

Pools for Africa Instant Quoting System

Welcome to the Installer Panel Tutorial!

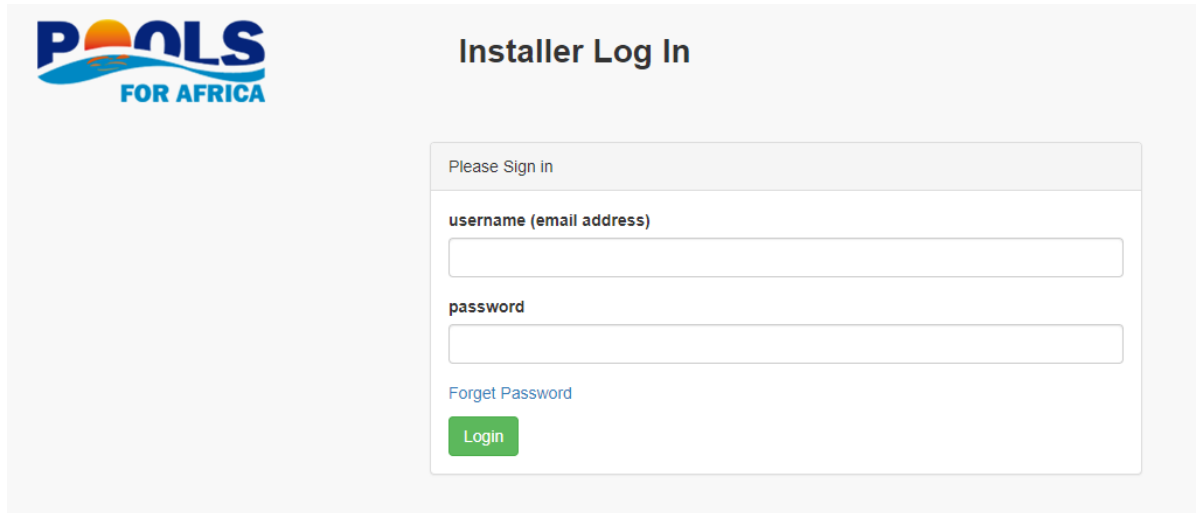
The instant quoting system is designed to provide the customers with a digitally generated quote on the installer letterhead sent to their e-mail address instantly.

Below are instructions to assist you with setting up the instant quoting system:

1. Follow the link to login to the Installer Panel Tutorial:

<https://poolsforafrica.co.za/poolsinstaller/>

Enter Username and Password:



POOLS FOR AFRICA

Installer Log In

Please Sign in

username (email address)

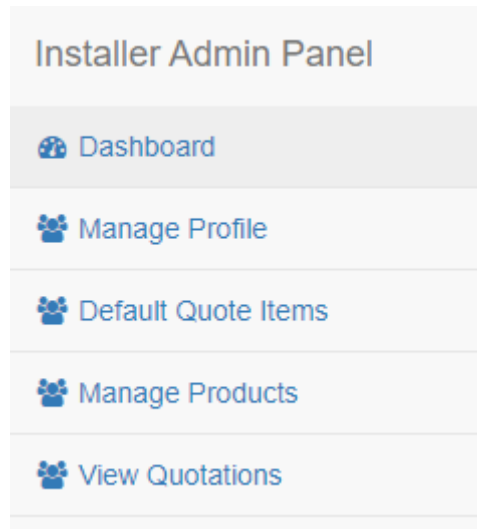
password

[Forget Password](#)

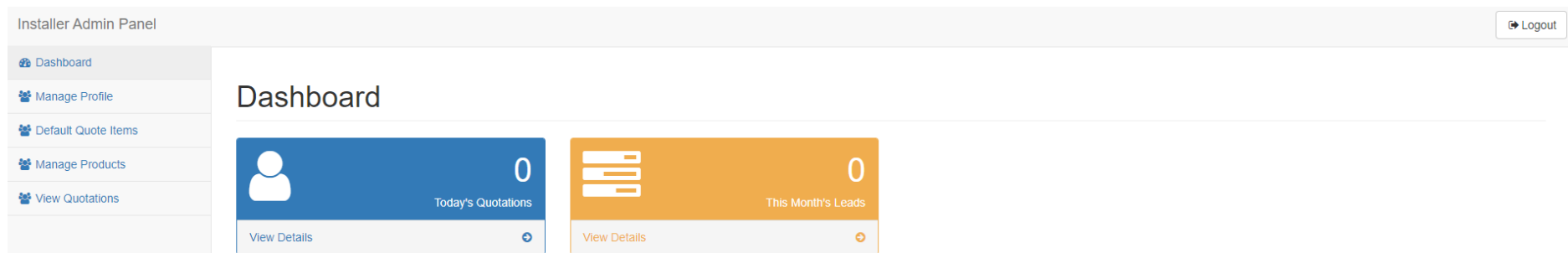
2. As an Installer you will be able to do the following:

- Manage your Profile
 - Including all payment details
 - Specify Terms & Conditions for yourself and Pools For Africa
- Customise the quotes to match your preferences
 - Insert your letterhead and details on each quote
 - Select what is included in a standard installation
- Manage the Products, e.g. pricing
- View Quotations issued on your behalf
 - Selecting the date range
 - Filtering by a Postal Code

3. The following tabs will be on the left column display:



4. The Dashboard looks like this:



4.1 When selecting “View Details” for either Today’s Quotations or This Month’s Leads, you will be able to view all the Quotations issued:

Installer Admin Panel Logout

[Dashboard](#)
[Manage Profile](#)
[Default Quote Items](#)
[Manage Products](#)
[View Quotations](#)

View Quotation

Date From Date To Postal Code

[FILTER](#) [RESET FILTER](#)

showing 0 out of 0

#	Customer Name	E-mail	Pool Shape	Date	Postal Code	Action
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4.2 As the installer, you are able to change the date range in the boxes provided.
Type in the “Post Code” if you wish to filter the results further:

View Quotation

Date From

Date To

Postal Code

4.3 Select “Filter” to refresh/load the results.

If you wish to remove the current results and filter new results, then select “Reset Filter”:

Date From

Date To

Postal Code

[FILTER](#)

[RESET FILTER](#)

sl

5. When selecting “Manage Profile” on the left column, you will be instructed to complete all sections first:

Installer Admin Panel Logout

Dashboard
Manage Profile
Default Quote Items
Manage Products
View Quotations

Manage Profile

Please Fill These Details First. x

Edit Details that will Feature on Quotes

Business Name
John Doe

E-mail : john@doe.com

Phone Number
1234567890

Logo
Choose File | No file chosen

Address
123 John Road
Doe Estate
Cape Town

Banking Detail

Account Name: John Doe
Bank: Doe Estate
Account No: 123789456
Branch No: 987654

Payment Period Terms

- 10% - ON ACCEPTANCE OF THE WORK
- 70% - OF THE TOTAL IF POOL IS DELIVERED TO SITE
- 20% - OUTSTANDING – WHEN WORK IS COMPLETED

5.1 Note:

5.1.1 Make sure the Company Logo has been uploaded.

5.1.2 Banking Details are uploaded and correct.

5.1.3 The Company’s Payment Period Terms should be uploaded and correct.

5.1.4 Complete the Company's Terms & Conditions in the section allocated.

5.2 If there is a change to the Company's details, then remember to update it in this "Manage Profile" section.

6. When selecting "Default Quote Items" on the left column, the following list of information will appear:

Installer Admin Panel Logout

- Dashboard
- Manage Profile
- Default Quote Items**
- Manage Products
- View Quotations

Default Quote Items

Please select the installation fee options to be shown on all quotes over and above the shell, skimmer box, aim flow, jets, LED lights, delivery, and installation fee (to be included in the full price quoted). These will be included in all quotes, but there will be an option to edit at individual pool level.

Update Default Options

- Colour
- Mosaic
- DB Box
- Prepare base for pool
- Level Pool
- 0.75kW Pump
- Filter (incl. sand)
- Electrical Connection
- Standard Coping
- Chemicals
- Building Plan
- Standard Manual Excavation
- Water
- Pool cleaner
- Fibreglass Pool Shell
- Skimmer Box
- Aimflows

- Spa-Jets
- LED Light
- Manual Cleaning Kit
- Manual Excavation
- Rubble Removal
- Pool shell delivery
- Backfill the pool
- Install pump and filter
- Drafting of building plans
- Handover
- Complete Cosmo Loq installation
- my custom option 1
- Pump & Filter (4 bag)

6.1 Select the items which are included in your quote and should be shown to the customer on the quote. For example:

Default Quote Items

Please select the installation fee options to be shown on all quotes over and above the shell, skimmer box, aim flow, jets, LED lights, delivery, and installation fee (to be included in the full price quoted). These will be included in all quotes, but there will be an option to edit at individual pool level.

Update Default Options

- Colour**
- Mosaic
- DB Box**
- Prepare base for pool**
- Level Pool**
- 0.75kW Pump
- Filter (incl. sand)**

6.2 Select “Submit” after selecting all the relevant checkboxes.

Note: If you don’t select “Submit” before switching pages, then all checked boxes will be cleared and not saved.

7. When selecting “Manage Products” on the left column, the following information will appear:

Installer Admin Panel Logout












- Dashboard
- Manage Profile
- Default Quote Items
- Manage Products**
- View Quotations










Manage Products

Click on "EDIT" next to each product to insert prices or to edit the installation options if it is different to the Default Quote Items

Order By: Product Title Asc Go

Bulk Update

<input type="checkbox"/>	#	Image	Product Title	Installer Price	Installation Options	Action
<input type="checkbox"/>	1		Agate		Default	Edit
<input type="checkbox"/>	2		Agate Bay		Default	Edit
<input type="checkbox"/>	3		Amber		Default	Edit
<input type="checkbox"/>	4		Amber Bay		Default	Edit
<input type="checkbox"/>	5		Amber Patio		Default	Edit
<input type="checkbox"/>	6		Amethyst		Default	Edit
<input type="checkbox"/>	7		Amethyst Patio		Default	Edit
<input type="checkbox"/>	8		Amozonite		Default	Edit
<input type="checkbox"/>	9		Aqua 3		Default	Edit
<input type="checkbox"/>	10		Aqua 5		Default	Edit
<input type="checkbox"/>	11		Aqua Blue		Default	Edit

<input type="checkbox"/>	12		Aquamarine		Default	Edit
<input type="checkbox"/>	13		Aquasphere		Default	Edit
<input type="checkbox"/>	14		Azora 4		Default	Edit
<input type="checkbox"/>	15		Azora 4 Patio		Default	Edit
<input type="checkbox"/>	16		Azora 5		Default	Edit
<input type="checkbox"/>	17		Azora 5 Patio		Default	Edit
<input type="checkbox"/>	18		Azora 6		Default	Edit
<input type="checkbox"/>	19		Azora 6 Patio		Default	Edit
<input type="checkbox"/>	20		Beryl Lappool		Default	Edit

1 2 3 4 5

7.1 There is a list of Products which will load, note that there are four pages to go through. (Please ignore the all items that are not pool shells)

7.2 You are able to filter the Products in an “Order By” either “Product Title” or “Installer Price”, and either “Asc” (Ascending) or “Desc” (Descending) order:

Order By Product Title Asc Go

7.3 Follow the instructions by completing the necessary information:

7.3.1 Click “Edit” to select the Product and allocate an “Installer Price” and change the “Installation Options” if it is different; for example:

7.3.1.1 The Agate Product:

Agate

Size: 3m x 2.5m x 1m

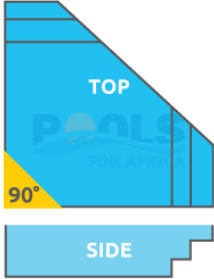
Update product price and options

Standard Price *

Price is to include: shell, skimmer box, aim flow, jets, LED lights, delivery and installation.

Options featured on quote

- Default selection for this pool
- Customise selection for this pool



Submit

7.3.1.2 Give a “Standard Price” and select “Customise selection for this pool” to choose specific features for the Product quote:

Agate

Size: 3m x 2.5m x 1m

Update product price and options

Standard Price *

Price is to include: shell, skimmer box, aim flow, jets, LED lights, delivery and installation.

Options featured on quote

Default selection for this pool

Customise selection for this pool

Colour

Mosaic

DB Box

Prepare base for pool

Level Pool

0.75kW Pump

Filter (incl. sand)

Electrical Connection

Standard Coping

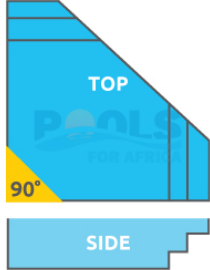
Chemicals

Building Plan

Standard Manual Excavation

Water

Pool cleaner



Fibreglass Pool Shell

Skimmer Box

Aimflows

Spa-Jets

LED Light

Manual Cleaning Kit

Manual Excavation

Rubble Removal

Pool shell delivery

Backfill the pool

Install pump and filter

Drafting of building plans

Handover

Complete Cosmo Loq installation

my custom option 1

Pump & Filter (4 bag)

Submit

7.3.2 To do a Bulk Edit (AFTER) allocating Prices to each Product:

7.3.2.1 Check the boxes to edit (more than one),

7.3.2.2 After checking all the boxes, click "Bulk Update"

Note: This will not work if the Products have not been allocated individual Prices.

Product Options Bulk Update

Bulk Update

Product Title : Agate
Product Title : Agate Bay
Product Title : Amber

Select Price Option
--SELECT--

Enter Amount/Percentage

Installation Options
 Default
 Custom

Submit

7.3.2.3 Select the “Price Option” dropdown menu to choose which edits to make to the bulk selected Products:

Select Price Option

--SELECT--
--SELECT--
Increase By Amount
Increase By Percentage
Decrease By Amount
Decrease By Percentage

Installation Options
 Default
 Custom

There is an option to change the “Installation Options” as well.

Once submitting the changes, the Products will be updated on the “Manage Products” tab.

8. The “View Quotations” tab will show the Quotations for a selected date range, and/or Postal Code selection:

Installer Admin Panel Logout

- Dashboard
- Manage Profile
- Default Quote Items
- Manage Products
- View Quotations**

View Quotation

Date From Date To Postal Code

FILTER RESET FILTER

showing 0 out of 0

#	Customer Name	E-mail	Pool Shape	Date	Postal Code	Action
<----->						

-THE END-