Patheon® Release 30 Notes

Patheon Release 30 includes the following feature enhancements. Click on one of the following links to get more details on specific highlights of this release:

Portal
- [Customer Record Enhancement](#)

POS
- [Refund Security Enhancement](#)

POS - Tunnel Entrance
- [Enable Auto-Send from First Position in the Queue](#)

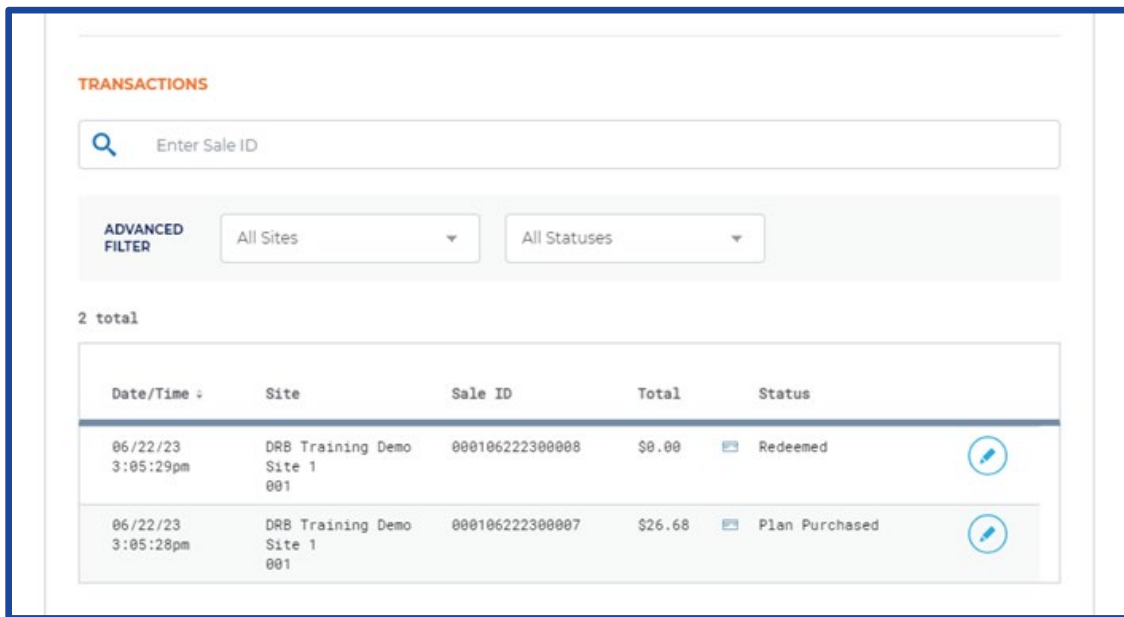Patheon Dashboards
- [New Prepaid & Gift Card Dashboard](#)

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

Portal

Customer Record Enhancement

To better support wash customers, wash staff can now view customer transactions in the Patheon Portal.

A new **TRANSACTIONS** section has been added to the Patheon Portal **CUSTOMER VIEW** panel, which displays all a customer's transactions.
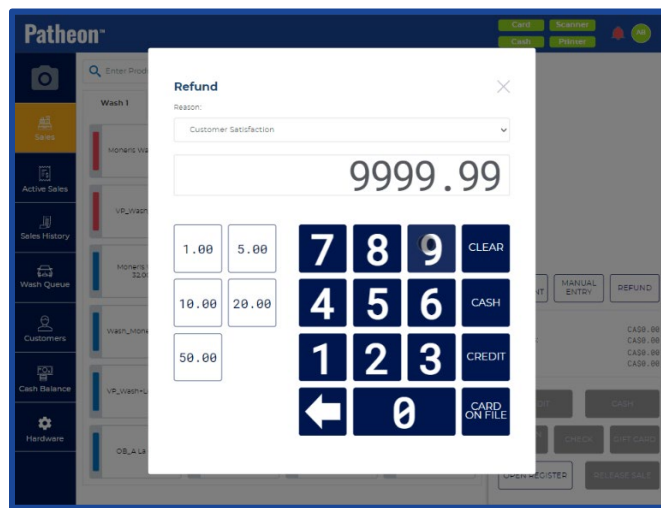

Sites can view (read-only) details of any transaction from a customer's transactions list by selecting a corresponding edit function.

POS

Refund Security Enhancement

To enhance internal controls, the cashier terminal **REFUND** function now limits the maximum amount that can be refunded/returned to a customer in a single transaction to $9,999.99.

POS – Tunnel Entrance

Enable Auto-Send from First Position in the Queue

To increase queuing efficiency, tunnel entrance terminals can now be configured to automatically send a vehicle from the first position in the queue.

There are three methods, for sending a vehicle:

- Auto Send: First Position
- Auto Send: Sensor
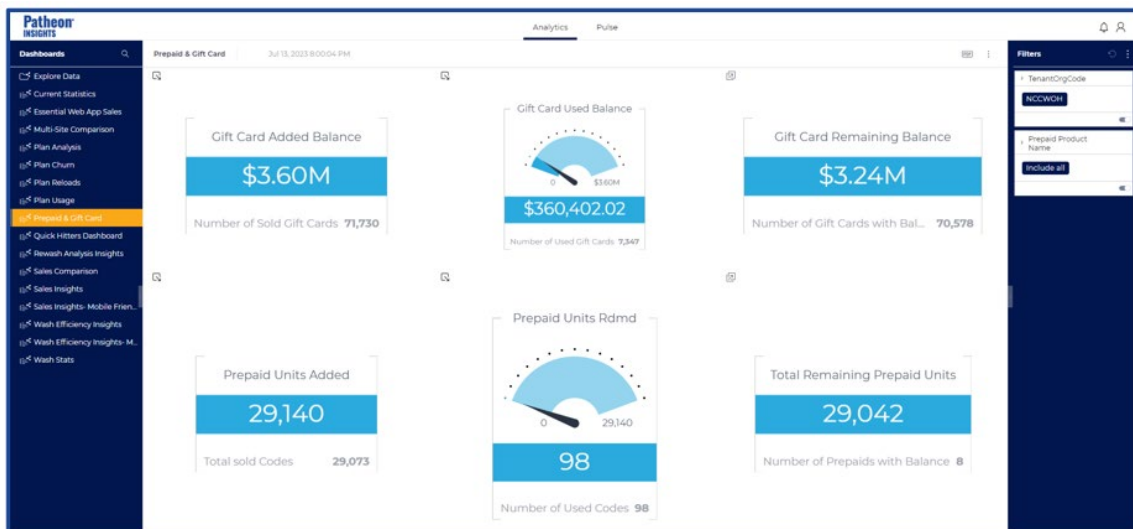- Manual Send Car (default selection at set-up)

The indicator button on the Wash Queue panel alerts wash staff which option is enabled. **Note**: Tunnel entrance staff can still manually send a vehicle by selecting **SEND CAR** if one of the auto-send methods is configured.

Dashboards

Prepaid & Gift Card Dashboard

The new Prepaid & Gift Card Dashboard allows users to easily review liabilities sold, used, and available for all prepaid and gift card plans.
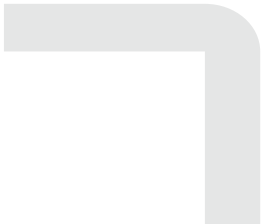
Widgets

Gift Card Section

- **Gift Card Added Balance**: This widget displays the total dollar amount for Gift Card balances, along with the total number of gift card codes that have balances added to them.
    - o Selecting the widget displays a drop-down with two stacked column charts, broken out by the site name and transaction date.
        - **Gift Card Codes Sold Count**: The number of gift card codes that had additional amounts added by month/year.
        - **Gift Card Dollar Amounts Added**: The total dollar amounts added to gift cards by each month/year.
- **Gift Card Used Balance**: This widget displays the total dollar amount used for all gift cards along with the count of codes used to redeem gift card balances.
    - o Selecting the widget displays a drop-down with two stacked column charts.
        - **Gift Card Codes Used**: The total number of gift card codes used by month/year, for each location.
        - **Gift Card Dollar Amounts Used**: The total gift card dollar amount used by month/year, for each location.
- **Gift Card Remaining Balance**: This widget provides the total dollar amount remaining on gift cards.
    - o Selecting this widget provides the user with a chart that displays the following data sets:
        - **Gift Card Code**
        - **Site Name - Site where the gift card was activated**
        - **Initial Purchase date for this Gift Card Code**
        - **Total Added Value Dollars**
        - **Total Used Value Dollars**
        - **Total Remaining Balance**

Prepaid Section

- **Prepaid Units Added**: Total prepaid units activated or sold, with a secondary value of number of codes sold.
    - o This widget will drop down to display two column charts.
        - **Prepaid Units Sold**: Total units sold or activated for each month/year stacked by site.
        - **Prepaid Units Sold by Plan Name**: Total units sold or activated by plan name, for each month/year stacked by site.

- **Prepaid Units Rdmd**: Total prepaid units redeemed, with a secondary value that displays the number of codes used.
    - o This widget will drop down to display three column charts.
        - **Prepaid Units Used by Month**, stacked by site.
        - **Prepaid Units Used by Plan Name**, stacked by site.
        - **Prepaid Units Used by Month and Plan**, stacked by name of plan.
- **Prepaid Remaining Units**: This widget provides the units left in prepaid liabilities.
    - o Clicking on this widget will provide the user with a prepaid chart that displays the following data sets:
        - **Prepaid Code**
        - **Prepaid Product Name**
        - **Total Purchase Amount**
        - **Prepaid Units Added**
        - **Prepaid Units Redeemed**
        - **Prepaid Units Remaining**

Prepaid & Gift Card Filter Options
- **Prepaid Product Name**: Allows users to filter the dashboard to a specific plan.