



# Pool Notes Desktop Overview

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## Desktop Navigation and Tools

Every page of the Desktop Pool Notes site has a navigation bar on the left side of the screen. This navigation bar gives you quick access to the complete Pool Notes tool set. The following section lists all of the desktop tools in the order that they are presented in the navigation bar.

**Home** – Returns you to the Home page with a list of links to the major interface pages.

**Customers** – Takes you to the Customer Interface Page.

**List Active Customers** – Displays a list of your current customers.

**List Non-Active Customers** – Displays a list of non-active customers. Marking a customer as “Non-Active” deletes their pool or pools from your routes and removes their information from the main site. However, the information is not removed from Pool Notes; you can re-activate the customer at a later time and all of their information will have been preserved.

**Add New Customer** – Add a new customer to Pool Notes. In Pool Notes, Customers and Pools are two separate pieces of information. A Customer contains billing and contact information, where a Pool contains equipment and service information. When you create a Pool in Pool Notes, it is linked to a Customer.

**Edit Customers** – Quick access to edit a customer’s contact or billing information.

**Search Customers** – You can search for a specific customer by looking for a portion of their name, phone number, email address, or billing address. For example, if you receive a text message from a number you do not recognize, you can use this feature to quickly search and find if it is one of your customers.

**Pools** – Takes you to the Pools Interface Page.

**List Pools** – Displays a list of your current pools.

**List Non-Active Pools** – Displays a list of pools that belong to customers in the “Non-Active” status. Marking a customer as “Non-Active” deletes their pool or pools from your routes and removes their information from the main site. However, the information is not removed from Pool Notes; you can re-activate the customer at a later time and all of their information will have been preserved.

**Add Pools** – Quickly add a new pool to an existing customer. In Pool Notes, Customers and Pools are two separate pieces of information. A Customer contains billing and contact information, where a Pool contains equipment and service information. When you create a Pool in Pool Notes, it is linked to a Customer.

**Edit Pools** – Quick access to edit a pool’s equipment or service information.

**Search Pools** – You can search for a specific pool by looking for a portion of the owner’s name, the pool’s address, fee or equipment, or by when the pool is serviced and who does it. For example, you can quickly build a list of every pool you service that has a cartridge filter by using this search function.

**Cleaning History** – Quickly view the cleaning history of any specific pool on your route. This tool will display the dates the pool was serviced, and what records were taken by the technician that serviced it.

**Routes** – Takes you to the Routes Interface Page.

**View Routes** – Displays a specific route.

**Edit Routes** – Allows you to create a new route, rearrange an existing route, or move pools from one route to another.

**Print Routes** – Provides a printer friendly version of the selected route.

**Service Calls** – Takes you to the Service Call Interface Page.

**List Service Calls** – Displays a list of open and active service calls. This page also has the option of displaying both completed service calls, and service calls that were rejected by the customer.

**Add Service Call** – Quickly create a new service call for a selected customer.

**Edit Service Call** – Quickly update the status of an open service call.

**Search Service Calls** – Search through all of the service calls in your Pool Notes tool for specific information. You can search for specific information in the following fields: customer name, pool address, the job title, any job notes, or the price of the service call. You can also specify the date range and category of service call to search.

**Tickets** – Takes you to the Tickets Interface Page.

**List Tickets** – Displays a list of open tickets in your Pool Notes account. You can also view closed tickets from this page. Tickets are created when you type in the “Notes” section of the Pool Notes mobile tool while you are servicing a pool. At the end of your route, Pool Notes will go through each of these notes and ask you what type of ticket they represent. There are several types of tickets in the Pool Notes tool set:

- **Billing Note** – A billing note is a part or service that you performed for a customer that needs to be billed. It will be listed on the “Items to be Billed” report (explained later in this guide).
- **Information Update Note** – This type of ticket is information that has changed or needs to be updated in your Pool Notes account. For example, if a customer changes their phone number, you can type in the new phone number and label that ticket as an “Information Update Note”. This type of ticket will give you quick access to update the customer’s new information in Pool Notes.

- **New Service Call** – This type of ticket will generate a task for you to call the customer seeking approval to schedule a service call or repair to their pool.
- **Part to be purchased & installed** – This type of ticket is used to add Parts to the Pool Notes system. When you label a ticket as “Parts”, it will be added to the “Parts Needing Approval” list. The part will stay on this list until you approve the part for purchase, or you get approval from your customer. Then, the part will be added to your “Parts to be Purchased” list. When you are at your supplier, this list gives you a quick reference of all the parts you need to purchase for your pools. Once purchased, the ticket system will then generate a reminder for you to install the part the next time you are at the pool. When the part is installed, the ticket will add it as an item on your “Items to be Billed” list.
- **Reminder for future action** – This type of ticket is used to generate a custom reminder in the Pool Notes system. You can add custom reminders to each of your pools that will remind you to perform specific tasks when you are at that pool when the task is due.
- **Note for future reference** – This is simply a note that will be added to the cleaning history of the pool. It will not generate any further actions or reminders; it is simply a piece of information that you wish to record for future reference.

**Add Ticket** – Quickly add a ticket.

**Search Tickets** – Search through open and closed tickets for specific information. Searchable fields include: the customer name, the pool address, or any notes associated with the ticket.

**Tools** – Takes you to the Tools Interface Page.

**Parts List** – Displays a list of parts that are pending approval, or that are pending purchase. Parts that are added to the list need to be marked as “approved” to be added to the “pending purchase” list. You have the option of marking a part as approved by either yourself or by the customer. In either case, the date of approval and who approved the part is recorded. Once the part is purchased, the purchase date is recorded.

**To-Do List** – Displays an automatically generated list of tasks that need to be completed. Several types of reminders appear on this list:

- **Filter Cleans** – Reminders to perform filter cleans are added to this page based on what type of filter the pool has, when the last time a filter clean was performed, and the time between filter cleans that you have set in your settings (described later). The action that is listed for this type of reminder is “Filter Cleaned”. Clicking that button will update the date that the filter clean was last accomplished to the current date, and also add a “Billing Note” for that customer.
- **Create New Service Call** – Notes that you make while on your normal cleaning route that you mark as “New Service Call” will generate a reminder here. The reminder tells you to create a new service call for the customer. The action that is listed for this type of reminder is “Create New Service Call”. Clicking the button will create a new service call for this customer.
- **Call Customer to approve Service Call** – Service Calls that have been created, but not accepted or rejected by the customer are listed here. The action that is listed for this

type of reminder is “Approve Service Call”. Clicking this button will set the Service Call’s approval date to the current date.

- Call Customer to schedule Service Call – Service Calls that have been accepted by the customer, but not scheduled are listed here. The action that is listed for this type of reminder is “Schedule Service Call” along with an input field for a date. Entering a date and clicking the button will set the Service Call’s scheduled date to the entered date. If no date was entered, the Scheduled Date will be set to the current date.
- Do Service Call – Service Calls that have been scheduled will be listed here on their scheduled date. The action that is listed for this type of reminder is “Completed”. Clicking this button will mark the service call as completed on the current date.
- Service Call needs to be Billed – Service calls that have been completed but not billed will be listed here. The action listed for this type of reminder is “Service Call Billed”. Clicking the button will mark the Service Call as billed and set the billed date to the current date.
- Call For Customer Approval of Parts – Parts that are not yet approved will appear on this list. The action that is listed for this type of reminder is “Approved by:” and then two buttons. Clicking “Me” will mark the part as having been approved by you, the pool service tech. Clicking “Cust” will mark the part as having been approved by the customer. In either case, the approval date will be listed as the current date and the part will be added to the list of parts pending purchase.

**Fill-in-the-blanks** – This tool displays a summary of the missing information in your Customer and Pool accounts. For Customer accounts, this tool will display the number of accounts that are missing the following information: customer first or last name, home or cell phone numbers, email address, or any field in their billing address. For Pool information, this tool will display the number of accounts that are missing the following information: any field in the pool’s address, the monthly fee, the type of filter, the type of pump, the type of cleaning system, the date of the pool’s last drain, and the date of the pool’s last filter clean. Clicking on the field title will show a list of all of the customers and pools that are missing that information; for example, clicking “Cell Phone” will show a list of all the Customers that do not have a cell phone number listed in their account. On this list, you can quickly add the missing information and click the “Update” button to add that information to the account.

**Track Employees (Corporate Edition Only)** – This tool displays a list of each employee’s route for the current day, and the date of that pool’s last service. It allows a user that has “Owner” privileges in Pool Notes to track each employee throughout the workday.

**Reports** – Takes you to the Reports Interface Page

**General Stats & Info** – This report shows basic information about your business based on the data in Pool Notes. It will show you the number of Customer accounts and Pools that you have, your total monthly billing total, and your average monthly fee. It also lists how many total pools you’ve cleaned, service calls that you have done, and a breakdown of your weekly routes.

**Items to be Billed** – This report shows a list of all of the items that you need to bill. Each item in the list will have the date that it was created, the customer that it is associated with, and the notes that go with the item. The list shows both parts that you’ve purchased and installed and service calls that you have completed that have not been marked as “billed”. Once you bill these items,

simply click the “Billed” button in that items row and it will be removed from the list and marked as billed on the current date.

**Pool Profitability** – This report shows a breakdown of how profitable your pools are. It takes the monthly billing rate of the pool and subtracts out the average chlorine tablets used to give a “Profitability” number to each Pool. This number represents the average amount of money that you make on each visit to that particular pool. Using this formula, the tool shows you the most and least profitable pools that you service followed by an ordered list of the rest of your pools from most to least profitable.

**Advanced** – Takes you to the Advanced Site Tools Interface Page

**Manage Users** – This page allows Standard Edition accounts to update their password, display name and email address. In addition, it allows Corporate Edition accounts to add, remove, or update additional user logins for their employees.

**Site Settings** – This page allows you to update your default settings for your Pool Notes Tools. The fields that you can update on this page are:

- **Business Name** – This is the display name of your business.
- **Default Text Message** – When you use the “Text” tool from your smartphone, this is the message that will be populated into your text messaging application.
- **Default State** – This is the default state that will appear when adding new customers or pools. The list includes US Territories and Canadian provinces.
- **Time zone** – This is time zone that your business is located in. This setting ensures that all of the dates and times recorded by Pool Notes are correct.
- **Information to Record at Each Pool** – Each field in this list determines if that item is displayed by default when you are servicing one of the pools on your route. For example, if the “Soda Ash” field is set to “Yes”, then the mobile version of Pool Notes will ask you to input how much soda ash you used at each of your pools. If the field is set to “No”, then the field is not displayed by default.
- **Filter Clean Interval** – Pool Notes uses this field to determine when to generate Filter Clean reminders. For example, if you set this field to “6 months”, then Pool Notes will only generate Filter Clean reminders for pools that have a Filter Clean date listed that is more than 6 months before the current date. You can also use this field to disable Filter Clean reminders. NOTE: This field is used for DE and Cartridge filter cleans only.
- **Backwash Interval** – Pool Notes uses this field to determine when to generate Backwash reminders. For example, if you set this field to “1 month”, then Pool Notes will only generate Backwash reminders for pools that have a Backwash date listed that is more than one month before the current date. You can also use this field to disable backwash reminders. NOTE: This field is only used for Sand Filters.

**Subscription Info** – This page shows your Pool Notes account subscription information. This includes your Account Number, the current subscription expiration date, the type of Pool Notes account you have, and the version number of your tools.