Pool Notes
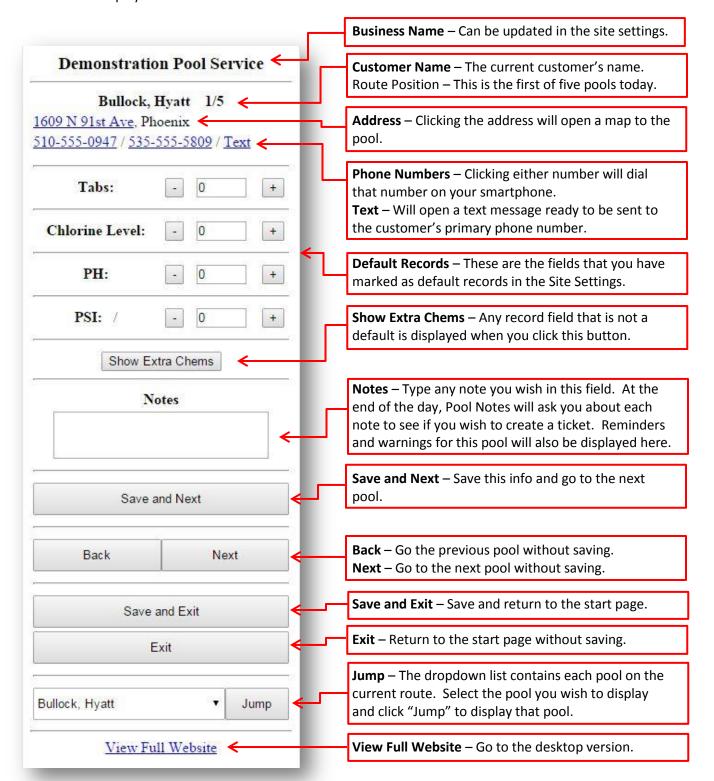# Mobile Overview

Table of Contents

Start Page

The mobile version of Pool Notes is built to be used when you are in the field. It assumes that you want streamlined access to the information you need to get through your day. When you log in to your Pool Notes account from a smartphone, the mobile version will be displayed by default.

Demonstration Pool Service

Routes

Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
Sunday

Mobile Pages

Parts

View Full Website

Business Name – This name can be updated in the Site Settings.

Day Links – Clicking on a day of the week will display the first pool in that day's route. If you have the corporate version of Pool Notes, the route that is displayed is the route that is assigned to the user who is currently logged in.

Parts – This will display both the Approved Parts list and the Pending Approval list (both described later in this guide).

View Full Website – This will take you to the Desktop version of Pool Notes.
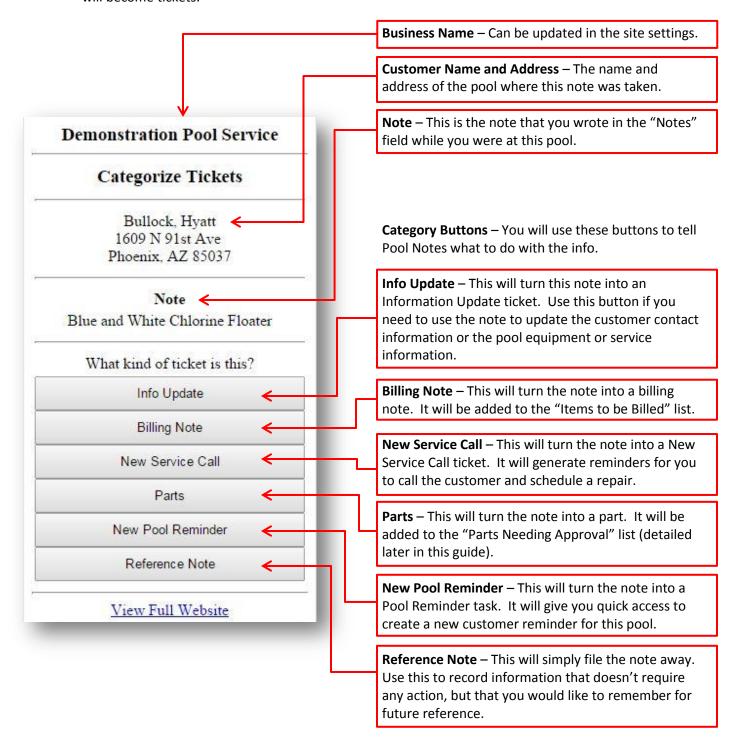
Pool Pages

The Pool Pages are displayed when you click on one of the day links on the start page. The first pool of that day's route is displayed. For example, if you click Tuesday, then the first pool on your Tuesday route is displayed.

Demonstration Pool Service

Bullock, Hyatt   1/5

1609 N 91st Ave, Phoenix
510-555-0947 / 535-555-5809 / Text

Tabs: -   0   +

Chlorine Level: -   0   +

PH: -   0   +

PSI: /   -   0   +

Show Extra Chems

Notes

Save and Next

Back   Next

Save and Exit

Exit

Bullock, Hyatt   ▼   Jump

View Full Website

Business Name – Can be updated in the site settings.

Customer Name – The current customer's name.
Route Position – This is the first of five pools today.

Address – Clicking the address will open a map to the pool.

Phone Numbers – Clicking either number will dial that number on your smartphone.
Text – Will open a text message ready to be sent to the customer's primary phone number.

Default Records – These are the fields that you have marked as default records in the Site Settings.

Show Extra Chems – Any record field that is not a default is displayed when you click this button.

Notes – Type any note you wish in this field. At the end of the day, Pool Notes will ask you about each note to see if you wish to create a ticket. Reminders and warnings for this pool will also be displayed here.

Save and Next – Save this info and go to the next pool.

Back – Go the previous pool without saving.
Next – Go to the next pool without saving.

Save and Exit – Save and return to the start page.

Exit – Return to the start page without saving.

Jump – The dropdown list contains each pool on the current route. Select the pool you wish to display and click "Jump" to display that pool.

View Full Website – Go to the desktop version.

End of Day Page

At the end of each route, you will see the "End of Day" page. This page will go through each of the notes that you created and ask you to categorize them. This is where the Notes you took on your pools will become tickets.

Business Name – Can be updated in the site settings.

Customer Name and Address – The name and address of the pool where this note was taken.

Note – This is the note that you wrote in the "Notes" field while you were at this pool.

Demonstration Pool Service

Categorize Tickets

Bullock, Hyatt
1609 N 91st Ave
Phoenix, AZ 85037

Note
Blue and White Chlorine Floater

What kind of ticket is this?

| Info Update |
| Billing Note |
| New Service Call |
| Parts |
| New Pool Reminder |
| Reference Note |

View Full Website

Category Buttons – You will use these buttons to tell Pool Notes what to do with the info.

Info Update – This will turn this note into an Information Update ticket. Use this button if you need to use the note to update the customer contact information or the pool equipment or service information.

Billing Note – This will turn the note into a billing note. It will be added to the "Items to be Billed" list.

New Service Call – This will turn the note into a New Service Call ticket. It will generate reminders for you to call the customer and schedule a repair.

Parts – This will turn the note into a part. It will be added to the "Parts Needing Approval" list (detailed later in this guide).

New Pool Reminder – This will turn the note into a Pool Reminder task. It will give you quick access to create a new customer reminder for this pool.

Reference Note – This will simply file the note away. Use this to record information that doesn't require any action, but that you would like to remember for future reference.

Parts Pages

The Parts Page is used to keep track of all the parts you need when you are in the field. Two lists are displayed: an Approved Parts list, and a list of Parts Needing Approval. The Approved Parts list are parts that either you or the customer have approved for purchase and install. The Parts Needing Approval are parts that you have entered on the Pool Pages, but that you have not yet approved or called the customer about.

Business name – Can be updated in the site settings.

Approved Parts List – List of parts ready to be purchased.

Customer Name – The name of the customer who needs the part. Clicking the name will show you that customer's contact details.
Part – This is the part that needs to be purchased.
Got it – This button will label the part as purchased. It will also add a reminder to that customer's pool page to install the part on your next visit.

Parts Needing Approval List – This is the list of parts that still need either customer or your approval to be purchased and installed.

Customer Name – The name of the customer who needs the part. Clicking the name will show you that customer's contact details.
Part – This is the part that needs approval.
Approved – These buttons allow you to mark the part as approved. Clicking "Me" will mark the part as having been approved by you, the service tech. Clicking "Cust" will mark the part as having been approved by the customer.

Add Part – To quickly add a part for yourself, simply enter the part name in the box and click "Add Part". This part will automatically be marked as being approved by you, but will not generate an installation reminder.

Back – Returns you to the Start Page.

View Full Website – Go to the desktop version.