



Pool Pro Office, Inc.  
 PO Box 542942  
 Merritt Island, FL 32954  
 Phone: (321) 574-0358  
 email: [sales@poolprooffice.com](mailto:sales@poolprooffice.com)

## Features

### **Leads Management**

- Review Status of Leads
- Review Proposals
- Review Pool Plans
- Report Sorted by Designer
- Report Sorted by Active/Inactive/Lost/Sold
- Report Sorted by Referral/Builder/Call-In/Rotation Walk-In/Advertising
- Create and Print Custom Lead Report by Selected Dates
- Add Appointment Date and Sales Notes,
- Track Appointments and Sales Notes
- Add and View Drawing and Proposal
- Add and View 3d and 2d Drawings
- Email Lead Information to Designer
- Google Map Plot of Lead Location

### **Permitting**

- Create and Print Permits for Permitting Agency
- View and Print Permit Status Report
- Create and Print Permit Revision
- View and Print Permit Revision Table

### **Sales Tracking**

- Create, Review, and Print Monthly Sales Report by Designer
- Create, Review, and Print Yearly Sales Report by Designer
- Create, Review, and Print Monthly Builders Report by Builder

### **Project Information**

- Create and Review Project Information
- Review and Modify Schedule Information
- Review Lead Information
- Google Map with Direction to Location from Company Address
- Weather Information base on Zip of Installation Location
- Review County Property Appraiser data for Installation Location
- Legal Description of Installation Location

### **Receivables Tracking**

- Create, Review, and Print Current Receivables List
- Create, Review, and Print Current Change Order Receivables
- Create, Review, and Print Current Service Receivables

### **Company Wide Job Board**

- Create, Review, and Print Electronic Job Board for All Jobs Under Construction
- Create Job Board by Beginning Milestone to Ending Milestone of Your Choice
- Constrain Job Board by Site Super
- Constrain Job Board by Designer
- Sort by Contract Date
- View a Selected Project Under Construction and Go Directly to Project Folder
- Create, Review, and Print Open Punch List Items
- Create, Review, and Print Open Work Order Items

### **Storage and Viewing**

- Design Sketch
- Contract
- Site Survey
- Tile Selection Sheet
- Engineering Plans
- Change Orders

### **Find a Project**

- Search by:
  - Job Number
  - Client Last Name
  - Installation Address
  - City
  - Subdivision
  - Lot
  - Permit Number

### **Payments**

- Create, Review, and Print Payments from a Start Date to an End Date
- Create Construction Draw Payments
- Receive Payments for Draw Payments
- Received Payment for Change Orders
- View and Print Payment Card

### **Change Orders**

- Create and Review Change Orders
- Input Change Order Processing Charge and List Line Items with Description and Charge
- Upon Entry, Change Order Posted to Job Card
- Scan of Signed Change Order
- Change Order Report by Selecting Start and End Date
- Optional Create Change Order Document



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### **Production Tracking**

- Create, Review, and Print Completed Production Report for a Selected Time Period based on Milestones Selected in the Milestone Manager

### **Digs**

- Create, Review, and Print Digs Available with Permits
- Schedule and Assign Dig
- Create, Review, and Print Digs Scheduled and Map Plotting of Scheduled Digs in Google Maps

### **Announcements**

- Create, Post and View Multiple Company Announcements to be seen by All Users
- Set Start Date and End Date for Display of Announcement

### **Manufacturers and Distributor Database**

- Search Built-In Database of Distributor and Link Directly to Distributor
- Search Built-In Database for Manufacturers by Products
- Display Manufacturers of Selected Product
- Link Directly to Manufacturer

### **Milestone Management**

- Create and Edit Construction Milestones
- Select Milestones for Construction Report Creation

### **Vendor/Employee Management**

- Vendor Types
- Employee
- Designer/Sales
- Site Super
- Construction Vendor
- Electrical Contractor
- Engineering Contractor
- Bank & Builder
- Draw Schedules
- Permit Agency
- Corporate Directors
- Company Info

### **Work Orders**

- Create and Review Work Orders
- Attach Photos to Work Orders
- Company Wide View of Open Work Orders
- Notify Selected Employees

### **Site Super Visit Request**

- Create and Review Site Super Visit Requests
- Notify Selected Employees

### **Punch List**

- Create and Review Punch Item
- Attach Photos to Punch Item
- Company Wide View of Open Punch Item
- Notify Selected Employees

### **Service/Warranty**

- Create service work order
- List services and/or parts installed and pricing
- Print invoice for service/warranty provided

### **Communications**

- Communication Type
- Notes
- Email
- Phone Message
- FAX
- Issues
- Notify Selected Employees
- Integrate with Constant Contact to create marketing campaigns, newsletter and specials

### **Network Facilities for ASP/SAAS Provided by CNI, Inc.**

- Fully Redundant Tier 1 DS3s Riding on a Wholly-Owned OC12 SONET Ring
- Formal Disaster Recovery Plan
- Liebert Climate Control Equipment
- Digital Security Access Controls
- FM2000 Fire Suppression System
- Redundant Generators
- Secured, Locked Racks with Server Noding Schema
- 24-hour Video Monitoring
- Detection and Prevention Intrusion System
- Backup Media Stored in Offsite Vault
- Redundant Boarder Routing Hardware and PIX Firewall
- 1Gb/sec Switched Internal Network
- External Vulnerability and Penetration Testing
- Citrix Certified
- 24x7 Technical Support
- Complete Background Checks Performed on All Staff