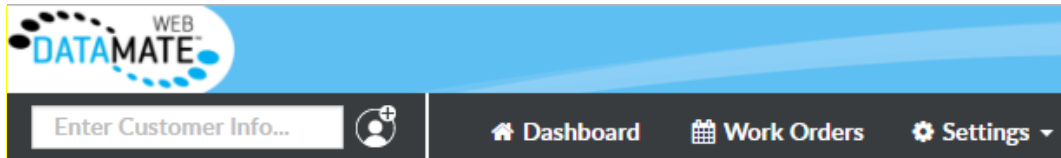
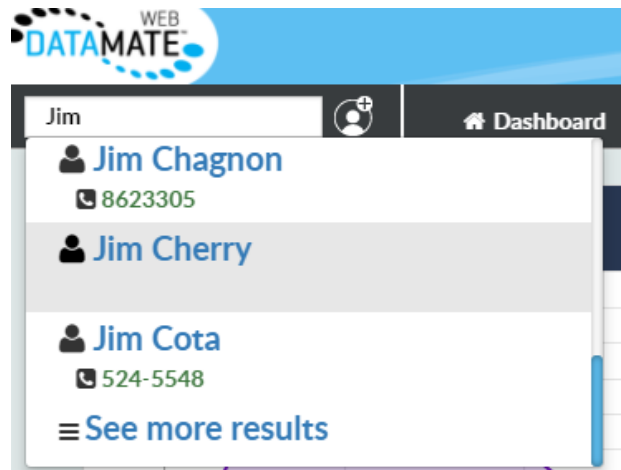


Customers & Tests

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.



Datamate Web User Guide

The screenshot displays the Datamate web interface. At the top, there are two main sections: 'ACCOUNT INFORMATION' with an 'EDIT' button, and 'SITE GALLERY'. The 'ACCOUNT INFORMATION' section contains fields for Name (Jim Cherry), Account Number, Phone (1234567890), Address (505 N Academy Kingtree NC USA29556), Email (jcherry@example.com), and Customer Type. A map of the address is shown. Below this, a navigation bar includes 'Pool' (selected), 'Start Date' (07/10/2017), 'End Date' (10/10/2017), and user icons. The 'SITE INFORMATION' section shows details for a pool: Type (Pool), Volume (22000 Gallons), Surface (Plaster), Profile (Calcium Hypochlorite Pool), Primary Sanitizer (AZ's Shock), and Build (InGround). It also features 'Work Order' and 'Water Test' buttons. A graph on the right shows a water level trend from High to Low, with a date of 16-46:07.203.

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 screenshot focuses on the 'ACCOUNT INFORMATION' section of the Datamate web interface. It includes an 'EDIT' button at the top right. The section contains the following fields: Name (Jim Cherry), Account Number, Phone (1234567890), Address (505 N Academy Kingtree NC USA29556), Email (jcherry@example.com), and Customer Type. A map of the address is displayed at the bottom right, showing the location on a street labeled 'Rt 436'.

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.

Datamate Web User Guide

ACCOUNT INFORMATION

First Name

Jim

Last Name

Cherry

Account Number

Customer Type

Phone

1234567890

Email

jcherry@example.com

Address

505 N Academy

City

Kingstree

State/Province

NC

ZIP

29556

Country

USA

Opt in

☐ Send Watertest Via Email

☒ Send Doorhanger Via Email

☐ Email Sharing With Provider

Cancel

Delete

Save

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.

Datamate Web User Guide

Pool1 ▼

Start Date

SITE INFORMATION

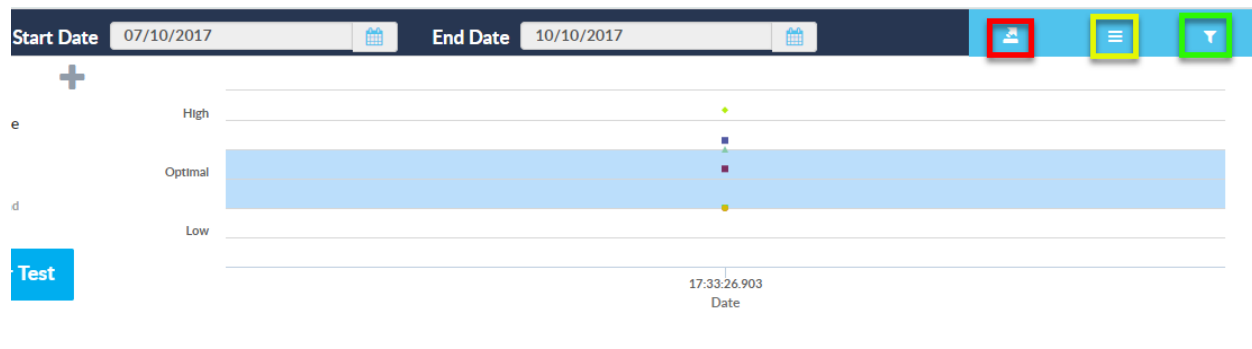
+

Type	Volume	Surface
Pool	22000 Gallons	Plaster
Profile	Primary Sanitizer	Build
Calcium Hypochlorite Pool	AZ's Shock	InGround

Work Order

Water Test

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.)

Datamate Web User Guide

Start Date 07/10/2017 End Date 10/10/2017

TEST DATE	REPORT	DOORHANGER	temp	fcl	tcl	alka
10/10/2017 01:33:26			0	4.00	4.30	120
10/10/2017 12:46:07			0	2.00	2.00	90

Test

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.

REPORT   

Dr. Demo's Pool and Spa

2017-10-10 13:33



CUSTOMER

Jim Cherry
1234567890
505 N Academy
Kingstree NC 29556

SITE INFORMATION

Site name: Pool1
Volume: 22000 gallons
Surface: Plaster
Site type: Pool

TEST REPORT

Color: None
Temperature: 0 F
Saturation Index: 0
Clarity: Clear

TEST RESULTS

Factor	Result	Range
Free Chlorine	4	2 - 4
Total Chlorine	4.3	2 - 4
Combined Chlorine	0.3	0 - 0
Cyanuric Acid	40	20 - 50
pH	7.9	7.4 - 7.7
Hardness	287	200 - 400
Alkalinity	120	80 - 120

TREATMENT RECOMMENDATION

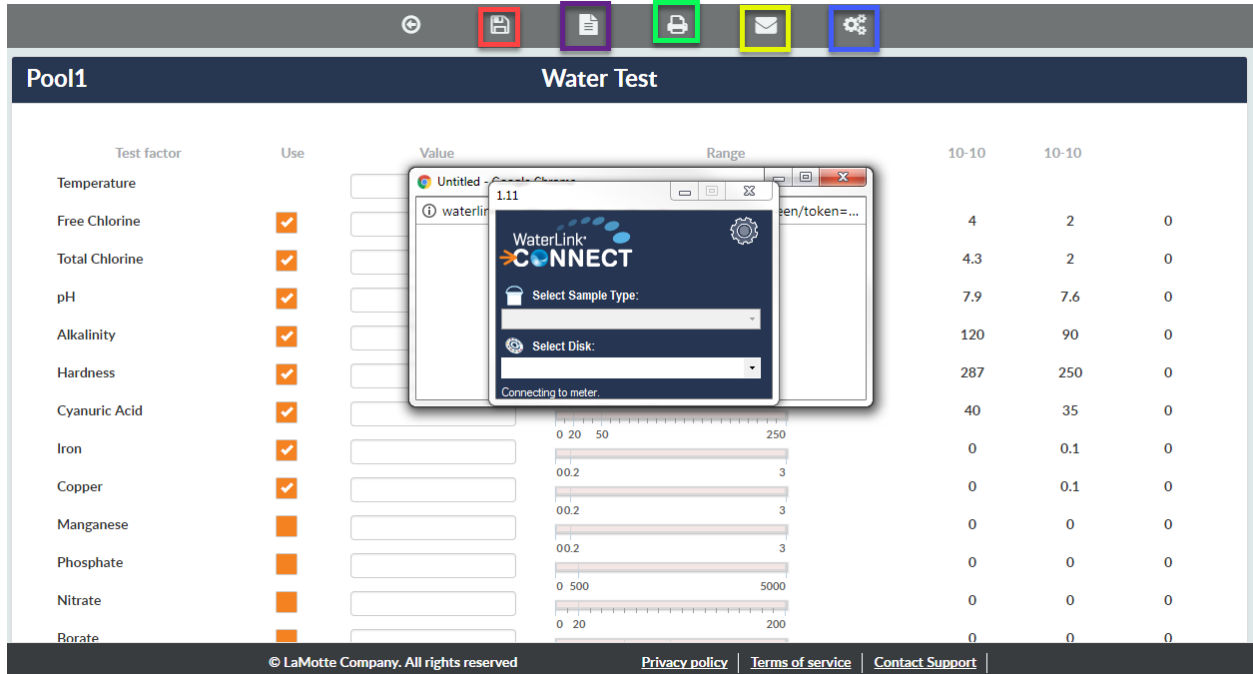
 Be sure to read all instructions before applying chemicals to water. Proper safety equipment should be used when handling raw chemicals.

pH is high. Add 2lbs. 3.2oz. of Sodium Bisulfate.
Split the recommended dosage into three treatments of about 11.7oz. and distribute the chemical evenly around the deep end, and away from metal fixtures. Allow the pool to circulate at least 6 to 8 hours between each of the three partial adjustments.

max combined A shock treatment is required. Add 6lbs. 9.6oz. of Calcium Hypochlorite. NOTHING IN THE POOL
Evenly distribute the recommended dosage across the deep end of the pool.

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.

Datamate Web User Guide



Red: Save & close

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

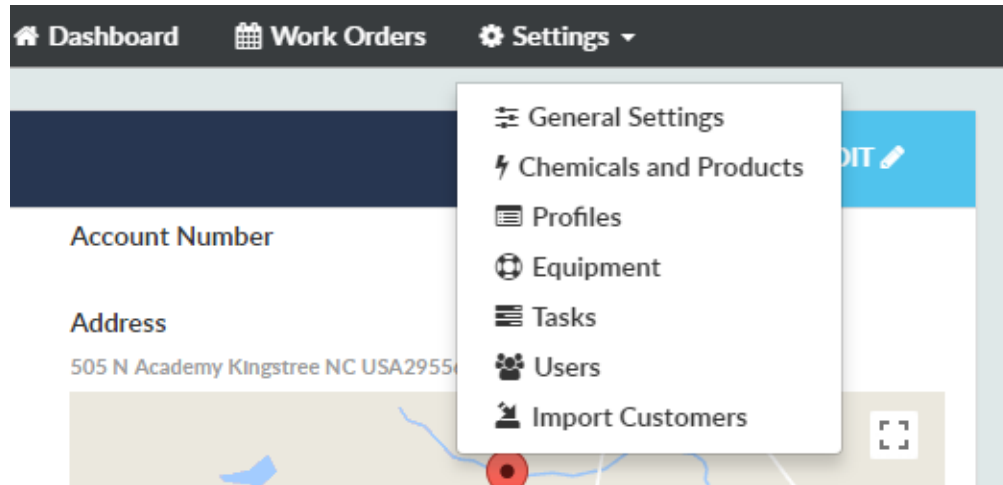
Green: Print

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

SUBSCRIPTION

ACTIVE USERS

MANAGE SUBSCRIPTION

Provider

DataMate Web

Subscription status

Active

Subscription type

DataMateWeb Monthly Subscription

Next billing date

10/31/2017

Subscription price

\$19.95USD

Addons

INVOICES

Number	Price	Date		
11837	\$0 USD	10/02/2017 02:26		
9050	\$0 USD	03/07/2017 19:44		
8748	\$0 USD	02/07/2017 19:44		
8479	\$0 USD	01/07/2017 19:44		
8220	\$0 USD	12/07/2016 19:44		
7958	\$0 USD	11/07/2016 19:44		

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.

Datamate Web User Guide

Chemicals and Products

Chemicals And Products				
⚠ This chemical is from your provider and can not be edited.				
Name	Site Type	Unit	Dose	Volume
Chlorine Sanitizer				
whatever	Pool	DryOz	1.2	1000
AZ's Shock	Pool	DryOz	2	10000
Lithium Hypo	Pool	DryOz	4	10000
Dichlor	Pool	DryOz	2	10000
ROCKIN Trichlor 1" Tablets	Pool	Tablets	3	10000
Trichlor 3" Tablets	Pool	Tablets	1	10000

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)

PROFILES		
⚠ This profile is from your provider and can not be edited.		
Name	Site Type	Sanitizer
Calcium Hypochlorite Pool	Pool	AZ's Shock
Bromine Spa	Spa	Bromine
Trichlor Pool	Pool	ROCKIN Trichlor 1" Tablets
Bromine Pool	Pool	Bromine
Biguanide Pool	Pool	Biguanide
Trichlor Spa	Spa	Trichlor 1" Tablets













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.

Datamate Web User Guide

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

✔ Checklist Manager			☰ Task Manager		
Filter: <input type="text" value="Enter a Value..."/>			Filter: <input type="text" value="Enter a Value..."/>		
Name	Time	Action	Task	Time	Recurrence
Basic Service	00 Hrs. 59 Mins.	 	Backwash the Filter	00 Hrs. 15 Mins.	1 Months
Equipment Check	00 Hrs. 30 Mins.	 	Scrub the walls	00 Hrs. 20 Mins.	2 Weeks
Gold Service	00 Hrs. 21 Mins.	 	Empty Skimmer Baskets	00 Hrs. 03 Mins.	1 Weeks
Super Service	01 Hrs. 38 Mins.	 	Clean Area	00 Hrs. 10 Mins.	1 Weeks
Spa Valet - Gold	00 Hrs. 05 Mins.	 	Vacuum Surface	00 Hrs. 00 Mins.	
Sample Checklist	00 Hrs. 00 Mins.	 	Check Heater	00 Hrs. 10 Mins.	1 Months
			Replace Filter	00 Hrs. 05 Mins.	3 Months
			Check Pump	00 Hrs. 10 Mins.	1 Months
			Check Motor	00 Hrs. 10 Mins.	1 Months

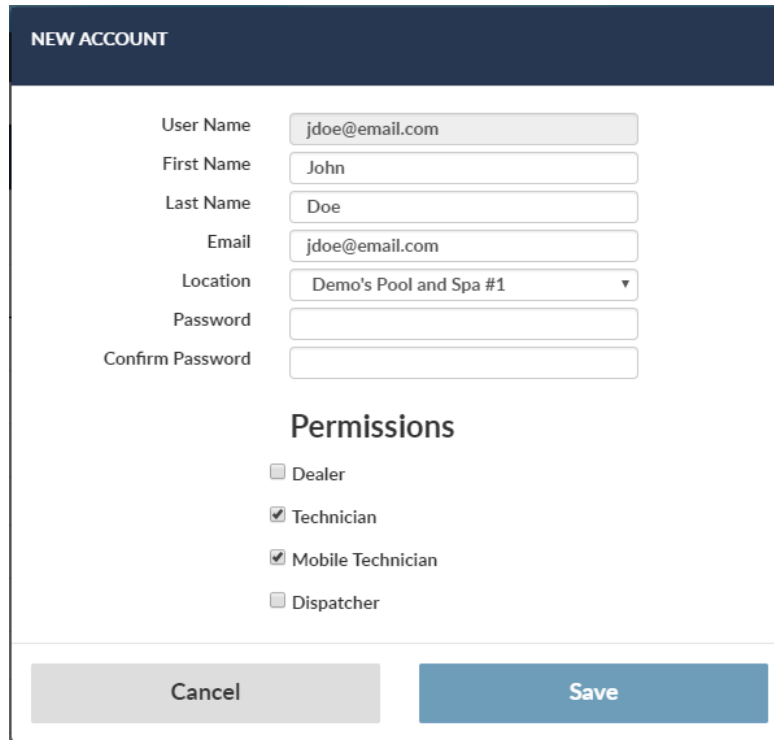
This section directly affects work orders, which is explained later on. There are tasks and checklists. Checklists are comprised of individual tasks. Either can be assigned to work orders but checklists may be more efficient if you have a standard procedure you follow when conducting pool maintenance/service. 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

ACCOUNT LIST						+
Name	Email	Account Status	Dealer	Technician	Mobile Technician	Dispatcher
Jonathan Banish		Active	✓	✓	✓	✓
undefined undefined		Inactive		✓		
John Benz		Active		✓	✓	✓

Datamate Web User Guide

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.)



The screenshot shows a web form titled "NEW ACCOUNT" with a dark blue header. The form contains several input fields: "User Name" (pre-filled with "jdoe@email.com"), "First Name" (pre-filled with "John"), "Last Name" (pre-filled with "Doe"), "Email" (pre-filled with "jdoe@email.com"), "Location" (a dropdown menu showing "Demo's Pool and Spa #1"), "Password", and "Confirm Password". Below these fields is a section titled "Permissions" with four checkboxes: "Dealer" (unchecked), "Technician" (checked), "Mobile Technician" (checked), and "Dispatcher" (unchecked). At the bottom of the form are two buttons: "Cancel" and "Save".

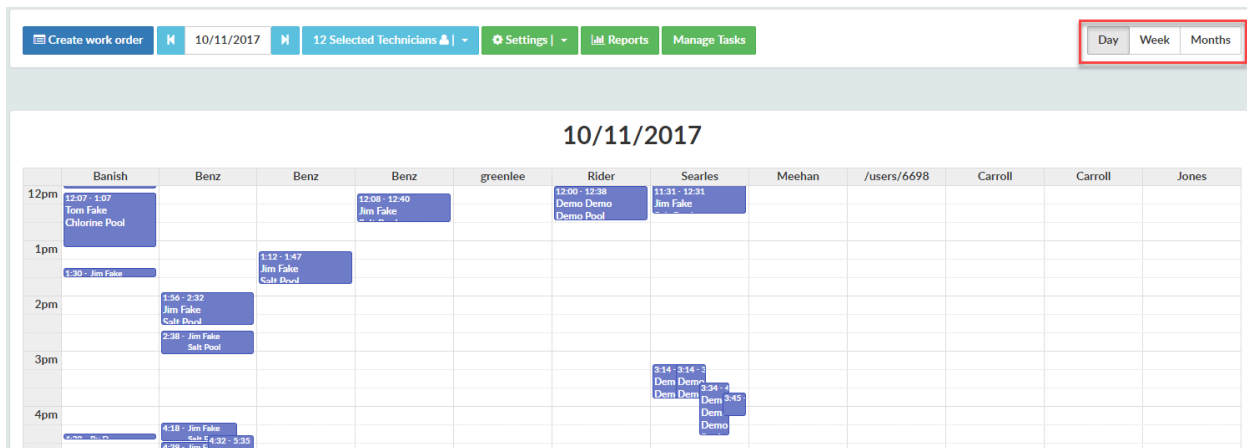
Here is the form for adding a new user. You want to select only the necessary permissions for each user. If one user is only doing pool service out in the field then you probably only need to give them the "Mobile Technician" permission. If they do in store testing at a computer then you'd want to select "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.

The screenshot shows the Datamate interface with two main sections: 'Site Assigned Tasks' and 'Available Tasks'. The 'Site Assigned Tasks' section has a filter input and a table with columns for Task, Time, Recurrence, and Action. The 'Available Tasks' section has a 'New Task' button, a filter input, and a table with columns for Task, Time, Recurrence, and Action. The 'Checklists' tab is selected, and the 'Add' button is highlighted.

Task	Time	Recurrence	Action
Backwash the Filter	00 Hrs. 15 Mins.	1 Months	Add
Scrub the walls	00 Hrs. 20 Mins.	2 Weeks	Add
Empty Skimmer Baskets	00 Hrs. 03 Mins.	1 Weeks	Add
Clean Area	00 Hrs. 10 Mins.	1 Weeks	Add
Vacuum Surface	00 Hrs. 00 Mins.		Add
Check Heater	00 Hrs. 10 Mins.	1 Months	Add
Replace Filter	00 Hrs. 05 Mins.	3 Months	Add
Check Pump	00 Hrs. 10 Mins.	1 Months	Add
Check Motor	00 Hrs. 10 Mins.	1 Months	Add

Datamate Web User Guide

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.

Site Assigned Tasks

▼ Filter:

Task	Time	Recurrence	Action
Backwash the Filter	00 Hrs. 15 Mins.	1 Months	Del
Scrub the walls	00 Hrs. 20 Mins.	2 Weeks	Del
Empty Skimmer Baskets	00 Hrs. 03 Mins.	1 Weeks	Del
Clean Area	00 Hrs. 10 Mins.	1 Weeks	Del
Check Heater	00 Hrs. 10 Mins.	1 Months	Del
Check Handrails	00 Hrs. 00 Mins.		Del

Available Tasks New Task

Tasks

Checklists

Name

Time

Action

▼ Basic Service

00 Hrs. 59 Mins.

Add

Task	Time	Recurrence
Backwash the Filter	00 Hrs. 15 Mins.	1 Months
Scrub the walls	00 Hrs. 20 Mins.	2 Weeks
Empty Skimmer Baskets	00 Hrs. 03 Mins.	1 Weeks
Clean Area	00 Hrs. 10 Mins.	1 Weeks
Check Heater	00 Hrs. 10 Mins.	1 Months
Check Handrails	00 Hrs. 00 Mins.	0

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.

Technician:

Date:

Hour:

Available Technicians:

10/08 - 14/2017

today < >

	Sun 10/8	Mon 10/9	Tue 10/10	Wed 10/11	Thu 10/12	Fri 10/13	Sat 10/14
1pm							
1:30pm		1:20 - 1:50					
2pm				1:56 - 2:32	2:13 - 2:56		
2:30pm				2:38 - 3:03			
3pm							
3:30pm							
4pm							

Recurrence Metrics:
Weekly

Recurrence Ends
☒ On ☐ Never
5 occurrences
Select one Date

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.