

## 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 <u>Adding equipment to Pad inventory</u> 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.

< Leads	<mark>4</mark> ک	<	Leads	40
Ted Baker			VIEW PRODUCT PDF	
(908) 123-1234				
12 APPLE LN. SOMERSET, NJ 08873		Install Date Scheduled for 10/10/2019		
Get Directions			Edit Date	
More Details 💙	Manage Pad	COMMENT		
CAMPAIGN 48-Hour Pump Replace	ement			
VIEW PRODUCT PDF		ADD COMMENT		
Install Date Sch 10/10/20	eduled for 019	$\square$	DROP LEAD	
Edit Date			CLOSE LEAD	

