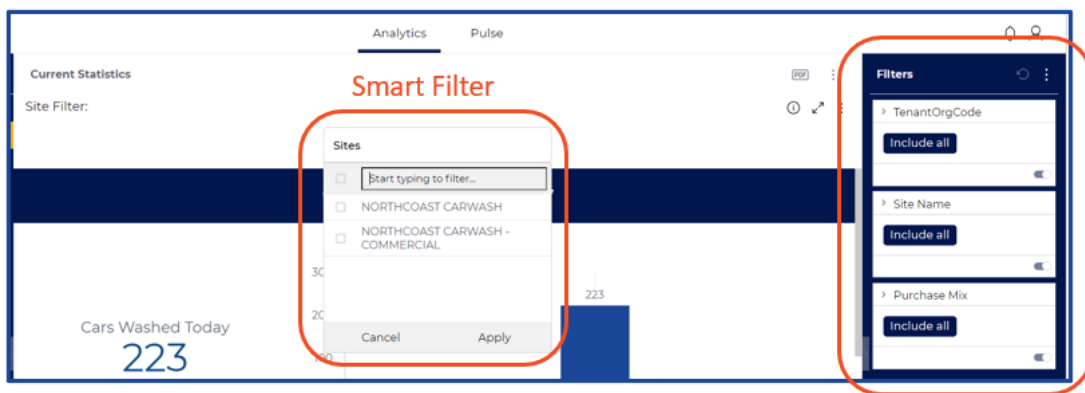
While this dashboard was created primarily for use in the Patheon Insights mobile app, it can be viewed on any device with an internet connection.

Widgets

- **Cars Washed Today**: This widget provides the user with the total number of cars washed for the current day, along with a 90-day average for comparison.
- **Cars Washed by Site**: This column chart breaks down the total cars washed per location for the current day.
- **Car Counts by Time Period**: This chart breaks down the total number of cars by previous hour, current day, previous day, current week, and month.

- **Cars Washed by Hour**: This column chart breaks down the cars washed by hour and provides the 90-day average for each hour. The current hour is displayed as a green bar.
- **Sales by Time Period**: This chart breaks down the total sales dollars by the last hour, current day, previous day, current week, and current month.
- **Today's Top Products**: This bar graph provides the top wash products that were sold on the current day.
- **Plan Sales**: This widget provides plan sales and reload activity by time period. It allows users to see the total plans sold and reloaded for the current day, previous day, current week, and previous week.
- **Plans Lost**: This chart displays the total plans Discontinued, Terminated, and Unpaid for the current day, previous day, and current month.
- **Plans Sold by Hour**: This chart allows the user to review plan sold statistics by the hour. Like the **Cars Washed by Hour** chart, the current hour is a green bar.
- **Today's Top Plans Sold**: This bar graph displays plans sold by plan name, allowing the user to easily review which plans are selling at the site.
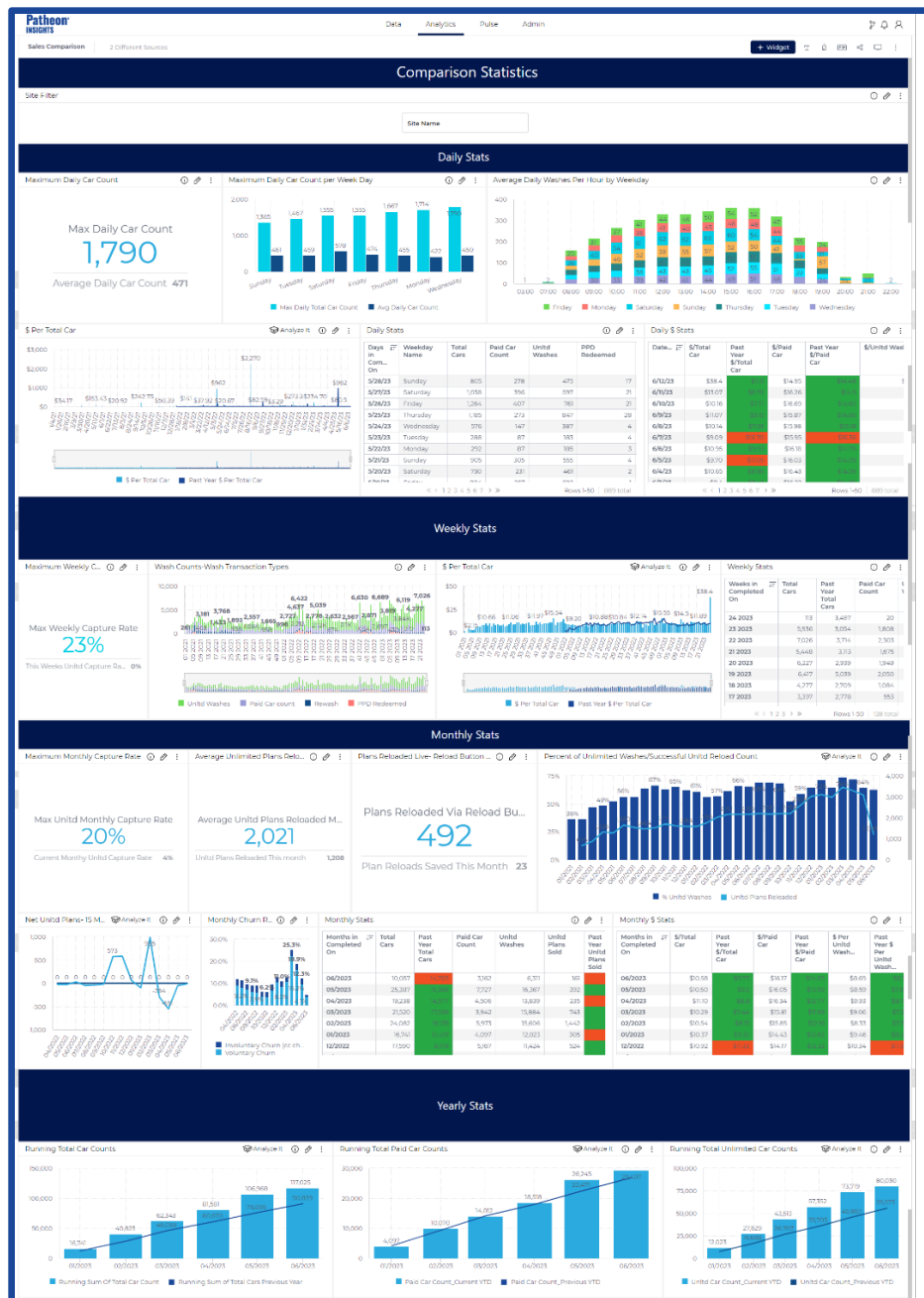

Current Statistics Dashboard Filter Options
- **Smart Filter - Site Name**: Review Current Statistics data for all sites or specific sites in an organization.
    - On the main dashboard, a site filter is available so mobile users can quickly filter data without accessing the mobile app filter options.
    - The **Site Name** filter is also available on the right side of the screen for users that prefer that method for filtering their dashboards.
- **Purchase Mix Filter**: Filter information by Unlimited, PayGo or Essential Web App (EWA) PayGo data.

New Sales Comparison Dashboard

The new **Sales Comparison Dashboard** allows users to easily compare Daily, Weekly, Monthly, and Yearly sales count and revenue per car data.

While this dashboard is designed primarily for use in the Patheon Insights mobile app, it can be viewed on any device with an internet connection.

Daily Stats
Widgets
- **Maximum Daily Car Count**: This widget provides the maximum daily wash count for the selected filter parameters. It also displays the average daily car count for comparison.
- **Maximum Daily Car Count per Weekday**: This chart provides the maximum and average daily car count for each weekday.
- **Average Daily Washes Per Hour by Weekday**: Users can easily review their average hourly car count by weekday.
  - Easily filter for specific days by clicking on the weekday names.
- **$ Per Total Car**: This column chart provides daily revenue per car. The previous year's calculations are also represented, providing a visual comparison.
  - In the mobile app, select the widget and pinch in/out to zoom in/out for specific parts of this chart.
  - In the desktop version, use the slider bar at the bottom of the chart to zoom in/out.
- **Daily Stats**: This chart provides all the daily car count statistics.
  - **Total Cars**: Any completed transaction that contained a wash product.
  - **Paid Car Count**: Single wash count, which is any wash transaction that was not a Plan use, a Rewash, or Prepaid code use.
  - **Unltd Washes**: Unlimited plan redemptions.
  - **PPD Redeemed**: Any redeemed unit plan code wash; this includes free washes with a Prepaid code.
  - **Rewash Count**: Any $0 wash entered from the Rewash tab at a point-of-sale terminal.
  - **Unltd Plans Reloaded**: Total successfully reloaded unlimited plans.
  - **Unltd Plans Sold**: Count of unlimited plans sold transactions.
  - **Unltd Capture Rate**: Percent of potential non-plan customers that were converted to plan members.
- **Daily $ Stats**: This chart provides revenue per car statistics and allows users to easily visualize these same statistics for the previous year. The previous year's statistics are green if the new/current data is higher and orange if the current data is lower.
  - **$ per Car**: Total Revenue/Total Car count.
  - **Past Year $ Per Car**: Total Revenue/Total Car Count for the same period in the previous year.
  - **$/Paid Car**: Single wash revenue/paid car count.
  - **Past Year $/Paid Car**: Single wash revenue/paid car count for the same period in the previous year.
  - **$/Unlimited Wash**: Unlimited Revenue/Unlimited Car Count.

- o **Past Year $/Unlimited Wash**: Unlimited Revenue/Unlimited Car Count for the same period in the previous year.
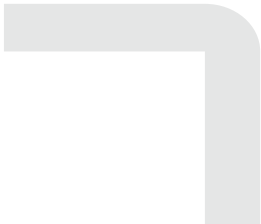
Weekly Stats

Widgets

- **Maximum Weekly Capture Rate**: This widget calculates the maximum weekly capture rate for the past 12 months. It also displays the current week's capture rate for comparison.
- **Wash Count by Transaction Type**: This widget provides the weekly car count breakdown for the following.
  - o **Paid Car Count**: Single wash count, which is any wash transaction that was not a Plan use, a Rewash, or a Prepaid code use.
  - o **Unltd Washes**: Unlimited plan redemptions.
  - o **PPD Redeemed**: Any unit plan code wash; this includes free washes with a Prepaid code.
  - o **Rewash Count**: Any $0 wash entered from the Rewash tab at a point-of-sale terminal.
- **$ Per Total Car**: This chart allows users to review their weekly revenue per car. The previous year's calculations are also represented, providing users with a visual comparison.
  - o In the mobile app, select the widget and pinch in/out to zoom in/out for specific parts of this chart.
  - o In the desktop version, use the slider bar at the bottom of the chart to zoom in/out.
- **Weekly Stats**: This chart provides users with all their weekly car count statistics.
  - o **Total Cars**: Any completed transaction that contained a wash product.
  - o **Past Year Total Cars**: Any completed transaction that contained a wash product for the same time period in the previous year.
  - o **Paid Car Count**: Single wash count, which is any wash transaction that was not a Plan use, a Rewash, or Prepaid code use.
  - o **Unltd Washes**: Unlimited plan redemptions.
  - o **PPD Redeemed**: Any unit plan code wash; this includes free washes with a Prepaid code.
  - o **Unltd Plans Sold**: Count of unlimited plan sold transactions.
  - o **Unltd Capture Rate**: Percent of potential non-plan customers that were converted to plan members.

Monthly Stats

Widgets

- **Maximum Monthly Capture Rate**: This widget calculates the maximum monthly capture rate. It also provides the current month's capture rate for comparison if the current month is included in selected date filters.
- **Average Unlimited Plans Reloaded Monthly**: This widget displays the average count of successfully reloaded Unlimited plans for each month. The current month's count is displayed as a secondary calculation.
- **Plans Reloaded Live- Reload Button Use**: This widget displays the total number of plans that were reloaded via the on-site reload button. The current month's reload button count is displayed as a secondary calculation.
- **Percent of Unlimited Washes/Successful Unltd Reload Count**: This chart provides the percent of washes that were Unlimited Washes. It also includes the total count of plan reloads.
- **Net Unltd Plans - 15 Months**: This widget provides net plan counts (Sold - (minus) Ended) for the last 15 months (including the current month). A negative value represents a net loss in plan counts.
  - This widget ignores the dashboard filters.
- **Monthly Churn Rate History**: This widget provides the last 15 months of churn, including Total Churn, Involuntary Churn, and Voluntary Churn. This is the same widget available on the Churn Rate dashboard.
  - This widget ignores the dashboard filters.
- **Monthly Stats**: This chart provides all monthly car count statistics.
  - **Total Cars**: Any completed transaction that contained a wash product.
  - **Past Year Total Cars**: Any completed transaction that contained a wash product for the same time period in the previous year.
  - **Paid Car Count**: Single wash count, which is any wash transaction that was not a Plan use, a Rewash, or Prepaid code use.
  - **Unltd Washes**: Unlimited plan redemptions.
  - **Unltd Plans Sold**: Count of unlimited plans sold.
  - **Past Year Unltd Plans Sold**: Count of unlimited plans sold, for the same time period in the previous year. It is red if the count is greater than the current year; it is green if it is less than the current year.
  - **Unltd Plans Reloaded**: Total successfully reloaded unlimited plans.
  - **Unltd Capture Rate**: Percent of potential non-plan customers that were converted to plan members.
- **Monthly $ Stats**: This chart provides revenue per car statistics and allows users to see that same information for the previous year. It is green if the previous year's data is higher and orange if the current data is lower.
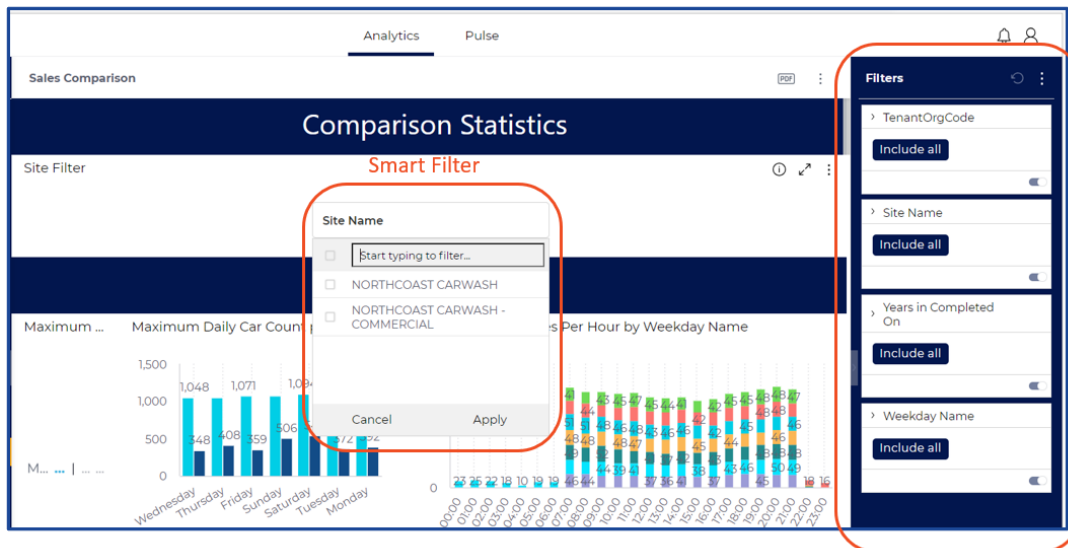
- o **$ Per Car**: Total Revenue/Total Car count.
- o **Past Year $ per Car**: Total Revenue/Total Car Count for the same period in the previous year.
- o **$/Paid Car**: Single wash revenue/paid car count.
- o **Past Year $/Paid Car**: Single wash revenue/paid car count for the same period in the previous year.
- o **$/Unlimited Wash**: Unlimited Revenue/Unlimited Car Count.
- o **Past year $/Unlimited Wash**: Unlimited Revenue/Unlimited Car Count for the same period in the previous year.

Yearly Stats

Widgets

- **Running Total Car Counts**: A chart that provides the current year's total car count by month. It also includes a line graph depicting the previous year's total for the same time period.
- **Running Total Paid Car Counts**: A column chart that provides the current year's total paid car count by month. It also includes a line graph depicting the previous year's total for the same time period.
- **Running Total Paid Car Counts**: A column chart that provides the current year's total unlimited car count by month. It also includes a line graph depicting the previous year's total for the same time period.

Sales Comparison Dashboard Filter Options

- **Smart Filter - Site Name**: Review Sales Comparison data for all sites or specific sites in an organization.
  - o On the main dashboard, a site filter is available so mobile users can quickly filter data without accessing the mobile app filter options.
  - o The **Site Name** filter is also available on the right side of the screen for users that prefer that method for filtering their dashboards.
- **Date Filter (Years in Completed On):** Open date filter; select days, weeks, year, or even relative date ranges.
- **Weekday Name Filter**: Easily review statistics by day of week.

New Multi-Site Comparison Dashboard

The new **Multi-Site Comparison Dashboard** enables users to easily compare daily, weekly, monthly, and yearly sales data across multiple sites.

While this dashboard is designed primarily for Patheon Insights mobile app use, it can be viewed on any device with an internet connection.

Daily Stats

Widgets

- **Maximum Daily Car Count**: Provides the maximum daily wash count for the selected filter parameters. It also provides the user with the average daily car count for comparison.
- **Maximum Daily Car Count per Location**: This widget provides the maximum daily car count for each location. It also provides daily averages for those locations.
- **Average Daily Car Count**: Provides the average daily car count, for each weekday, by site.

- o Easily filter for specific days by selecting the weekday names or use the Weekday Name filter option to filter the entire dashboard to specific days of the week.
- **$ Per Total Car**: This column chart provides daily revenue per car by site. The previous year's calculations are also represented, providing users with a visual comparison.
    - o In the mobile app, select the widget and pinch in/out to zoom in/out for specific parts of this chart.
    - o In the desktop version, use the slider bar at the bottom of the chart to zoom in/out.
- **Average Daily Washes Per Hour**: Provides the average hourly car count by site.
    - o In the mobile app, select the widget and pinch in/out to zoom in/out for specific parts of this chart.
    - o In the desktop version, use the slider bar at the bottom of the chart to zoom in/out.
- **Daily Stats**: This chart provides all daily car count statistics, by site.
    - o **Total Cars**: Any completed transaction that contained a wash product.
    - o **Paid Car Count**: Single wash count, which is any wash transaction that was not a Plan use, a Rewash, or Prepaid code use.
    - o **Unltd Washes**: Unlimited plan redemptions.
    - o **PPD Redeemed**: Any redeemed unit plan code wash; this includes free washes with a Prepaid (PPD) code.
    - o **Rewash Count**: Any $0 wash entered from the Rewash tab at a point-of-sale terminal.
    - o **Unltd Plans Reloaded**: Total successfully reloaded unlimited plans.
    - o **Past Month Unltd Plans Reloaded**: To easily compare information from their current statistics, this chart provides the total successfully reloaded Unlimited Plans for the same day of the previous month. If the current year's statistics are higher, it is green; it is orange if the current data is lower.
    - o **Unltd Plans Sold**: Count of unlimited plan sold transactions.
    - o **Unltd Capture Rate**: Percent of potential non-plan customers that were converted to plan members.
- **Daily $ Stats**: This chart provides revenue per car statistics and allows users to easily see these same stats for previous years, for each day and location selected in the filter options. If the current year's statistics are higher, it is green; it is orange if the current data is lower.
    - o **$ Per Car**: Total Revenue/Total Car count.
    - o **Past Year $ Per Car**: Total Revenue/Total Car Count for the same period in the previous year.
    - o **$/Paid Car**: Single wash revenue/paid car count.

      o **Past Year $/Paid Car**: Single wash revenue/paid car count for the same period in the previous year.
      o **$/Unlimited Wash**: Unlimited Revenue/Unlimited Car Count
      o **Past Year $/Unlimited Wash**: Unlimited Revenue/Unlimited Car Count for the same period in the previous year.

Weekly Stats
Widgets

- **Maximum Weekly Capture Rate**: Provides the maximum weekly capture rate for the selected filter options. The secondary calculation provides the capture rate for the current week.
- **Maximum Weekly Capture Rate by Site**: This widget provides the maximum weekly Unlimited capture rate for each site along with each site's current week unlimited capture rate.
- **Total Cars Per Site**: This chart provides the user with the total car breakdown for each week, for each location. The data is presented in a stacked column chart.
- **Weekly Stats**: This chart provides users with their weekly car count statistics, by location.
  - o **Total Cars**: Any completed transaction that contained a wash product.
  - o **Past Year Total Cars**: Any completed transaction that contained a wash product for the same time period the previous year.
  - o **Paid Car Count**: Single wash count, which is any wash transaction that was not a Plan use, a Rewash, or Prepaid code use.
  - o **Unltd Washes**: Unlimited plan redemptions.
  - o **PPD Rdmd**: Any redeemed unit plan code wash; this includes free washes with a Prepaid code.
  - o **Unltd Plans Sold**: Count of unlimited plan sold transactions.
  - o **Unltd Capture Rate**: Percent of potential non-plan customers that were converted to plan members.

Monthly Stats
Widgets

- **Maximum Monthly Capture Rate**: Provides the maximum monthly capture rate. This widget also provides the current month's capture rate for comparison if the current month is included in selected date filters.
- **Maximum Monthly Capture Rate Per Site**: Provides the maximum monthly capture rate for each location.
- **Current Monthly Unltd Capture Rate Per Site**: This chart provides the current month's capture rate for each location selected in the filter options.
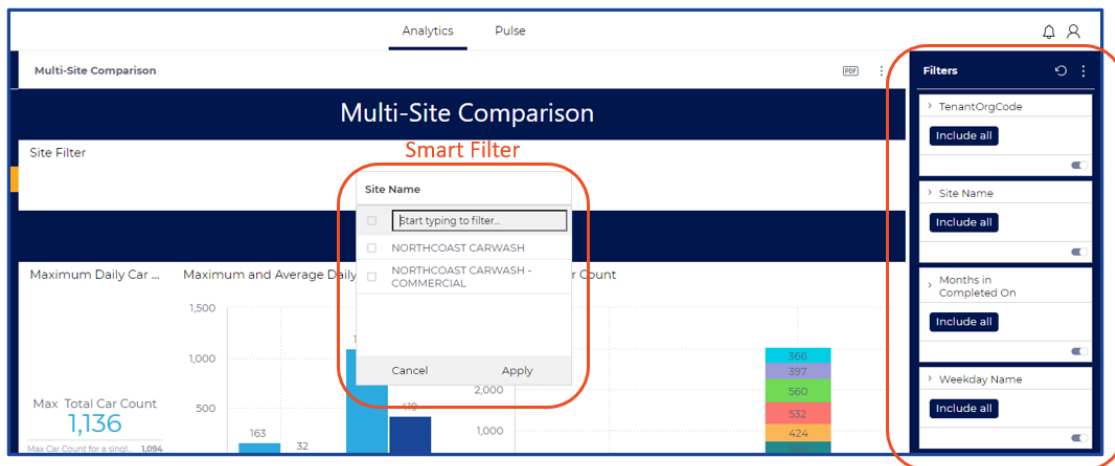
- **Average Unlimited Plans Reloaded Monthly Per Location**: This widget provides the average count of successfully reloaded Unlimited plans for each location, along with the current month's reload count.
- **Plans Reloaded Live - Reload Button Use**: This widget displays the total number of plans that were reloaded via the on-site reload button. The current month's reload button count is displayed as a secondary calculation.
- **Net Unltd Plans - 15 Months**: This widget provides net plan counts (sold - (minus) ended) for the last 15 months (including the current month). Negative values represent a net loss in plan counts.
  - The data is presented in a stacked column chart.
  - This widget ignores the dashboard filters. Use the location legend at the bottom of this widget to remove/add sites to chart.
- **Monthly Stats**: This chart provides monthly car count statistics. These stats are displayed by Month and Location.
  - **Total Cars**: Any completed transaction that contained a wash product.
  - **Past Year Total Cars**: Any completed transaction that contained a wash product for the same time period, in the previous year.
  - **Paid Car Count**: Single wash count, which is any wash transaction that was not a Plan use, a Rewash, or a Prepaid code use.
  - **Unltd Washes**: Unlimited plan redemptions.
  - **Unltd Plans Sold**: Count of unlimited plans sold.
  - **Past Year Unltd Plans Sold**: Count of unlimited plan sold transactions for the same time period the previous year. If it is greater than the current date, the data is orange. If it is less than the current date the data is green.
  - **Unltd Plans Reloaded**: Total Successfully reloaded Unlimited Plans.
  - **Unltd Capture Rate**: Percent of potential non-plan customers that were converted to plan members.
- **Monthly $ Stats**: This chart provides revenue per car statistics and allows users to see that same information for the previous years for each month and location selected in the filter options. This chart is color coded; previous years' statistics will be green if the new/current data is higher, and it will turn orange if the new/current data is lower.
  - **$ Per Car**: Total Revenue/Total Car count.
  - **Past Year $ Per Car**: Total Revenue/Total Car Count for the same period in the previous year.
  - **$/Paid Car**: Single wash revenue/paid car count.
  - **Past Year $/Paid Car**: Single wash revenue/paid car count for the same period in the previous year.
  - **$/Unlimited Wash**: Unlimited Revenue/Unlimited Car Count.

- Past year $/Unlimited Wash: Unlimited Revenue/Unlimited Car Count for the same period in the previous year.

Yearly Stats
Widgets
- **Running Total Car Counts**: A chart that provides a running total of the current year's running total car count by month. It also includes a line graph depicting the previous year's total for the same time period for each location.
    - To view a specific location, zoom in and out on that part of the graph.
- **Running Total Paid Car Counts**: A column chart that provides a running total of the current year's paid car count by month. It also includes a line graph depicting the previous year's total for the same time period for each location.
    - To view a specific location, zoom in and out on that part of the graph.
- **Running Total Paid Car Counts**: A column chart that provides a running total of the current year's unlimited car count by month. It also includes a line graph depicting the previous year's total for the same time period for each location.
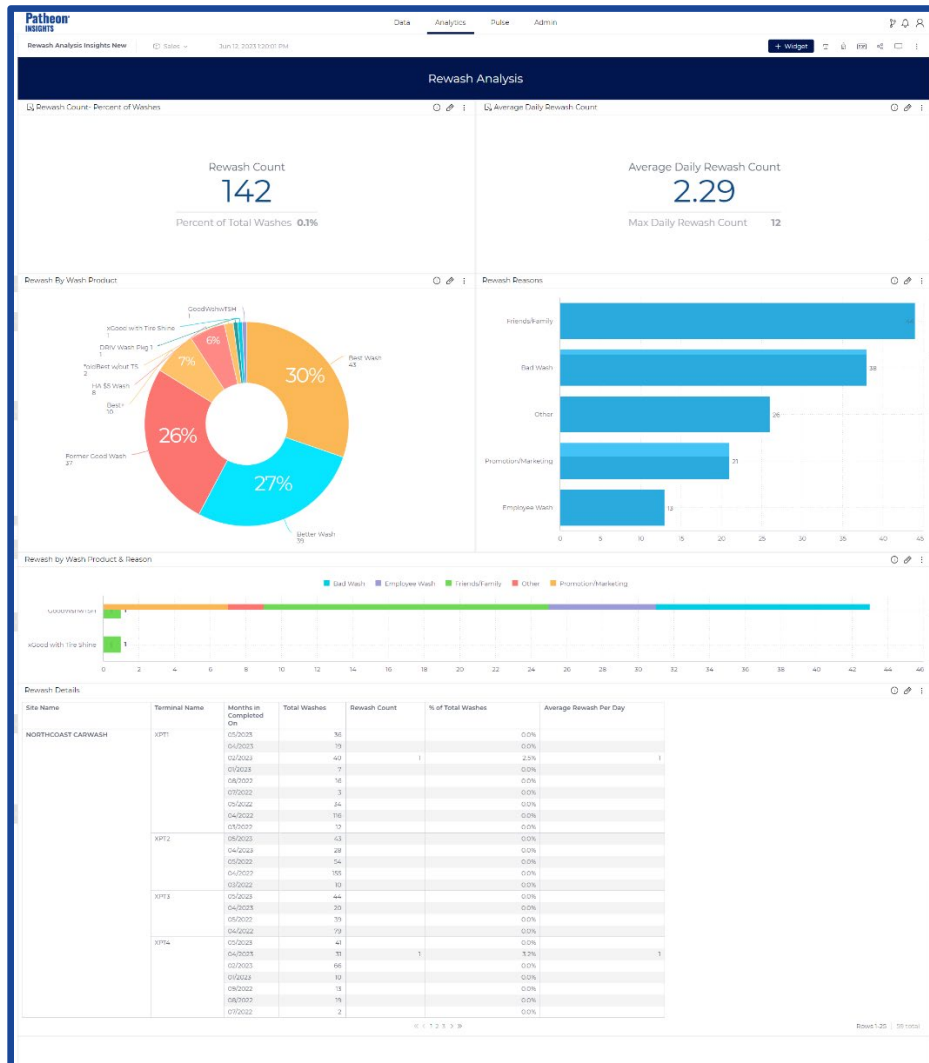   - To view a specific location, zoom in and out on that part of the graph.

Multi-Site Comparison Dashboard Filter Options
- **Smart Filter - Site Name**: Review Sales Comparison data for all sites or specific sites in an organization.
    - On the main dashboard, a site filter is available so mobile users can quickly filter data without accessing the mobile app filter options.
    - The **Site Name** filter is also available on the right side of the screen for users that prefer that method for filtering their dashboards.
- **Date Filter (Months in Completed On):** Open date filter; select days, weeks, year, or even relative date ranges.
- **Weekday Name Filter**: Easily review statistics by day of week.

Reconfigured Rewash Analysis Dashboard

The reconfigured **Rewash Analysis Dashboard** provides more analytics to better understand your rewash trends delivered with an enhanced visual layout.

The enhanced dashboard allows users to easily review counts, reasons and averages for each site's rewash counts.
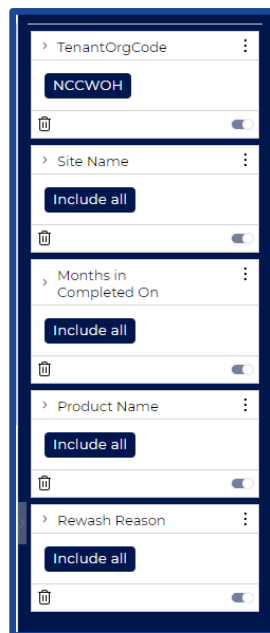

Widgets

- **Rewash Count - Percent of Washes**: Indicator widget that displays the total rewash count and % of Rewashes for the selected filter options.
  - This widget will drop down to display a column chart, that displays the daily rewash count.

- The chart is color coded and turns orange (warning) if the selected day's rewash count is 10 higher than the selected date range daily average. A blue column indicates the rewash count for the selected day is within range of the average rewash count.
- **Average Daily Rewash Count**: This widget displays the average daily rewash count. The secondary calculation is the maximum daily rewash count for the selected filter options.
  - This widget will drop down to display a single column chart that displays the daily rewash average for each location.
- **Rewash by Wash Product**: This donut chart displays rewash counts by wash product name.
- **Rewash Reason**: This bar graph displays the rewash count by rewash reason.
- **Rewash by Wash Product & Reason**: This stacked bar graph displays the rewash count by wash product. The data in the chart is stacked by the rewash reason.
- **Rewash Details**: This chart displays the following rewash statistics by site.
  - Site Name
  - Terminal Name
  - Month/Year
  - Total Wash Count
  - Rewash Count
  - % of Total Washes
  - Average Rewashes Per Day

Rewash Analysis Dashboard Filter Options

- The following filters are available for the **Rewash Analysis Dashboard**:
    - Site Name
    - Date Filter (Transaction Date)
    - Product Name
    - Terminal Name
    - Rewash Reason