



Getting Started with Pool Notes

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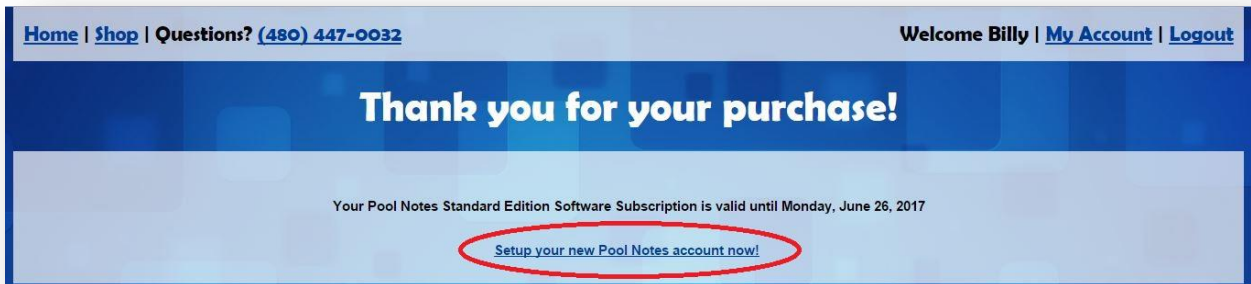
Standard Edition

Pool Notes, Standard Edition supports a single user, but unlimited customers and pools. If you are a one man show and you handle all of your company’s work yourself, then this is the edition for you! This guide will walk you through setting up and accessing your account, adding customers and pools to your account, creating your daily routes, and provide a basic overview of the Pool Notes Ticket system.

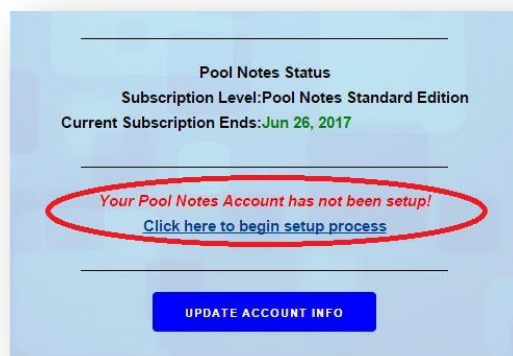
All of these instructions apply to Pool Notes, Corporate Edition as well. Features that are exclusive to Corporate Edition will be explained later in this guide.

Setting Up your Pool Notes Account

1. Once you have purchased a Pool Notes plan, you need to submit a Setup Request for our technicians. There are several ways for you access the Setup Request Form:
 - a. When you first purchase your Pool Notes subscription, you will see a link immediately after the checkout process.



- b. Whenever you are logged in to PoolNotes.com, you can click “My Account” in the upper right hand corner of the screen. A link to the Setup Request Form will appear on your “Account Details” page.



2. Complete the Setup Request Form. Here is a description of each field on the form:

- a. **Full Business Name** – This is the full name of your business. It will be displayed on your Pool Notes Account whenever you are logged in.
- b. **Business Abbreviation** – This is the abbreviated version of your business name. This abbreviation will serve as the web address you will use to access your Pool Notes Account. For example, if you use “abc” as your abbreviation, you will access your account by typing “abc.poolnotes.com” into your browser’s address bar. The abbreviation must follow these rules:
 - It must contain at least three letters or numbers.
 - It cannot contain any spaces or special characters
 - It must be unique (not being used by any other Pool Notes Customer)You will be told if your abbreviation violates any of these rules when you try and submit the Setup Request Form.

Setup your new Pool Notes Account

Completing this form will give us all the information we need to setup your new Pool Notes account.

Full Business Name: Please provide the full name of your business.

Business Abbreviation:

This is the abbreviated version of your Business name. The abbreviation will be used to create the web address that you use to access your Pool Notes account. For example, if you list the abbreviation "abc", you will access your Pool Notes account by going to "abc.poolnotes.com"

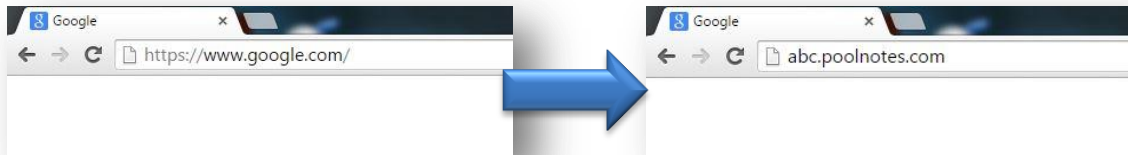
- It must contain at least 3 letters or numbers
- It cannot contain any spaces
- It cannot contain any special characters
- It must be unique (not used by any other Pool Notes account)

SUBMIT **CANCEL**

3. Once the Form is completed, hit the “Submit” button at the bottom of the page. If there are any errors, you will be redirected to the form and asked to enter new or corrected information. If there are no errors, you will see the message “Account Setup Form Submitted”. Our technicians will then use the information you provided to setup your account. This process can take up to 24 hours and you will be emailed once the setup is complete.

Logging in to Pool Notes

1. You can log in to your Pool Notes tools from any internet browser; either on your desktop computer, or your mobile device. In the browser’s address bar, type the business abbreviation that you entered in the Setup Form, followed by “poolnotes.com”. For example: if you entered “abc” as your abbreviation, enter the address “abc.poolnotes.com”.



2. The default page that loads is the Login page. Enter your Pool Notes username and password to log in.

Adding Customers

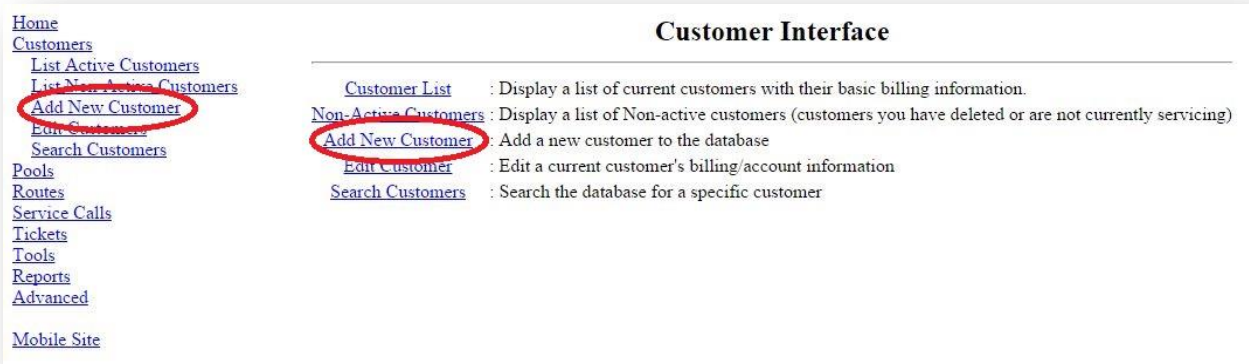
A Quick Note about Customers VS Pools in Pool Notes

Pool Notes divides each of your accounts into two separate pieces of information: Customers and Pools. A “Customer” contains information about the customer, but not the pool. For example, a “Customer” in Pool Notes has a phone number and an email address, where a “Pool” does not. “Pools” contain information about the pool, but not the customer. In Pool Notes, you will create “Customers” and then add “Pools” to their account. This approach has several advantages. For example, if you have a single customer that owns multiple pools that you service, you only need to enter the customer’s billing and contact information once.

1. Click on the “Customers” link on either the home page, or on the navigation bar on the left side of the screen.



- To add a customer, click “Add New Customer” on either the Customer Interface page, or on the navigation bar on the left side of the screen.



- Fill out the New Customer form, and then click “Add Customer”.

- The following Fields are required on the New Customer Form:

- First Name
- Last Name
- Home Phone
- Billing Address
- City
- State
- Zip Code

- If you make a formatting error, or forget to fill in any of the required fields, an error message will be displayed, and you will need to fix the error before you can proceed.

- Once the customer has been added, you will immediately be prompted to add the Pool information for that customer. Filling out the “Add New Pool” form is described on page 9.

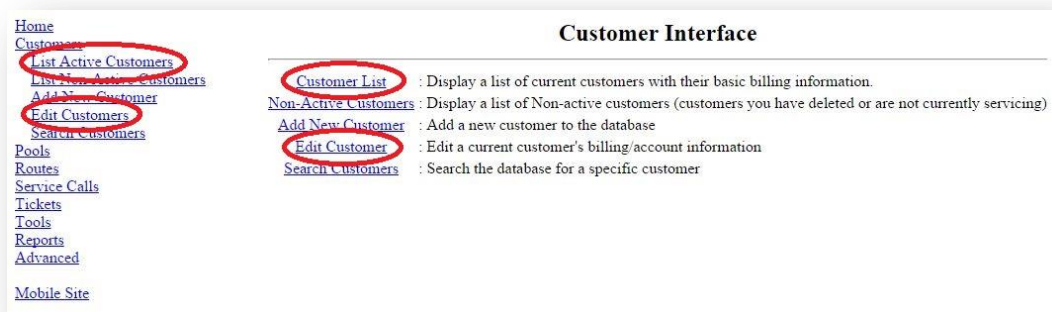
The 'Add New Customer' form contains the following fields: First Name, Middle Initial, Last Name, Home Phone, Cell Phone, Email Address, Billing Address, Address (cont), City, State (dropdown menu with "--Choose a State--"), Zip Code, and Country (dropdown menu with "United States"). Below these fields is a 'Notes' section with a large text area. At the bottom of the form are two buttons: 'Add Customer' and 'Cancel'.

Editing Customers

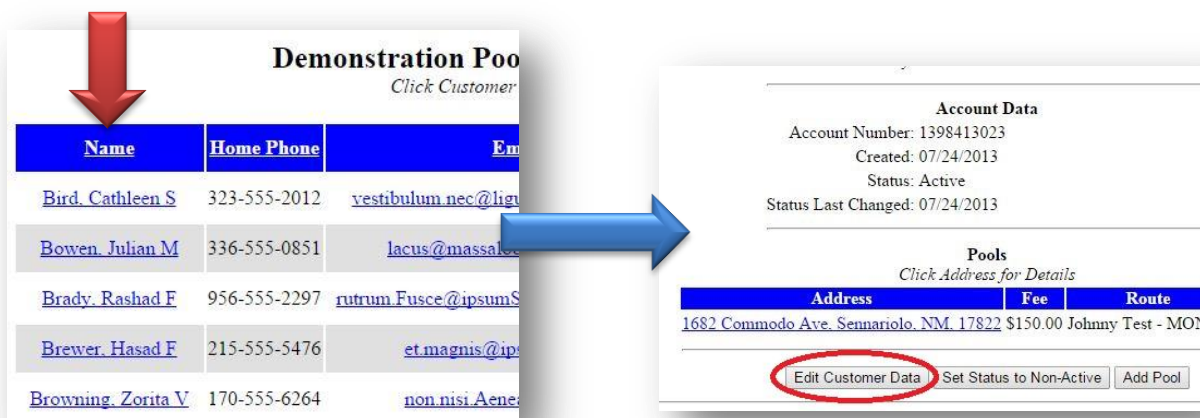
1. Click on the “Customers” link on either the home page, or on the navigation bar on the left side of the screen.



2. Click either “Customer List” or “Edit Customers” on the Customer Interface page, or in the navigation bar on the left side of the screen.



3. If you clicked the “Customer List” link, find the customer that you wish to edit and click on their name. Then, on the “Customer Details” page, click “Edit Customer Data” at the bottom of the screen.



- 4. If you clicked the “Edit Customers” link, find the customer’s name in the dropdown menu and click “Edit”.

Select a Customer

Bird, Cathleen S ▼

Edit Set Non-Active Set Active

- 5. Both of these methods will bring you to the “Edit Customer Details” page. Each field will have the customer’s current information already filled in. Simply make the changes you need to and click “Save Changes” at the bottom of the screen.

Edit Customer Details

First Name: Cathleen
Middle Initial: S
Last Name: Bird

Home Phone: 3235552012
Cell Phone: 7175551824
Email: vestibulum.nec@ligulaNullan

Billing Address
Address: 1682 Commodore Ave
Address (cont):
City: Sennariolo
State: New Mexico ▼
Zip: 17822
Country: United States ▼

Account Data
Account Number: 1398413023
Created: 07/24/2013
Status: Active Set Non-active
Status Last Changed: 07/24/2013

Notes

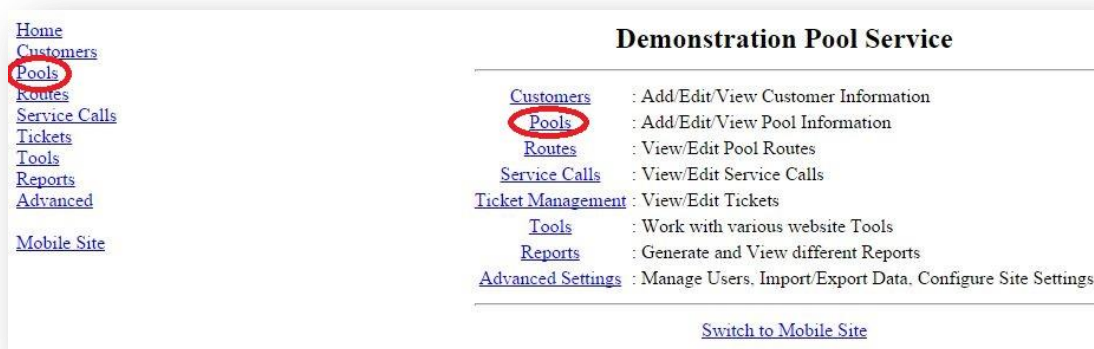
Save Changes Cancel

Adding Pools

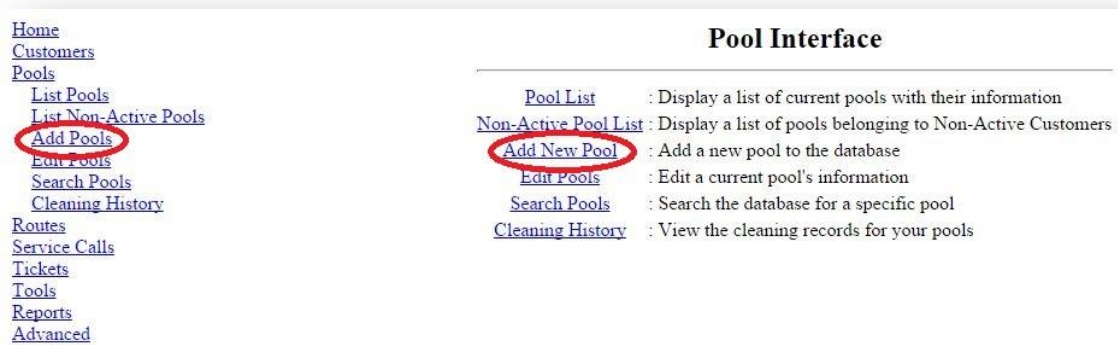
A Quick Note about Customers VS Pools in Pool Notes

Pool Notes divides each of your accounts into two separate pieces of information: Customers and Pools. A “Customer” contains information about the customer, but not the pool. For example, a “Customer” in Pool Notes has a phone number and an email address, where a “Pool” does not. “Pools” contain information about the pool, but not the customer. In Pool Notes, you will create “Customers” and then add “Pools” to their account. This approach has several advantages. For example, if you have a single customer that owns multiple pools that you service, you only need to enter the customer’s billing and contact information once.

1. Click on the “Pools” link on either the home page, or on the navigation bar on the left side of the screen.



2. To add a Pool, click “Add New Pool” on either the Customer Interface page, or on the navigation bar on the left side of the screen.



3. Select the “Customer” that the new pool belongs to from the dropdown menu and click “Select Account” (see the Note at the beginning of this section for more details).



4. The “Add New Pool” form will be displayed.
 - a. The Pool Address is the physical address where the pool is located. By default, the pool’s address will be pre-filled with the customer’s billing information.
 - b. The Service Info contains details about the pool itself. Only the “Fee” is required to be filled in on this form. If any of the Service Info is blank, Pool Notes will generate a warning on the mobile version when you visit that pool.
 - c. The Route Info is used to assign the pool to a specific route.
 - d. The Notes section is for any miscellaneous information you need to know about the pool. These notes will be displayed on the mobile tools, so it is ideal for non-standard information that you need at each pool

Add New Pool for Bird, Cathleen

Pool Address

Address:

Address (cont):

City:

State:

Zip:

Service Info

Fee:

Filter:

Pump:

Cleaner:

Last Drain:

Last Filter Clean:

Route Info

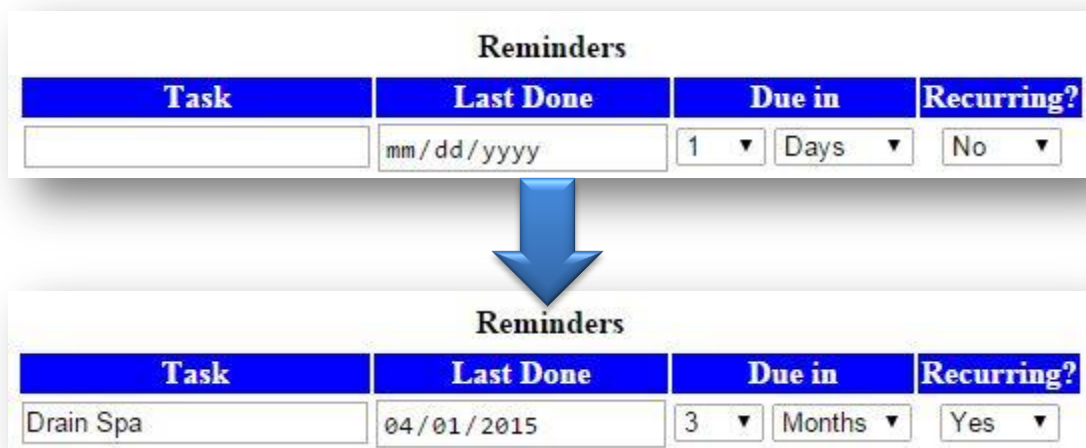
Day:

Notes

Reminders

Task	Last Done	Due in	Recurring?
<input type="text"/>	<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="1"/> <input type="text" value="Days"/>	<input type="text" value="No"/>
<input type="text"/>	<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="1"/> <input type="text" value="Days"/>	<input type="text" value="No"/>
<input type="text"/>	<input type="text" value="mm/dd/yyyy"/>	<input type="text" value="1"/> <input type="text" value="Days"/>	<input type="text" value="No"/>

- e. The Reminders are used to setup recurring tasks that are specific to the pool. Enter a name for the task, the date it was last accomplished, followed by the timeframe the task is next due, then whether or not this is a recurring task. For example; Johnny has a pool with a spa that needs to be drained every three months. He would enter “Drain Spa” in the Task field, then the date he last drained the spa. Then, using the dropdowns, he would select “3 months” in the “Due In” field. Finally, he would select “Yes” for recurring. When this task is next due, Johnny will see a reminder pop up on the mobile version of Pool Notes when he is at the Pool.



- f. When you have completed the form, click “Add Pool” at the bottom of the screen.

Adding Pools – Alternate Method

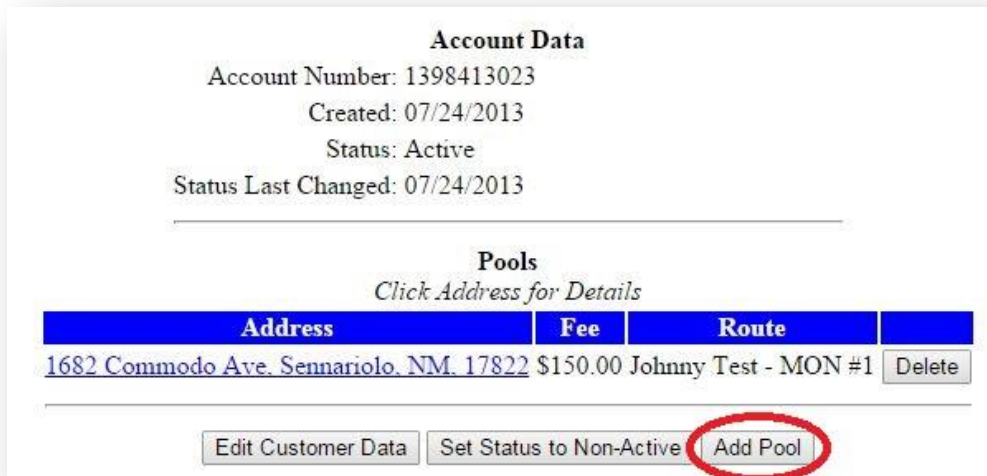
- 1. From the “Home Page” or the navigation bar, click “Customers”, then “Customer List”.
- 2. From this list, find the customer who owns the pool you are adding and click their name.



Demonstration Pool
Click Customer

Name	Home Phone	Em
Bird, Cathleen S	323-555-2012	vestibulum nec@ligu
Bowen, Julian M	336-555-0851	lacus@massalot
Brady, Rashad F	956-555-2297	rutrum Fusce@ipsumS
Brewer, Hasad F	215-555-5476	et.magnis@ip
Browning, Zorita V	170-555-6264	non.nisi.Aene

- 3. At the bottom of the “Customer Details” page, click “Add Pool”.



Account Data
Account Number: 1398413023
Created: 07/24/2013
Status: Active
Status Last Changed: 07/24/2013

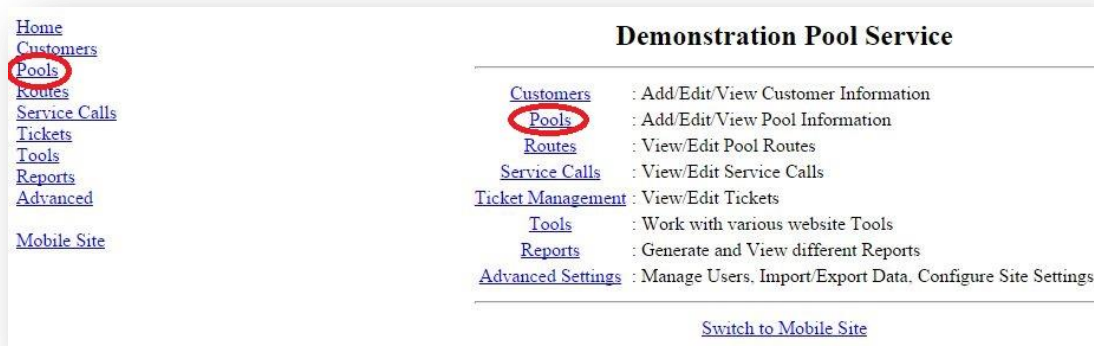
Pools
Click Address for Details

Address	Fee	Route	
1682 Commodo Ave. Sennariolo, NM, 17822	\$150.00	Johnny Test - MON #1	Delete

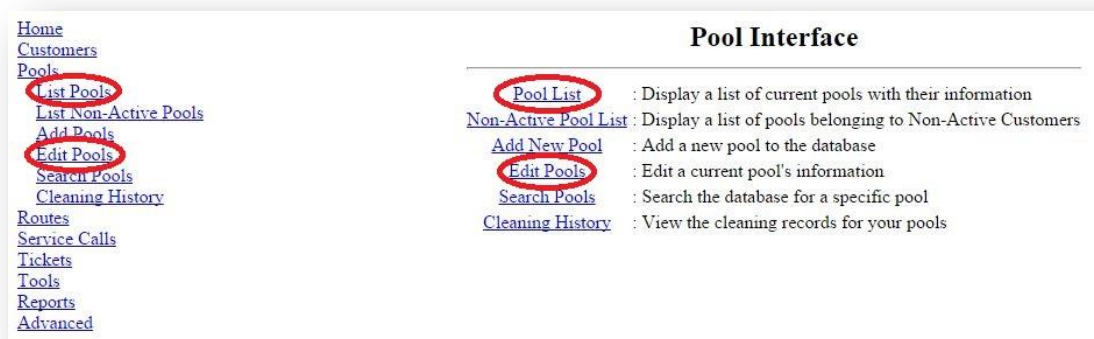
- 4. Fill out the “Add New Pool” form as described on page 9.

Editing Pools

1. Click on the “Pools” link on either the home page, or on the navigation bar on the left side of the screen.



2. Click either “Pool List” or “Edit Pools” on the Pool Interface page, or in the navigation bar on the left side of the screen.



3. If you clicked “List Pools”, find the Pool that you wish to edit and click on the Customer’s name. Then at the bottom of the “Pool Details” page, click “Edit Pool Data”.



- If you clicked the “Edit Pools” link, find the Pool you wish to edit in the dropdown menu and click “Edit”.

Select a Pool

Bird, Cathleen S - 1682 Commodo Ave ▼

- Both of these methods will bring you to the “Edit Pool Details” page. Each field will have the Pool’s current information already filled in. Simply make the changes you need to and click “Save” at the bottom of the screen.

Edit Pool Details

Location

Address:

Address (cont):

City:

State: ▼

Zip:

Service Info

Fee:

Filter: ▼

Pump:

Cleaner:

Route:

Dates

Last Drain:

Last Filter Clean:

Account Info

Pool Number:

Owner:

Notes

Reminders

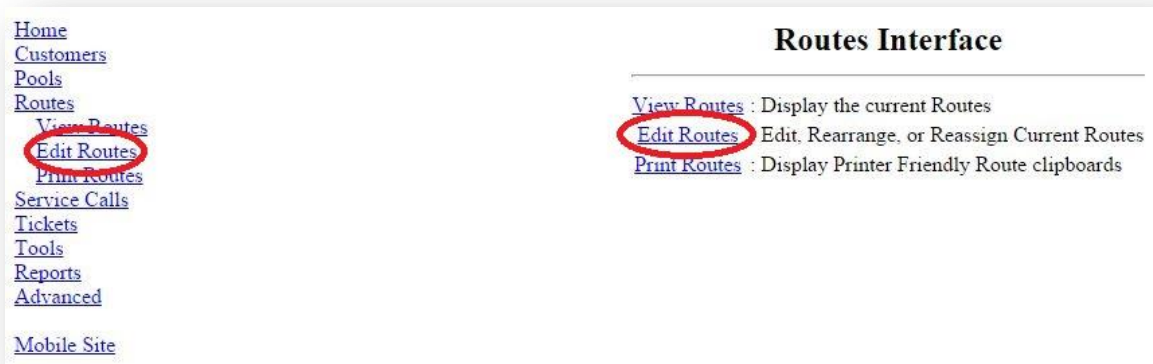
Task	Last Done	Due in	Recurring?
	mm / dd / yyyy	1 ▼ Days ▼	No ▼

Creating & Updating Daily Routes

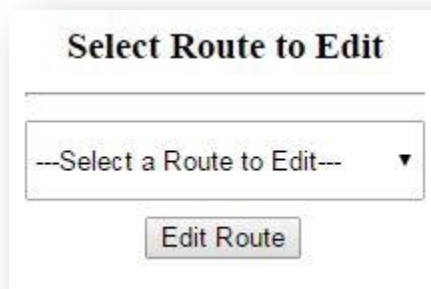
1. Click on the “Routes” link on either the home page, or on the navigation bar on the left side of the screen.



2. Click “Edit Routes” on either the “Routes Interface” page, or using the navigation bar on the left side of the screen.



3. From the dropdown list, select the route that you want to edit. If you did not specify a route day when you created the pool, then by default it will be on the “Pools Not Assigned” list. Once you have selected, press “Edit Route”.



4. The route corresponding to the day you selected will now be displayed.


Johnny Test - Monday Route

Customer Name	Pool Address	Number	Assigned To	Day	Actions
Bird, Cathleen S	1682 Commodo Ave Sennariolo, NM 17822	↑ 1 ↓	Johnny Test	MON	Update
Wood, Althea X	717-4138 Volutpat. Rd. Mandi Burewala, NM 62901	↑ 2 ↓	Johnny Test	MON	Update
Swanson, Ursula O	P.O. Box 451, 4576 Fringilla Rd. Port Coquitlam, CA 82935	↑ 3 ↓	Johnny Test	MON	Update
Bullock, Hyatt V	817-2099 Luctus Rd. GoiAçnia, AZ 70661	↑ 4 ↓	Johnny Test	MON	Update
Ellison, Shellie Y	P.O. Box 129, 9029 Lacus. Av. Goderich, FL 25513	↑ 5 ↓	Johnny Test	MON	Update
Wood, Neville H	Ap #896-8396 Class Street Truro, AZ 41606	↑ 6 ↓	Johnny Test	MON	Update

Done Working with this Route

- a. The Up Arrow button will move the Pool one slot earlier in the route.


Customer Name	Pool Address	Number	Assigned To	Day	Actions
Bird, Cathleen S	1682 Commodo Ave Sennariolo, NM 17822	↑ 1 ↓	Johnny Test	MON	Update
Wood, Althea X	717-4138 Volutpat. Rd. Mandi Burewala, NM 62901	↑ 2 ↓	Johnny Test	MON	Update



Customer Name	Pool Address	Number	Assigned To	Day	Actions
Wood, Althea X	717-4138 Volutpat. Rd. Mandi Burewala, NM 62901	↑ 1 ↓	Johnny Test	MON	Update
Bird, Cathleen S	1682 Commodo Ave Sennariolo, NM 17822	↑ 2 ↓	Johnny Test	MON	Update

b. The Down Arrow button will move the Pool one slot later in the route.


Customer Name	Pool Address	Number	Assigned To	Day	Actions
Wood, Althea X	717-4138 Volupat. Rd. Mandi Burewala, NM 62901	↑ 1 ↓	Johnny Test	MON	Update
Bird, Cathleen S	1682 Commodo Ave Sennariolo, NM 17822	↑ 2 ↓	Johnny Test	MON	Update



Customer Name	Pool Address	Number	Assigned To	Day	Actions
Bird, Cathleen S	1682 Commodo Ave Sennariolo, NM 17822	↑ 1 ↓	Johnny Test	MON	Update
Wood, Althea X	717-4138 Volupat. Rd. Mandi Burewala, NM 62901	↑ 2 ↓	Johnny Test	MON	Update

c. The Number dropdown allows you to move the pool to a specific slot in the route. Select the number you want the pool to be in the route, and click “Update” on that pool’s row. The other pools will be shifted either up or down without changing their order.

Customer Name	Pool Address	Number	Assigned To	Day	Actions
Bird, Cathleen S	1682 Commodo Ave Sennariolo, NM 17822	↑ 3 ↓	Johnny Test	MON	Update
Wood, Althea X	717-4138 Volupat. Rd. Mandi Burewala, NM 62901	↑ 2 ↓	Johnny Test	MON	Update
Swanson, Ursula O	P.O. Box 451, 4576 Fringilla Rd. Port Coquitlam, CA 82935	↑ 3 ↓	Johnny Test	MON	Update



Customer Name	Pool Address	Number	Assigned To	Day	Actions
Wood, Althea X	717-4138 Volupat. Rd. Mandi Burewala, NM 62901	↑ 1 ↓	Johnny Test	MON	Update
Swanson, Ursula O	P.O. Box 451, 4576 Fringilla Rd. Port Coquitlam, CA 82935	↑ 2 ↓	Johnny Test	MON	Update
Bird, Cathleen S	1682 Commodo Ave Sennariolo, NM 17822	↑ 3 ↓	Johnny Test	MON	Update

- d. The Day dropdown allows you to move a pool to a different route entirely. Select the new day in the dropdown and click “Update” on that pool’s row. The pool will be added as the last pool of the selected day.

Johnny Test ~~Monday~~ Route

Customer Name	Pool Address	Number	Assigned To	Day	Actions
Bird, Cathleen S	1682 Commodo Ave Sennariolo, NM 17822	↑ 1 ↓	Johnny Test	TUE	Update

↓

Johnny Test Tuesday Route

Customer Name	Pool Address	Number	Assigned To	Day	Actions
Carroll, Emerald D	P.O. Box 869, 7041 Gravida St. Invercargill, FL 70453	↑ 1 ↓	Johnny Test	TUE	Update
Fulton, Akeem R	Ap #919-1218 Velit St. Amsterdam, AZ 70385	↑ 2 ↓	Johnny Test	TUE	Update
Bird, Cathleen S	1682 Commodo Ave Sennariolo, NM 17822	↑ 3 ↓	Johnny Test	TUE	Update

- e. When you are finished editing the route, click “Done Working with this Route” at the bottom of the page.

Johnny Test - Monday Route

Customer Name	Pool Address	Number	Assigned To	Day	Actions
Bird, Cathleen S	1682 Commodo Ave Sennariolo, NM 17822	↑ 1 ↓	Johnny Test	MON	Update
Wood, Althea X	717-4138 Volutpat. Rd. Mandi Burewala, NM 62901	↑ 2 ↓	Johnny Test	MON	Update
Swanson, Ursula O	P.O. Box 451, 4576 Fringilla Rd. Port Coquitlam, CA 82935	↑ 3 ↓	Johnny Test	MON	Update
Bullock, Hyatt V	817-2099 Luctus Rd. GoiAenia, AZ 70661	↑ 4 ↓	Johnny Test	MON	Update
Ellison, Shellie Y	P.O. Box 129, 9029 Lacus. Av. Goderich, FL 25513	↑ 5 ↓	Johnny Test	MON	Update
Wood, Neville H	Ap #896-8396 Class Street Truro, AZ 41606	↑ 6 ↓	Johnny Test	MON	Update

Done Working with this Route

Corporate Edition

Pool Notes, Corporate Edition supports all of the tools that Standard Edition has, plus added features that make managing employees easier than ever! Each employee will have their own separate username and password, and they will only have access to customers that you assign to them. That way, you will be the only person with access to your entire business.

This section of the guide deals specifically with these extra Corporate Edition features. All of the previous instructions still apply; for example, adding a customer in Standard and Corporate Editions is exactly the same.

Creating Employee Logins

1. Click on the “Advanced Settings” link on either the home page, or on the navigation bar on the left side of the screen.

The screenshot shows the 'Demonstration Pool Service' home page. On the left is a vertical navigation menu with links: Home, Customers, Pools, Routes, Service Calls, Tickets, Tools, Reports, **Advanced** (circled in red), and Mobile Site. The main content area is titled 'Demonstration Pool Service' and contains a list of tools with descriptions:

- [Customers](#) : Add/Edit/View Customer Information
- [Pools](#) : Add/Edit/View Pool Information
- [Routes](#) : View/Edit Pool Routes
- [Service Calls](#) : View/Edit Service Calls
- [Ticket Management](#) : View/Edit Tickets
- [Tools](#) : Work with various website Tools
- [Reports](#) : Generate and View different Reports
- [Advanced Settings](#) : Manage Users, Import/Export Data, Configure Site Settings (circled in red)

At the bottom right of the main content area is a link: [Switch to Mobile Site](#)

2. Click on the “Manage Users” link on either the “Advanced Site Tools” page, or on the navigation bar on the left side of the screen.

The screenshot shows the 'Advanced Site Tools' page. On the left is a vertical navigation menu with links: Home, Customers, Pools, Routes, Service Calls, Tickets, Tools, Reports, **Advanced**, **Manage Users** (circled in red), Site Settings, Subscription Info, and Mobile Site. The main content area is titled 'Advanced Site Tools' and contains a list of tools with descriptions:

- [Manage Users](#) : List authorized users, Add or Remove Users, and Change Passwords (circled in red)
- [Site Settings](#) : View/Update Website and Database options and settings
- [Pool Notes Subscription Info](#) : View your current Pool Notes Subscription Info

3. Click “Add User” at the bottom of the page.



4. Fill out the form on the “Add New User” page, then click “Add User”.

- a. The “Login” field is the Username the employee will use to login to Pool Notes.
- b. The “Password” and “Password Again” fields will set the employee’s password.
- c. The “Display Name” is how the employee’s name will appear on the Route assignment pages. It can be the same or different from their login.
- d. The “Email” field is the email address of the employee. It is used in case they forget their login or password; a message will be sent to this email address to help them recover their account.
- e. The “Privileges” field lets you set what level of access the employee has on your Pool Notes account. There are two options:

Add New User

Login:

Password:

Password Again:

Display Name:

Email:

Privileges: ▼

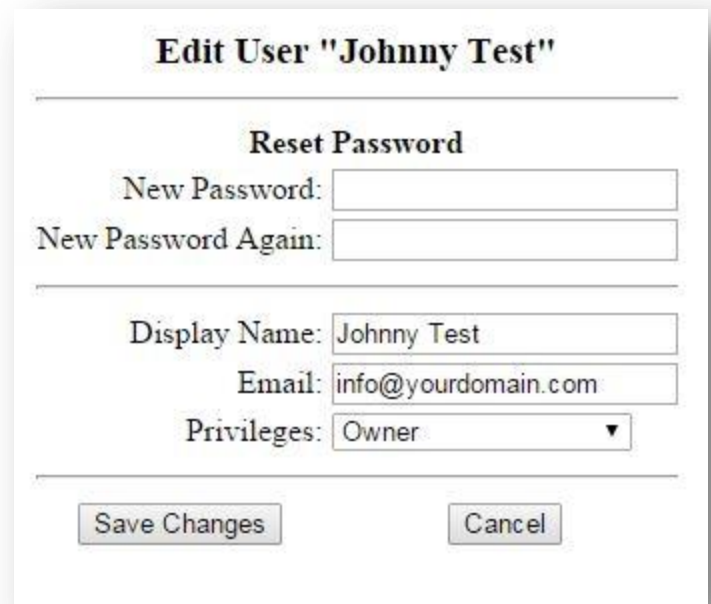
- i. “Employee” – This will set the user’s privileges to the most restricted level. Employees can only view customers and pools that have been assigned to them on the “Routes” page. Employees can enter tickets into the system, but they cannot update or change any customer or pool information.
- ii. “Owner” – This will set the user’s privileges to the least restricted level. Owners on your Pool Notes account have all the same access that you do. They can create, view and edit all customers, pools, routes, tickets and service calls. Owners can also add and remove users from your Pool Notes account.

Updating Employee Logins

1. Click on the “Advanced Settings” link on either the home page, or on the navigation bar on the left side of the screen.
2. Click on the “Manage Users” link on either the “Advanced Site Tools” page, or on the navigation bar on the left side of the screen.
3. On the “Users” page, find the employee login that you wish to edit and click the “Edit” button in its row. (NOTE: To Delete an employee from your Pool Notes account, click the “Delete” button in that employee’s row)



4. Fill out the form on the “Edit User” page, then click “Save Changes”.
 - a. The “New Password” and “New Password Again” fields are only used if you wish to reset the employee’s password. If you do, fill out both fields with the new password.
 - b. The “Display Name” field is how the employee’s name will appear on the Route assignment pages.
 - c. The “Email” field is the email address that is used if the employee needs to recover their Pool Notes account.
 - d. The “Privileges” field is used to change what access the employee has to your Pool Notes account.



Creating Separate Daily Routes

1. Click on the “Routes” link on either the home page, or on the navigation bar on the left side of the screen.
2. Click “Edit Routes” on either the “Routes Interface” page, or using the navigation bar on the left side of the screen.
3. From the dropdown list, select the route that you want to edit. If you did not specify a route day when you created the pool, then by default it will be on the “Pools Not Assigned” list. Once you have selected, press “Edit Route”.
4. Find the pool that you wish to assign to an employee and select the “Assigned To” dropdown list. This list will be populated with all of the users that you have in your Pool Notes account. Select the employee you wish to assign the pool to and click “Update”.

Johnny Test - Monday Route

Customer Name	Pool Address	Number	Assigned To	Day	Actions
Swanson, Ursula O	15827 N Cave Creek Rd Phoenix, AZ 85032	↑ 1 ↓	Billy Bob	MON	Update
Wood, Althea X	19825 N 51st Ave Glendale, AZ 85308	↑ 2 ↓	Johnny Test	MON	Update
Bullock, Hyatt V	1609 N 91st Ave Phoenix, AZ 85037	↑ 3 ↓	Johnny Test	MON	Update
Ellison, Shellie Y	5050 W Bell Rd Glendale, AZ 85308	↑ 4 ↓	Johnny Test	MON	Update
Wood, Neville H	15111 N Hayden Rd Scottsdale, AZ 85260	↑ 5 ↓	Johnny Test	MON	Update

No Pools assigned to Billy Bob on Monday

Done Working with this Route

Johnny Test - Monday Route

Customer Name	Pool Address	Number	Assigned To	Day	Actions
Wood, Althea X	19825 N 51st Ave Glendale, AZ 85308	↑ 1 ↓	Johnny Test	MON	Update
Bullock, Hyatt V	1609 N 91st Ave Phoenix, AZ 85037	↑ 2 ↓	Johnny Test	MON	Update
Ellison, Shellie Y	5050 W Bell Rd Glendale, AZ 85308	↑ 3 ↓	Johnny Test	MON	Update
Wood, Neville H	15111 N Hayden Rd Scottsdale, AZ 85260	↑ 4 ↓	Johnny Test	MON	Update

Billy Bob - Monday Route

Customer Name	Pool Address	Number	Assigned To	Day	Actions
Swanson, Ursula O	15827 N Cave Creek Rd Phoenix, AZ 85032	↑ 1 ↓	Billy Bob	MON	Update

Done Working with this Route