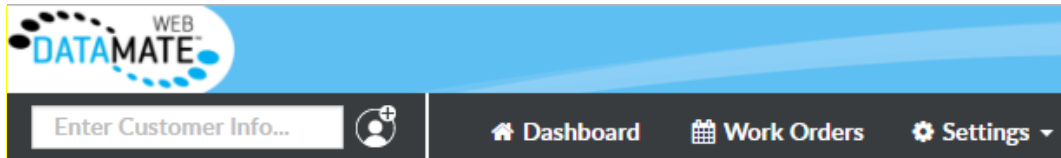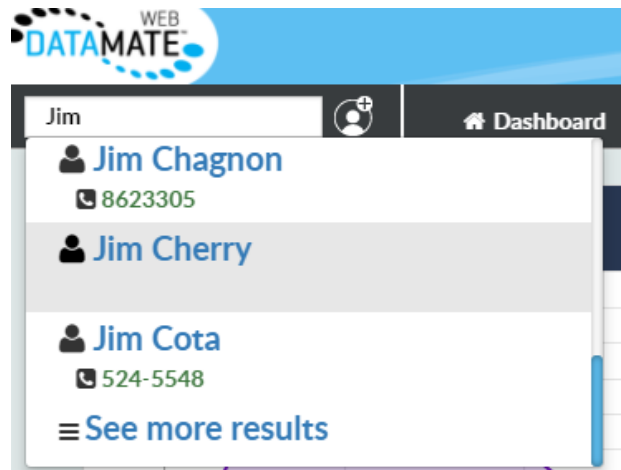# Customers & Tests

The following image is what you will see in the top left of your screen. The search bar is for finding existing customers and the button to the right is for adding new customers. The next three items are your other menus but we will get to those later.

To find an existing customer, type either their first or last name in the search bar. (You don't have to type the entire name but you must type at least 3 letters.) It will bring up a short list of matching results which you can scroll through. Press on the customer you want to select. If the one you want is not included, press to see more results.

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After selecting the customer, you will find yourself on their profile page. This is where it will give you a rundown of their basic info, site (pool or spa) info, and test history. I will break down the separate sections here in detail.

This is the customer's account info section. As you can see it only contains their basic info. If you press on "EDIT" at the top the following window will pop up.

The first and second checkboxes technically only apply to the mobile app (Waterlink Connect, available on iOS and Android) if you use it. If you finish up a test on the mobile app it will send whichever one you select to that customer. **However, you can also send or resend reports through the browser.** I will show you this later on in the guide. The Watertest includes only the test results and recommendations. The Doorhanger includes the test results plus whatever the tech checked off as complete (i.e. "5.6 lbs. of muriatic acid were added", etc.). Email sharing is for marketing purposes only. That is explained when creating a new customer profile. Pressing on the delete button will delete the customer completely.

The site gallery is where it would display photos taken using the mobile app.

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Next, we have Site Information. Where it says "Pool1" you can open up a drop down of all sites (pools or spas) for this particular customer. **This is important because the tests that you run will be applied to whichever site is currently selected.** You can press on the pencil symbol to edit the selected site or you can press on the "+" symbol to add a new site. There are default chemical profiles and chemicals already loaded in Datamate Web. You must select one of these profiles for each site. You can add your own but I will go over that later.
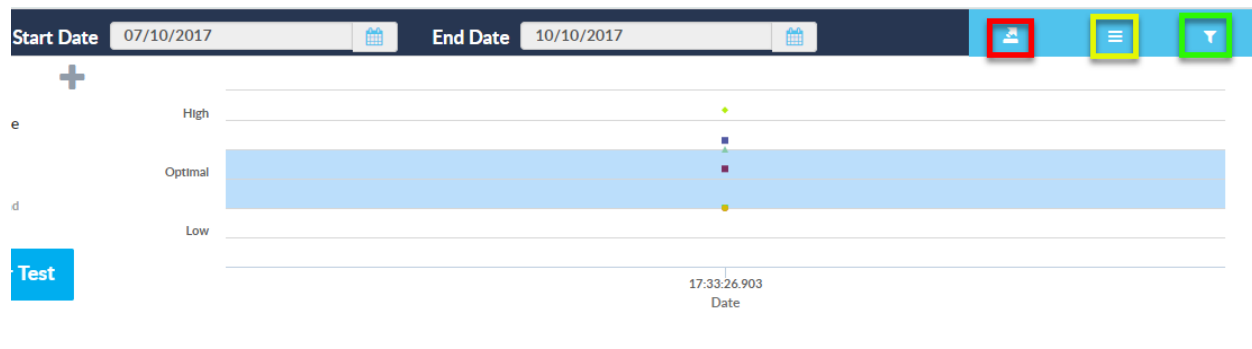
This is the default view of the test history when you enter the page. It displays a graph of all the tests within a certain date range. You can change the dates to narrow the view. I've highlighted three buttons on the top with different colors.

Red: export all test history within date range to an Excel file.

Yellow: change test history view from graph to list.

Green: Filters for what is displayed on the graph. (i.e. alkalinity, pH, etc.)

To open a report, press on the button highlighted in red. Notice that the area highlighted in yellow has no buttons. This is because the tests were run through the browser, not the mobile app.

This is what your typical report will look like. If you press on the button highlighted, an email containing this exact report will be sent to the email provided in the customer's profile. Next, we will cover the "Water Test" button. When you press on that it takes you to the following page. I've highlighted buttons for this one as well.

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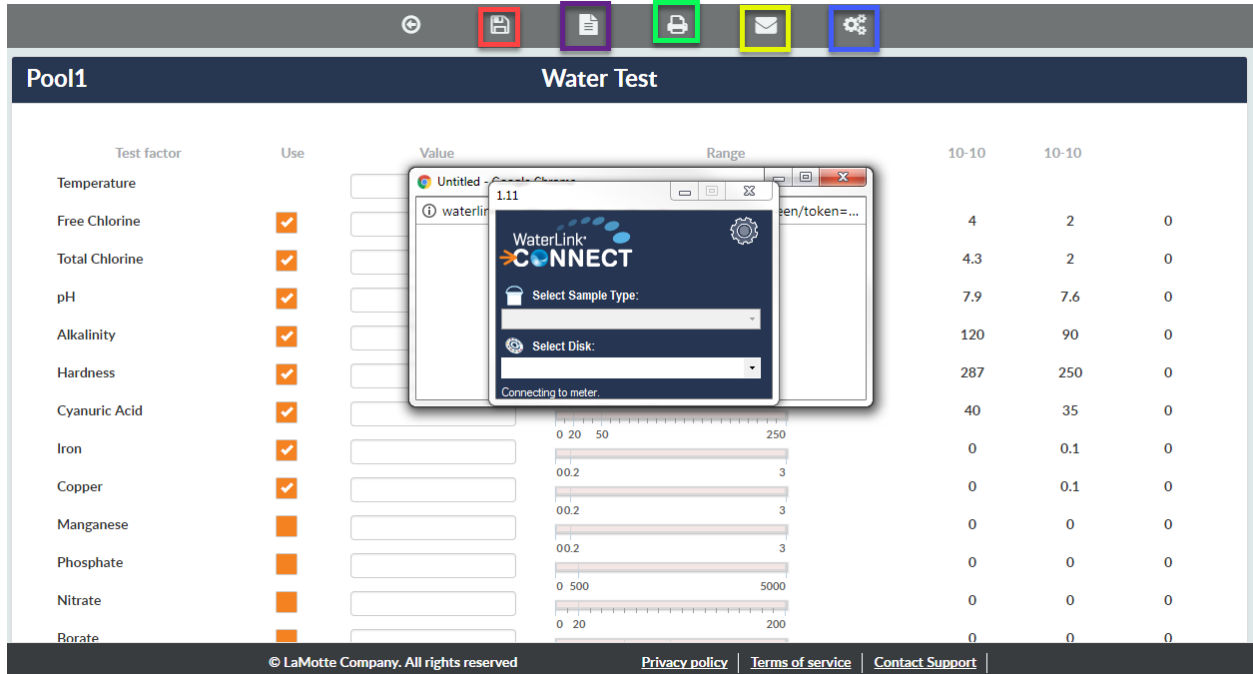
Red: Save & close

Purple: Open report (can only be done after the fields have been populated with results)

Green: Print

Yellow: Send report via email

Blue: Press on this if Waterlink Connect does not automatically pop up after pressing on "Water Test" on the previous page.

Once you get to this page Waterlink Connect should pop up as shown in the above image. You must select the correct disk series. At this point you can fill your disk just beyond the marked fill line and place it in the meter with the black cover on top. Then press "Run Test" and the results should populate once complete.

Settings
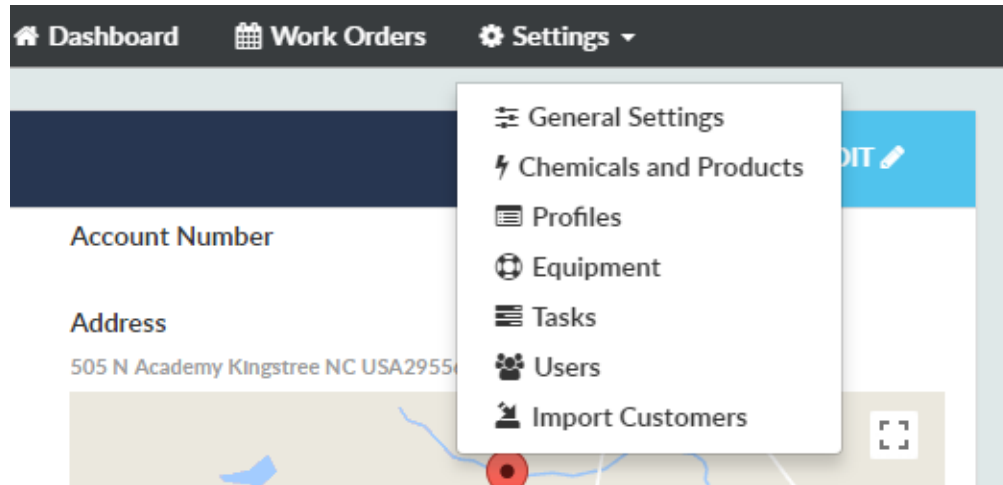
Above is the settings root menu.

General Settings

Above is the first thing you see in General Settings. This is your basic subscription info. If you press on "MANAGE SUBSCRIPTION" you can alter or cancel your subscription. "ACTIVE USERS" shows you a list of everyone logged in currently. The admin account (Permission level: Dealer) can force certain users to log off if the number of active logins exceeds what your subscription allows. Beyond that, the rest of this section contains basic things that generally self-explanatory.

Chemicals and Products

This is a list of all your chemicals. **Datamate has certain defaults that you should avoid changing as this may cause problems with the database.** Instead you can simply add your own if you need to. The symbol highlighted above is a key. If any chemical on the list has this key next to it then it cannot be changed. **You probably will never have to worry about this. It is only for users with certain chemical providers.** If you create a chemical, be sure to enter the proper dose (i.e. 10 oz. per 10000 gallons) and select the correct site type (pool or spa).

Profiles (AKA Chemical Profiles)

Here is your list of chemical profiles which are a combination of chemicals that can be selected for a site. Basically, you can create a unique profile to use for pools or spas instead of having to select each individual chemical every time you create a customer. Inside these profiles you can select each chemical you need (i.e. sanitizer, shock, balancers, etc.). You can also change the ideal ranges for each test factor. When you edit an existing profile, those changes are applied to each site that uses the profile. Once you create a new profile, the site type cannot be changed so be sure to select either pool or spa.

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Equipment

This section is for adding any equipment that can be linked to any site. For example, you can create filters from specific manufacturers to keep track of what each customer has. These don't have any effect on the test results or recommendations. This one is pretty straightforward.
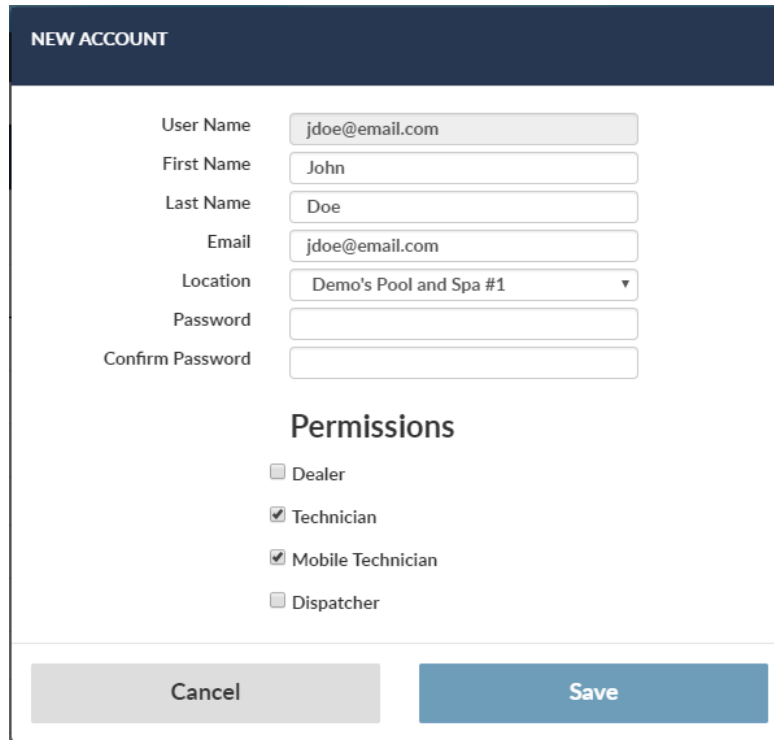
Tasks

This section directly affects work orders, which is explained later on. There are tasks and checklists. Checklists are comprised of individual tasks. Either can be assigned to work orders but checklists may be more efficient if you have a standard procedure you follow when conducting pool maintenance/service. If you use the mobile app, these tasks and checklists will show up in each **scheduled** work order if any have been assigned to that particular work order. Work orders created on site will not have any tasks assigned.

Users

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This is where you can add or deactivate user accounts. This list will show you which accounts are active (i.e. able to log in) and which permissions they have. You can have as many user accounts as you want, but with a standard subscription only three of them can be logged in at the same time. (This includes the mobile app.)


Here is the form for adding a new user. You want to select only the necessary permissions for each user. If one user is only doing pool service out in the field then you probably only need to give them the "Mobile Technician" permission. If they do in store testing at a computer then you'd want to select "Technician". The "Dispatcher" permission allows you to view and edit work orders and scheduling. "Dealer" can be regarded as the admin account and has access to all settings.

Import Customers

This is where you can import customers. You can do so via a CSV file or through Datamate 10 but only if it is installed directly on whatever computer you are using. Either option may take some time depending on internet speed and file size, but importing using the Datamate 10 export tool may take especially long. **It is critical that you do not interrupt the import or you may end up with duplicate records if you attempt to upload data again.**

Work Orders

Work orders are meant for any pool store that has technicians out in the field servicing pools on site. There are several ways to create work orders. You can go directly to a customer's profile and press on the work order button or you can go to the work orders menu and select whichever customer you need. Any scheduled work orders will show up on the mobile app.
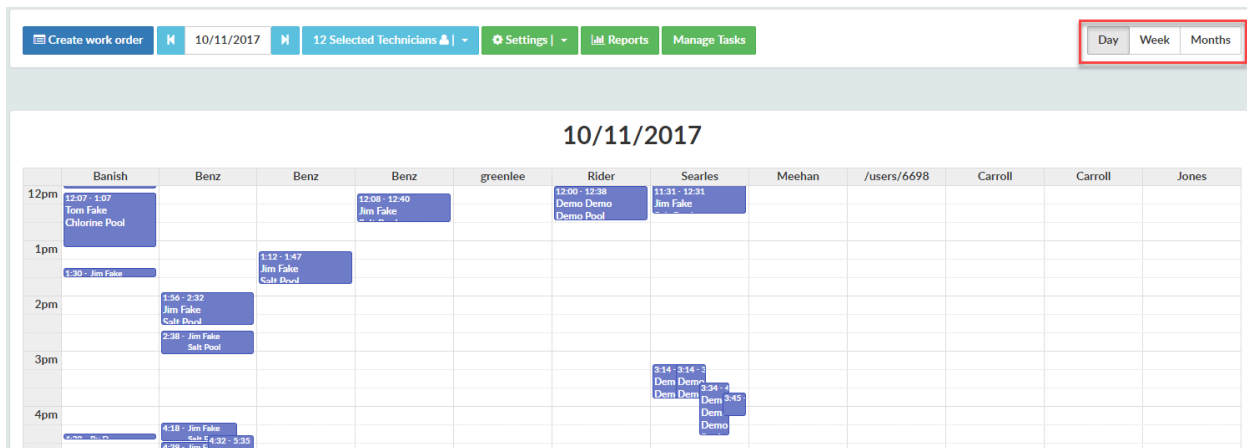
Here you can see the current work orders that are scheduled for the day. You can also view them by week or month.

When you create a work order you need to search for the customer and select them. Then you select the site the work order is for and press on "Add Site to Work Order". From there you can add any tasks or checklists to the work order as I mentioned before.

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Notice the tabs outlined in red. You can switch between tasks and checklists as needed. Also, you can add any combination of tasks and checklists required. You can also delete individual tasks from the assigned tasks list as needed.

Next you can set a recurrence so that the work order is automatically scheduled at whichever interval you pick for a period of time you specify.

Then you can press save and that's all. Mobile technicians can create work orders on the fly as well. In case it was not scheduled by accident or otherwise.