

Your first 30 minutes Settings ▶ Setup Wizard

CH. 1

- 1 Company & timezone 2 Payments 3 Customer portal 4 Visit reports 5 Email 6 Your first technician

The timezone drives every schedule and billing date. Get it right at the start — changing it later shifts every date already in the system.

Two ways work comes in

CH. 4 · 6 · 8

THE REGULAR ROUND

A customer, their address, the service they are signed up for, and how often you bill for it. It puts a stop on the calendar every week on its own.

Only ONE of a customer's services puts stops on the calendar. The rest just bill.

A ONE-OFF JOB

One form: their name, the address, the job, who does it and when. Nothing to build first — by the time you close the form they are booked.

Typed an email you already have? It offers you that customer instead of quietly making a duplicate.

Turn a one-off customer into a regular one later — and it tells you exactly which booked jobs that would cancel before it does anything.

What you can tell the router

CH. 3 · 4 · 7

Other systems put your stops in driving order. This one plans the whole week around rules you set once.

ABOUT EACH TECHNICIAN

- Where they start and finish
- Their hours, day by day
- Their lunch window — and how far it may move
- Most jobs in a day
- Most miles in a day
- Most driving time in a day
- Which services they are qualified for

ABOUT EACH ADDRESS

- Which days you may come
- Which hours, day by day
- Gate code, the dog, where the equipment lives

ABOUT EACH SERVICE

- How long the job takes
- Who is allowed to do it

THEN PICK HOW THE WEEK SHOULD LOOK

- Fill the early days, keep the later ones free
- Balance the load so nobody is buried
- Spread the work evenly across the week
- Keep each technician in blocks of days

Lock a stop that cannot move and it plans around it. Apply the same plan to every future week in one go.

What the technician is asked

CH. 5 · 8 · 11 · 12

Every service carries its own list of questions — and every one-off job carries a different one. A drain and deep clean asks about the refill level, never the weekly readings.

- Mark a question **required** and the job cannot be closed without it.
- Numbers are checked on the spot, so a slipped decimal is caught at the pool instead of back in the office.
- Tell a service which supplies it uses, and finishing the job takes them off that technician's truck by itself.
- Changed your mind? Restore the original list for that one job.

Who may do what

CH. 3

Six ready-made roles — Admin, Manager, Billing, Operations, Support, Technician — or build your own from any mix of permissions.

Charges, payments, credits and messaging each split in two: who may **see** them, and who may **make** them. So an assistant can look up what a customer was charged without being able to charge them anything.

Change the week without anyone seeing

CH. 7

LIVE what your technicians' phones show right now**DRAFT** your own private copy of that same week

Move everything, change your mind, start over. Nobody in the field sees a thing until you press **Apply Draft to LIVE**.

Made a mess? **Return to LIVE** throws the draft away and puts you back where you started.

Proof without paperwork

CH. 12

ARRIVE

GPS + time

**RECORD**

Chemistry readings

**PHOTOS**

camera only

**CHECKLIST**

required items

**FINISH**

GPS + time

- Photos can only come from the camera. Nobody can pick an old one out of the gallery.
- Both ends of the visit record where they were and when, against the address on file.

- Every photo is stamped with the date, the time, the technician's name and where it was taken.
- **No signal?** All of it still works. The whole visit syncs the moment the phone finds a bar.

The customer gets their report. The truck loses the stock. Neither needs anyone in the office.

When a customer says it never happened, you have the answer.

Money that chases itself

CH. 6 · 10

THE CARD DECLINES

It tries again on the schedule you set. Still failing? It switches autopay off and tells your team, instead of quietly doing nothing.

THE BILL GOES LATE

The fee is added for you when your grace period runs out — nobody has to remember. One customer deserves longer? Give just them longer.

THEY STOP PAYING

Service pauses on its own, after the grace days you set and only over the amount you set. When they pay it resumes — below the balance you set, after a delay, so a part-payment does not restart the round. Both ends email the customer.

THEY PAY BY BANK

It takes a few days to clear. No late fee while it is on its way, and when it lands it is dated the day **they** paid, not the day it cleared. Their statement reads right.

Agreed now, due later: post-date a charge and it sits marked **Scheduled** — you can see it, it is not in their balance, it is not on their statement, and it is never chased.

Set once, never typed again

CH. 4 · 13 · 15 · 17

- Customers sign in by clicking a link in any email — no password to lose. Sharing an address with someone? They use the Account # from their statement.
- A bookkeeper can be copied on statements only, not on everything.
- A raise never changes what someone was owed last month — pay rates are kept with the dates they applied from.
- See the screen exactly as any member of staff or any customer sees it, and settle "I can't find it" in one click.

And everything you would expect anyway

Customer list, addresses & notes · Calendar & map · Card and PayPal payments · PDF statements · Email & text messages · Reports on money, work and tax · QuickBooks · Customer portal · Supplies catalog · Payroll totals · Several addresses per customer · Tax per service. **Every one of them is in the manual.**

What you pay for

CH. 18

Addresses you actually worked on this month. Once each, no matter how often you went — a weekly customer costs the same as a monthly one.

Quiet, paused and canceled customers cost you nothing.

Settings ► Manage EZ Pool Biller Plan

And if you are stuck

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Support who have actually worked the trade. Moving from other software? We bring your data across free, usually in 1–2 working days.