

QUICK REFERENCE GUIDE

Pool Solutions App - Closing a Lead

To close a job, you must update the lead with the existing Pool Pad inventory as well as, add the newly installed equipment to the Pool Pad inventory.

- 1 Make sure the lead has all the Pool Pad equipment in the app. If you need help updating the Pool Pad inventory refer to the [Adding equipment to Pad inventory](#) guide.
- 2 Make sure the new equipment for the current Work Order is added as a Replacement for the existing equipment or installed as a new piece of equipment in the Pool Pad inventory. If you need help follow the [Replacing equipment in Pad inventory](#) guide.
- 3 Once step 1 and 2 are complete, close out the lead. Select leads and tap the lead you want to close. When the lead opens scroll down and tap close.

Note: If step 1 and 2 were not complete it will prompt you to complete the steps.

