Patheon® Release 34 Notes

Patheon Release 34 includes the following feature enhancements. Click on the links to get more details on these features:

['Set Price To' Discounts](#)

[Create and Manage Site Groups](#)

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

'Set Price To' Discounts

Patheon users can now easily create one discount for all plans with the 'Set Price To' option. This feature enables organizations to reduce the number of discounts they must set up and is unaffected by price changes. 'Set Price To' makes managing discounts faster and more efficient:

- All sites need to configure is the discounted price – the amount due after the discount is applied.
- Automatically factors and calculates different tax rates across multiple sites
- Works with item(s), product type(s) and new plan members
- Works with coupon/promo code discounts and automatic discounts
- Works across multi-site organizations – the discount follows the item's, product type's or plan's configuration.

To learn how to get the most out of the 'Set Price To' feature, watch the video below or follow the written instructions.

Click here to view the 'Set Price To' video

Configuring a 'Set Price To' Discount

Use these steps to add and configure a new **Set Price To** discount.

1. Log in to Patheon Portal.
2. Select **Discounts**. The **DISCOUNTS** panel opens.
3. Select **ADD DISCOUNT**. The **ADD DISCOUNTS** (**1 CONDITIONS**) panel opens.
4. In **Name***, enter the discount name.
5. In **Type***, select **Coupon** or **Automatic**. **Note: Set Price To** discounts can be either type.
6. Configure the discount conditions. **Note: Set Price To** discounts can be applied to items, product types or plans.
7. Select **CONTINUE**. The **ADD DISCOUNTS** (**2 ACTIONS**) panel opens.
8. In **Type of Discount***, select **Set Price To**.
9. In **Discounted Price***, enter the price charged after the discount is applied, for example, **10.00**.
10. Select **CONTINUE**. The **ADD DISCOUNTS** (**3 ACTIVATION**) panel opens.
11. In **Status***, select **Active**.
12. Select **SAVE**.

'Set Price To' Examples

The following are examples of **Set Price To** configuration for items, product types and plans.

Item(s)

Example **Set Price To** configuration for a discount that sets the discounted price to $10 for a site's Good Wash, Better Wash and Best Wash.

Product Type(s)

Example **Set Price To** configuration for a discount that sets the discounted price to $2 for every A La Carte product at a site.

New Plan Members

Example **Set Price To** configuration for a discount that sets the discounted price to $10 for the first period of all the site's unlimited plans.

Create and Manage Site Groups

Multi-site organizations can improve their operational efficiency by adding, managing (add sites or remove sites) and deleting site groups.

- Plans can now be activated for site groups (or deactivated for a site group), in addition to individual or select individual sites.
- Products can now be activated for site groups (or deactivated for a site group), in addition to individual or select individual sites.
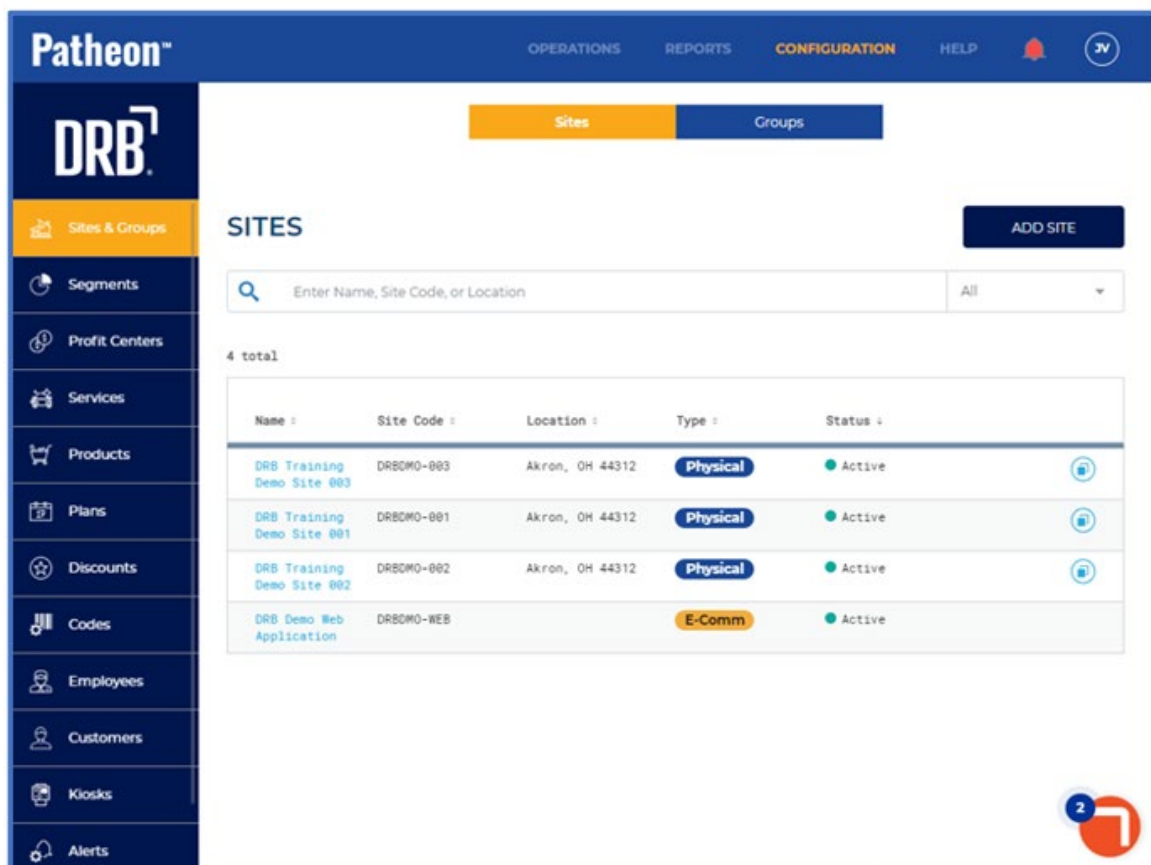
To learn how to create and manage site groups, watch the video below or follow the written instructions.

<div style="border:1px solid #1a3a6b; padding:20px;">

[Click here to learn more about Site Groups in Patheon](#)

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Add a Site Group

Use these steps to add a new site group in Patheon Portal. Site groups can be selected when configuring where products or plans are active. **Note**: A site can only belong to one site group at a time.
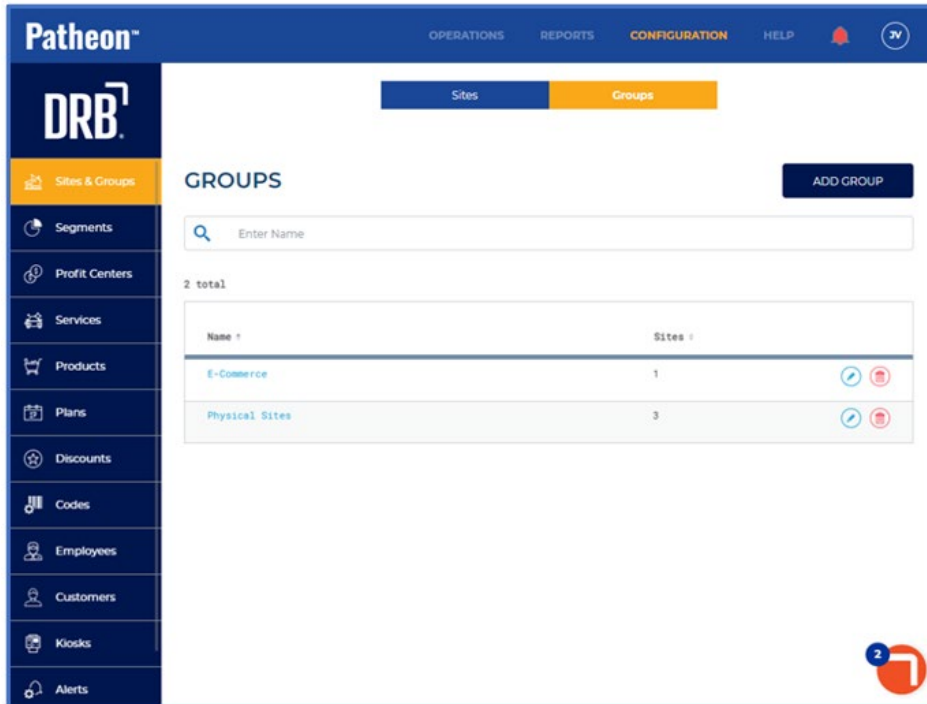
1. Log in to Patheon Portal.
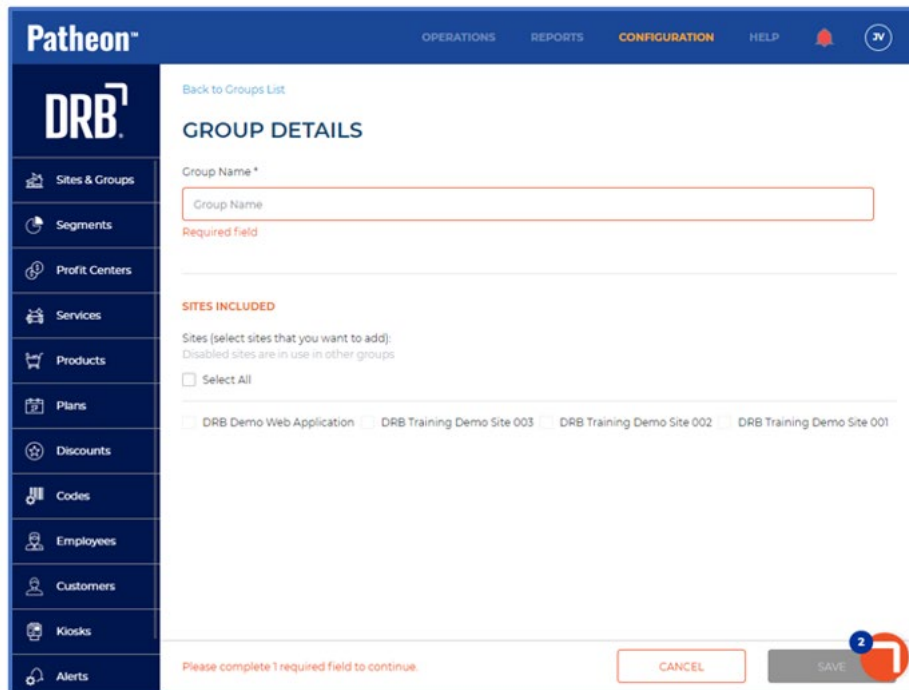2. Select **Sites & Groups**. The **SITES** panel opens.

3. Select **Groups**. The **GROUPS** panel opens.

4. Select **ADD GROUP**. The **GROUP DETAILS** panel opens.

5. In **Group Name***, enter the name of the new site group.

6. In the **SITES INCLUDED** section, select a site to add it to the new group. A check mark appears next to the site. **Note:** If a site already belongs to another site group, it can't be added to the new site group.
7. Select any additional sites to add to the group.
8. Select **SAVE**. An **Are you sure?** confirmation dialog opens.
9. Select **SAVE**. The dialog closes and the changes are saved.

Delete a Site Group

Use these steps to delete an existing site group in Patheon Portal. Note: A site group can be deleted even if it has sites assigned to it.
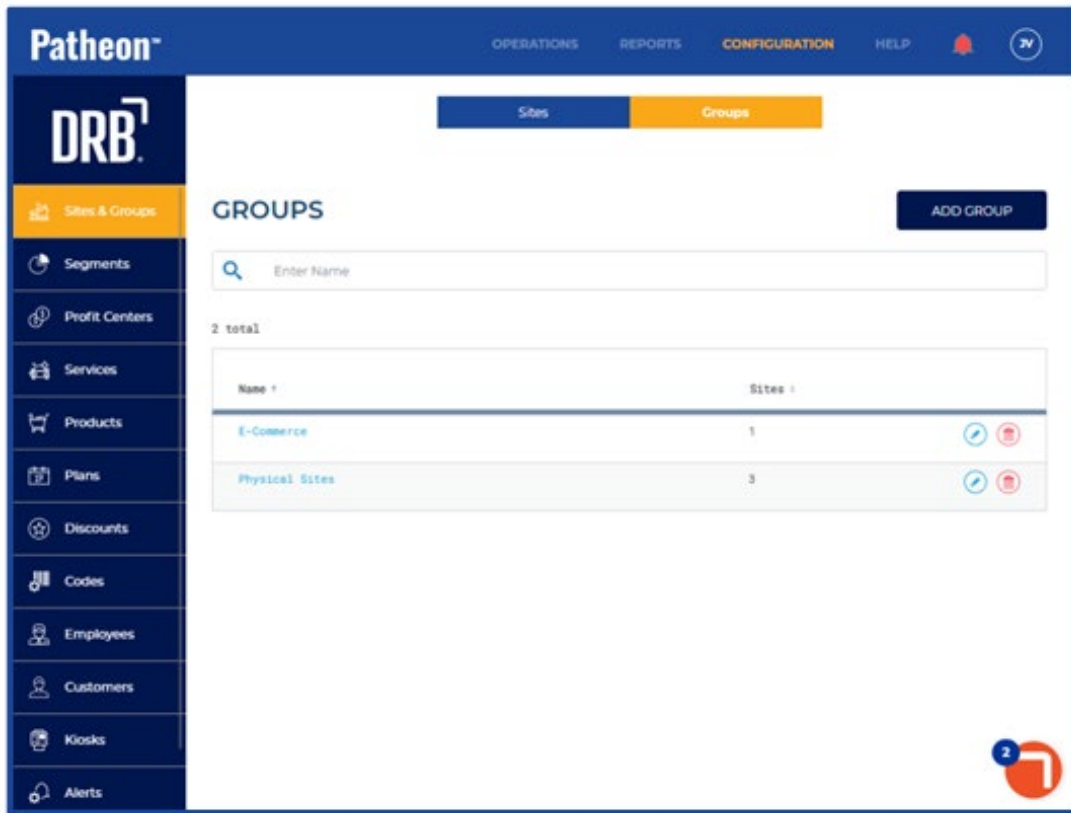
1. Log in to Patheon Portal.
2. Select **Sites & Groups**. The **SITES** panel opens.

3. Select **Groups**. The **GROUPS** panel opens.

4. Select the delete function for the group to delete. An **Are you sure?** confirmation dialog opens.
5. Select **SAVE**. The dialog closes and the group is deleted.

Manage Site Groups - Add a Site to a Group

Use these steps to add a site to an existing site group in Patheon Portal. Site groups can be selected when configuring where products or plans are active. Note: A site can only belong to one site group at a time.

1. Log in to Patheon Portal.
2. Select **Sites & Groups**. The **SITES** panel opens.

3. Select **Groups**. The **GROUPS** panel opens.

4. Locate the group to which the site is being added.
5. Select the edit function for the group. The **GROUP DETAILS** panel opens.
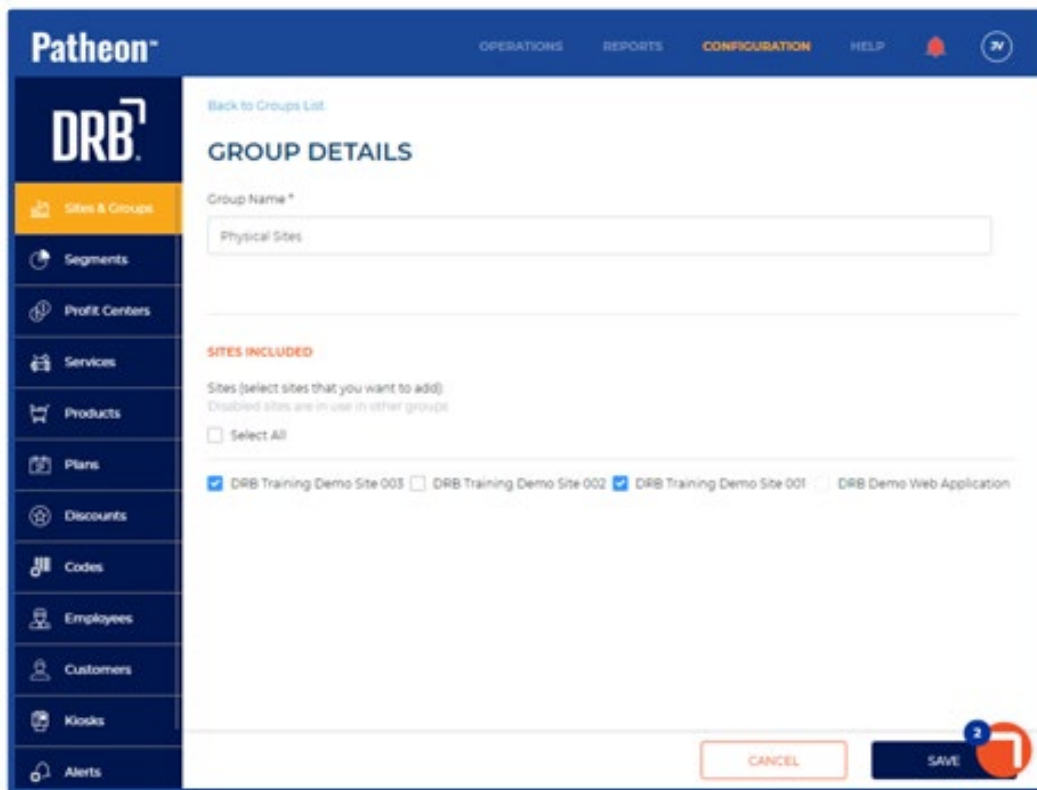
6. In the **SITES INCLUDED** section, select the site to add. A check mark appears next to the site. Note: If a site already belongs to another site group, it can't be added to this site group.
7. Select **SAVE**. An **Are you sure?** confirmation dialog opens.
8. Select **SAVE**. The dialog closes, and the changes are saved.

Manage Site Groups - Remove a Site from a Group

Use these steps to remove a site from a site group in Patheon Portal. Site groups can be selected when configuring where products or plans are active. Note: A site can only belong to one site group at a time. After a site is removed from a site group, it can be added to another site group.

1. Log in to Patheon Portal.
2. Select **Sites & Groups**. The **SITES** panel opens.

3. Select **Groups**. The **GROUPS** panel opens.

4. Locate the group from which the site is being removed.
5. Select the edit function for the group. The **GROUP DETAILS** panel opens.
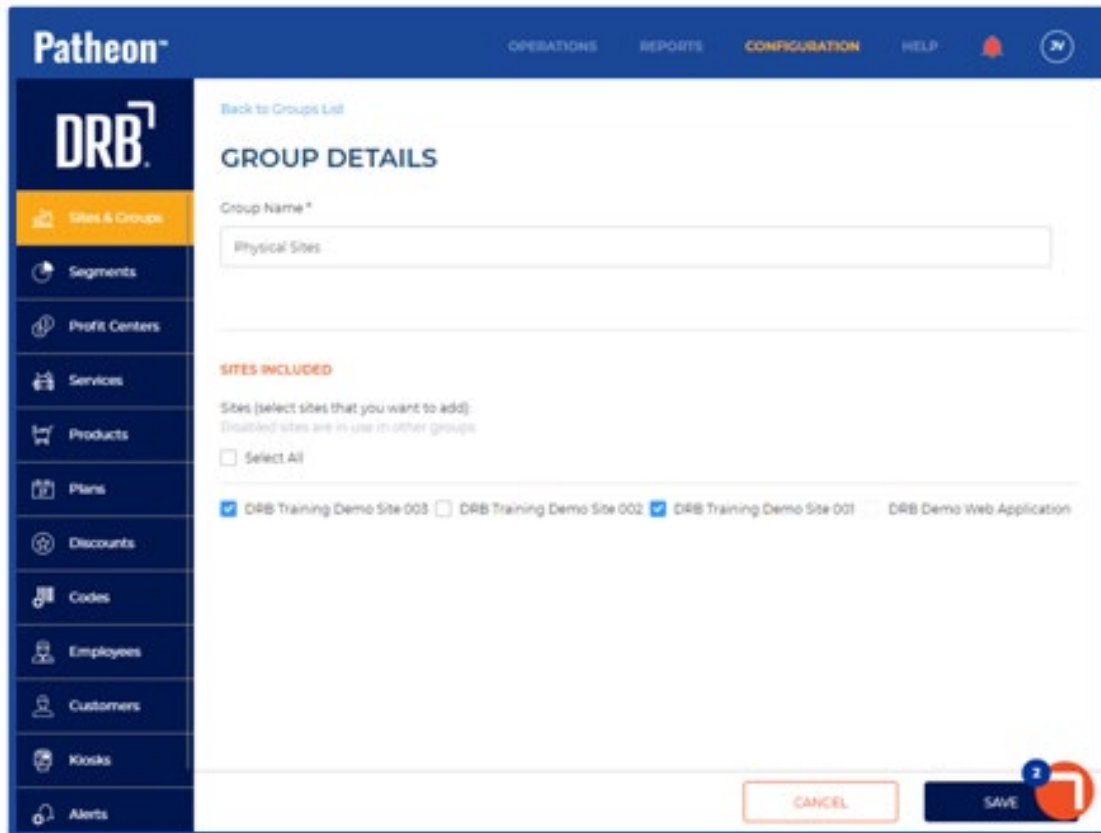
6. In the **SITES INCLUDED** section, select the site to remove. The check mark next to the site is removed.
7. Select **SAVE**. An **Are you sure?** confirmation dialog opens.
8. Select **SAVE**. The dialog closes, and the changes are saved.