



DataMate Web User Guide

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# System Requirements

DataMate Web is a web based water analysis program. Your computer or mobile device must be connected to the internet to access it.

The web pages are optimized for Google® Chrome. It can be used in other browsers but layout and functionality may be impaired. Google® Chrome is required to use DataMate Web with a Spin lab.

## Retail and Service

DataMate Web is a web based application accessible from any device that can connect to the internet. It offers a solution for Retail stores as well as Service Professionals or a hybrid of the two.

When accessing the system from a computer and logging into via the web portal, you are accessing the “Retail” experience of the system. Even if your business has no retail location, many administrative activities, such as adding customer records and scheduling work orders are completed through the “Retail” experience.

Service Professionals in the field can access DataMate Web via the WaterLink Connect Mobile app available for Android® and iOS® Devices. To log into the mobile app, your user account must have been assigned the “Mobile Technician” role as outlined below in the User Permissions section.

## User Permissions

DataMate Web offers four levels of security permissions based on the User Roles assigned to your User Account. The first User Account created when you sign up for DataMate Web is granted the “Dealer” role by default.

Additional user accounts and their roles can be created and managed in the “Manage Accounts” section. See “Manage Accounts” Below for more information.

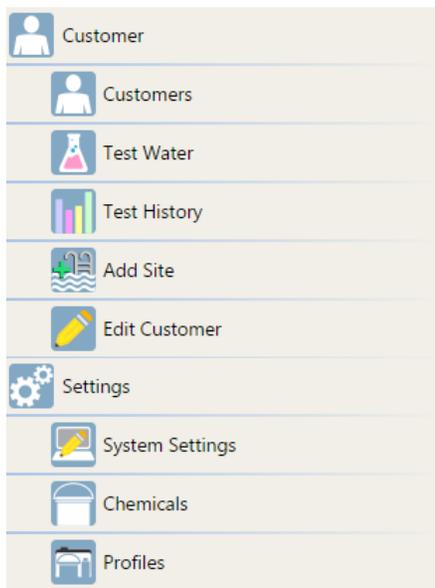


## Overview

This section will explain the main navigation controls and topline features of DataMate Web.

## Navigation

Along the left hand side of the screen is a vertical menu of navigation options. Selecting the feature you want to access from the left menu will open that screen.



Some menu items are only available when other features are open. For example, once you select a customer record, several more controls related to the customer will appear on the left. These menu items include “Test Water,” “Test History,” and more.

### Search Bar

At the top left is a persistent Search Bar to let you search for a customer record no matter what screen you currently viewing. Entering a name, a phone number, or even an address will return a list of customers that meet your search criteria.

### Reports

Right of the search bar is the Reports button. This feature offers various filters and controls to return a list of customers. For example, you could generate a report that shows only customers that have not had a water test in the last six months.

### New Customer

Press this button to create a new customer record. This will begin a wizard that guides you through a step by step process of entering the customer information. See, Add a New Customer in the Technician Features section for more information.

### Welcome Message and Sign Out

In the upper right hand side of the screen is a welcome message and button to log out. Simply click the Sign Out button to return to the log in screen. This is handy for switching user accounts.

# Administrative Features

The features below are only accessible to a user with the “Dealer” role.

## System Settings

Here you can manage your subscription, as well as information related to your store that will appear on water test report printouts and door hangers for your customers. Also, here you can manage a few system configuration settings such as date format and unit of measure.

### Subscription Management

This section provides a summary of your current subscription, such as the status, the price, and the next billing date. You can also download invoices from the table on the right. Lastly, press the Change Subscription button to make changes to or cancel your subscription.

### Report Settings

Determine whether to display test factor results on the e-doorhanger sent to customers from the WaterLink Connect Mobile app. By default, this option is not selected. This simply displays a grid of tested factors, the result of the test, the ideal range for that factor, and whether the result was low, ok, or high for that factor.

### Service Hours

Establish hours of operation for your business. Unchecking a box next to a day of the week closes your business for that day. Otherwise, set the open and close time for each day. This is primarily used in the Work Order Calendar for determining when work orders can be scheduled.

Service Hours						
<input checked="" type="checkbox"/> Monday	<input checked="" type="checkbox"/> Tuesday	<input checked="" type="checkbox"/> Wednesday	<input checked="" type="checkbox"/> Thursday	<input checked="" type="checkbox"/> Friday	<input checked="" type="checkbox"/> Saturday	<input type="checkbox"/> Sunday
Open 09:00 AM	Open 09:00 AM	Open 09:00 AM	Open 09:00 AM	Open 09:00 AM	Open 10:00 AM	Open 09:00 AM
Close 07:00 PM	Close 07:00 PM	Close 11:00 PM	Close 07:00 PM	Close 08:00 PM	Close 04:00 PM	Close 09:00 AM

### Editing Dealer Information

This section captures the name of your store, unit of measure, date format, and other settings. This information will display for your customers on Water Test Reports and e-Doorhangers.

### Water Treatment Report Customer Message

Text entered into this field appears on the bottom of every water test report.

### Importing a Logo

Press the “Choose File” button to select your logo image file. Your logo image will appear at the top of all water test reports and door hangers. The image file must be an image file format, such as .jpg, .gif, or .png. Other non-image file types like .pdf, .word documents, or powerpoint presentations cannot be uploaded.

## **Locations**

If your business has more than one physical store front location, those can be added here. At least one physical location must be added into the system. By default, you are provided only a single location, but more can be purchased by pressing the “Manage Subscription” button.

To add a new location:

1. Select an empty row. This will open the new location details form.
2. Complete the form with as much information as possible.
3. Press the Save button to complete the form and return to Edit Dealer Information.

When first logging into the system you will be asked to select a Location from a dropdown list. Selecting a location determines which address, phone number, and email address information appears on the water test report.

## **Downloads**

If you plan on using a WaterLink® Spin lab with DataMate Web, you will need to download and install the WaterLink® Connect application as well as the web extension. This is only compatible in Google® Chrome. Downloading and installing WaterLink® Connect and the extension can also be done from the Water Test screen.

# Chemicals

To provide chemical dosing information for a customer’s pool or spa you will need to have chemical products configured. Usually, this product ships with several preconfigured chemicals for your use, though you can add more chemical products or, in some cases, edit the existing ones.

Chemical products are applied to Profiles. See “Profiles” below to learn more about chemical profiles.

### **Add a new chemical product**

Press the “Add a Chemical” button at the top. This will display the Create Chemical form.

### **To edit an existing chemical product**

Select any chemical product from the list to display the chemical details form. Some chemical products cannot be edited.

## Create or Edit a Chemical Product

Complete the form to add a new chemical product to your database.

### Edit Chemical

Name	<input tablets"="" type="text" value="Trichlor 1"/>	Site type	<input type="text" value="Pool"/>
Category	<input type="text" value="Chlorine Sanitizer"/>	Unit	<input type="text" value="Tablets"/>
Dose	<input type="text" value="3"/>		
Per	<input type="text" value="10000"/> gallons		
Treatment report text	<input type="text" value="Place the recommended dose of tablets into your floater. Ensure your floater is open to allow the water to erode the tablets. This is a stabilized form of chlorine which will add CYA to your water."/>		

[Back to List](#) | [Delete Chemical](#)

### Name

This is the name of the chemical product and will appear in treatment text on the water test report, so it is important to add the chemical product name exactly as you would like your customer to read it.

### Category

Chemical products are grouped into categories such as “Sanitizers,” “pH Up,” and “Algaecide.” The Category you select here will determine where the product can be included in Chemical Profiles.

### Type

Determine whether this product is for use with Pools or with Spas. If the product can be used for pools and spas you will need to create two copies of this chemical, one for each Type.

### Dose

Set the dosage rate of the product. This can be found on the packaging for the chemical product. Typically, dosage rates adjust the factor by 1 ppm, but on occasion chemical manufacturers change the dosage rate to change 10 ppm or some other value. In such a case, be sure to enter a value into the dosage field for a 1 ppm change.

For example, your chemical product may read “add 1 lb of this product per 10,000 gallons to raise 1 ppm.” Here, enter “1” into the dose field. The unit of measure will be selected next and the “per” field will contain the “10,000.”

### Unit

Select the unit of measure in which the product is dosed. This can be found on the product packaging.

### Per

Enter here the gallon or liter amount the base dosage at which the product is dosed. For example, if the product package reads to add 8 oz per 1000 gallons, you would enter “1000” into this field.

## Treatment Report Text

Enter the “body text” for the product here. This should include the proper methods of adding the physical product to the pool or spa. To allow for some situations where dynamic text is required, the system offers a few macros that can be entered into this text field which will be converted to calculated values or text from the database on the final water test report. See the Macros section below for more information.

## Macros

Specific macros can be used in the “Treatment Report Text” and “Door Hanger Text” fields. These macros will display calculated information or database entries on the water test reports and door hangers. Below is a list of macros.

Macros must be surrounded by the % symbol and must be entered in all capital letters as shown below.

- %CHEMICAL% - this macro will display the name of the product.
- %DOSE% - the correct dosage of the product with the appropriate usage will display
- %MAXDOSE% - divides the dosage supplied by the %DOSE% macro by 3. This is often used for statements like “divide the recommended dosage into three smaller treatments of %MAXDOSE% over a 48 hour period.”
- %DRAIN% - determines the total percentage of a pool or spa that needs to be drained to reach the proper target number. Should be followed by another % symbol to have it appear on the report properly.
- %COLOR% - displays the color of the water selected during the test entry. For example, the report might read “a Green color was reported.”

## Delete Chemicals

It is possible to delete a chemical product by pressing the Delete button. A chemical that is currently assigned to a customer’s site cannot be deleted. You should maintain at least one chemical product for each treatment category, at least one for Pools and one for Spas.

## Profiles

Product Profiles are groupings of chemical products with a set of ideal ranges for test factors such as Free Chlorine, Alkalinity, and Phosphate. Product Profiles allow you to create common combinations of treatment products that you can quickly assign to your customers when creating sites for them in your database.

For example, you could create a profile with Trichlor tablets as your sanitizer, but would not recommend a separate product to treat low levels of Cyanuric Acid. Similarly, a Profile with Calcium Hypochlorite as the sanitizer might have a different series of products, treatments, and ideal ranges.

Usually, this product ships with several preconfigured Product Profiles for your use, though you can add more or, in some cases, edit the existing ones.

### To add a new profile

Press the Add a Profile button at the top. This will open a new, blank Product Profile form. For more information on completing a Profile, see “Create or Edit a Profile” below.

### To edit an existing profile

Select any profile from the list to display the profile details form. Some product profiles cannot be edited. Once the profile details form is open, you can adjust the chemical products, ideal ranges, and text.

If you have customer sites with a profile assigned and you edit that profile, the changes you make to the profile will affect all sites with that profile assigned.

## Create or Edit a Profile

Complete the form to add a new Product Profile to the system.

### Name

Provide a name for the Profile. Whatever you enter here will appear in the software when assigning a profile to a customer site and will also appear on water test reports and door hangers.

### Site Type

Select whether this profile is for pools or for spas. This selection will filter which profiles are viewable when you create a site and choose whether that site is a pool or spa. It also filters which chemical products appear in the dropdown boxes when creating the profile. If you select "Pool" only products that were categorized as "Pool" will appear.

### Chemicals

This section lists every chemical product for which the system can provide a treatment. When chemical products are created, a category is selected. That category selection determines in which of the dropdowns that product will appear.

If the product was categorized as a sanitizer, it will only appear in the sanitizer dropdown list, for example.

Each dropdown must have a chemical product selected.

When you assign a Product Profile to a customer site, then perform a test for that site, the chemical products recommended will be the products selected here.

### Ideal Ranges

One of the most robust features of this system is the ability to modify the ideal ranges and "header text" that will appear on the water test report and door hangers.

For each test factor, a minimum and maximum value can be entered. This will

### IdealRanges

Test Factor	Min	Target	Max
Bromine	<input type="text" value="2"/>	<input type="text" value="3"/>	<input type="text" value="4"/>
Alkalinity (Plaster)	<input type="text" value="80"/>	<input type="text" value="100"/>	<input type="text" value="120"/>
Alkalinity (Other)	<input type="text" value="100"/>	<input type="text" value="125"/>	<input type="text" value="150"/>
pH	<input type="text" value="7.2"/>	<input type="text" value="7.5"/>	<input type="text" value="7.8"/>
Copper	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0.2"/>
Iron	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0.2"/>
Manganese	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0.2"/>
Nitrate	<input type="text" value="0"/>	<input type="text" value="20"/>	<input type="text" value="20"/>
Borate	<input type="text" value="30"/>	<input type="text" value="40"/>	<input type="text" value="50"/>
Phosphate	<input type="text" value="0"/>	<input type="text" value="500"/>	<input type="text" value="500"/>
Hardness (Plaster)	<input type="text" value="200"/>	<input type="text" value="225"/>	<input type="text" value="400"/>
Hardness (Other)	<input type="text" value="175"/>	<input type="text" value="225"/>	<input type="text" value="350"/>
Total Dissolved Solids	<input type="text" value="0"/>	<input type="text" value="2000"/>	<input type="text" value="2000"/>

automatically calculate a target value somewhere between the min/max. The target is not always the center point between the minimum and maximum, however. This is dependent upon the specific test factor. For example, the target for Cyanuric Acid is always 10 above whatever you set the minimum to be.

Some test factors, like Alkalinity and Hardness have a suffix of (Plaster) or (Other). This relates to the surface type of the pool or spa. When creating a site, you may select the surface type. If the surface type selected is plaster (or plaster like), then the range for Hardness (Plaster) will be used instead of the ranges for Hardness (Other). Several surface types behave as “Plaster” and several behave as “Other.”

### **Min/Max and Doorhanger Text**

Each test factor also possesses text to display on the water test report and door hanger when the test result is below the minimum or above the maximum. This text is “header text” that appears above the “body text” from the chemical product. Generally, this text is used for statements like “Free Chlorine levels are low. Add 2lbs of Calcium Hypochlorite.”

The example below shows a treatment from a water test report. The top line of text in bold is “header text” managed in the min/max text boxes in the Product Profile. The second line of text that is not in bold is pulled from the chemical product treatment text.

**Alkalinity is low. Add 5lb 2oz of Sodium Bicarbonate.**  
Evenly distribute the recommended dosage across the deep end of the pool.

Mobile technicians will see standard water treatment reports formatted like the above example, but the information placed on the door hanger that is sent to the customer will appear differently. You can edit the default text a customer will see on a doorhanger in the “Doorhanger Text” box. Mobile Technicians in the field can edit or add to this default text from the WaterLink Connect mobile app when completing a Work Order.

Because the content of these text boxes needs be dynamic, the system utilizes macros to calculate numbers and display text from the database. See the Macros section below for more detail on using macros.

### **Adjust alkalinity value based on cyanuric acid**

Checking this box allows the system to calculate an “adjusted alkalinity” value based on the amount of cyanuric acid levels in the water.

When checked, tests performed with this profile will adjust the alkalinity result down on the water test report. The amount adjusted is roughly 1/3 of the CYA value.

For example, if your tested result for Alkalinity was 100 and your CYA result was 30, then 1/3 of the CYA value (10) would be subtracted from the Alkalinity, leaving an “adjusted alkalinity” of 90.

## Special Instructions

Certain recommendations are not related to ideal ranges but are more static and respond to whether a specific checkbox was checked during the water analysis. To edit text for any of these special instructions, press the button corresponding to the category you would like to edit.

For example, special instructions can be added for opening a pool. When performing an analysis, checking the “Open Pool” checkbox will display the text managed behind the “Open Pool” button.

## Saving and Deleting a Profile

After editing a profile, you must press the Save button at the bottom of the screen for any changes to take effect. Browsing away from the Edit Profile form without saving will result in loss of all changes.

You can completely delete a Product Profile by pressing the blue “Delete Profile” button at the bottom. A prompt will check to make sure you want to delete the profile before continuing. You cannot delete a Product Profile that is assigned to any customer sites.

## How analysis works

When performing a test, the system uses the values from the ideal ranges to determine when it should provide a treatment and what value it should balance to.

For example, let's say Alkalinity (Other) is set with a minimum of 100 and a maximum of 150 with a target of 125. During a test, the Alkalinity result is 90. Comparing this result to the ideal ranges, the system determines that 90 is lower than the minimum of 100 and recommends increasing the alkalinity level. It will recommend the product selected in the “Alkalinity Up” field of the profile. Based on the dosage rate of that product and the volume of the pool or spa, the system will calculate a recommendation to balance the alkalinity up from 90 ppm to the target of 125 ppm.

## Macros

Specific macros can be used in the “Treatment Report Text” and “Door Hanger Text” fields. These macros will display calculated information or database entries on the water test reports and door hangers. Below is a list of macros.

Macros must be surrounded by the % symbol and must be entered in all capital letters as shown below.

- %CHEMICAL% - this macro will display the name of the product.
- %DOSE% - the correct dosage of the product with the appropriate usage will display
- %MAXDOSE% - divides the dosage supplied by the %DOSE% macro by 3. This is often used for statements like “divide the recommended dosage into three smaller treatments of %MAXDOSE% over a 48 hour period.”
- %DRAIN% - determines the total percentage of a pool or spa that needs to be drained to reach the proper target number. Should be followed by another % symbol to have it appear on the report properly.
- %COLOR% - displays the color of the water selected during the test entry. For example, the report might read “a Green color was reported.”

# Manage Accounts

To log into DataMate Web a user must have an active User Account. From the Manage Accounts section, you can create new user accounts, manage permissions (roles) for a user account, and other administrative functions.

Every user that accesses your DataMate Web account should have their own unique login account. This is for security purposes and to protect your data. Because DataMate Web is web based, a user can access the system from anywhere, they do not need to be in the office to do so. So users can access the system from their home or the local coffee shop, if they have user credentials that allow them to.

If, for example, one of your employees leaves your company, you will want to prevent that user from accessing your system. If that user was given their own user account, then it is as simple as deactivating that user's account, but if you are using a globally shared account across all users, you could not prevent the former employee from logging into the system later.

## Creating a New User Account

Press the "Add Account" button to create a new user. Complete the fields and select the role(s) you would like the user to have, then press the Register button.

A verification email will be sent to the email address you supplied for that user account. The user must open that email and click the verification link before the account is activated and useable for logging into the system.

## Editing a User Account

Select a user account from the list of users to edit it.

You can update the user information, changed the user roles, and reset the user's password. Additionally, you can determine whether this account is active or not, which determines whether this user can log into the system. It is not possible to delete a user account.

## User Roles

Permission to perform various functions in DataMate Web is limited based on the Role(s) assigned to your user account.

Role	Create/Edit Customers	Test Water	Create/Edit Work Orders	Mobile app access	Admin Controls
Technician	●	●			
Dispatcher			●		
Mobile Technician				●	
Dealer	●	●	●		●

- **Technician:** Most users that access your account should possess the Technician Role. Technicians can add and edit customer records and sites, perform water tests and delivery water test reports. Mobile Technicians with this role can edit customer sites from the WaterLink Connect Mobile App.

- **Dispatcher:** Dispatchers schedule work orders for the Mobile Technicians. Without the dispatcher, access to the Work Order calendar is prohibited. Mobile Technicians with the Dispatcher role can schedule Work Orders from the WaterLink Connect Mobile app.
- **Mobile Technician:** With this role, a user has permission to sign into the WaterLink Connect Mobile app and act as a field technician, completing Work Orders and sending e-doorhangers to customers. This is the only role that can be assigned a limited number of times. A base subscription for DataMate Web allows the assignment of this role up to two times (two different users). Additional assignments of this role can be purchased via the “get more” button or the “Change Subscription” button via System Settings.
- **Dealer (administrator):** By default, a user account with this Role has administrative access to DataMate Web. This includes the ability to modify the subscription, edit chemical information, and change permissions for other accounts. It is recommended that only the Store Owner and/or a Store Manager possess this role. Users with this role additionally gain all the rights of the “Technician” and “Dispatcher” roles below, but not the “Mobile Technician” role.

## Import Customers

There are two ways to import records into DataMate Web.

**IMPORTANT:** it is highly recommended that any chemical product and profile customizations are made prior to importing customer records.

### Import Via DataMate 10

To import customer records from DataMate 10,

#### *Import Customers from DataMate 10*

Customers and customer sites can be imported from DataMate10 by downloading and using the [DataMate 10 export tool](#).

#### Select the profile to apply to pools

Calcium Hypochlorite Pool ▼

#### Select the profile to apply to spas

Bromine Spa ▼

#### Select the DataMate 10 customer export file

Choose File No file chosen

This operation may take several minutes to complete.

Upload Data

1. Log into DataMate Web
2. Select “Import Customers” from the menu on the left (note: you must be logged into an account with the “Dealer” role to have access to this feature).
3. From the blue button at the top, download the “DataMate 10 Export Tool.” The export tool must be installed and run on the computer that is hosting your DataMate 10 database.

4. Follow the onscreen instructions to install the export tool.
5. Once the installation completes, the tool will attempt to export your DataMate 10 database. You will be prompted to select a location to save the export.
6. Save the export to a location you can access.
7. Back in DataMate Web, under “Select a DataMate 10 customer export file” press the Browse button and select the DataMate 10 export file created by the DataMate 10 Export Tool.
8. Choose a chemical Profile to assign to all of the imported pools and a profile to assign to all of the imported spas (NOTE: a Profile can always be changed later by editing the individual customer’s account).
9. Press the “Upload Data” button to begin the import.
10. Wait for the import to complete.

### Import via CSV

A CSV file is a standard comma separated text file. The fields that can be imported via this method are shown in the screenshot below.

**Import Customers From a CSV File**

CSV files must be properly formatted and contain the file extension ".csv".

Fields that can be imported are:

- First Name
- Last Name
- Address 1
- Address 2
- Address 3
- City
- State/Province
- Postal Code
- Email Address
- Phone 1
- Phone 2
- Account Number
- Pool Volume
- Spa Volume
- Volume (if site type is unknown)

**Select CSV file to Import**

Choose File No file chosen

**Upload Data**

1. Press the “Choose File” button.
2. Browse to the CSV file containing your customer records
3. Press the “Upload Data” button
4. A tool will open prompting you to assign data header to each column. For example, the first column of data might be your customer’s first name. Proceed until all columns have been assigned, then press continue.
5. Wait for the import to complete.

# Technician Features

The features below are accessible to a user with the “Technician” role.

## Add a New Customer

You can add a new customer to the database at any time by pressing the “Add Customer” button at the top of the screen. This will launch the “add new customer” workflow.

### Customer Contact Information

First, add contact information such as the customer’s name, address, and phone number. Once complete, press the Save button to continue.

### Add a Site

Next, configure a Pool or Spa – called a Site – to the customer. There is no limit to the number of Sites you can create for a single customer.

- **Site Name:** this is a name for the pool or spa, like “Pool 1” or “Indoor Pool” or “Hot Tub.” Really, anything that helps you identify the Site.
- **Site Type:** Select whether this site is a pool or a spa
- **Volume:** the number of gallons or liters in the pool or spa. This is used to calculate the treatment dosages of chemicals. There is a Calculator button to open a volume calculator based on the dimensions of the pool or spa.
- **Filter:** Select the filter type for the pool or spa
- **Surface:** select the surface type for the pool or spa
- **Location:** choose the build location for the pool or spa
- **Checklist:** select a checklist for mobile technicians to perform while visiting a customer. For more information on creating Checklists see “Checklists” in the Administrative Features.
- **Address Information:** if the Site is at a different address than the customer’s home address, this can be entered. Checking the “Use Customer Address” box will automatically enter the Site Address information with the Customer’s contact address information.
- **Chemicals:** DataMate Web uses pre-built chemical Profiles to assign chemical products and ideal ranges to Sites. Select a Profile from the dropdown box and all the default chemicals configured in that Profile will be assigned to the customer’s pool or spa. However, each individual chemical product can still be configured in the appropriate dropdowns. These customizations will be in effect for this Site only and will not affect the master Profile. For more information on creating or editing Profiles see the “Profiles” section above.

When the Site information has been completed, press the Save button to continue.

### Add Equipment

Each Site can possess Equipment items. To create a new Equipment item press the “Add Equipment” button. Once equipment items are created they will appear in the list. You can edit an existing equipment item by selecting it from the list.

Adding Equipment is optional.

Once equipment additions are complete, browse to the task you want to perform using the left navigation menu. If you immediately wish to test water for this customer, press the “Test Water” Navigation button on the left.

## Customer Search

Search for a customer using the search box in the upper left hand corner and press the magnifying glass search button to begin. This will result in a list of customers that meet your search filters. Select the customer you want from the list to open the customer’s Water Test screen.

## Testing Water

After you’ve added a customer or searched for and found the customer for whom you want to test water, select that customer from the list or click the Test Water button on the left. The Test Water button only appears once a customer record is open. You must first select a customer record before you can test water.

Select which of the customer’s Sites you would like to test by choosing from the “Sites” dropdown box at the top.

Test the water by entering test values into the test entry fields. To the right of the test factors is a display of the ideal range for that factor based on what is configured in the Profile assigned to this site. Additionally, there is a scrolling summary of the last three tests performed for this site by date for quick, at a glance, comparison.

Finally, mark special conditions in the water source, like coloration, cloudiness, and others.

When complete, press the Report button to view a Water Test Report.

### **Using a WaterLink Spin Lab**

If you are performing a water test with a WaterLink Spin lab, press the “Install Software” button in the upper right hand corner to install the WaterLink Connect application and the web extension. This is only compatible with Google® Chrome.

Once the WaterLink Connect application and web extension are installed, the button will change from “install software” to “Start Test.” Pressing the Start Test button will launch WaterLink Connect, where you can select the Disk type you are running and launch the WaterLink Spin.

Test results will automatically be transferred to the DataMate Web test entry fields for all factors the Spin tests.

### **Water Test Report Controls**

At the top of the Water Test Report are a few controls for managing the Water Test Report.

- **Send to Customer:** emails the water test report to the customer’s email address stored in their contact information.

- **Print:** opens the print preview screen to be sent to your printer.
- **Close:** closes the window
- **Doorhanger:** will appear if a mobile technician performed a test and sent a doorhanger to a customer. The doorhanger sent to the customer can be previewed here. For more information on Doorhangers, see “Mobile Technicians” below.

# Dispatcher Features

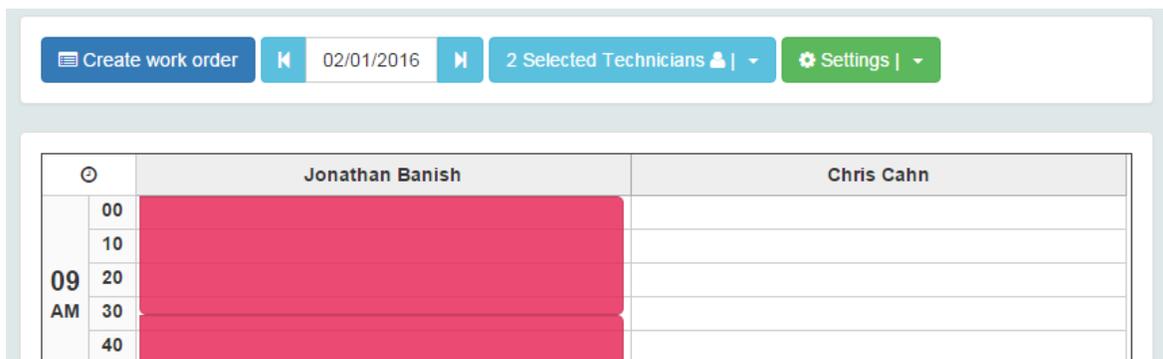
The features below are accessible to a user with the “Dispatcher” role.

As of the writing of this document, the Work Order feature is in open beta testing. This beta testing period is currently scheduled to conclude by June 2016 but may be extended as needed.

## What is a Work Order

DataMate Web offers tools to schedule and manage Work Orders for the mobile technicians. A Work Order is a collection of work items that a mobile technician needs to perform when providing onsite service for a customer’s pool or spa. This allows you to manage a fleet of mobile technicians and the work they perform and even notify the customer, all through DataMate Web.

By scheduling a Work Order in the web application, it will appear in the Work Order list in the WaterLink Connect Mobile app for the assigned technician on the appropriate day of the week.



### Offline Syncing

Work Orders are the mechanism that allows offline syncing between the mobile technicians and the web server. When a mobile technician logs into the mobile app, all Work Order information is downloaded to the technician’s mobile device. The app only attempts to sync data with the server again when the technician completes a work order. What this means is that a mobile technician can complete the water test, receive treatment recommendations, fulfill tasks – essentially perform all of the work in a Work Order even when the mobile device lacks internet connectivity.

Once the mobile tech completes the Work Order and presses the “Send Doorhanger” button, all of the work data is sent to the web server. If the mobile device lacks internet connection at that moment, the app will continue to attempt to reach the web server until an internet connection is established.

### Work Order List

Work Orders can be scheduled for a specific day but not a specific time on that day. This is because the Work Order scheduling system lists the Work Orders in the order they should be completed (top to bottom) based on the most efficient driving route for the total collection of work orders scheduled for that day.

A mobile technician can ignore this automated sequencing in the mobile app simply by selecting the desired work order from the list. This will not, however, alter the sequencing of the driving route order.

## Doorhanger

Gone are the days when it was necessary to print a receipt of services performed onsite and leave it hanging on the front door knob of the customer. This has now been replaced by the e-Doorhanger. As the mobile technician completes the Work Order, the e-Doorhanger is automatically populated with the services completed. Once the job is done, the e-Doorhanger is emailed directly to the customer.

Some customers may not want to receive this e-Doorhanger. You can opt the customer out by checking the “opt out of doorhanger” checkbox in the Edit Customer screen.

## Work Order Dashboard

To access the Work Order dashboard, press the “Dashboard” button from the left navigation menu.

While this feature is in beta, a beta test informational screen will display. You can check the box to prevent seeing this message again. Press OK to continue.

The Work Order dashboard currently requires you to log into it separately from the rest of DataMate Web. This will not always be the case. As long as your user account possesses the Dispatcher role, the same login credentials will grant access to the Work Order Dashboard.

### Dashboard Controls

The main navigation bar has been moved to the top. Press the Main Menu button to expand a menu of additional navigation options. Press the “Sign Out” button to log out.

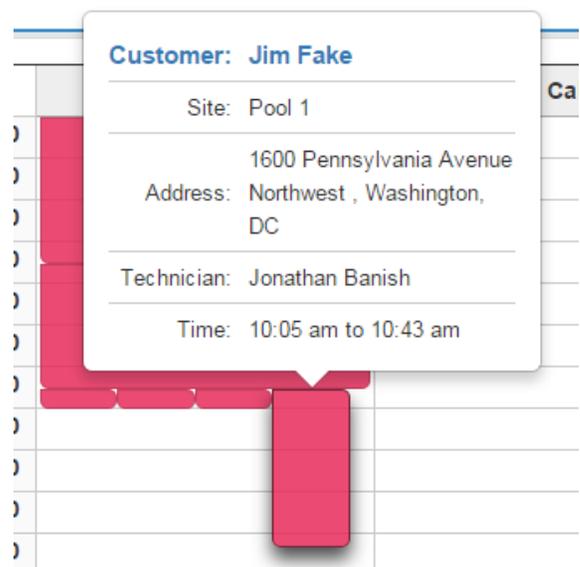
### Calendar

The Calendar displays Works Order scheduled for all users assigned the “Mobile Technician” role. The calendar will display a column for each mobile technician.

Other controls include:

- **Create Work Order:** creates a new work order. This process can also be started by clicking any empty space on the calendar.
- **Date Picker:** use the date picker to move forward or backward in time. Only a single day can be viewed on the calendar.
- **Technician Display:** select which technicians to show or hide from the calendar.
- **Settings:** adjust the time range of the calendar as well as the hour slice. A smaller hour slice shows more detail for shorter work orders.

Scheduled Work Orders appear as empty colored blocks on the calendar. Mouse over a scheduled work order for a balloon with more details of that Work Order. Click a scheduled Work Order to view additional details or edit that Work Order.



## Create New Work Order

To schedule a new Work Order, begin by either rpressing the “Create New Work Order button or click an empty space on the calendar.

To create a Work Order:

1. Begin by searching for and selecting a customer.
2. Once a customer is selected, choose a site to service on the work order. Multiple sites can be assigned to the same work order as long as all sites are located at the same physical address. Once you select a site from the dropdown, press the “Add to Work Order” button to add the site. Each site will form its own tab.
3. Optionally, assign Tasks to the Work Order by pressing the “Add” button next to each Task. Alternatively, or in addition to, you can assign a whole checklist to your Work Order. Press the Checklists or Tasks Tabs to toggle between the two options. On the Checklists Tab you can expand a checklist to view all of the Tasks included in that Checklist. For more information on creating Tasks and Checklists, see Managing Tasks and Checklists below.
4. Review the estimated work time. This can be manually edited if you wish the Work Order to take more or less time than calculated. The estimated work time is based on the total amount of time required to complete all of the assigned Tasks.
5. Select a date to schedule the Work Order. This defaults to today.
6. Assign a technician who will complete this Work Order. Only users with the Mobile Technician role can be selected.
7. Choose a recurrence (if any) on which you would like this Work Order to recur.
  - a. Scheduling a recurrence automatically builds a copy of the work order at each point in the recurrence based on the day of the first occurrence. For example, if you schedule a work order starting on a Tuesday and enter a recurrence of once per week, then each Tuesday, this Work Order will automatically be scheduled.
8. Press the Save button.

### Editing a Work Order

By selecting an existing Work Order from the calendar, you can view and edit the details of the Work Order. If the Work Order is scheduled with a recurrence and you make a change to the Work Order, you will be prompted to select whether the changes should be applied to this one instance of the work order or the entire series of this work order.

### Completing Work Orders in the WaterLink Connect Mobile App

For instructions on completing Work Orders in the WaterLink Connect mobile app, please see the user guide for that application.

## Manage Tasks and Checklists

Tasks are non-water analysis related activities assigned to Work Orders and given to mobile technicians to complete when they are at a customer’s site servicing the pool or spa. Tasks can be grouped into checklists to easily assign that group of tasks when building a Work Order.

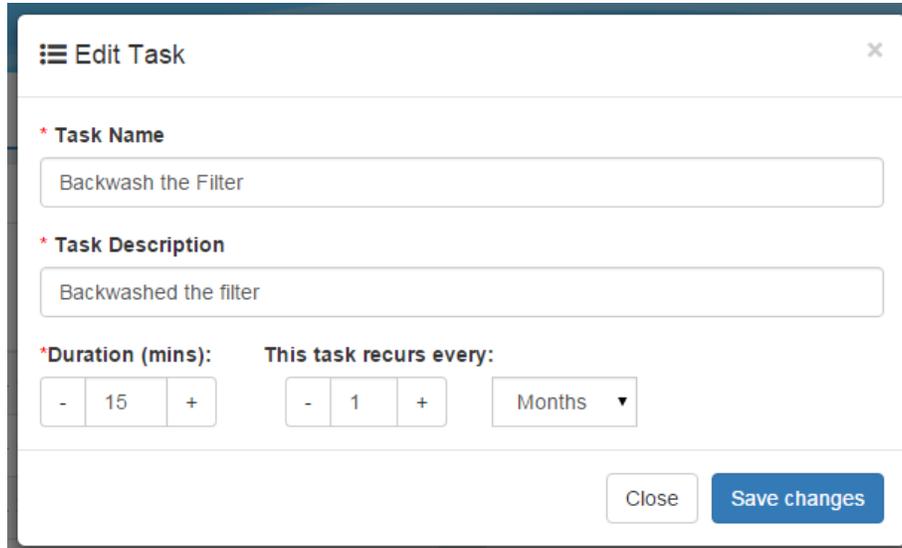
To begin managing your Tasks and Checklists, select “Main Menu” from the upper right, then choose “Manage Tasks” from the list.

## Tasks

The right hand side of the Manage Tasks screen consists of a list of your catalogue of Tasks. No default Tasks are supplied, so you will need to create a few if you want to assign them to a Work Order.

### Create a New Task

To create a new Task, press the blue “New Task” button in the upper right.



The screenshot shows a web form titled "Edit Task". It includes a close button in the top right corner. The form has three main sections: "Task Name" with a text input field containing "Backwash the Filter"; "Task Description" with a text input field containing "Backwashed the filter"; and "Duration (mins):" and "This task recurs every:" with numeric input fields and a dropdown menu. The "Duration" field shows "15" and the "recurs every" field shows "1" with a dropdown set to "Months". At the bottom right are "Close" and "Save changes" buttons.

- **Task Name:** This is the Title of the Task. An example of this might be “Backwash the Filter.” This text does appear on the e-Doorhanger sent to the customer.
- **Task Description:** Description text is best written in past tense. This is the explanation of work the technician performed for this Task. This text appears in the WaterLink Connect Mobile app and can be edited by the technician in the field. The text you enter here is merely the default text. Your customer will also see this text on the e-doorhanger. An example of this might be “Backwashed the filter to remove debris.”
- **Duration:** enter the time, in minutes, required to complete this Task. When the system determines how long a Work Order takes to complete, the system totals the duration of all of the Tasks assigned to the Work Order. Assigning meaningful durations is important for managing your technician’s time and schedule throughout the work day.
- **Task Recurs Every:** set how often the Task should be performed. The mobile app will inform the technician when this Task was last performed for the selected customer and offer a comparison for how frequently it should recur, allowing the technician to make a judgement call on whether the Task should be performed again, even if it is assigned to the Work Order.

Save the change to add the Task to your Task Catalogue.

### Edit/Delete Tasks

Edit an existing Task by pressing the Pencil icon next the Task name. You can also delete a Task by pressing the trashcan icon.

## Checklists

A checklist is simply a grouping of Tasks. This makes it easier to build collections of Tasks for easy assignment when building Work Orders. For example, you might want to build a Basic Service Checklist that consists of the twenty or so Tasks that your technicians perform on most of their weekly maintenance service visits. Rather than manually selecting all twenty of the Tasks each time you build a Work Order, simply group them into a Checklist and assign the whole Checklist at once to the Work Order.

The left hand side of the Manage Tasks screen is a catalogue of your Checklists. There are no checklists available by default.

### Create a New Checklist

To create a new Checklist, press the “New Checklist” button.

- **Checklist Name:** enter a name for the checklist that your dispatcher will easily be able to recognize for the grouping of Tasks included in the Checklist. Customers will not see a Checklist name.
- **Checklist Description:** include an optional description for the Checklist. Only the Dispatcher will see the description.
- **Available/Assigned Tasks:** The right window contains your catalogue of Tasks. By pressing the Add button next to a Task, it will be moved to the “Assigned Tasks” window on the left. This means the Task will be included in this checklist. You can remove the Task from the Assigned window by pressing the “Del” button next to the assigned Task. Tasks must first be created out outlined above before they will appear in this control.

Edit CheckList

\* Checklist Name: Basic Service

Checklist Time: 00 Hrs. 58 Mins.

Checklist Description: Silver level service

Task Filter: Search Task ...

☰ Checklist Assigned Tasks		
Task	Time	Action
Backwash the Filter	00 Hrs. 15 Mins.	Del
Scrub the walls	00 Hrs. 20 Mins.	Del
Empty Skimmer Baskets	00 Hrs. 03 Mins.	Del
Clean Area	00 Hrs. 10 Mins.	Del

☰ Available Tasks		
Task	Time	Action
Vacuum Surface	00 Hrs. 00 Mins.	Add
Replace Filter	00 Hrs. 05 Mins.	Add
Check Pump	00 Hrs. 10 Mins.	Add
Check Motor	00 Hrs. 10 Mins.	Add

Close Save changes

# Support

Support for DataMate Web is available. Depending on your region, support contact information is included below.

## US and Canada

Call Center: 800-344-3100 option 3

Monday – Friday: 9 am to 5 pm EST

Email: [support@waterlinkconnect.com](mailto:support@waterlinkconnect.com)

## Europe and EFTA

Phone: +44 (0) 1926 498203

fax: +44 (0) 1926 497055

Monday-Friday: 08.30 – 16.30 GMT

Email: [support@lamotte-europe.com](mailto:support@lamotte-europe.com)

## Australia and New Zealand

Support Desk: +61-1300 723 488

Monday- Friday: 8 am to 4 pm AEST

Email: [support@vendart.com.au](mailto:support@vendart.com.au)