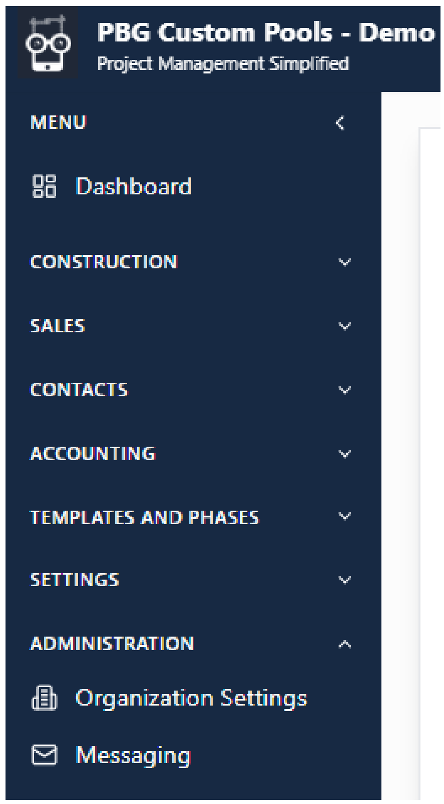
Pool Builder Geek Onboarding Phases

Area	Tasks
Phase 1: Administration/Team Setup	
Area	**Tasks**
Organizational Settings	Confirm/Edit Org Settings
Contacts>Team	Add Team Members
Contacts>Groups	Add Groups
	Add Channels
Settings>File Categories	Add File Types
Phase 2: Construction Setup	
Area	**Tasks**
Settings>Project Types	Add Project Types
Contacts>Subcontractors	Add Subcontractors/Assign Trades
Templates and Phases>Job Phases	Add Phases
Templates and Phases>Job Templates	Create Job Templates
Settings>Draw Schedules	Add Draw Schedules
Settings>Checklists	Create Construction Checklists
Settings>Custom Fields	Add Custom Fields for Construction
Settings> User Selections	Add User Selections
Phase 3: Sales Setup	
Area	**Tasks**
Templates and Phases>Sales Phases	Add Sales Phases
Templates and Phases>Sales Templates	Create Sales Templates
Settings>Checklists	Create Sales Checklists
Settings>Custom Fields	Create Sales Custom Fields
Templates and Phases>Sales Templates> Sales Lead Widget Preview	Add Sales Widget to Company Website
Phase 4: Customers	
Area	**Tasks**
Contacts>Customers	Add Customers
Phase 5: Messaging & Notifications	
Area	**Tasks**
Administration>Messaging>Library	Copy Desired Messages from Library to Mine
Administration>Messaging>Library>Mine	Edit messages and set to Published when ready to use
Phase 6: Accounting	
Area	**Tasks**
Accounting>Product Categories	Add Product Categories
Accounting>Products	Add Products
Accounting>Tax Authorities	Add Tax Authorities
Accounting>Expenses> Categories	Add Expense Categories

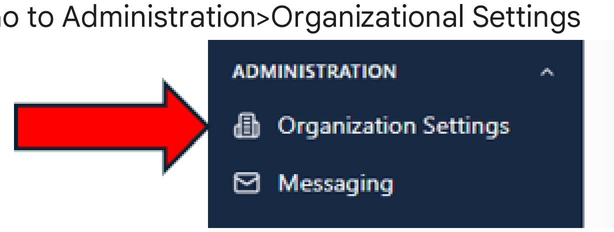
Welcome to Pool Builder Geek!

Your journey to a more streamlined building process starts here. Follow this step-by-step onboarding guide to get your portal fully operational. The steps covered in this guide will all be performed in the Pool Builder Geek web portal: https://portal.poolbuildergeek.com/
You will find the locations mentioned in the left menu tree.



Phase 1: Administration & Team Setup

- **Organizational Settings:** First, let's confirm and edit your company details.
  Go to Administration>Organizational Settings

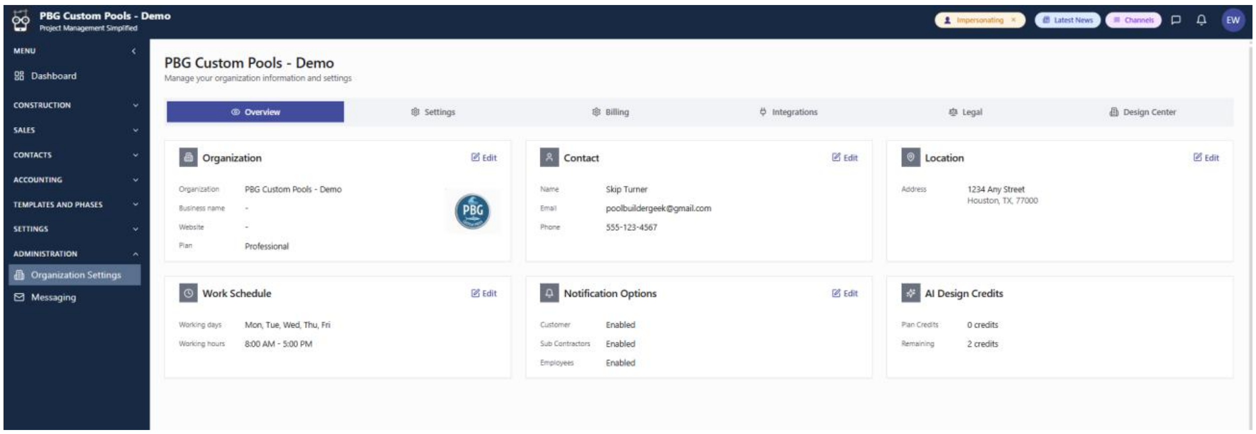


Organizational Settings: Navigation Header

At the top, you can navigate to other management sections:

- **Settings | Billing | Integrations | Legal | Design Center**

Note: Each card includes an **Edit** button in the top-right corner, allowing for quick updates to those specific details.

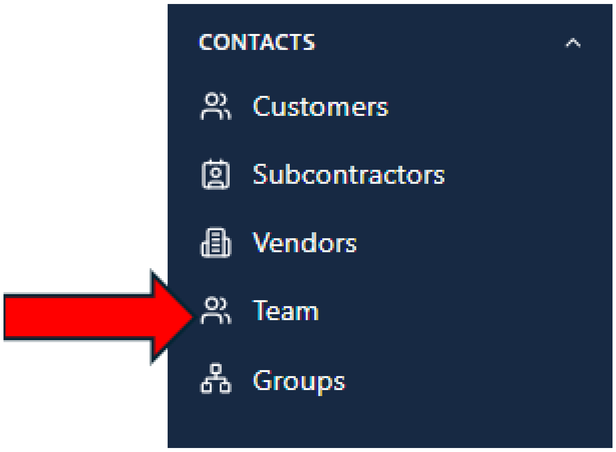


This screen is the Overview dashboard for your organization, where an administrator can manage organization settings and view high-level account details.

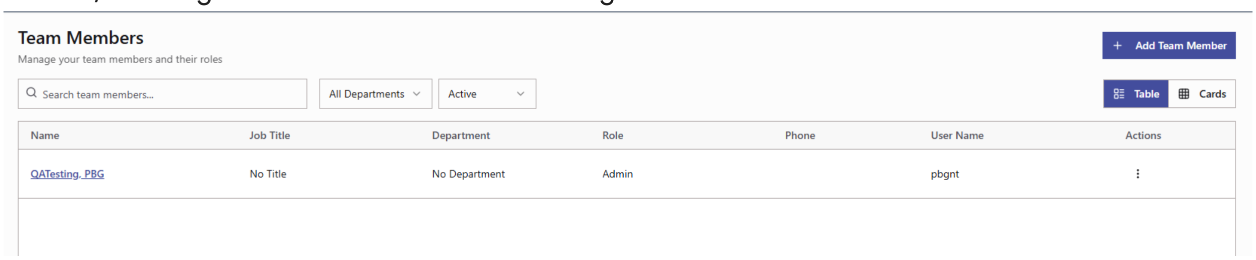
The dashboard is organized into six primary information cards:

- **Organization:** Here you can edit the Organization, Business Name, website address, and logo.
- **Contact:** Lists the primary contact's name, email, and phone number.
- **Location:** The physical address of your business.
- **Work Schedule:** BY default, the work schedule is set to **Monday through Friday**, from **8:00 AM to 5:00 PM**.
- **Notification Options:** Notifications can be **Enabled** or **Disabled** for Customers, Subcontractors, and Employees.
- **AI Design Credits Balance:** This shows how many design credits your plan includes, and how many are remaining.

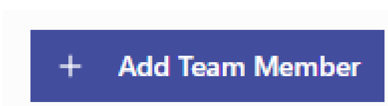
- **Team & Groups:** Add team members



This screen is the **Team Members** management page, which allows administrators to view, search, and organize staff roles within the organization.



- **Search and Filter:** Users can find specific staff using a search bar or filter the list by **All Departments** and member status (currently set to **Active**).
- **View Options:** The interface allows switching between a **Table** view (currently active) and a **Cards** view.



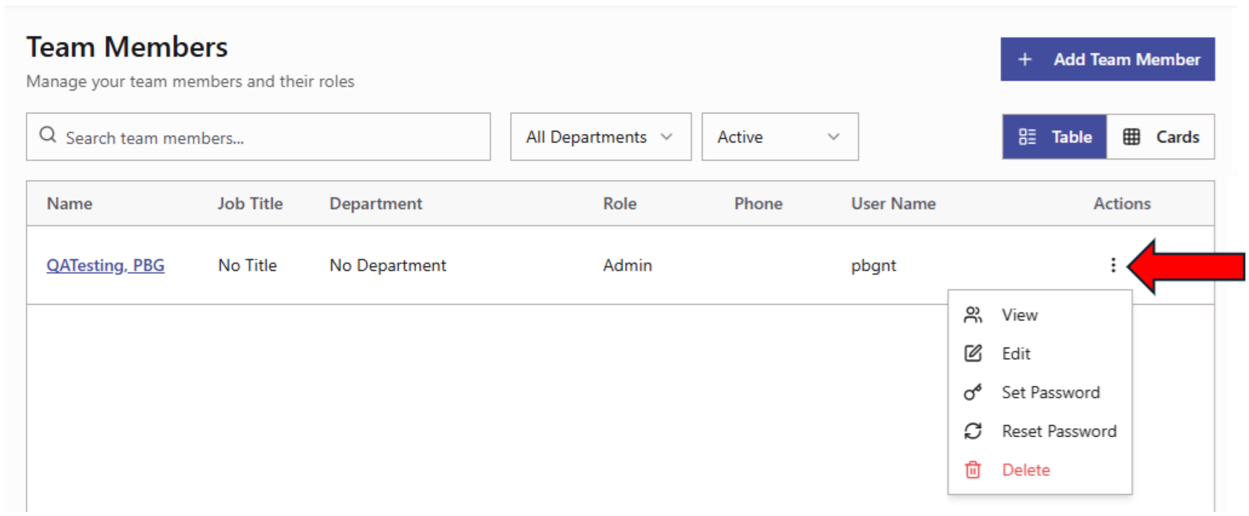
- **+ Add Team Member** Clicking the + Add Team Member button opens a setup form to register a new employee with the following details:

Required Information

- **Basic Identity:** You must provide a **First Name**, **Last Name**, and **Email** address.
- **Permissions:** You are required to select a **Role** from the dropdown menu to determine the user's access level within the system.
- Fields are available for **Employee Number**, **Job Title**, **Department**, and designating who the individual **Reports To**.
- **Personal Contact:** You can enter a **Phone** number and a full **Street Address**, including Community, City, State, and Zip.

- **Login Credentials: User Name** allows you to set a specific login ID for the member.
- **Status and Notifications**
- At the bottom of the form, you can toggle global settings for the new member:
- **Active:** Set the account to active or inactive status.
- **Email/SMS Notifications:** Enable or disable automated alerts sent to the member via email or text message.
- Once all details are entered, click **Create Team Member** to save the profile.

To edit an existing team member profile, click on the **three-dot action icon** on the far right of any individual listed in the **Team Members** table.



This menu provides administrators with several options for managing an existing team member's profile and account access.

Menu Options

- **View**: Opens the team member's full profile for a read-only overview of their current information.
- **Edit**: Allows you to modify any existing details, such as their **Job Title**, **Department**, **Role**, or contact information.
- **Set Password**: Enables an administrator to manually create and assign a specific password for the user's account.
- **Reset Password**: Triggers a system-generated process to reset the user's current password, typically used if a member has forgotten their credentials.
- **Delete**: Permanently removes the team member from the organization's system

- **Groups:** The **Groups** management screen is designed to help you organize contacts into logical units, which can also function as communication channels. This interface provides a high-level overview of existing groups and tools for creating new ones.

Groups Dashboard Overview

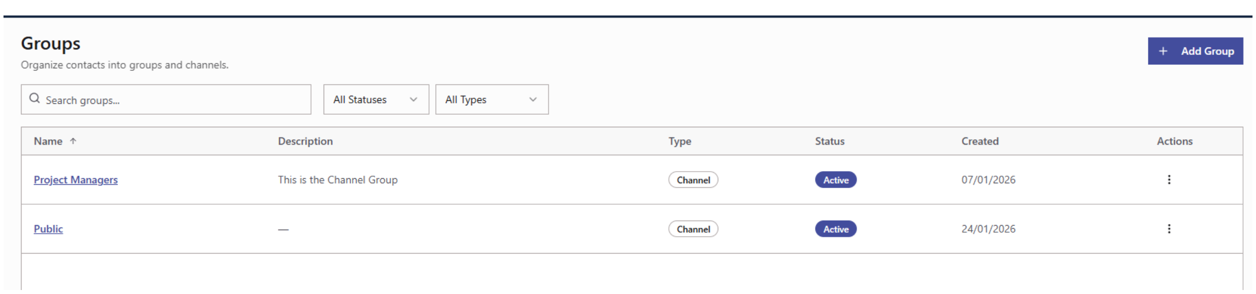
The main dashboard displays a table of all registered groups with the following details:

- **Name:** The identifying title of the group (e.g., "Project Managers" or "Public").
- **Description:** A brief summary of the group's purpose.
- **Type:** Indicates how the group functions, such as a **Channel** for messaging.
- **Status:** Shows whether the group is currently **Active** or inactive.
- **Created:** The date the group was originally established.
- **Actions:** A three-dot menu allows management tasks such as editing or deleting the group.

Search and Filtering Tools

To efficiently manage large numbers of groups, use the top navigation tools:

- **Search Bar:** Quickly find a group by typing its name into the "Search groups..." field.
- **Status Filter:** View groups based on their current state (e.g., Active, Inactive) using the dropdown of the **All-Statuses** dropdown.
- **Type Filter:** Sort the list by group functionality using the **All-Types** dropdown.

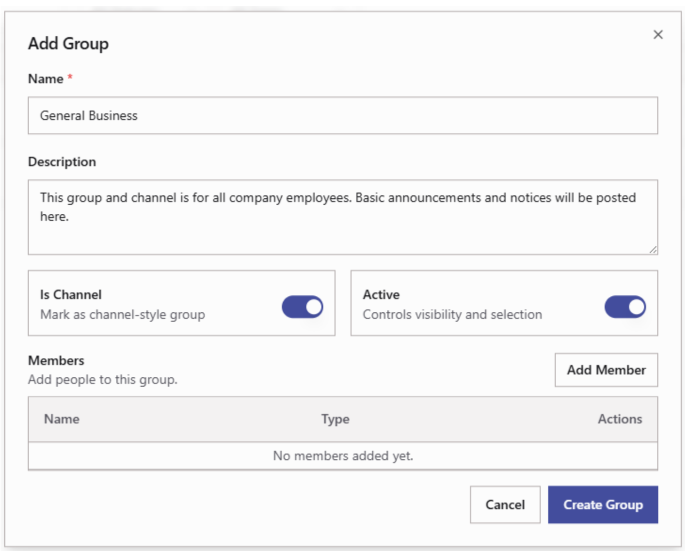


Understanding Group Types

- **Standard Groups**: Use this type when you need to organize team members for administrative or reporting purposes without necessarily creating a dedicated chat space.
    - **Best for**: Filtering team lists by department, assigning permissions to specific blocks of users, or organizing staff for internal project tracking.
- **Messaging Channels**: Use this type when the primary goal is real-time communication between members.
    - **Best for**: Collaborative project discussions, department-wide announcements, or creating a persistent "chat room" for specific topics.

Creating a New Group

To establish a new group or messaging channel, click the **+ Add Group** button located at the top right of the screen.



How to Assign Team Members to a Group

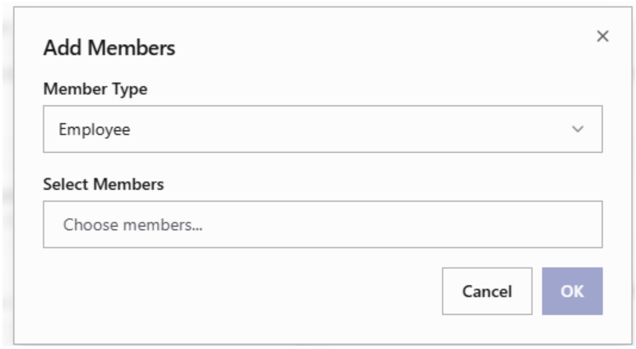
Once you have defined the basic group details such as the **Name** and **Description**, you can manage individual access in the **Members** section.

1. Locate the Members Section

- Navigate to the bottom portion of the group setup form labeled **Members**.

2. Add a New Member

- Click the **Add Member** button located at the top right of the Members table.



- This opens a selection tool or dropdown where you can choose from your existing team member list.

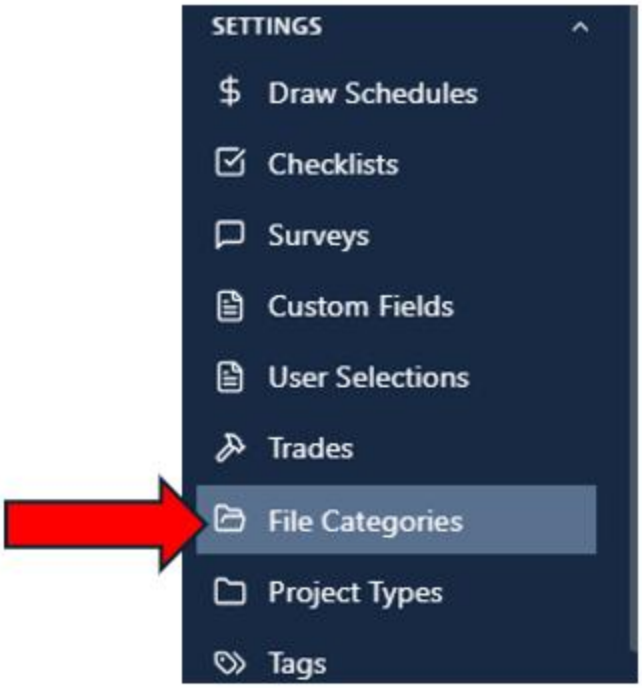
3. Review of the Member List

- The Members table provides a quick overview of who is in the group:
    - **Name:** Displays the team member's full name.
    - **Type:** Indicates the member's specific designation or status within this group.
    - **Actions:** Provides options to manage or remove a specific individual from the group.

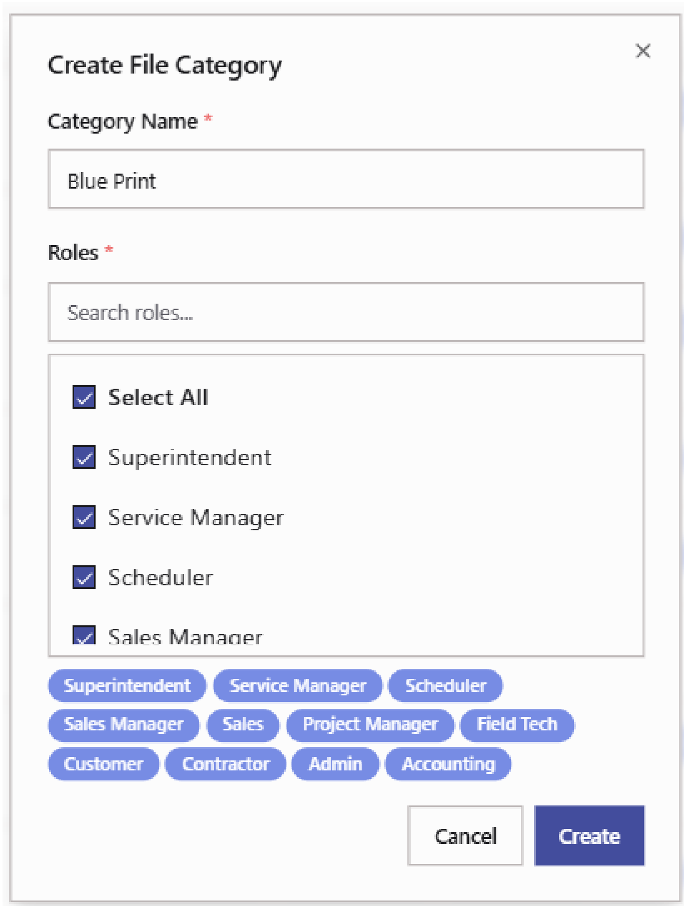
4. Finalize the Group

- After adding all necessary team members, ensure the **Active** toggle is enabled to make the group visible and functional for those assigned.
- If you want this group to function as a messaging channel, ensure the **Is Channel** toggle is switched on.
- Click **Create Group** (or **Save Changes**) to finalize the assignments.

- **Settings>File Categories:** Here you will add common file types used for your organization. Examples include Permits, 3d Renderings, and Contracts. You will also be able to set which user roles can access each file types.



- The main table displays an inventory of your organization's file classifications and their corresponding permissions:
- **File Category Name:** Lists specific document types such as **Change Order**, **Contract**, **Customer Document**, **Invoice**, and **Other**.
- **Roles:** Displays the specific user groups (e.g., Admin, Superintendent, Sales, Customer) authorized to view or manage files within that category.
- **Restricted:** Indicates if the category has additional security constraints (
- **Actions:** Features a three-dot menu for editing or deleting category settings.
- **Navigation and Controls**
- **Search and Filter:** A search bar at the top left allows you to quickly locate specific categories by name.
- **View Options:** You can toggle the display between a **Table** view (currently active) and a **Cards** view using the buttons on the right.
- **Add Category:** Click the **+ Add Category** button located at the top right to create new file classifications.



File Category Details

- **Category Name:** A required text field used to label the new document type, such as **"Blueprint"**.
- **Roles:** A required section that determines which user groups can access files uploaded under this category.

Role Management Features

The interface includes tools to precisely control permission:

- **Search Roles:** A search bar to quickly find specific internal or external roles.
- **Selection List:** A scrollable list of roles with checkboxes, including a **Select All** option.
- **Selected Roles Display:** Visual tags at the bottom show all currently selected roles, such as **Superintendent**, **Service Manager**, **Project Manager**, **Customer**, and **Admin**.

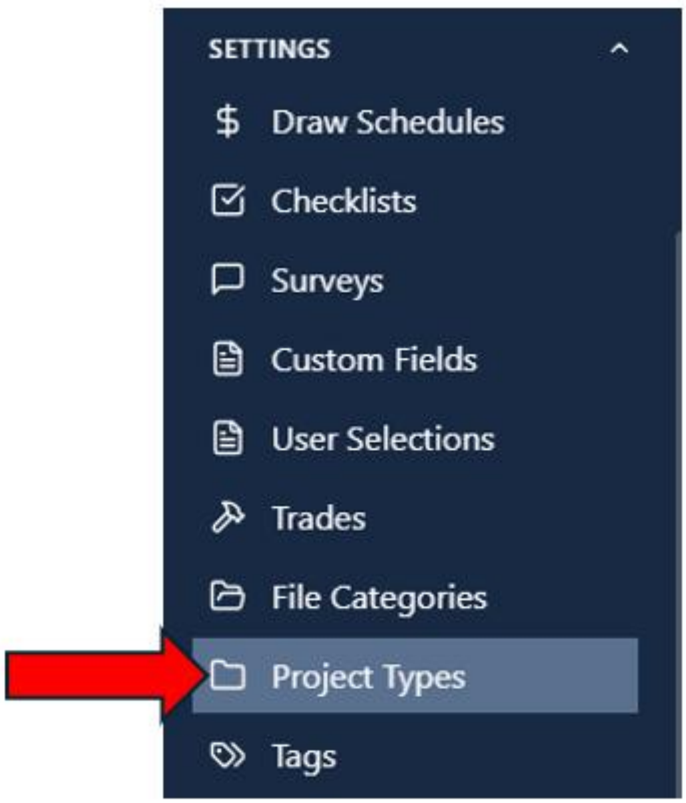
Final Actions

- **Create:** A blue button to save the new category and apply the assigned role permissions.
- **Cancel:** Closes the window without saving the new category.

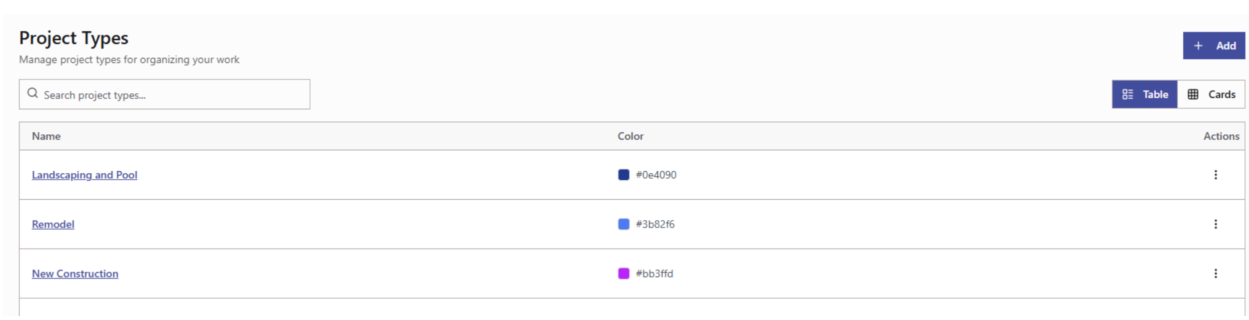
Phase 2: Construction Setup

- This section outlines the essential steps for configuring your construction environment. Following these phases ensures that your projects, subcontractors, and workflows are standardized for maximum efficiency.

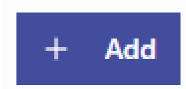
Settings>Project Types
Here we will add your Project Types



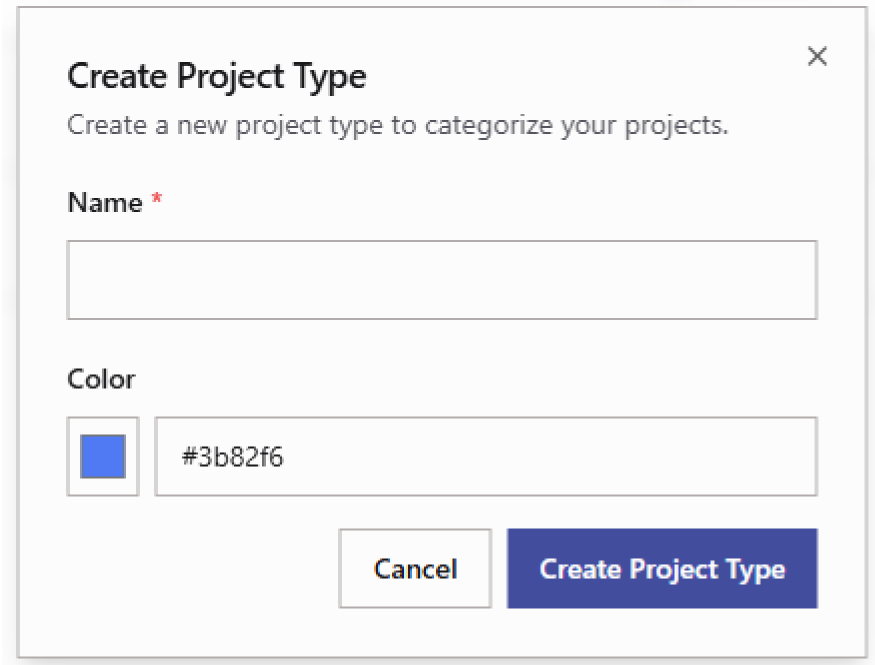
This screen is the **Project Types** management dashboard, designed to help you categorize and organize your work projects.



- **Project Type:** Examples: Pool and Spa, Landscaping, Remodel
    - **Click+ Add:** to create new project categories.



    - **Name:** Enter a descriptive name for the category (e.g., "Remodel" or "New Construction").

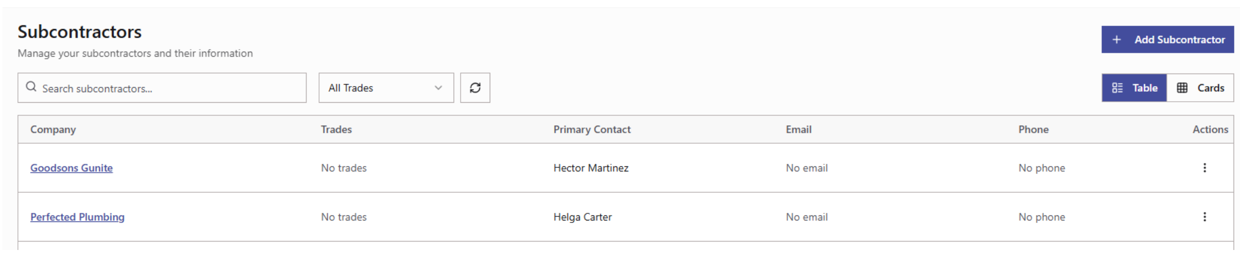


- Click **Create Project Type** to save the new category and add it to your active inventory.

- **Contacts>Subcontractors**

Here we will add your subcontractors.

This screen is the Subcontractors management dashboard.



Adding Subcontractors
Click the blue **+ Add Subcontractor** button in the top-right corner.
In the Create New Subcontractor window, provide the foundational business information:

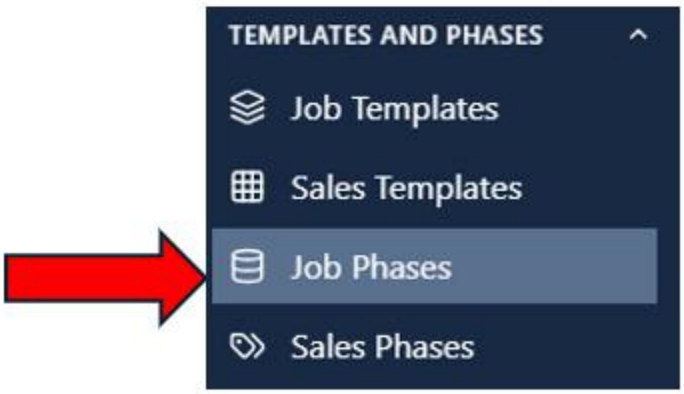
- **Name:** Enter the official company name of the subcontractor (e.g., "Champion Plumbing").
  Address Information: Complete the physical location details, including **Street Address**, **Community**, **City**, **State**, and **Zip**. Ensure the correct **Country** is selected from the dropdown menu.

Contact Information: Enter the **First Name**, **Last Name**, **Phone** number, and **Email** address for primary contact.
App Access: Assign a unique **Username** and a secure **Password** to allow the subcontractor to log into their portal.
Click the **Create Subcontractor** button to save the record to your roster.

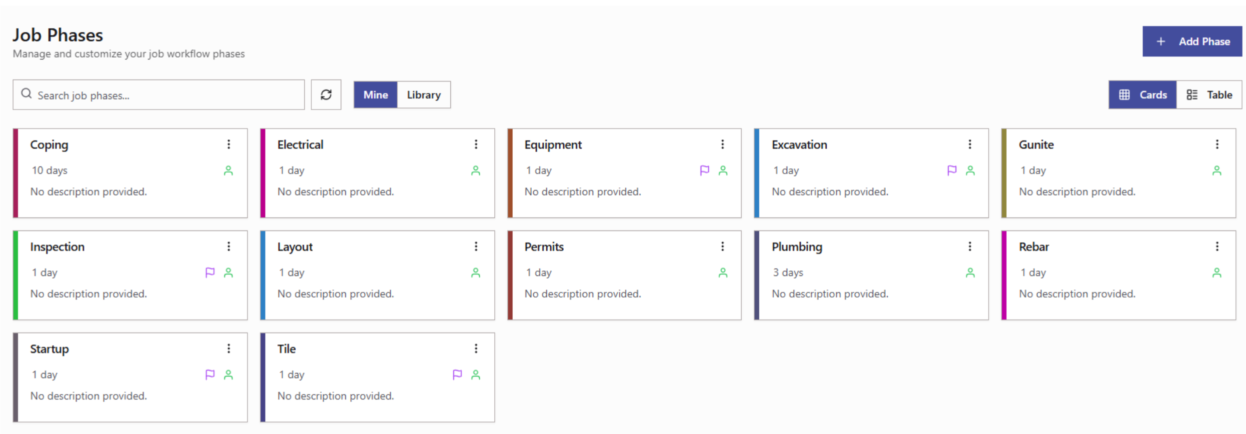
Editing Use the **three-dot icon** to access individual management settings for a subcontractor record.

- **Templates and Phases>Job Phases**

Here we will add your Job Phases



The **Job Phases** dashboard serves as the central hub for managing and customizing the various stages of your project workflow. This interface allows you to define the timeline, description, and sequence of tasks for every construction project.

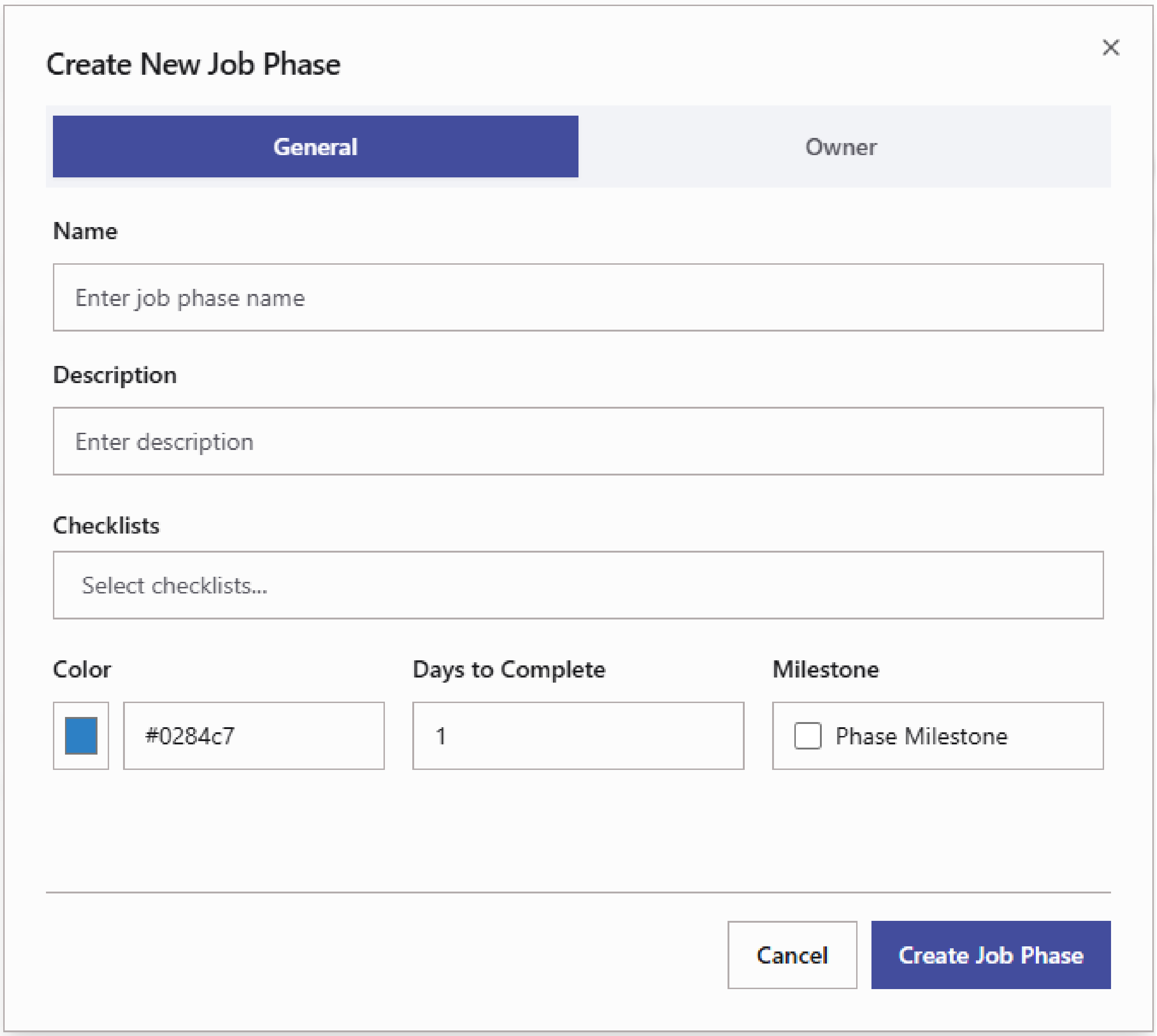


Add Phase: Click the blue **+ Add Phase** button in the top-right corner to create a new workflow stage.

The Add Phase form is divided into two tabs, with the **General** tab containing the primary phase settings:

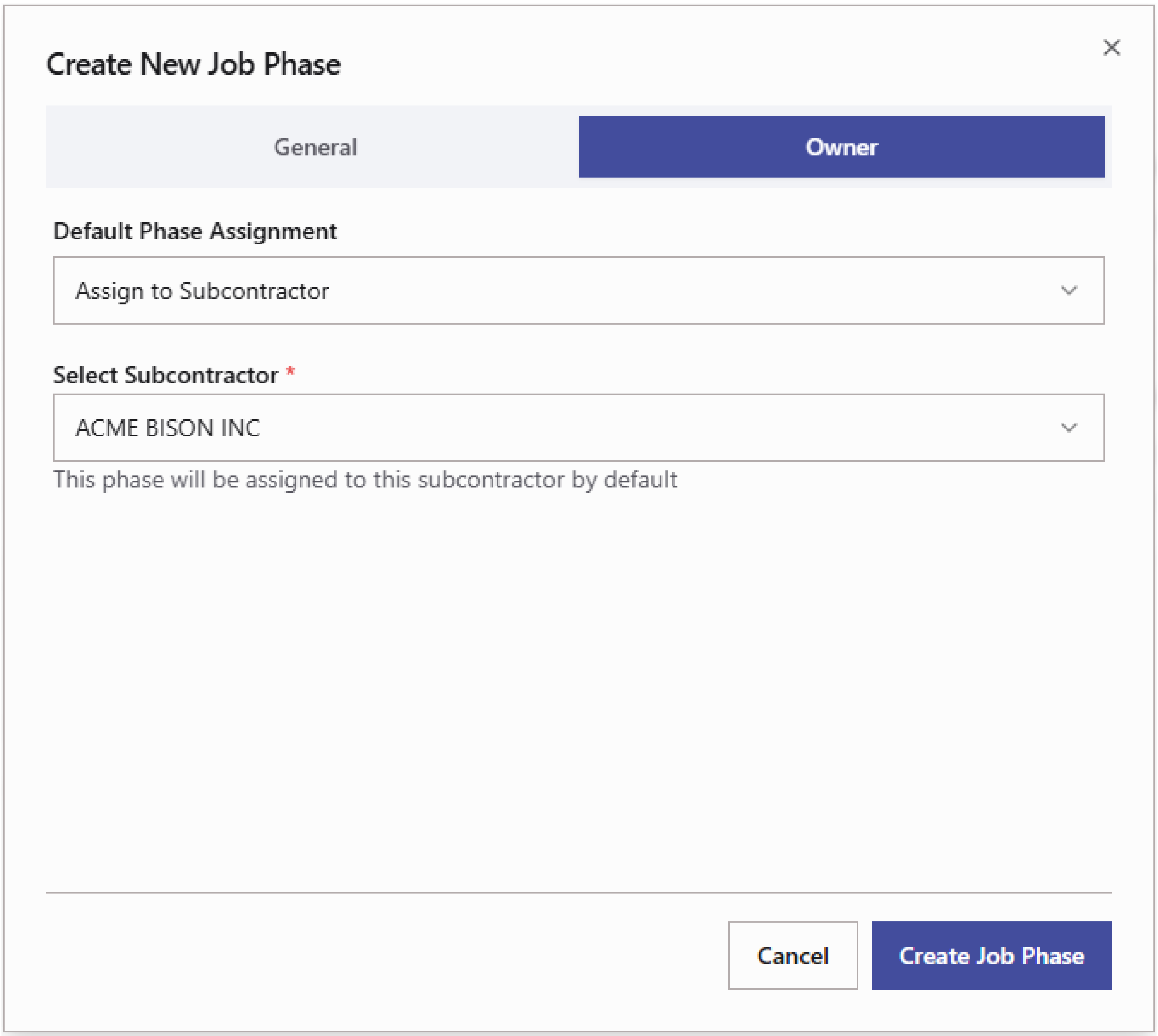
- **Name:** Enter a clear, descriptive title for the stage, such as "Excavation" or "Electrical".
  Description: Use this area to outline the specific work requirements or goals for this phase.
  Checklists: Select any pre-defined quality control or task lists that must be completed during this stage.

- **Color:** Assign a specific hex color code to help visually identify this phase on the master project schedule.
- **Days to Complete:** Define the estimated duration of the phase to help the system calculate the overall project timeline.
- **Milestone:** Check the **Phase Milestone** box if this stage represents a critical deadline or project turning point.



This screen is the Owner tab within the Create New Job Phase window.
Configuration Details

- **Default Phase Assignment:** A dropdown menu that allows you to choose the category of worker responsible for the phase, such as "Assign to Subcontractor".
- **Select Subcontractor:** A required field where you choose a specific partner (e.g., **ACME BISON INC**) from your saved subcontractor roster.
- **Automation Note:** Once saved, this phase will be automatically assigned to the selected subcontractor by default whenever it is used in a project.

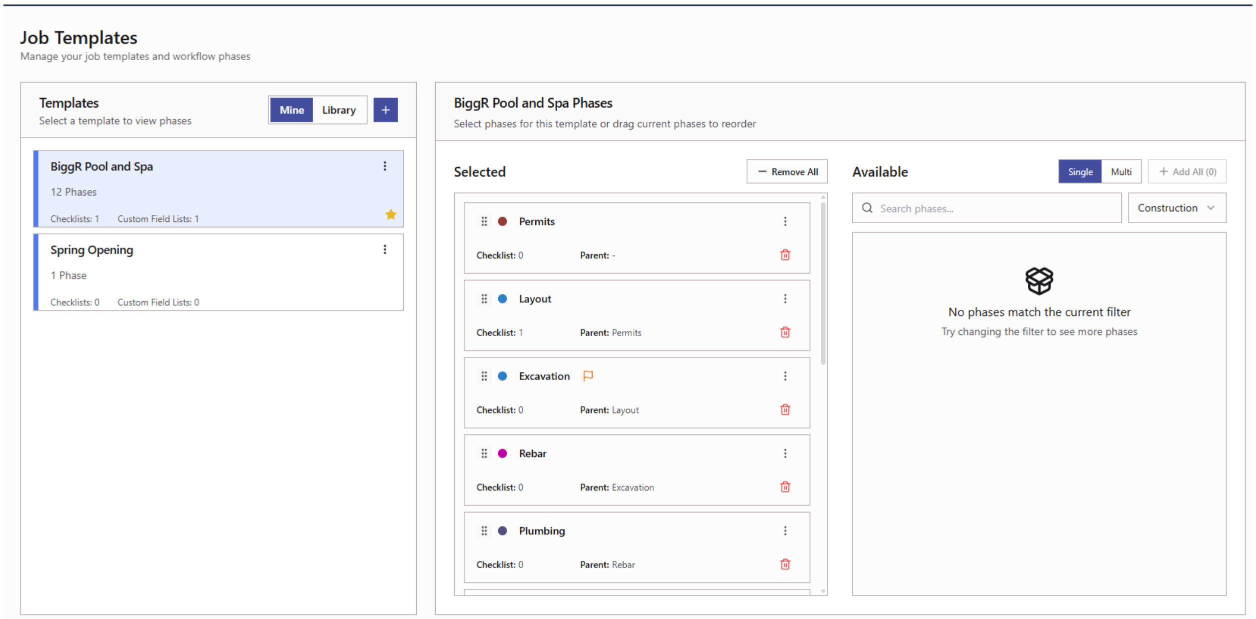


Create Job Phase: Saves and adds it to your active job phases.

- **Templates and Phases>Job Templates**

Here we will add your Job Templates

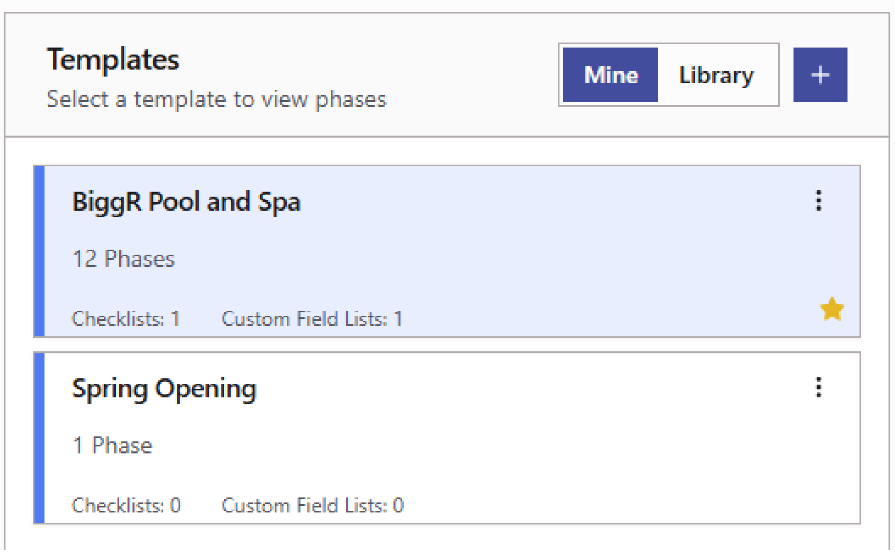
This screen is the **Job Templates** management dashboard, used to create and sequence standardized workflows for your projects. By organizing your **Job Phases** into templates, you can quickly launch new projects with a pre-defined schedule and task list.



Templates Sidebar (Left Panel)

This panel acts as your master directory for saved workflows.

- **Template Selection:** View all organization-owned templates (e.g., "BiggR Pool and Spa"). Each entry shows the number of phases, checklists, and custom field lists included.
- **Create New:** Use the blue **"+" icon** to start a new template from scratch.
- **Library:** Switch to the **Library** tab to browse pre-made industry standard templates.



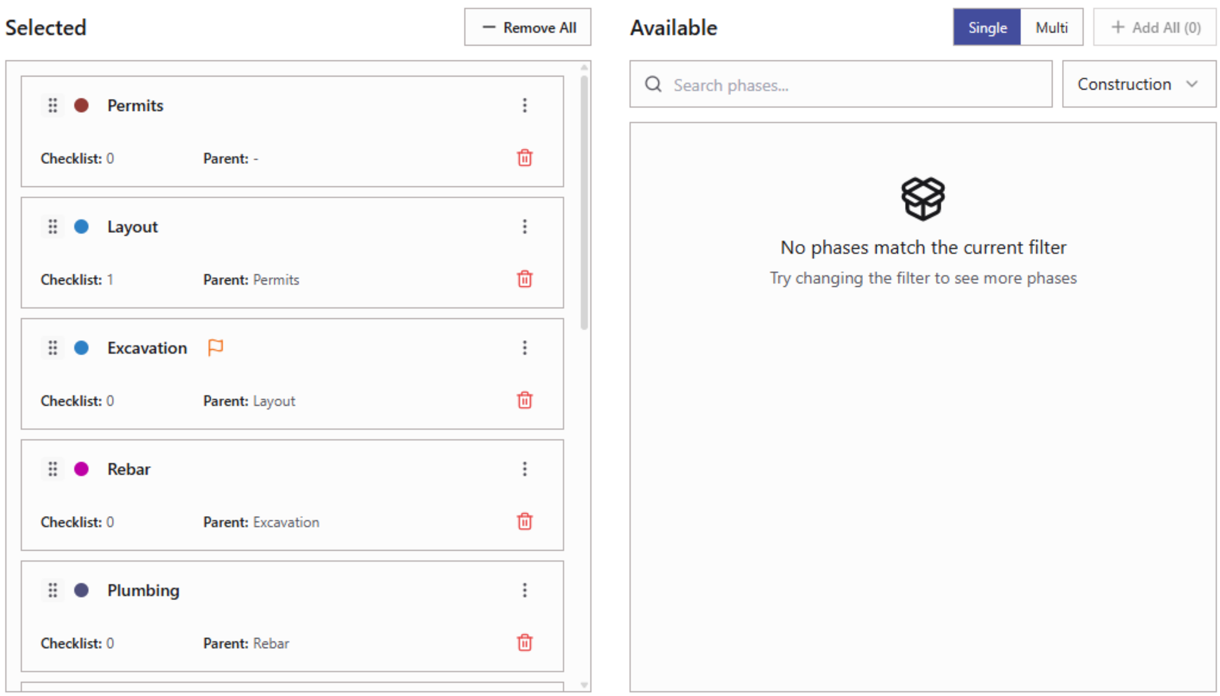
Building a Template

To build a standardized workflow:

1. **Select or Create** a template in the left sidebar.
2. **Find Phases** in the right column and click to add them to your template.
3. **Arrange the Order** in the center column by dragging phases into their logical construction sequence.
4. **Click Save**

Selected Phases (Center Panel)

- **Sequence Management:** Use the **six-dot drag handle** on any phase card to reorder the workflow.
- **Phase Details:** Each card identifies the phase name (e.g., Layout, Rebar), its parent phase (for dependency tracking), and any attached checklists.
- **Removal:** Click the **red trash icon** on a card to remove that phase from the current template.

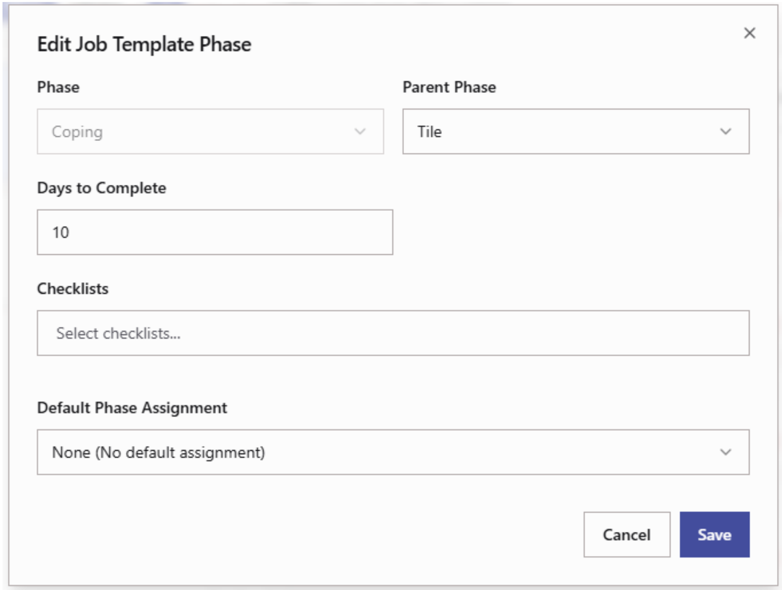


Available Phases (Right Panel)

This panel contains your inventory of individual job phases that can be added to the template.

- **Search & Filter:** Use the search bar or the category dropdown (e.g., "Construction") to find specific phases.
- **Selection Mode:** Toggle between **Single** or **Multi** selection modes to add phases to your template one by one or in bulk.

Editing a Job Template Phase



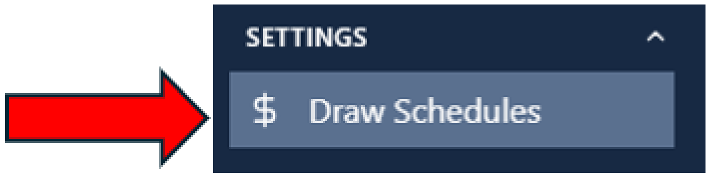
The **Edit Job Template Phase** window allows you to fine-tune the behavior of a specific stage in your workflow.

- **Phase**: Displays the name of the phase you are currently editing (e.g., Layout).
  Parent Phase: Defines the dependency for this stage. Use the dropdown menu to select which phase must be completed before this one can begin (e.g., Permits).
  Pro Tip: *Properly setting the* ***Parent Phase(s)*** *is crucial for generating a schedule projection of child phases (based on the number of days in each phase).*
- **Days to Complete**: Enter the estimated number of days required for this specific phase. This value is used to calculate the automated project timeline.
  Checklists: To add a checklist, search for its name in the field.

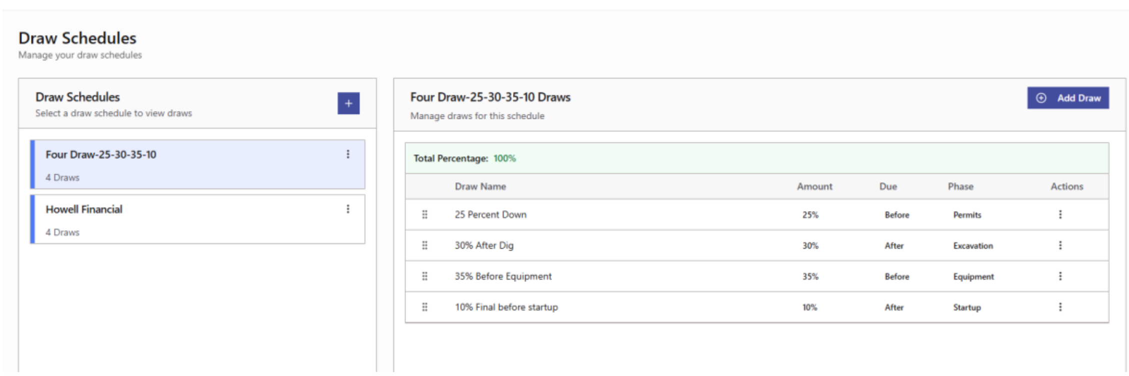
  Default Phase Assignment: Assign to Employee, Subcontractor, or Crew.
  Select Subcontractor: Choose the specific company (e.g., **ACME BISON INC**) from your saved roster that should be assigned to this work by default.
- **Save**: Click the blue button at the bottom right to apply your changes to the template.

- **Settings>Draw Schedules**

Here we will add your Draw Schedules



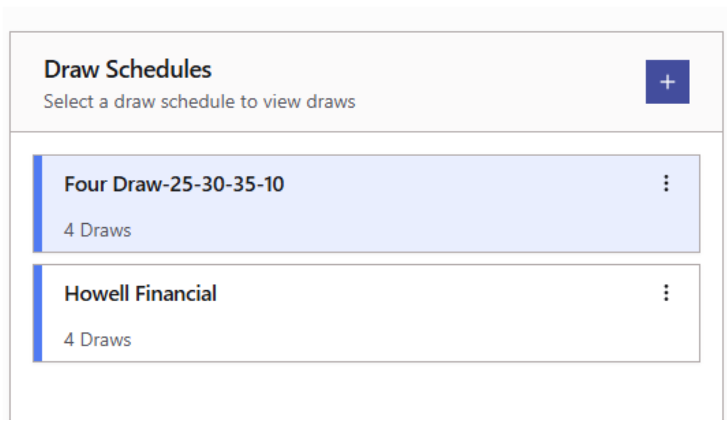
The **Draw Schedules** screen is used to define payment milestones for construction projects. This dashboard allows you to create custom Draw Schedules used by your organization. These are used when creating a new job, adding the contract amount, and picking the desired Draw Schedule.



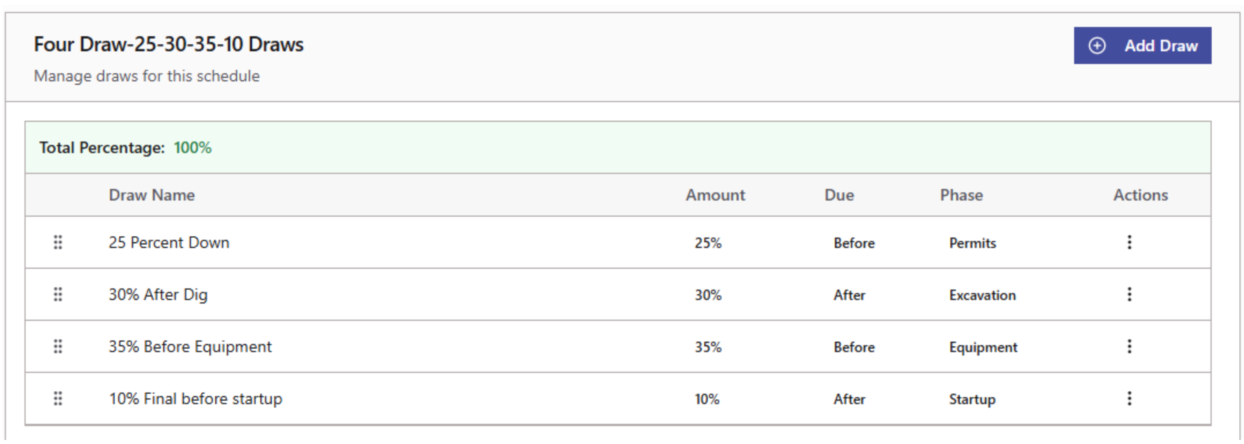
Dashboard Structure

The interface is split into two primary sections for selecting and managing specific payment plans:

- **Draw Schedules List (Left Panel):** This sidebar acts as a directory for your saved payment structures. You can add a new schedule by clicking the **"+" icon** or manage existing ones via the **three-dot action menu**.

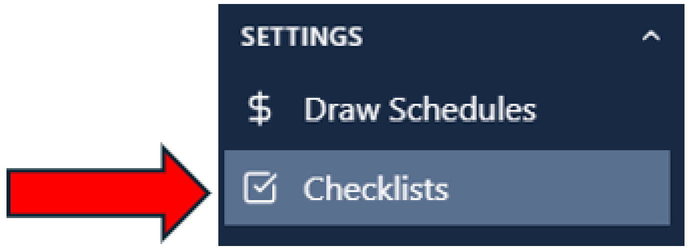


- **Manage Draws (Right Panel):** When a schedule is selected, this area displays the specific breakdown of that plan.

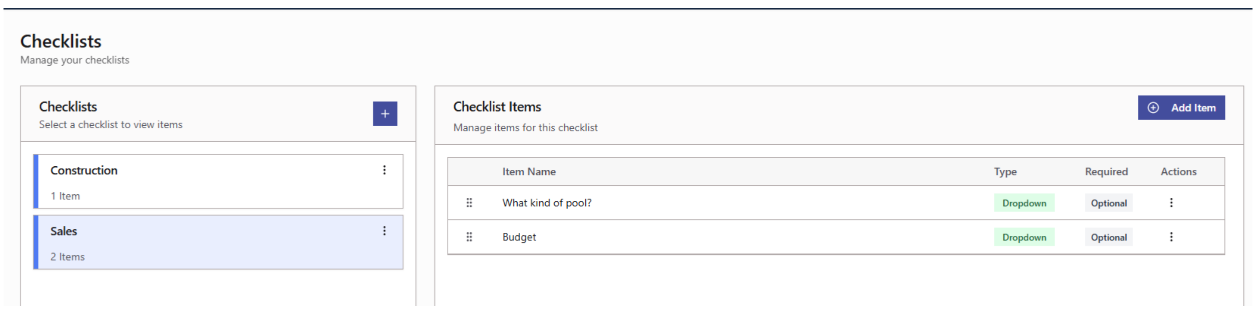


- **Settings>Checklists**

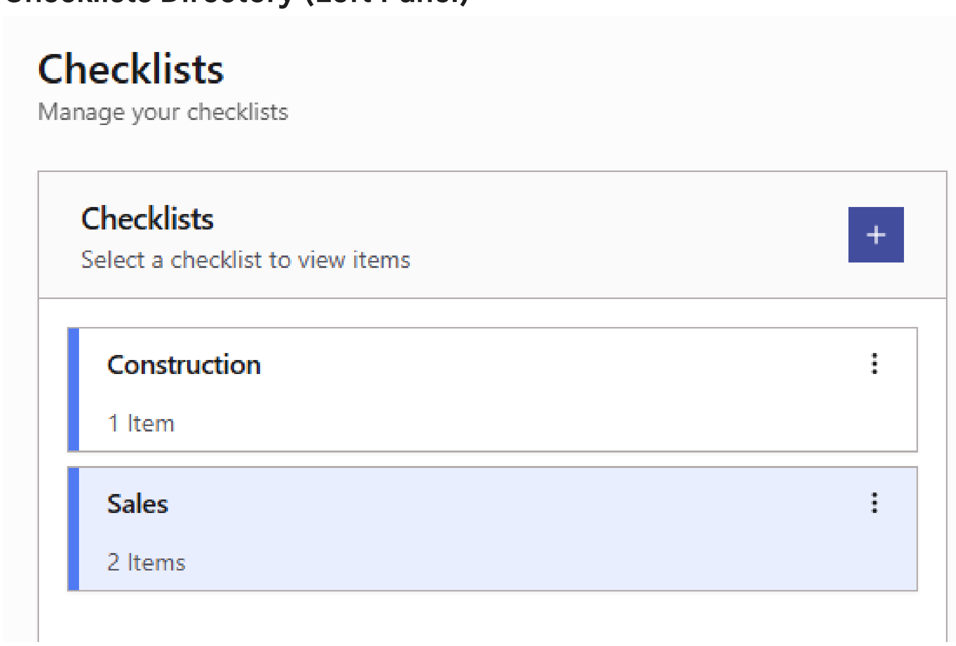
Here we will add your Checklists



The **Checklists** management screen is designed to create and organize standardized lists for various business processes, such as construction or sales. The interface is divided into two main sections: a master directory of checklists and a detailed view of specific items within a selected list.



Checklists Directory (Left Panel)



This sidebar serves as the navigation hub for all saved checklists.

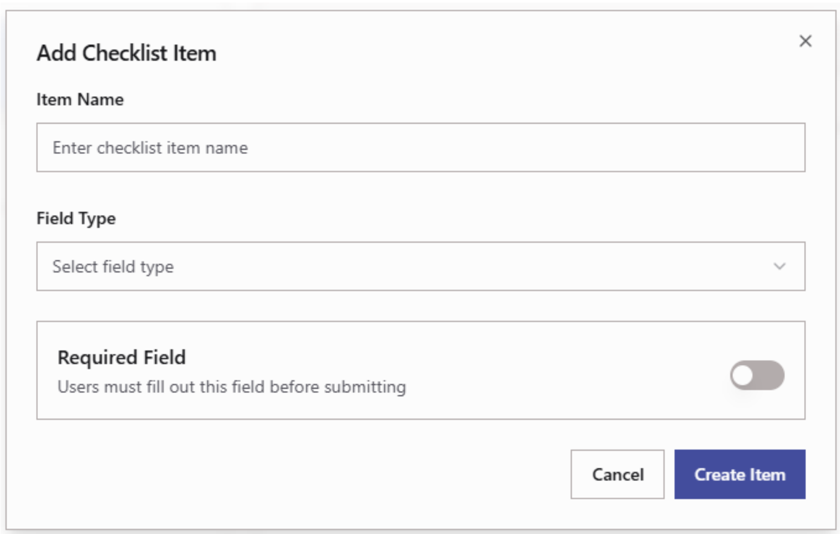
- **Checklist Navigation**: Users can select from existing lists, such as **Construction** or **Sales**, to view their specific requirements.
- **Organizational Tools**: Each checklist entry shows the number of items it contains.
- **Management Controls**:
    - **Add Checklist**: Click the **"+" button** at the top of the panel to create a new master checklist.
    - **List Options**: Use the **three-dot menu** on each list to edit or delete the master entry.

Checklist Items (Right Panel)

When a checklist is selected, this area allows for the granular management of its individual tasks or data points.

Column	Description
Item Name	The specific question or task, such as "What kind of pool?" or "Budget".
Type	The format of the input required (e.g., **Dropdown**).
Required	Indicates if the item is mandatory or **Optional** for the user to complete.
Actions	Features a **three-dot menu** for editing or removing the specific item.

Configuration Actions

- **Add Item**: Click the **"+ Add Item"** button at the top right to insert a new requirement into the active checklist.
- **Reorder**: Use the **six-dot handle** to the left of each item name to drag and drop tasks into a specific sequence.
- 

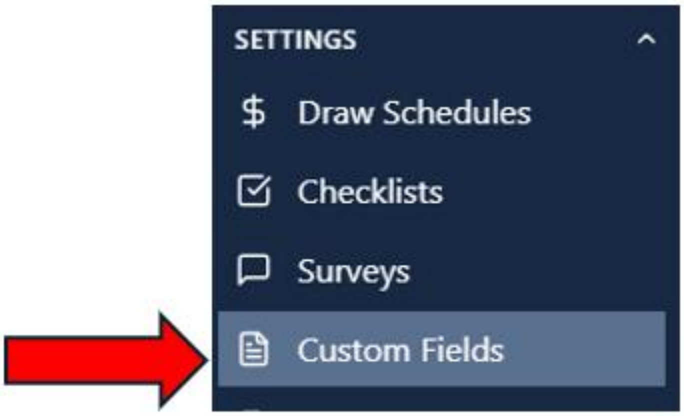
Item Name field (e.g., "Pool Dimensions" or "Final Electrical Inspection"). This is the label that will appear to the team member completing the checklist in the field.
Use the **Field Type** dropdown menu to choose how the user will provide their answer. Choosing the correct type ensures data consistency and makes the checklist easier to complete.
Available Field Types include:

5 Star: For quality ratings or satisfaction levels.
Date / datetime: To record specific project milestones or timestamps.
Dropdown: To provide a list of pre-defined options for the user to select from.
Money: For recording costs, budgets, or expenses.
Text / Multi-line Text: For brief notes or detailed observations.
Yes/No: For simple binary confirmations or "Pass/Fail" checks.

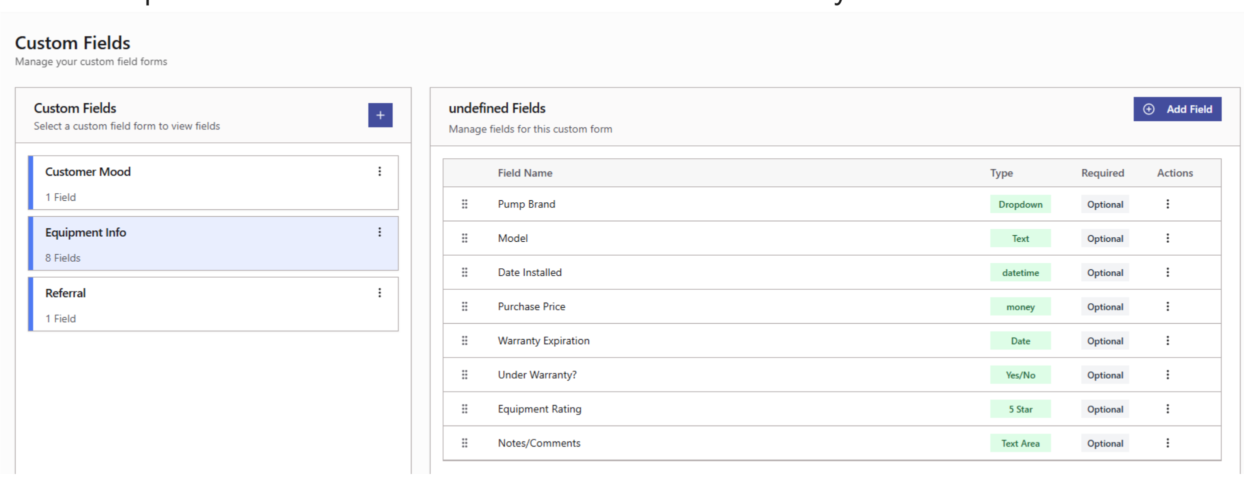
Set **Mandatory Status**
Create Item: Click the blue button at the bottom right to save the new requirement and add it to your active checklist.

- **Settings>Custom Fields**

Here we will add your Custom Fields



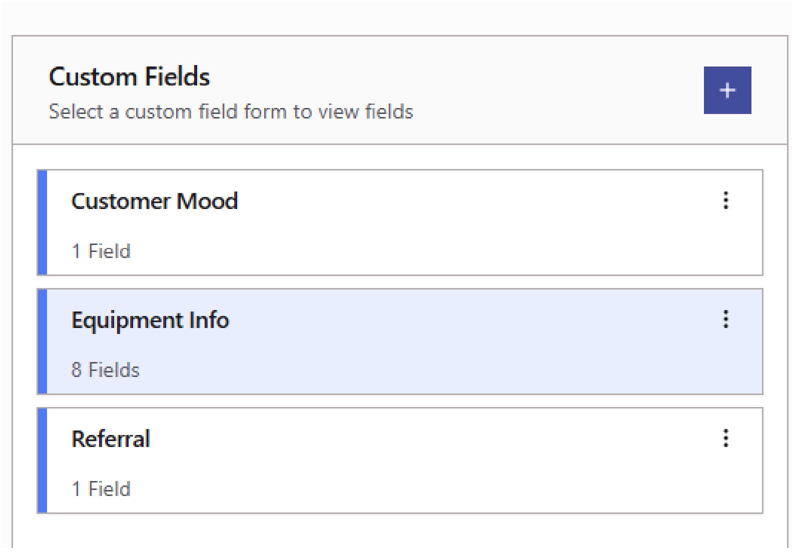
This screen is the **Custom Fields** management dashboard, a powerful tool that allows your organization to tailor the platform to your specific data-tracking needs. By creating custom fields, you can capture unique project details—such as specific swimming pool equipment or technical specifications—that aren't included in the standard system.



Custom Fields Overview

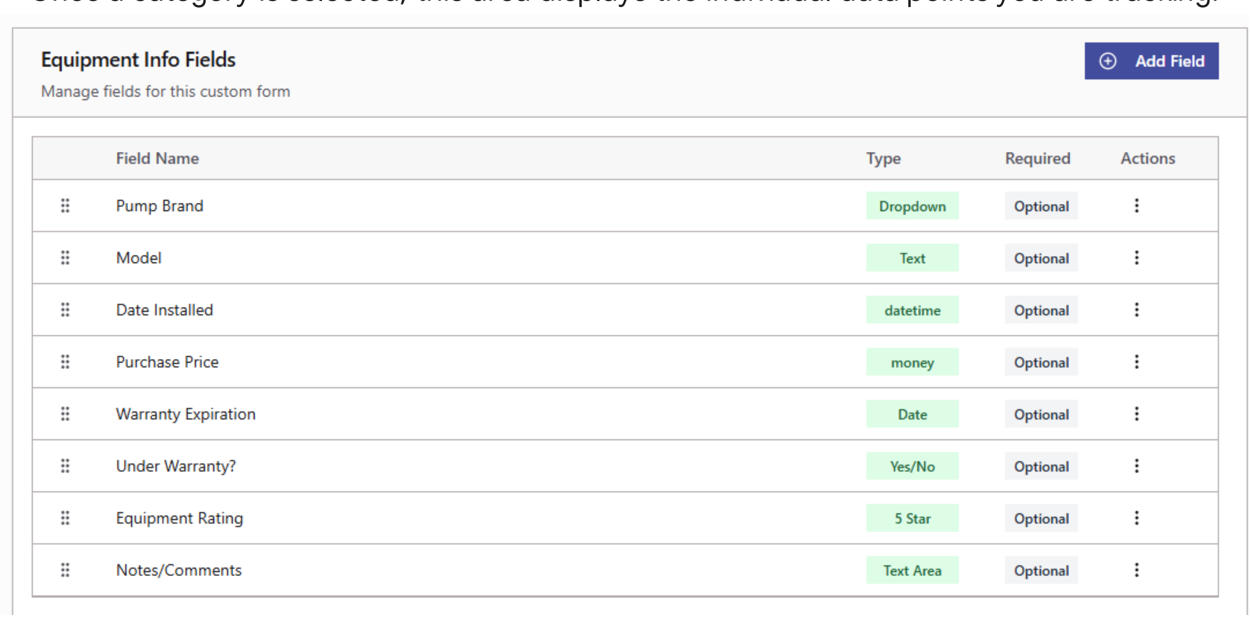
The dashboard is split into two functional areas to help you organize and manage your data points.

1. Left Panel: Custom Field Labels: Use the **"+" icon** to create a new category or the **three-dot menu** to edit or delete existing ones.



2. Field Management (Right Panel)

Once a category is selected, this area displays the individual data points you are tracking.



Equipment Info Fields
Manage fields for this custom form

Add Field

Field Name	Type	Required	Actions
Pump Brand	Dropdown	Optional	⋮
Model	Text	Optional	⋮
Date Installed	datetime	Optional	⋮
Purchase Price	money	Optional	⋮
Warranty Expiration	Date	Optional	⋮
Under Warranty?	Yes/No	Optional	⋮
Equipment Rating	5 Star	Optional	⋮
Notes/Comments	Text Area	Optional	⋮

Column	Description
Field Name	The label for the data point (e.g., "Pump," "Filter," "Heater").
Type	The format of the data (e.g., **Dropdown**, **Text**, **Date**).
Actions	A **three-dot menu** to edit or remove a specific field.

How to Create a New Data Category

1. Navigate to the left-hand **Categories** panel.
2. Click the **"+" icon** at the top of the list.
3. Enter a name for your category (e.g., "Site Conditions" or "Warranty Info").

How to Add a Custom Field

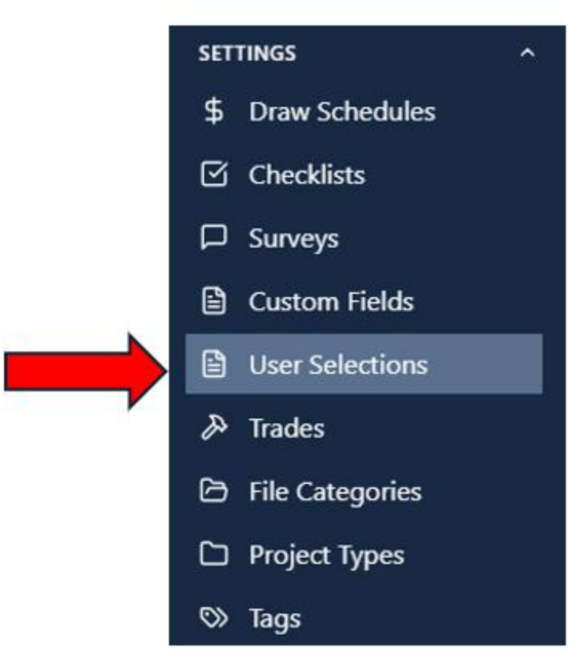
1. Select the relevant **Category** from the left panel.
2. Click the blue **+ Add Field** button in the top-right corner of the screen.
3. **Define the Field:**
    - **Field Name:** Give the field a clear title.
    - **Field Type:** Choose how users will enter data (e.g., select **Dropdown** for a list of equipment brands or **Text** for serial numbers).
4. Click **Create** to save the field to your category.

Organizing Your Fields

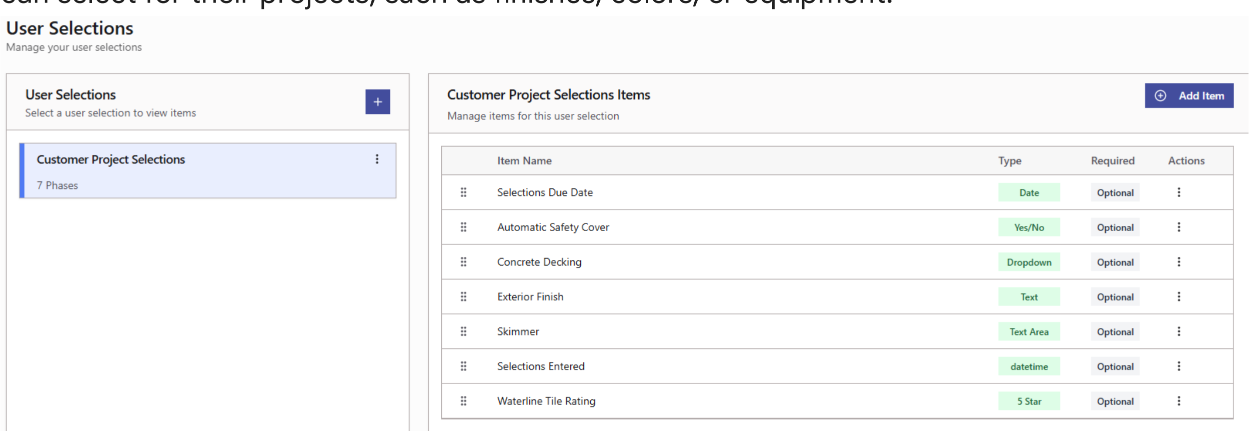
You can change the order in which these fields appear to your team by using the **six-dot drag handle** to the left of any Field Name. Simply click and drag the field to its new position in the list.

- **Settings>User Selections**

Here we will add your User Selections



This screen is the **User Selections** management dashboard, designed to help you organize and define the specific options—such as materials, finishes, or upgrades—that customers can select for their projects, such as finishes, colors, or equipment.



How to Manage User Selections

1. Navigate Your Selection Categories

The left panel serves as a directory for your selection groups.

- **Select a Group:** Click on a category (e.g., **"Customer Project Selections"**) to view and manage the individual items within that group.
- **Add a New Category:** Click the blue **"+" icon** at the top of the left panel to create a new category for grouping choices (e.g., "Kitchen Finishes" or "Pool Equipment").
- **Category Actions:** Use the **three-dot menu** next to a category name to edit its title or delete it from your system.

2. Manage Selection Items

Once a category is selected, the right panel displays the specific data points or choices available to the customer.

- **Review Item Details:** Each row shows the **Item Name**, the input **Type** (e.g., Date, Yes/No, Dropdown), and whether the selection is **Required** or **Optional**.
- **Add a New Item:** Click the blue **"+ Add Item"** button at the top right to define a new choice for your customers.
- **Edit or Remove:** Click the **three-dot menu** in the **Actions** column to modify an existing item or delete it from the category.

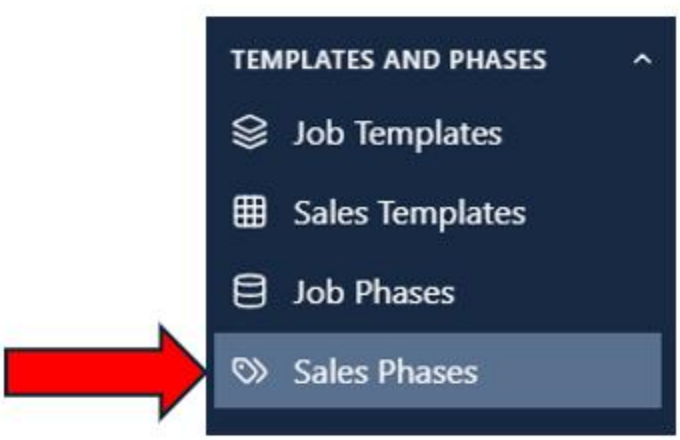
Available Field Types include:

- **5 Star:** For quality ratings or satisfaction levels.
- **Date / datetime:** To record specific timestamps.
- **Dropdown:** To provide a list of pre-defined options for the user to select from**.**
- **Money:** For recording costs, budgets, or expenses.
- **Text / Multi-line Text:** For brief notes or detailed observations.
- **Yes/No:** For simple binary confirmations or "Pass/Fail" checks.

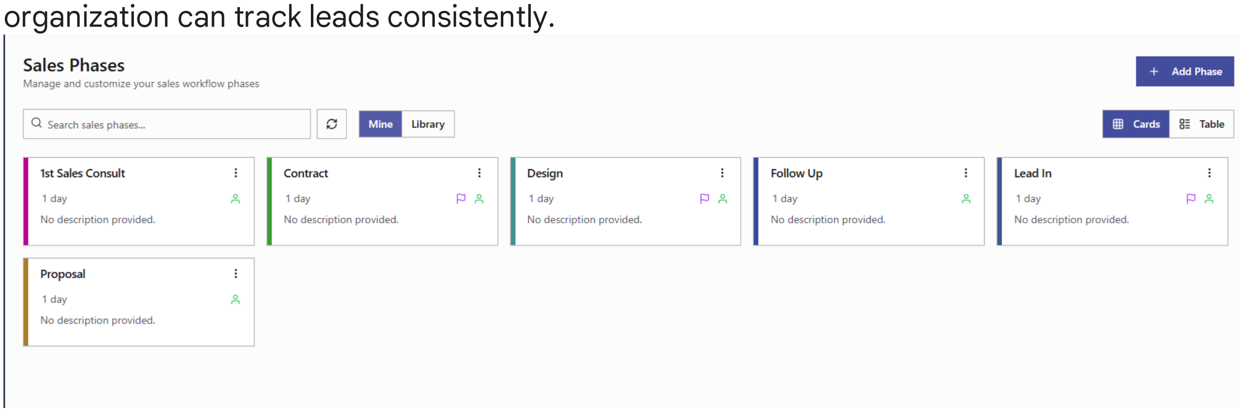
Phase 3: Sales Setup

This section focuses on **Sales Setup**, which establishes the core infrastructure for managing leads and sales workflows. This phase ensures that your sales team has standardized templates, checklists, and web integration tools necessary to move prospects through the pipeline efficiently.

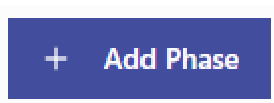
Templates and Phases>Sales Phases



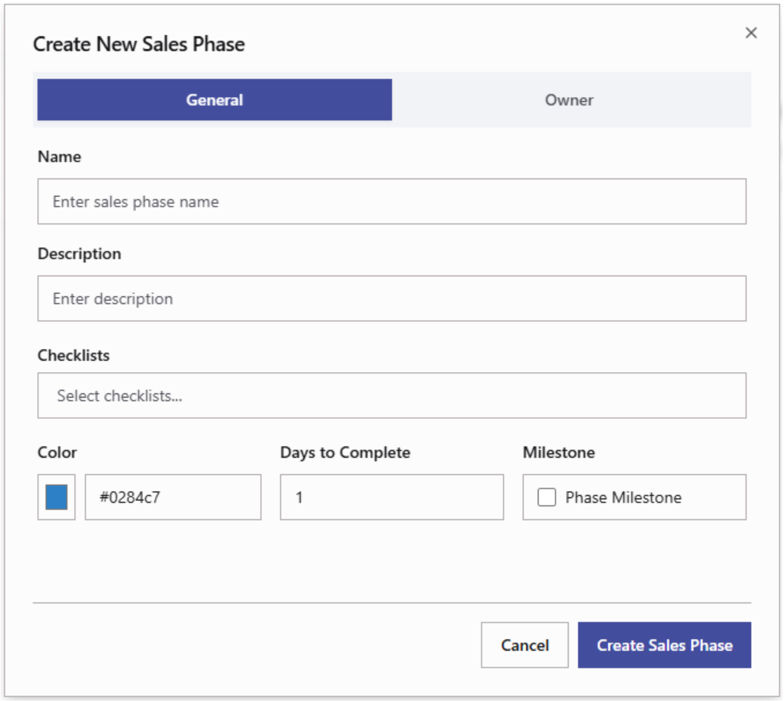
The **Sales Phases** management screen serves as the primary dashboard for defining and organizing the distinct stages of your sales workflow. By standardizing these phases, your organization can track leads consistently.



Add Phase: Click the blue **+ Add Phase** button in the top-right corner to define a new phase:



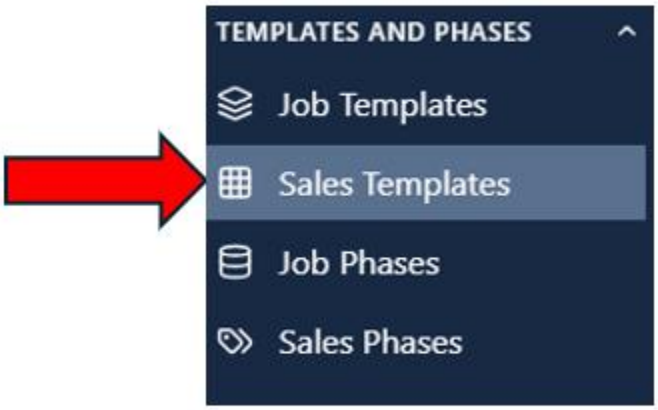
This screen is the **Create New Sales Phase** window, which is used to define and configure a specific stage in your sales lifecycle.



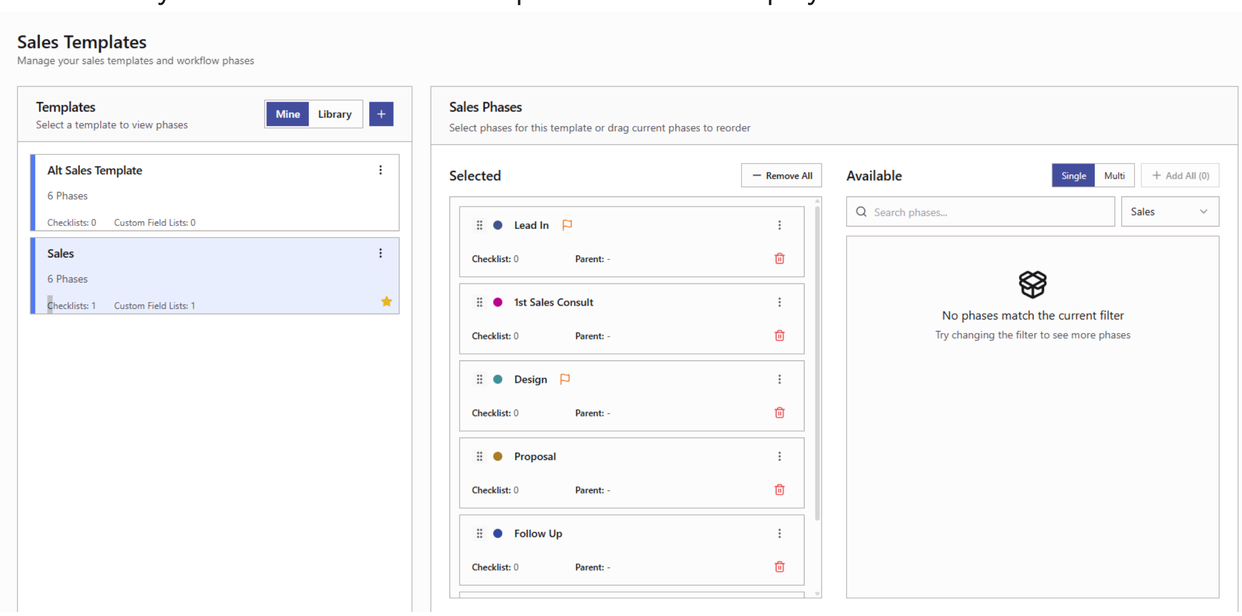
The **General** tab contains the foundational settings for the sales stage:
Name: Enter a clear title for the stage, such as "Lead In" or "1st Sales Consult".
Description: Use this text area to define the primary goals or standard operating procedures for this phase.
Checklists: Use the dropdown to link specific sales checklists (e.g., lead qualification forms) that must be completed during this stage.
Color: Assign a hex color code to visually distinguish this phase in your pipeline and calendar views.
Days to Complete: Set the expected duration for this stage to help calculate the total length of your sales cycle.
Milestone: Check the **Phase Milestone** box if this stage represents a significant achievement in the sales process.

Create Sales Phase: Saves the new stage and adds it to your organization's active sales workflow.

Templates and Phases>Templates



The **Sales Templates** dashboard is a central workspace used to build and organize standardized workflows for your sales team. By grouping **Sales Phases** into templates, you ensure every lead follows a consistent path from initial inquiry to a finalized contract.



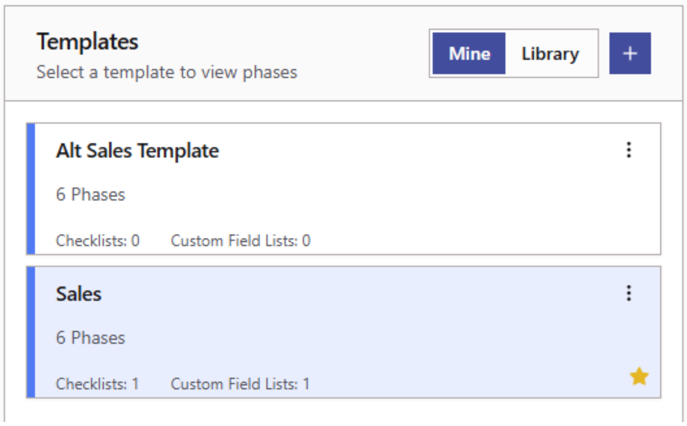
Interface Overview

The screen is organized into three primary columns to help you manage and sequence your sales activities:

Templates Sidebar (Left Panel)

This area acts as a library for your organization's saved sales workflows.

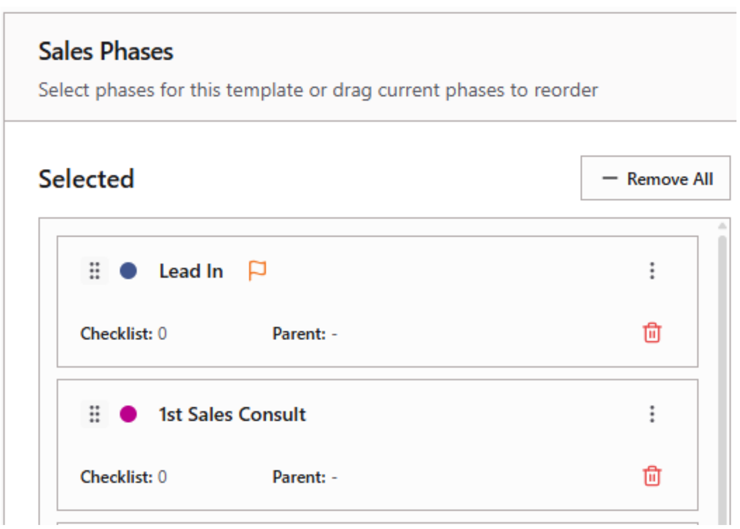
- Click the **"+" icon** to create a new template.
  Use the **three-dot menu** to edit or delete a specific template.



Sales Phases Sequence (Center Panel)

When a template is selected, this column shows the active progression of stages.

- **Workflow Order**: Phases are listed in the order they will occur (e.g., **Lead In → 1st Sales Consult → Design**).
- **Reordering**: Use the **six-dot handle** on the left of any phase card to drag and drop it into a new position in the sequence.
- **Phase Indicators**: Cards display linked data, such as the number of attached checklists and the "Parent" phase (the stage that must be completed first).
- **Milestones**: A **flag icon** next to a phase name indicates it has been designated as a critical project milestone.



Available Phases (Right Panel)

This column contains your inventory of individual sales stages that can be added to your template.

- **Search and Filter**: Use the search bar or the category dropdown (e.g., **"Sales"**) to find specific phases.
- **Bulk Actions**: Use **Multi** mode to select and add several phases at once, or click **+ Add All** to move the entire filtered list into your template.

Best Practices for Templates

- **Integrate Checklists**: Attach checklists to critical phases (like **Design** or **Proposal**) to ensure sales reps collect all necessary documentation before moving forward.
- **Designate Milestones**: Flag the most important stages so you can easily track conversion rates across your different templates.

Settings>Checklists: To add Checklists for Sales, follow the same steps covered in Phase 2.

Sales Custom Fields
Sales Lead Widget

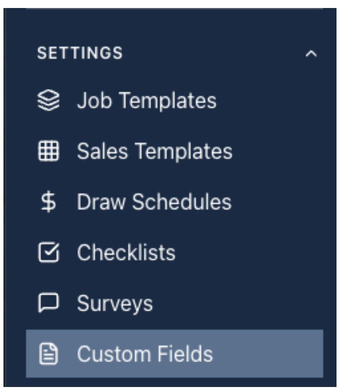
The Sales Leads Widget allows builders with a public-facing website to capture prospect information and automatically add those leads to Pool Builder Geek. This feature generates a small HTML snippet that can be embedded into any web page, creating a lead form that, when submitted, instantly populates the Leads section of the application.

Setting Up Your Digital Leads Widget

To begin, you'll first configure or create a **Custom Fields Form** that defines which fields will appear on your website's lead form.

Step 1: Access Custom Fields

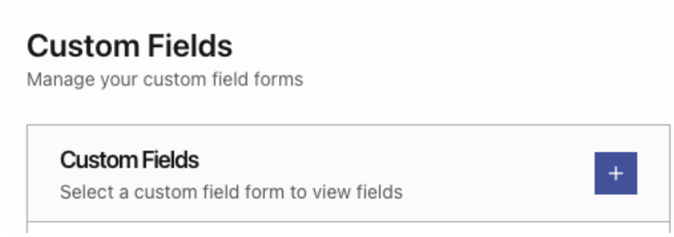
1. In Pool Builder Geek, go to **Settings → Custom Fields**.



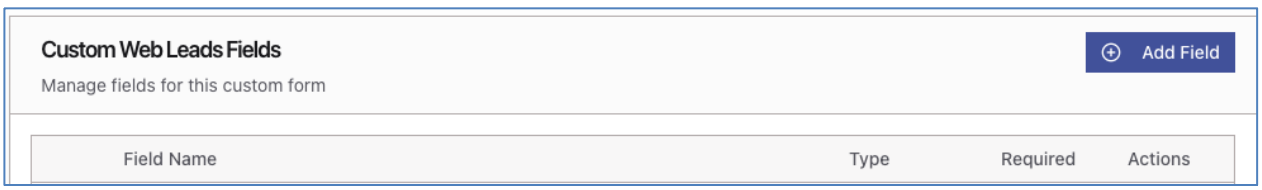
2. The Digital Leads Widget comes preloaded with standard contact form fields, but you can add custom fields to capture additional information such as **budget**, **desired pool shape**, or other preferences.
3. You can either use an existing **Custom Fields Form** or create a new one for your widget.

Step 2: Create a New Custom Fields Form

1. Click the **+** button next to **Custom Fields**.

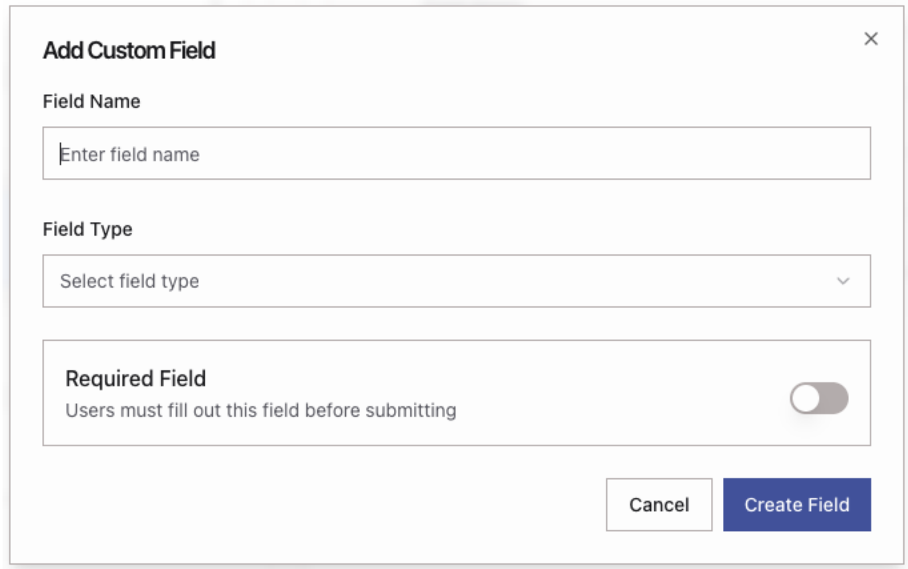


2. Enter a **Name/Description** that identifies the purpose of the form (such as Web Contact Details) , then click **Create Custom Field Form**. (Keep in mind, this title will appear on the form)
3. Once created, select your new form from the list on the left-hand side.
4. Click **+ Add Field** in the upper-right corner.

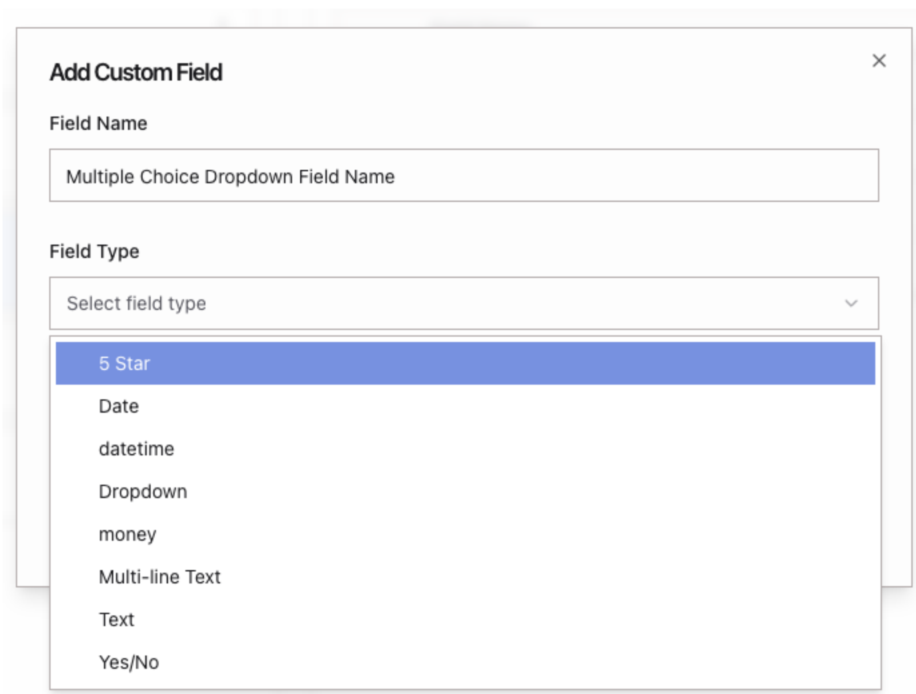


Step 3: Add Custom Fields

1. Enter a **Field Name**.
2. Choose a **Field Type** from the following options:
   - **5 Star** – Rating input
   - **Date** – Calendar date
   - **Datetime** – Date and time selection
   - **Dropdown** – Multiple-choice picklist
   - **Money** – Dollar amount entry
   - **Multi-Line Text** – Paragraph-style text box
   - **Text** – Single-line text field
   - **Yes/No** – Simple yes or no choice



3. If using the **Dropdown** type:
    - Click **+ Add Option** to create your first choice.
    - Enter a short label for the option.
    - Repeat this process until all dropdown options are added.

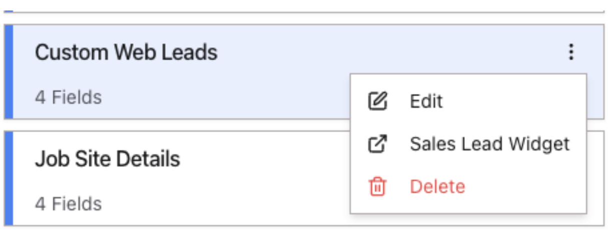


4. Toggle **Required Field** to **On** if the field must be filled out before submission.
5. Click **Create Field** to save it.
6. Repeat these steps until you've added all desired fields.

Step 4: Generate Your Digital Leads Widget

Your Leads Widget is linked to a specific Sales Template, allowing you to create multiple contact form widgets for different purposes. For example, you might use one widget for new pool construction leads and another for service requests. Each widget is tied to its corresponding Custom Field Template and Sales Template.

1. Once your Custom Field form is complete, navigate to the Settings section and click **Sales Templates**.
2. Choose the Template you wish to utilize with your Web Leads.
3. Click the **Options** ⋮ button next to the form name.
4. Click **Edit**.
5. Click the **Custom Fields** dropdown and select the desired Custom Fields form.
6. Click **Update Template**.
7. **Now click the Options ⋮ button**
8. Click **Sales Lead Widget**.



9. A new tab will open, displaying your customized lead form preview.
10. At the top of the screen, you'll see a **blue instruction box** with the form's **embed URL**.
11. Click **Copy** to copy the URL.
12. Paste it into an email, notepad, or other document to share with your website developer.

Step 5: Embed the Widget on Your Website

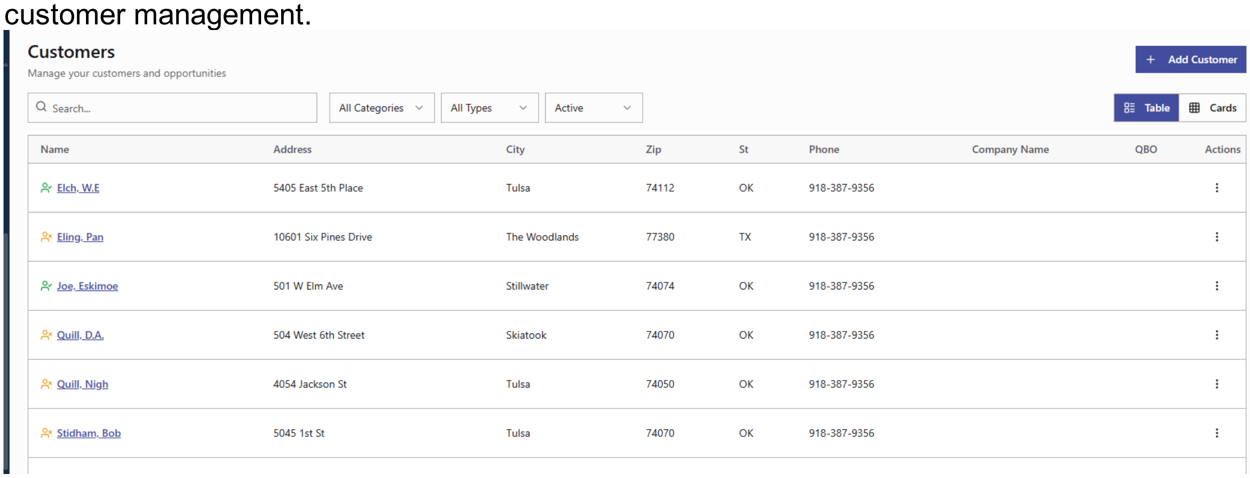
Your developer can now embed the form by placing the provided URL inside an **iFrame** on your website. Once published, visitors can complete the form, and new leads will automatically appear in your **Leads** list within Pool Builder Geek.

Phase 4: Customers

If you need assistance with a bulk import of customers, please email support with your business name and info along with your customer database in excel or .csv format.

Dashboard Overview
The primary table displays a comprehensive list of your customers with the following key details:

- **Name**: The client's name, which often functions as a clickable link to their full profile.
- **Address Information**: A quick reference for the client's location, including their **Street Address**, **City**, **Zip Code**, and **State**.
- **Phone**: The primary contact number for the customer.
- **Company Name**: Identifies if the customer is associated with a specific business entity.
- **QBO**: Displays the synchronization status with QuickBooks Online for financial tracking.
- **Actions**: A three-dot menu on the far right of each row provides options for individual customer management.

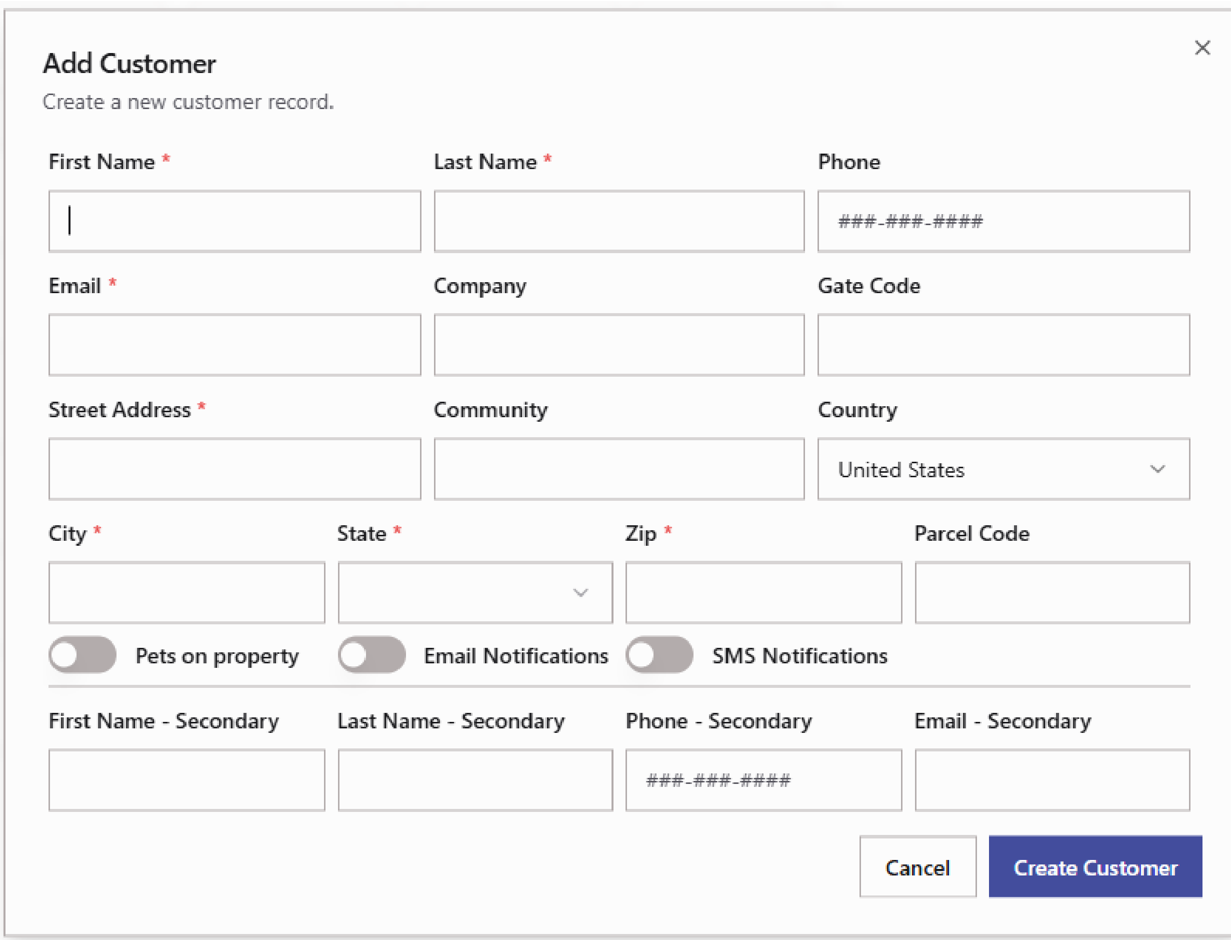


Name	Address	City	Zip	St	Phone	Company Name	QBO	Actions
Elch, W.E	5405 East 5th Place	Tulsa	74112	OK	918-387-9356			⋮
Eling, Pan	10601 Six Pines Drive	The Woodlands	77380	TX	918-387-9356			⋮
Joe, Eskimoe	501 W Elm Ave	Stillwater	74074	OK	918-387-9356			⋮
Quill, D.A.	504 West 6th Street	Skiatook	74070	OK	918-387-9356			⋮
Quill, Nigh	4054 Jackson St	Tulsa	74050	OK	918-387-9356			⋮
Stidham, Bob	5045 1st St	Tulsa	74070	OK	918-387-9356			⋮

Navigation and Filtering Tools
To help you manage a growing database, the dashboard includes several powerful search and organization features:

- **Search Bar**: Quickly locate a specific client by typing their name or identifying other details.
- **Dropdown Filters**: Narrow your view using multiple criteria:
    - **All Categories**: Filter by customer classification.
    - **All Types**: Filter by the type of project or lead.
    - **Active Status**: Toggle between active, inactive, or archived customers.
- **View Toggle**: Switch between the detailed **Table** view (currently active) and a more visual **Cards** view.
- **Sortable Columns**: You can click on column headers to sort your customer list alphabetically or by location for better organization.

Add Customer: Click the blue **+ Add Customer** button in the top-right corner



Primary Contact Information

This section gathers the identity and direct contact details of the lead or client:

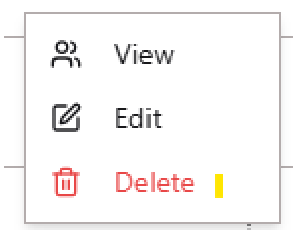
- **First and Last Name:** Required fields for the primary individual.
  Email: A required field used for project communication and portal access.
  Phone: The primary contact number for the customer.
  Company: Captures the business entity if the customer is a commercial lead.
  Full Address: Includes required fields for **Street Address**, **City**, **State**, and **Zip**.
  Community: An optional field for neighborhood or subdivision names.
  Gate Code: A specific field for secure site access.
  Parcel Code: For recording legal land identifiers or property tax IDs.
  Pets on Property: A toggle to alert field teams of animals on-site.
  Email/SMS Notifications: Toggles to opt the customer into automated project updates.

Secondary Contact
This section allows for the entry of a second individual (such as a spouse or co-owner) with their own **Name**, **Phone**, and **Email** fields.

Management Actions

- **Create Customer:** Saves the record and adds the individual to the master **Customers** dashboard.

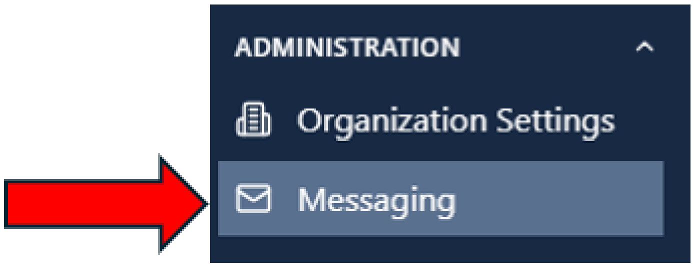
Editing a Customer Record



To open this menu, locate the **three-dot vertical icon** on the far right of any customer row in the dashboard table.
Menu Options

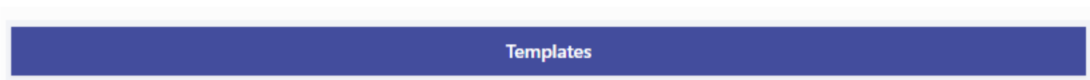
- **View:** Selecting this option opens the full customer profile.
  Edit: This allows you to update the customer's existing record, such as changing contact information, updating an address, or modifying notification preferences.
  Delete: A quick action to remove the customer record from your active database.

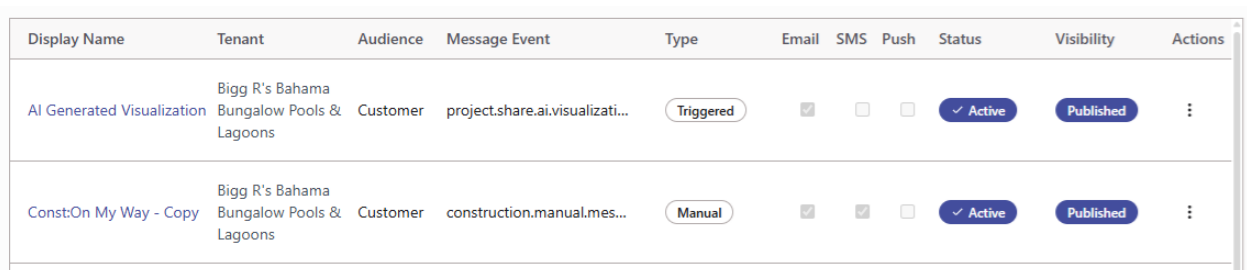
Phase 5: Messaging & Notifications



The **Messaging** screen allows you to standardize the messages sent to customers, subcontractors, and internal staff based on specific project triggers or manual actions. The dashboard is divided into two primary tabs for managing your communication strategy:

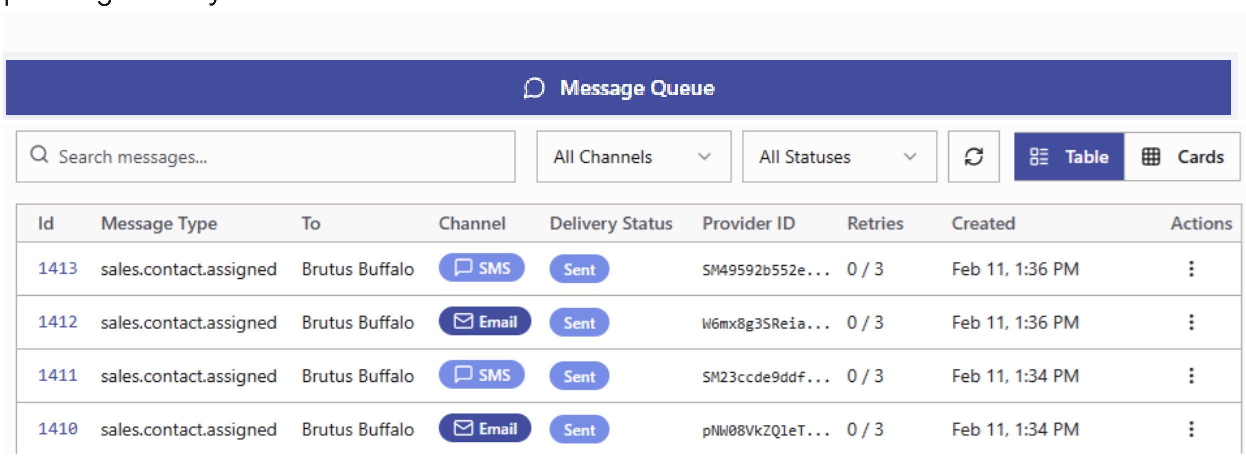
- **Templates Tab:** Use this area to build and edit the content of your messages.



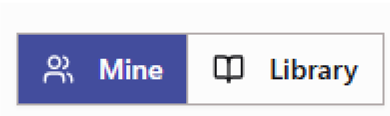


Display Name	Tenant	Audience	Message Event	Type	Email	SMS	Push	Status	Visibility	Actions
AI Generated Visualization	Bigg R's Bahama Bungalow Pools & Lagoons	Customer	project.share.ai.visualizati...	Triggered	☑	☐	☐	✓ Active	Published	⋮
Const:On My Way - Copy	Bigg R's Bahama Bungalow Pools & Lagoons	Customer	construction.manual.mes...	Manual	☑	☑	☐	✓ Active	Published	⋮

- **Message Queue Tab:** Use this area to monitor the status of sent messages or those pending delivery.



Id	Message Type	To	Channel	Delivery Status	Provider ID	Retries	Created	Actions
1413	sales.contact.assigned	Brutus Buffalo	SMS	Sent	SM49592b552e...	0 / 3	Feb 11, 1:36 PM	⋮
1412	sales.contact.assigned	Brutus Buffalo	Email	Sent	W6mx8g3SReia...	0 / 3	Feb 11, 1:36 PM	⋮
1411	sales.contact.assigned	Brutus Buffalo	SMS	Sent	SM23ccde9ddf...	0 / 3	Feb 11, 1:34 PM	⋮
1410	sales.contact.assigned	Brutus Buffalo	Email	Sent	pNW08VkZQ1eT...	0 / 3	Feb 11, 1:34 PM	⋮



The **Mine** tab shows the message in your organization

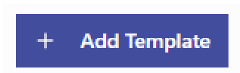
The **Library** tab shows available system templates available to be copied to your organization.

Template Management Table

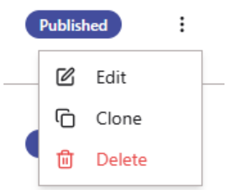
The main table provides a detailed overview of your active message templates:

Column	**Description**
Display Name	The internal name of the message template.
Audience	Who receives the message (e.g., Customer, Task Owner, or Sales).
Message Event	The specific action that triggers the message (e.g., "construction.phase.assigned").
Type	Indicates if the message is **Triggered** automatically by the system or sent **Manual**ly.
Channels	Checkboxes indicating if the template is configured for **Email**, **SMS**, or **Push** notifications.
Status/Visibility	Shows if the template is currently **Active** and **Published** for use.

- **Create New Template:** Click the blue **+ Add Template** button in the top-right corner to start building a new communication workflow.



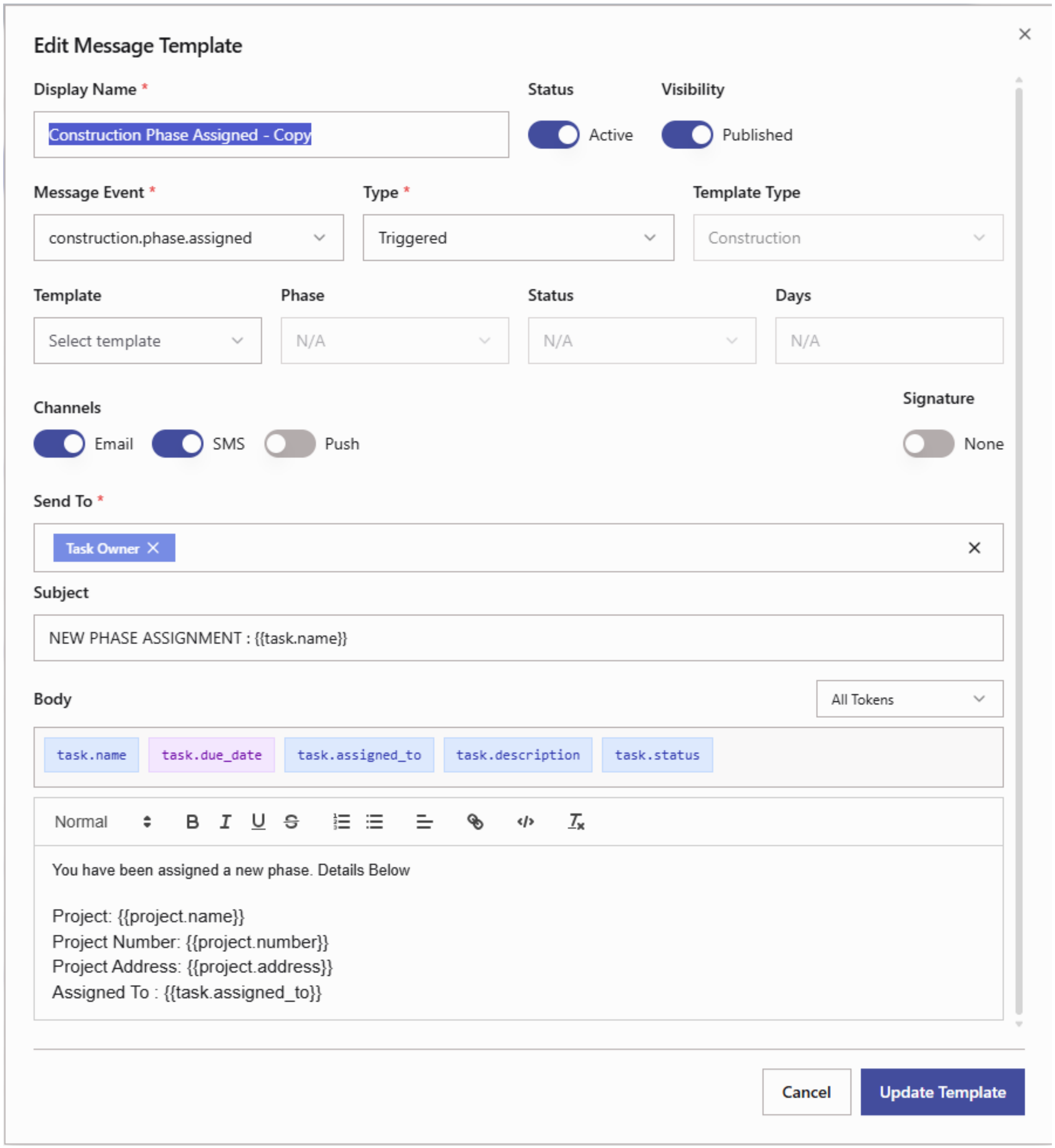
- **Edit Existing Messages:** Use the **three-dot action menu** on the far right of any template row to modify the content, change the audience, or adjust the trigger events.



The **Edit Message Template** window (or setup window) allows you to configure exactly how and when automated or manual communications are sent to your customers, staff, and partners. By utilizing dynamic tokens, you can create personalized messages that automatically pull in relevant project data.

Basic Template Information:
Display Name: Assign a clear, internal name to help you identify the template in your dashboard (e.g., "Construction Phase Assigned").
Status & Visibility: Use the toggles to mark the template as **Active** or **Inactive** and determine if it is **Published** for use across the organization.
Template Type: (e.g., **Construction** or **Sales**).
Message Event: Select the specific system action that initiates the message, such as construction.phase.assigned.
Type: Define if the message is **Triggered** (sent automatically by the system) or **Manual** (sent by a user action).
Channels: Choose the delivery methods by toggling **Email**, **SMS**, or **Push** notifications.
Send To: Designate the recipient group, such as the **Task Owner**, **Customer**, or **Sales** team.
Subject: Create a compelling subject line. You can use tokens like {{task.name}} to make the subject dynamic.
Tokens (Dynamic Data): The window provides a library of data placeholders (e.g., task.name, task.due_date, task.assigned_to).
Body Editor: A full rich-text editor allows you to format your message with bolding, lists, and links. You can build out clear templates that include project names, numbers, and addresses using the available message tokens.
Signature: Optionally toggle a standardized signature to be appended to the bottom of the message.

Update/Create Template: Click the blue button at the bottom right to save your configuration and activate the message workflow.



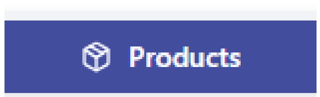
Phase 6: Accounting

Accounting> Products (Adding Products & Categories)

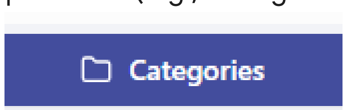
The **Products** dashboard is your centralized catalog for managing the items, equipment, and services your organization offers.

The dashboard is divided into two primary tabs to help you maintain a clean catalog:

- **Products Tab:** Displays individual items, their pricing, and specifications.

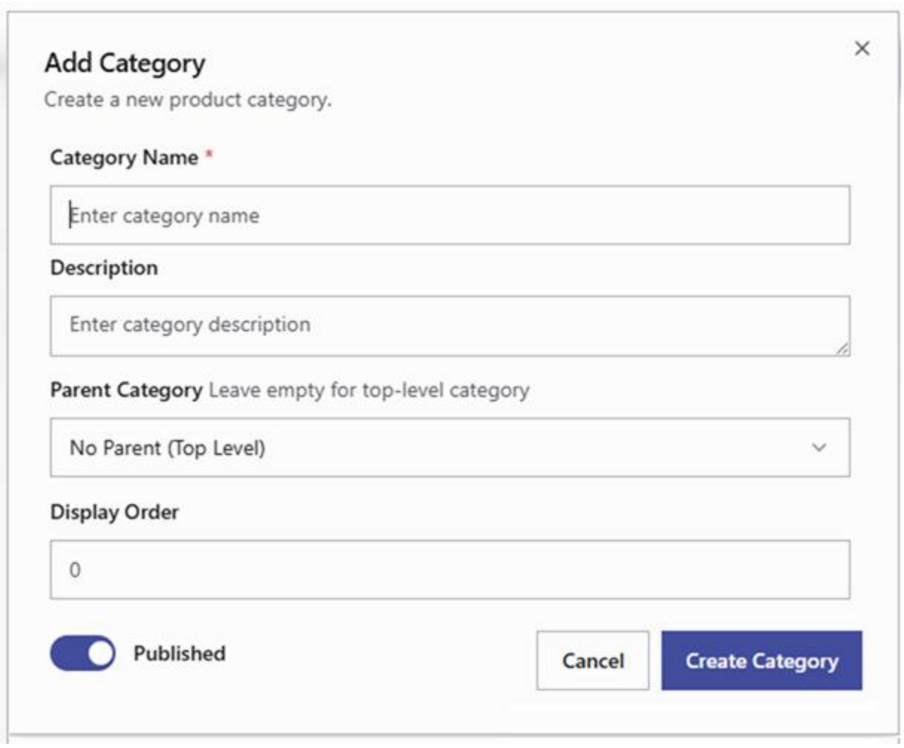
- **Categories Tab:** Allows you to manage the folders or groups used to classify your products (e.g., "Widgets" or "Pool Equipment").

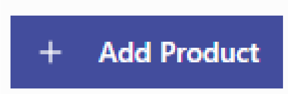
- **Adding Categories: Click the blue + Add Category button in the top-right corner to create a new grouping for your products.**

Enter Category Details

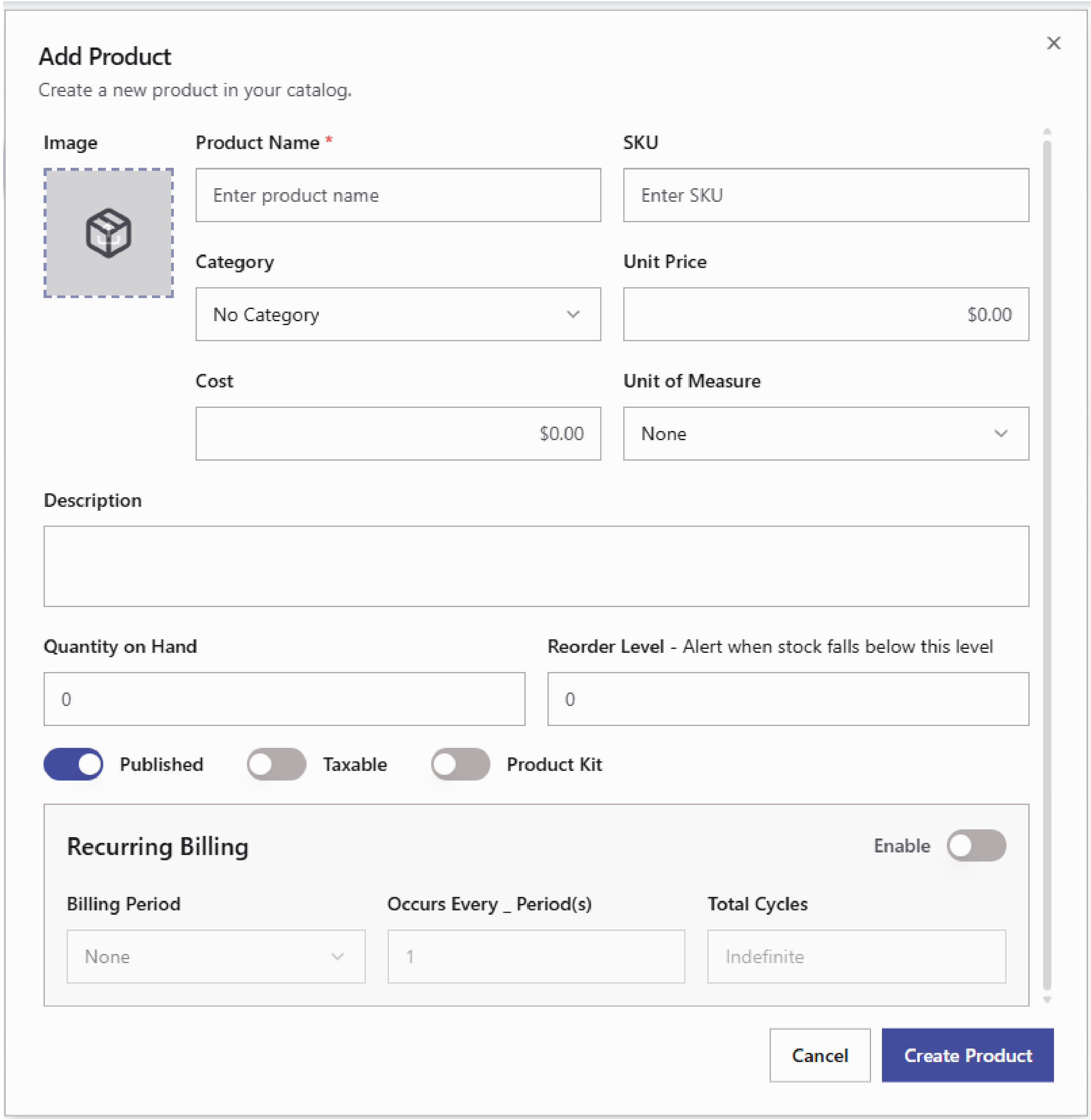
- **Category Name**: Provide a clear, unique title for the group (e.g., "Pool Equipment" or "Interior Finishes").
  Description: Enter a brief summary of what this category includes to help your team classify products correctly.
  Parent Category: Use the dropdown to nest this category under an existing one, or leave it as **"No Parent (Top Level)"** if it is a primary group.
  Display Order: Enter a numerical value to determine where this category appears in dropdown menus; categories with lower numbers are displayed first.
  Published Toggle: Ensure this is enabled (blue) if you want the category to be immediately available for selection in projects and product entries.
  Create Category: Click the blue button at the bottom right to save the new category to your dashboard.



Adding Products: Click the blue + Add Product button



This form allows you to define the product's specifications, pricing, and inventory settings for use in project estimates and management.

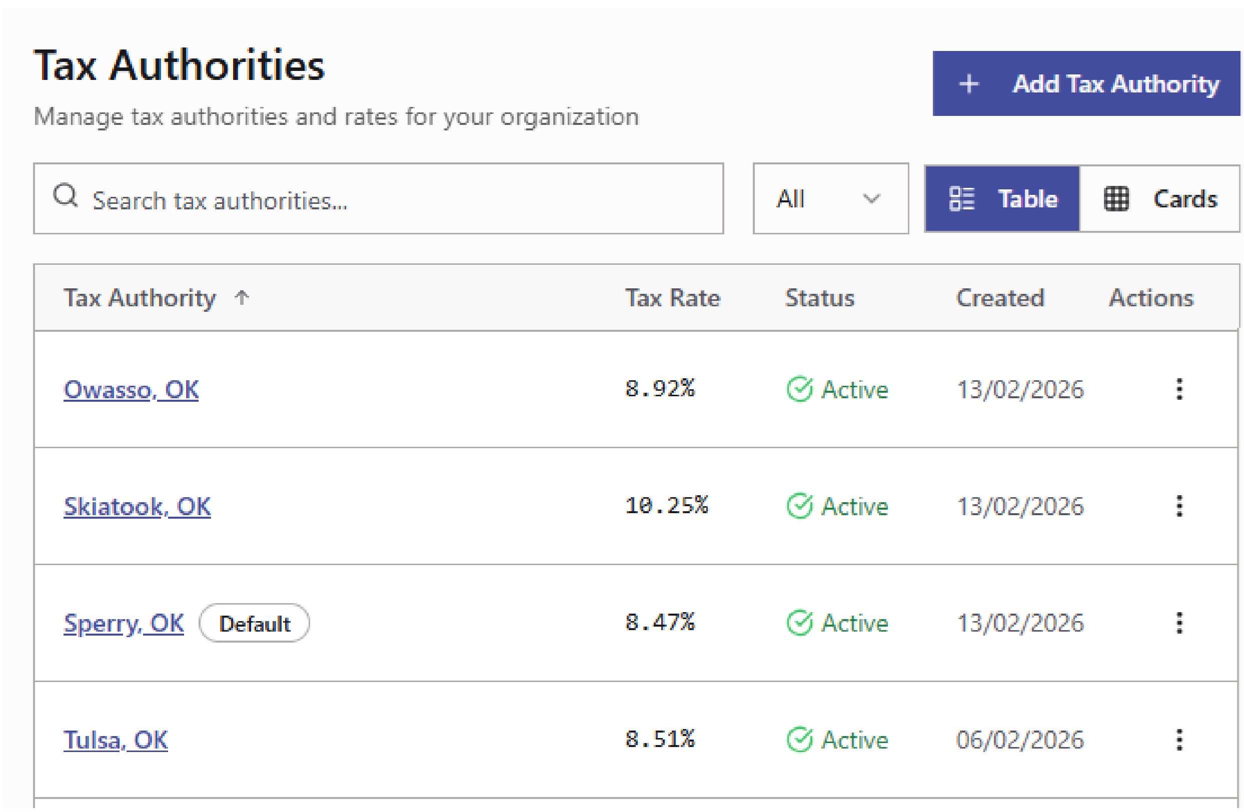


Explanation of Product fields

- **Image:** Click the image placeholder to upload a photo of the product.
- **Product Name:** Enter the required, unique name for the item (e.g., "Pentair IntelliFlo Pump").
- **SKU:** Assign a unique Stock Keeping Unit identifier for internal tracking.
- **Category:** Select a pre-defined category from the dropdown menu to group this item with similar products.
- **Unit Price:** Define the standard selling price for the item.
- **Cost:** Enter the internal cost of the product to help calculate project profit margins.
- **Unit of Measure:** Select the relevant unit (e.g., Each, Linear Foot, Square Foot) from the dropdown.
- **Description:** Provide a detailed summary of the product's features or technical specifications.
- **Quantity on Hand:** Enter the current number of units available in your inventory.
- **Reorder Level:** Set a threshold to receive an automated alert when stock falls below a specific level.
- **Status Toggles:**
  - **Published:** Enable this to make the product active and selectable for new projects.
  - **Taxable:** Toggle this on if the item is subject to sales tax.
  - **Product Kit:** Enable this if the item is a bundle of multiple individual products.
- **Recurring Billing:** If the product represents a subscription or service, click **Enable** to configure the **Billing Period**, frequency, and **Total Cycles**.
- **Create Product:** Click the blue button at the bottom right to save the new item.

Accounting> Tax Authorities

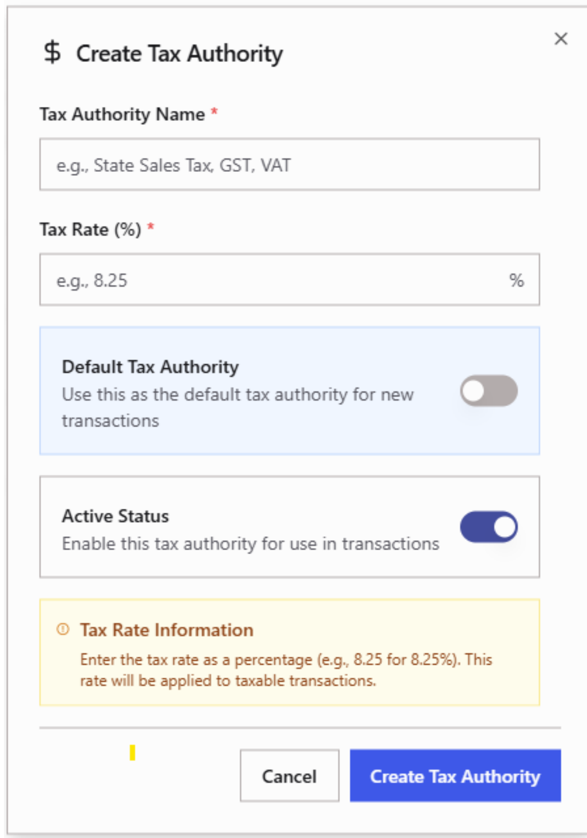
The **Tax Authorities** dashboard is a centralized workspace used to manage the various tax jurisdictions and associated rates that apply to your organization's projects.



Tax Authority	Tax Rate	Status	Created	Actions
Owasso, OK	8.92%	Active	13/02/2026	⋮
Skiatook, OK	10.25%	Active	13/02/2026	⋮
Sperry, OK Default	8.47%	Active	13/02/2026	⋮
Tulsa, OK	8.51%	Active	06/02/2026	⋮

Adding a New Tax Authority

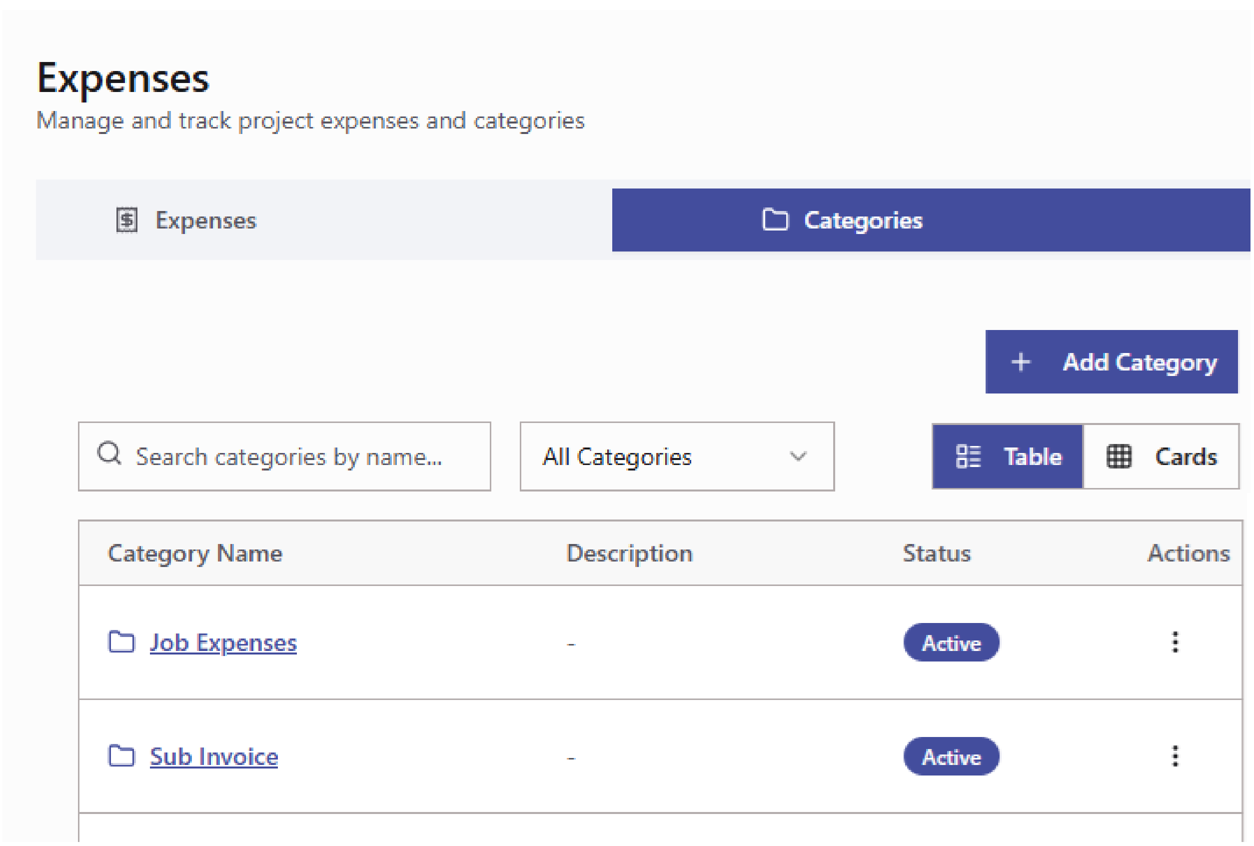
To add a new jurisdiction, click the blue + Add Tax Authority button in the top-right corner.



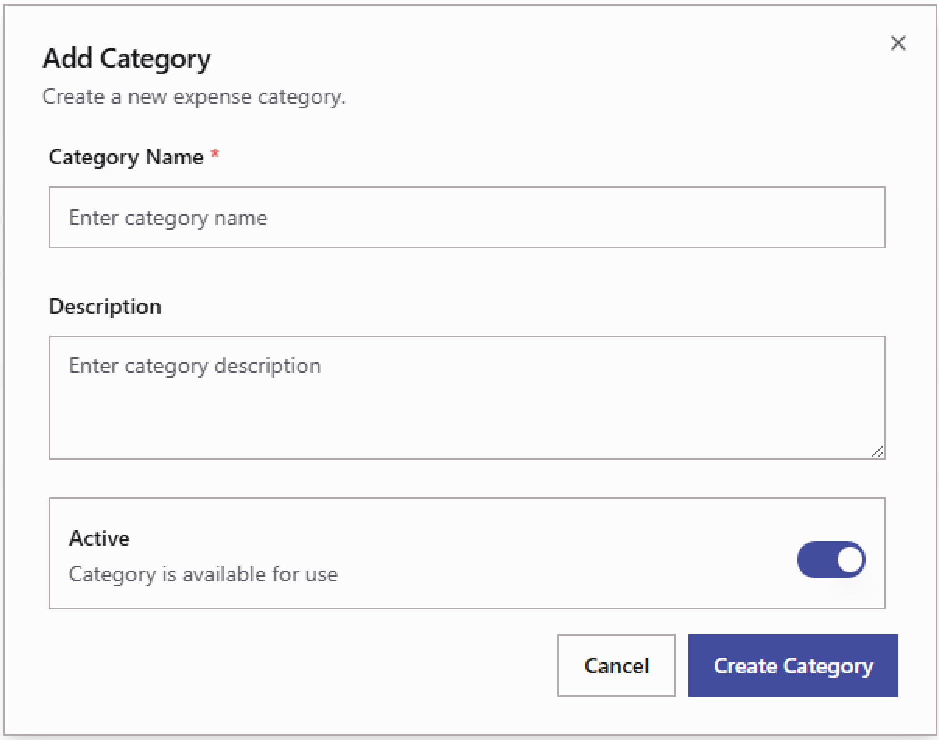
Tax Authority Name: Enter the official name of the jurisdiction, such as a specific city or state sales tax.
Tax Rate (%): Input the applicable percentage as a numerical value (e.g., enter 8.25 for a rate of 8.25%). This rate will be applied to all taxable items associated with this authority.
Default Tax Authority: Toggle this switch to **Active** (blue) if you want this specific jurisdiction to be automatically applied to all new transactions that do not have another authority assigned.
Active Status: Ensure this toggle is enabled to make the authority available for use in live transactions. If disabled, the authority will be saved but hidden from selection menus.
Create Tax Authority: Click the blue button at the bottom right to save the new rate.

Accounting> Expense Categories

- **Expenses Tab**: Used to record and view individual cost entries, such as material purchases or labor costs.
- **Categories Tab** (Active): Used to manage the organizational folders that classify your costs (e.g., Job Expenses or Sub Invoice).



Add Category: Click the blue **+ Add Category** button in the top-right corner to create a new classification for your project costs.



To set up a new expense classification, provide the following information:

- **Category Name:** Enter a clear, unique title for the group, such as "Materials" or "Labor Costs". This field is required to create the record.
- **Description:** Use this area to provide a summary of what should be filed under this category to help your team maintain consistent record-keeping.
- **Active Toggle:** Ensure this is enabled (blue) to make the category immediately available for logging new project expenses.
- **Create Category:** Saves the new classification and adds it to your active Categories list in the Expenses dashboard.
