

# Patheon™ Release 6 Notes

Patheon Release 6 includes the launch of Patheon Insights. In addition to the traditional reports Patheon already provides, Patheon Insights gives you access to a series of dashboards that provides you with an enhanced analytics and insights experience. Click on one of the following to get more details on specific highlights of this release:

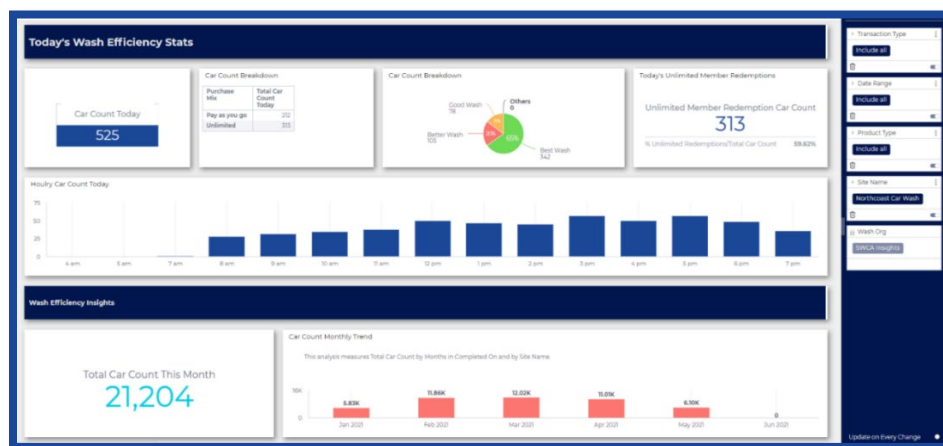
- [Patheon Insights](#)
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- [Report Enhancements](#)
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If you have any questions about this release, please contact the Knowledge Center at 330.645.3299 or [Knowledgecenter@drbsystems.com](mailto:Knowledgecenter@drbsystems.com).

\*The Essential Web App is an add-on module. If you would like to learn more, [contact your sales representative](#).

## Patheon Insights

Built on a powerful business intelligence engine, Patheon Insights provides interactive dashboards and narratives. It puts your data and metrics in one place, so you no longer need to cross-reference reports. You can easily filter, export, share and embed insights into other documents or web pages. You can toggle Insights access on for certain employees as you wish with this release. Eventually, Patheon will include the ability to control the data employees can view based on their role.



Please note that you'll see two versions of each dashboard, a browser version and a mobile enhanced version. We will eventually hide the duplicate versions based on the endpoint you are using.

## Accessing Patheon Insights

To utilize Patheon Insights, you'll need to have access turned on. If you have the permission level association with "Configure site SM Employees," you may click the management tab for employees and toggle "Insights Access" on.



From there, you may login using your SM credentials and site code. If you see an activation email from Sisense, you may ignore it. No further action is needed from you.

You can find the Patheon Insights dashboards by selecting "Insights" from the upper right corner of Patheon Portal. When selected, it opens the Insights dashboard in a new browser tab.



## Included Widgets

The dashboards are organized into widgets, with each providing a specific KPI, metric or trend. You can view the following widgets:

- **Total Revenue:** An indicator widget that displays the total revenue for the given date range.
- **Revenue Breakdown Purch Mix:** A pie chart widget that displays total revenue by purchase mix (unlimited vs pay-as-you-go).
- **Total Revenue Trend:** A line chart widget that displays the total revenue in trend format over time (weekly view).
- **Revenue Breakdown Product Type:** A pivot table widget that displays total revenue broken out by product type, item count and total revenue.
- **Total Car Count:** An indicator widget that displays the total car count for a given date range.
- **Car Count Breakdown Purch Mix:** A pie chart widget that displays car count broken out by redemptions/pay-as-you-go.
- **Total Car Count Breakdown Product Name:** A pivot table widget that displays total car count broken out by product name.
- **Total Car Count Trend:** A line chart widget that displays total revenue in trend format over time (weekly view).
- **Avg Weekly Cars Per Hour:** A line chart widget that displays the average car count per hour for the current day of the week.
- **Total Plan Revenue:** An indicator widget that displays total revenue derived from plans for the current date range on the dashboard.
- **Plans Sold Revenue:** An indicator widget that displays revenue from plans sold within the date range on the dashboard.
- **Plans Reload Revenue:** An indicator widget that displays revenue from plan reloads within the current date range on the dashboard.
- **Plan Summary:** A pie chart widget that displays total plan revenue broken out by unit-based and time-based plans.
- **Plans Sold Breakdown:** A pie chart widget that displays plans sold revenue broken out by unit-based and time-based plans.
- **Plan Reload Breakdown:** A pie chart widget that displays plan reload revenue broken out by unit-based and time-based plans.
- **Current Active Plan Count by Site:** A pivot table widget that displays active plan count totals by site.

## Patheon Insights Features

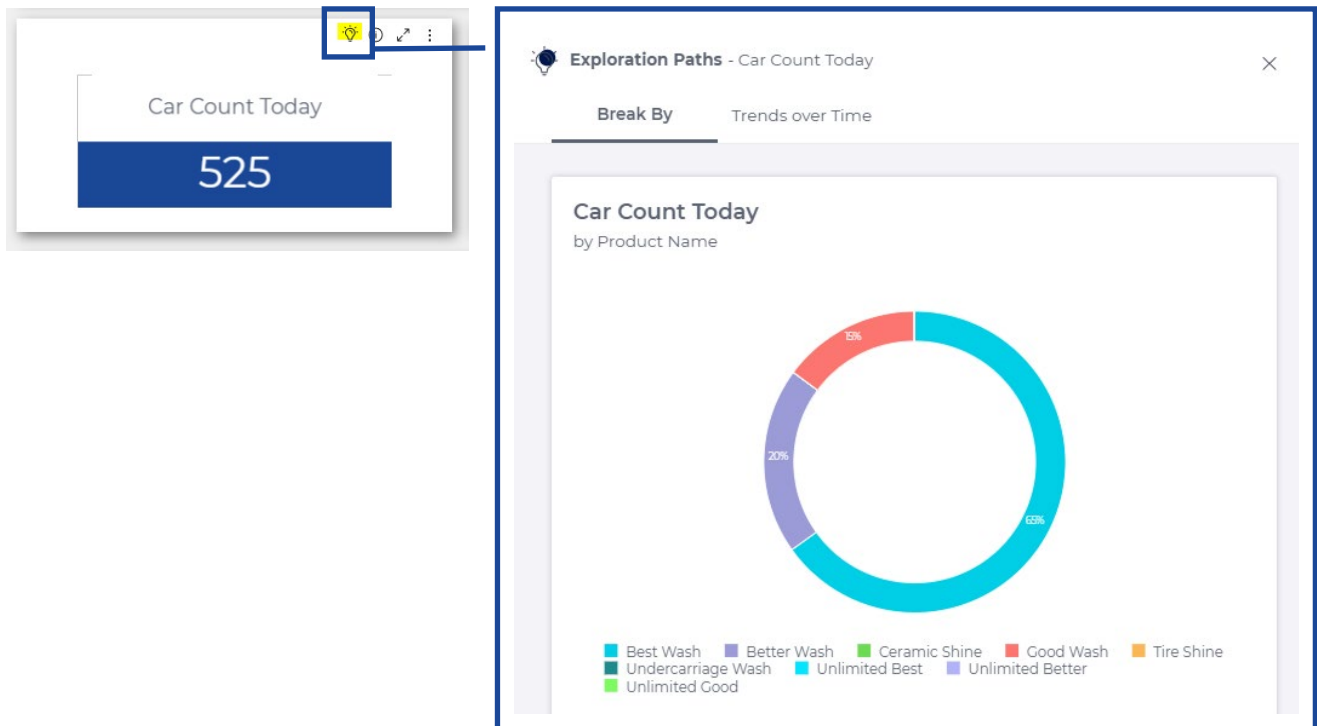
Patheon Insights includes a number of unique features that allow you to experience your data in new ways, allowing you to uncover opportunities for growth.

### Pulse

Bookmark your favorite widgets to the Pulse page so you can easily access the data that matters the most to you. You can also set alerts for those widgets. For example, if you want to reward your employees every time a site exceeds \$5,000 for the daily revenue, set an alert to notify you when revenue exceeds this threshold.

### Exploration Paths

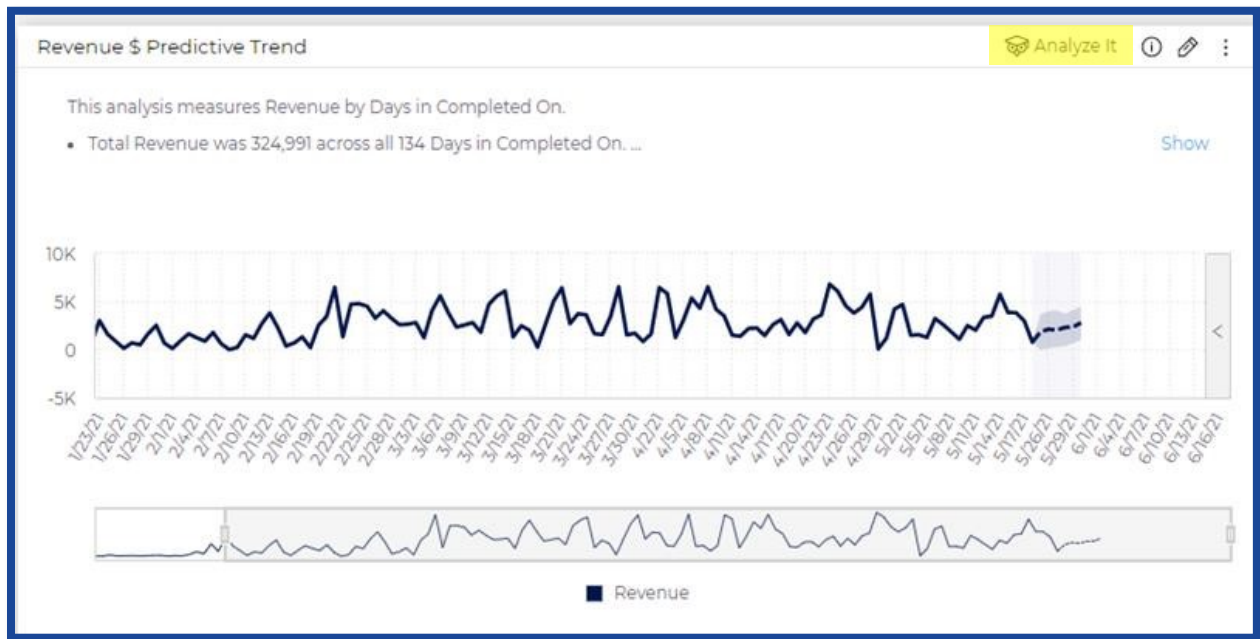
KPI widgets have lightbulb icons you can select to view additional information that the smart Patheon Insights smart engine anticipates you want to see.



## Analyze It

Select the “Analyze It” icon on trend widgets to launch the following options:

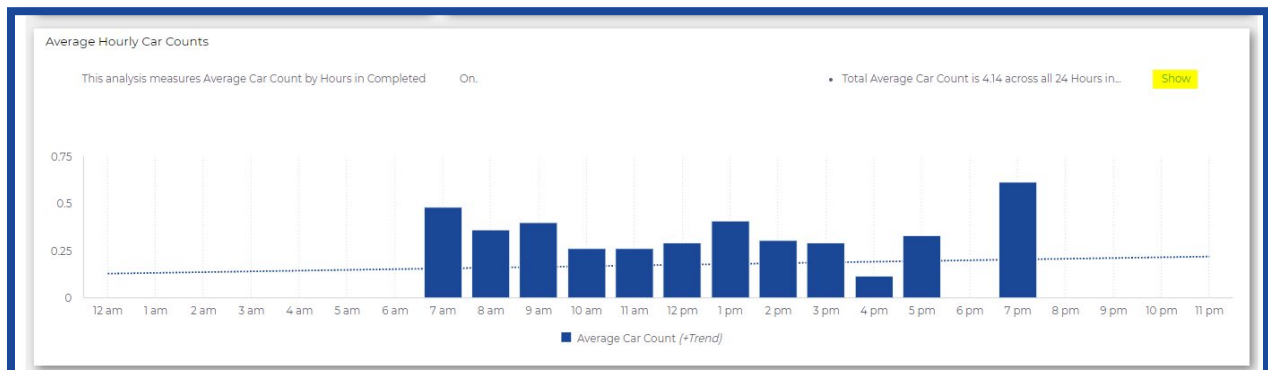
- **Explanations:** When you select a data point on the graph, Patheon Insights will attempt to compare it to a previous period and explains the differences.
- **Forecast:** Patheon Insights can forecast future values based on historical data. Use this function to compare what was forecast to what actually happened.
- **Trend:** Toggle the trend line to see the average trend for the data the widget is displaying.



## Narratives

You can view Narratives for select trend-based widgets by selecting “Show”.

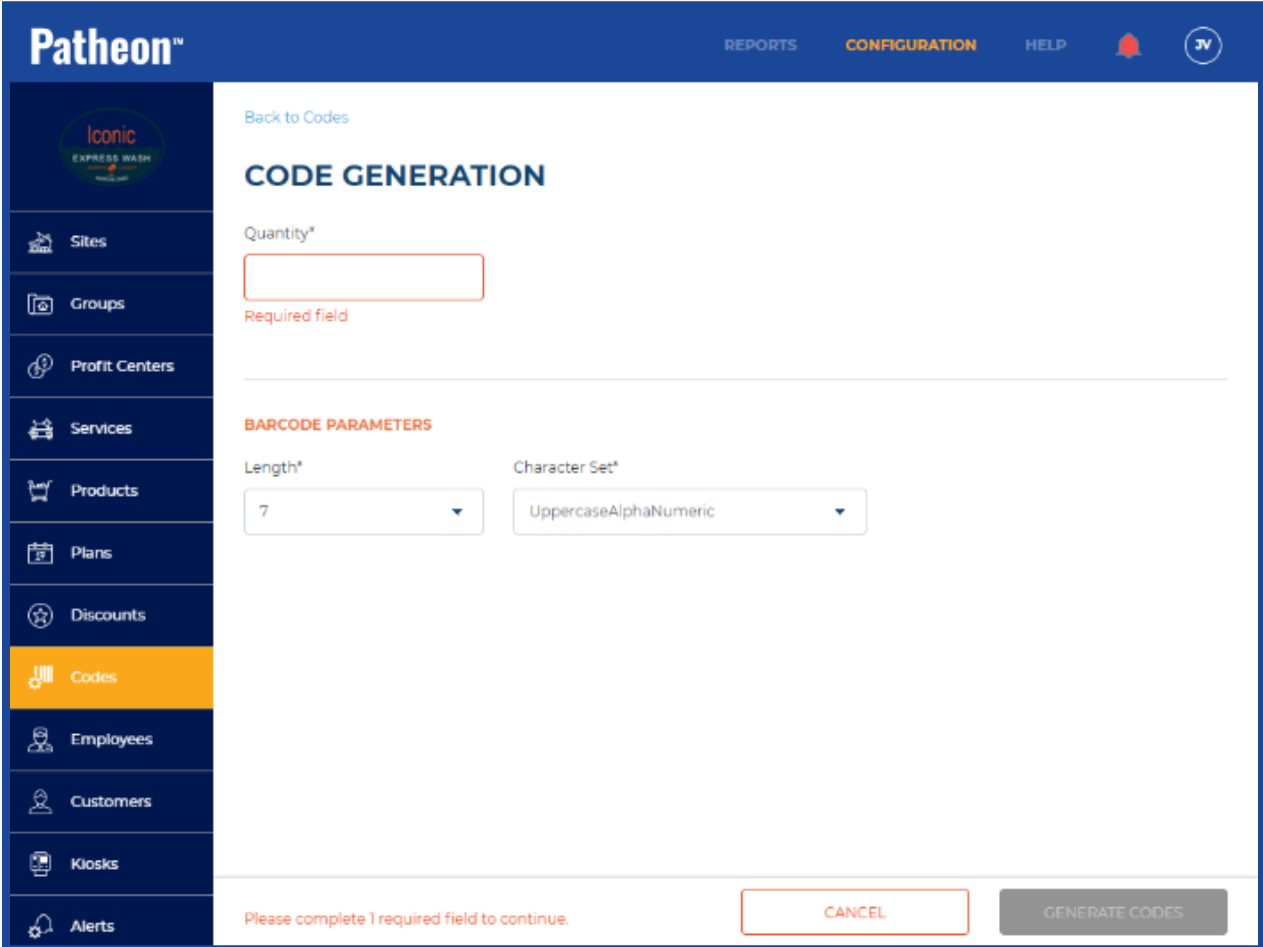
Narratives interpret the information into natural language, giving you the “so what” behind your data with bullet points highlighting major takeaways.



## Barcode Enhancements

You can now specify barcode length and character when generating a batch of barcodes via the Patheon Portal. This applies to generic product barcodes as well as barcodes for gift cards, prepaid cards, ticket books and WashCAP.

- The Patheon Portal CODE GENERATION panel (CONFIGURATION>CODES>GENERATE CODES) now includes a required Length field where you can set the length between 5 characters (minimum) and 20 characters (maximum). The field is set to the most recently selected value by default.
- The Patheon Portal CODE GENERATION panel (CONFIGURATION>CODES>GENERATE CODES) now includes a required Character Set field allowing you to configure barcodes to use any of the following character types: UppercaseAlpha, LowercaseAlpha, Numeric, UppercaseAlphaNumeric, LowercaseAlphaNumeric, or UpperAndLowercaseAlphaNumeric.



The screenshot displays the Patheon user interface for the CODE GENERATION panel. The top navigation bar includes 'REPORTS', 'CONFIGURATION', and 'HELP'. The left sidebar lists various menu items, with 'Codes' highlighted in orange. The main content area features a 'Back to Codes' link and a 'CODE GENERATION' heading. Below this, there is a 'Quantity\*' field which is currently empty and marked as a 'Required field'. Underneath, the 'BARCODE PARAMETERS' section contains two dropdown menus: 'Length\*' set to '7' and 'Character Set\*' set to 'UppercaseAlphaNumeric'. At the bottom, a message states 'Please complete 1 required field to continue.', accompanied by 'CANCEL' and 'GENERATE CODES' buttons.

## Tax Enhancements

You can configure discounts to be applied to a sale before or after tax is applied based on your local tax laws.

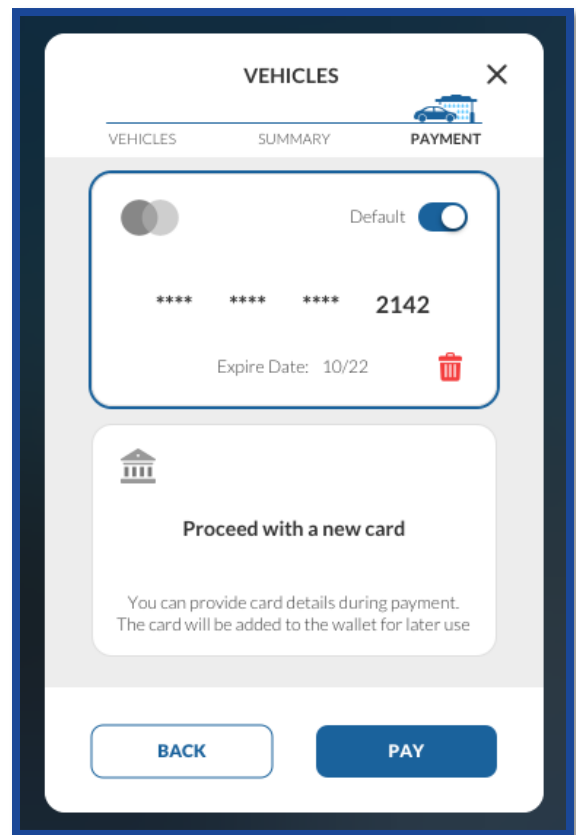
## Gate Operation from POS

This enhancement allows you to manually open and close any of your lane gates from a cashier terminal or a SAL lane terminal. This is helpful if a gate misses its signal to raise or lower. It also allows you to test gates. To manually operate a gate, select **Open <terminal name> gate** or **Close <terminal name> gate** from a cashier terminal.

## Patheon Essential Web Application Enhancements

We replaced the “add card” element with a “Proceed with a new card” element to reduce confusion in the payments area. If there is no card in the customer’s wallet, the app will automatically default to the “Proceed with a new card” element, resulting in a single click to proceed to the card entry screen.

Customers can now remove a vehicle from their profile from the profile edit screen. When a vehicle is removed, the app hides the card of the corresponding vehicle and displays a message informing the customer of the action. The customer can cancel the removal with an “Undo” function. If they do not cancel the action during the five-second timeout, the message disappears, and the request to remove the vehicle is sent. **Note:** A vehicle cannot be removed if it is linked to an active unlimited wash plan. It will instead be inactivated.





## Report Enhancements

### General Report Enhancements

- The “Generate On” date-time displayed in all report headers is the site’s local time rather than defaulting to ET.
- The General Sales Report now includes a “Channel” parameter, allowing you to generate the report for “All,” “Retail Only” or “ECommerce Only” sales data.

### Plan Customer Detail Report Added

- The report includes the following parameters: “Date Range” (for join date), “Site(s),” “Plan Name,” “Plan Status” and “Last Reload Status,” which includes an “Unknown” option that displays all customers with “null” values in the last reload date field.
- The report displays the following data points: “Join Date” (order by), “Customer Name,” “Email,” “Phone,” “Plan Name,” “Plan Status,” “Last Reload,” “Status” and “Redemptions.”

## Product Configuration Change

When configuring a new product, the “Sales Tax” radio button is now set to “No” by default, and the “Tax Inclusive Price” radio button is disabled. If “Sales Tax” is changed to “Yes,” the “Tax Inclusive Price” radio button is now enabled.

