



LR Toolkit — Job Formatting Guide

For the Front Office · How to write calendar events so the iPads, the map, and Drive uploads all work correctly

Why this matters

The LR Toolkit reads each Google Calendar event and turns it into a job card on the crew's iPad. The same event decides the job's **type** and color, the order stops appear in, and **where photos and videos are filed in Google Drive**. The Toolkit can only do this correctly if events are written in the format below. A few minutes of consistent formatting in the office keeps the crew on track and every photo in the right client folder.

1 · The Event Title

Always follow this order: **Vehicle**, then **Builder**, then **Client**, then the **Type or Material** in parentheses.

» (VEHICLE - RUN#) Builder: Client (MATERIAL)

Example: (LR2 - 1) Heritage: Walker (PS AQUA BLUE)

Part 1 — Vehicle (in parentheses)

The first thing in the title is the vehicle, in parentheses. Use the fleet ID from the Fleet Identifiers sheet (LR1 , LR2 , DC8 , T3 , and so on). This is what makes the job show up on the right iPad.

Set the run order with “- number”

Add a dash and a number inside the parentheses to set the order stops appear on that truck's iPad: (LR2 - 1) is the first stop, (LR2 - 2) the second, and so on. The crew sees the day in that exact order.

Assigning more than one vehicle

Need the same job on two or more iPads? List the vehicles with a comma: (LR2, LR3 - 1) — the job appears on both the LR2 and LR3 iPads. A slash, &, or + works too. The run number still applies.

DC trucks — no space needed

Write DC trucks as (DC8) or (DC10) . A space like (DC 8) works too, but the no-space form is the convention.

Not assigned yet? Use a placeholder

If a job isn't on a truck yet, use a placeholder as the vehicle: (LR0) or (DC0) . Placeholders (LR0 , DC0 , LRR , LRP) hold the job until you know the unit. When you do, edit the title to the real vehicle — the job moves to that iPad on the next refresh.

Part 2 — Builder

Right after the parentheses, type the builder's name followed by a colon. Examples: Heritage, Premier, Aqua Blue, Year Round, CHS Pools, HCA Pools.

Part 3 — Client

After the colon, type the client's (homeowner's) name. This becomes the Drive folder the job's photos file under. No client name yet? Leave it blank — the Toolkit files photos under the address instead (see Section 4).

Part 4 — Material or Job Type (in parentheses, at the end)

After the client name, add the material/mix in parentheses so builders can see it right in the title — e.g. (PS WHITE DIAMONDS) or (PF FRENCH GREY) . Reference only: the Toolkit keeps it **OUT** of the Drive folder name, so photos still file under just the client.

Where applicable, you can put the **job type** here instead — one of ACID WASH , PREP , REPAIR , RENO , or MEETING . The Toolkit recognizes it and colors the card accordingly, so (DC8 - 1) Heritage: Faust (ACID WASH) is perfectly acceptable. Plaster days keep the mix in this spot (e.g. (PS WHITE DIAMONDS)) and take their type from the TYPE: line in the description. Either way, this parenthesis is never part of the Drive folder name.

FIELD	WHAT TO TYPE / NOTES
(LR2 - 1)	Vehicle / iPad this job goes to, plus the run order. Required. Use a real fleet ID or a placeholder (LR0, DC0, LRR, LRP).
Heritage	Builder name. Goes right before the colon.
: Walker	Client name. Goes right after the colon.
(PS AQUA BLUE)	Material/mix, in parentheses at the end. Reference only — not part of the folder name.

The address does NOT go in the title

Put the address in the event's Location field instead (the line with the little map pin). See Section 4.

2 · Good vs. Avoid

✓ **DO WRITE**

(LR2 - 1) Heritage: Walker (PS AQUA BLUE)
Vehicle, run order, builder, client, material

(LR2, LR3 - 2) Premier: Smith (PF FRENCH GREY)
Same job on two iPads, second stop

(DC8) CHS Pools: Burns (PS WHITE DIAMONDS)
DC truck, no space

(LR0) Heritage: Walker
Parked until a truck is assigned

(DC8 - 1) Heritage: Faust (ACID WASH)
Job type in the end parentheses — recognized & colored

✗ **AVOID**

Heritage Walker LR2
No parentheses, no colon — won't parse

(Plaster) Heritage: Walker
"Plaster" isn't a vehicle — use a fleet ID (put the type in the description)

(LR2) Heritage: Walker 14 Oak St
Address belongs in the Location field, not the title

(LR2 and LR3) ...
Spelled-out "and" may miss — use a comma: LR2, LR3

3 · The Event Description — Type, Lead, Driver, Notes, Materials

Everything else goes in the event Description box, one label per line. Type the label, a colon, then the value. Capitalization does not matter — TYPE: , Type: , and type: all work.

TYPE: PLASTER

LEAD: Adrian

DRIVER: Kenneth

MATERIALS TO LOAD:

MIXES: 10 PF French Grey
80 BAGS Pebble Quartz (8)
40 BAGS Speckled Fina (4)
10 GAL Set N Cure (1)
NOTES:
Gate code 1234. Dog in backyard.

Type

Add a **TYPE:** line so the job shows the right colored label on the iPad card and on the map. Use one of these:

PLASTER

ACID WASH / DETAIL

REPAIR

DRAIN & CLEAN

RENO

PREP

SITE VISIT

START

MEETING

Anything unrecognized shows as **Other** (gray). This is the work type (Plaster, Repair...). Set it on this **TYPE:** line, or — where applicable — in the title's end parentheses, e.g. (ACID WASH). If both are present the **TYPE:** line wins. On plaster days the title parentheses hold the mix instead, so the type comes from this line.

Lead & Driver

LEAD: is the crew lead's name — it shows on the job card. **DRIVER:** is optional. Type each on its own line.

Notes

Put anything the crew should know after a **NOTES:** line — gate codes, where to park, pets, special instructions. Everything under **NOTES:** (until the next CAPITAL label) shows up as the note.

Materials

Start the list with **MATERIALS TO LOAD:** on its own line, then one material per line: amount, unit, name, and (if it's per-mix) the per-mix count in parentheses.

FIELD	WHAT TO TYPE / NOTES
Amount	A number first, e.g. 80.
Unit	BAGS, GAL, CUP, LBS, CASE, or HOSE. Left out → counted as bags.
Name	The product name, e.g. Pebble Quartz, Cement, Set N Cure.
(number)	Optional per-mix count, in parentheses at the end, e.g. (8).
MIXES:	Put mixes on their OWN line, e.g. MIXES: 10 PF French Grey — don't bury it in the list or it's counted like a bag.

Reading a material line

80 BAGS Pebble Quartz (8) means 80 bags of Pebble Quartz, 8 per mix. The crew checks each off on the iPad as they load the truck.

4 · The Address (Location field)

Type the job address in the event's Location field — the line with the map-pin icon. The Toolkit uses it two ways:

- It powers the crew's **Open in Maps** button and the job's pin on the Day Map.
- If a job has no client name in the title, photos file in Drive under the address instead.

So always fill in the Location field.

5 · Where Photos & Videos Are Filed

When the crew captures photos or videos, the Toolkit files them automatically in Google Drive:

2026 POOL BUILDER FILES > {Builder} > {Client}

Example: **2026 POOL BUILDER FILES > Heritage > Walker**

The year folder updates on its own each year. The material in the title is left OUT of the folder name. With no client name, the Toolkit files under the address from the Location field instead (e.g. ... > Heritage > 1772 Greenspoint Ct). This is why the title and Location field must be filled in correctly — together they decide the folder.

6 · What the System Does on Its Own

Nightly auto-sync — no import button

Every night the Toolkit pulls the whole year's calendar into the system: new jobs added, existing jobs updated, and any completed job stays completed. A catch-up runs shortly after any plugin update. There's nothing to import by hand — the old "Import 2025" menu has been removed.

Totals. On the Schedule, Total and Scheduled stay correct automatically. Completed grows as jobs are marked done — by the crew on the iPad or the office on the Schedule. (The bulk "Mark All Complete" button was removed to prevent accidents.)

Reports. In LR Toolkit → Reports, pick a day to see each job's details, crew notes (a blue Field Note), and crew photos as thumbnails that open full-size in Drive.

Day Map. Shows each stop with its Type, address, and lead, color-coded by job type.

A brand-new calendar job appears in the totals and reports after the next sync — usually the first time someone opens the site in the morning.

7 · Quick Checklist Before You Save an Event

- ✓ Title starts with the vehicle in parentheses: (LR2) — or a placeholder (LR0, DC0, LRR, LRP) if unassigned.
- ✓ Set the stop order with a dash and number inside the parentheses: (LR2 - 1).
- ✓ Builder name comes next, then a colon, then the client name.
- ✓ Material/mix — or, where applicable, the job type — goes in parentheses at the END: (PS WHITE DIAMONDS) or (ACID WASH).
- ✓ Using two trucks? Separate them with a comma: (LR2, LR3 - 1).
- ✓ Address is in the Location field — not in the title.
- ✓ Description has a TYPE: line plus LEAD: , NOTES: , and MATERIALS TO LOAD: .
- ✓ Materials one per line: amount, unit, name, optional (per-mix). Mixes on their own MIXES: line.

Full example, start to finish

Title: (LR2, LR3 - 1) Heritage: Walker (PS AQUA BLUE)

Location: 1772 Greenspoint Ct, Mt Pleasant, SC 29466

Description: TYPE: PLASTER / LEAD: Adrian / DRIVER: Kenneth / MATERIALS TO LOAD: / MIXES: 10 PF French Grey / 80 BAGS Pebble Quartz (8) / NOTES: Gate code 1234

Result: Shows on the LR2 and LR3 iPads as stop 1 with a blue PLASTER label and the mix visible; photos file to 2026 POOL BUILDER FILES > Heritage > Walker.