



LR Toolkit — Job Formatting Guide

For the Front Office · How to write calendar events so the iPads and Drive uploads 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. It also decides **where job photos and videos get 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 saves the crew confusion in the field and keeps every photo in the right client folder.

1. The Event Title

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

```
» (VEHICLE) Builder: Client (MATERIAL)
```

```
Example: (DC0) CHS Pools: Burns (PS WHITE DIAMONDS)
```

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.

Assigning more than one vehicle

Need the same job on two (or more) iPads? List the vehicles with a comma between them:

```
(LR2, LR3) Heritage: Walker (PS AQUA BLUE)
```

The job then appears on BOTH the LR2 and LR3 iPads. A slash, &, or + works too.

Not assigned yet? Use a placeholder (LR0 or DC0)

If a job isn't assigned to a truck yet, put a placeholder as the vehicle:

```
(LR0) Heritage: Walker Or (DC0) CHS Pools: Burns
```

Placeholders (LR0, DC0, LRR, LRP) hold the job until you know the unit. When you do, just edit the title and change the placeholder to the real vehicle (e.g. LR2) — 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 are filed under. If you don't have a client name yet, you can leave it blank — the Toolkit will file photos under the



address instead (see Section 4).

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

After the client name, add the material in parentheses so the **builders can see the mix** right in the title — for example (PS WHITE DIAMONDS) or (PF FRENCH GREY). This is shown for reference only; the Toolkit automatically keeps it OUT of the Drive folder name, so photos still file under just the client (e.g. “Burns”, not “Burns (PS WHITE DIAMONDS)”).

| FIELD | WHAT TO TYPE / NOTES |
|---------------------|--|
| (DC0) | Vehicle / iPad this job goes to. Required. Use a real fleet ID or a placeholder (LR0, DC0, LRR, LRP). |
| CHS Pools | Builder name. Goes right before the colon. |
| : Burns | Client name. Goes right after the colon. |
| (PS WHITE DIAMONDS) | Material/mix, in parentheses at the end, so builders can see it. Reference only — not part of the folder name. |

IMPORTANT — the address no longer goes in the title

Under the new format the address is **not** typed in the title. Put it in the event's **Location** field instead (the line with the little map pin). See Section 4.

2. Good vs. Avoid

✓ DO WRITE

| | |
|--|--|
| (DC0) CHS Pools: Burns (PS WHITE DIAMONDS) | Placeholder, builder, client, material |
| (LR2) Heritage: Walker (PF FRENCH GREY) | One truck, with the mix shown |
| (LR2, LR3) Premier: Smith (PS AQUA BLUE) | Same job on two iPads |
| (LR0) Heritage: Walker | Parked until a truck is assigned |

✗ AVOID

| | |
|----------------------------|--|
| Heritage Walker LR2 | No parentheses, no colon — won't parse |
| (Plaster) Heritage: Walker | “Plaster” isn't a vehicle — use a fleet ID |



✗ AVOID

(LR2) Heritage: Walker 14
Oak St

Address belongs in the Location field, not the title

(LR2 and LR3) ...

Spell-out "and" may miss — use a comma: LR2, LR3

3. The Event Description — Lead, Driver, Notes, Materials

Everything else goes in the event **Description** box, one label per line. The Toolkit looks for labels typed in CAPITAL LETTERS followed by a colon. Type the label, a colon, then the value. Keep one item per line.

```
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 Cube (1)

NOTES:

Gate code 1234. Dog in backyard.
```

Lead & Driver

LEAD: is the crew lead's name — it shows on the job card. **DRIVER:** is optional and names who's driving. 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. You can write several lines; 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. Write the amount, the unit, the 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. |
|---------------|--------------------------|



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

Reading a material line

80 BAGS Pebble Quartz (8) means 80 bags of Pebble Quartz, 8 per mix. The crew checks each one 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 same place that powers the “Open in Maps” button on the iPad. The Toolkit uses the address two ways:

- It powers the crew's **Open in Maps** directions button.
- If a job has **no client name** in the title, photos are filed in Drive under the address instead of a client name. So always fill in the Location field.

5. Where Photos & Videos Are Filed

When the crew takes photos or videos on a job, the Toolkit files them automatically in Google Drive using this path:

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

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

The year folder updates on its own each year (2027, 2028, ...). The material in the title (e.g. (PS WHITE DIAMONDS)) is automatically left OUT of the folder name. If there's no client name in the title, the Toolkit files under the address from the Location field instead (e.g. ... > Heritage > 1772 Greenspoint Ct). This is exactly why the title and Location field need to be filled in correctly — they decide the folder.

6. Quick Checklist Before You Save an Event

- ✓ Title starts with the vehicle in parentheses: (LR2) — or a placeholder (LR0, DC0, LRR, LRP) if unassigned.
- ✓ Builder name comes next, then a colon, then the client name.



-
- ✓ Material/mix goes in parentheses at the END: (PS WHITE DIAMONDS).
 - ✓ Using two trucks? Separate them with a comma: (LR2, LR3).
 - ✓ Address is in the Location field — not in the title.
 - ✓ Description uses CAPITAL labels with colons: LEAD:, DRIVER:, MATERIALS TO LOAD:, NOTES:.
 - ✓ Materials are one per line: amount, unit, name, optional (per-mix).
 - ✓ Mixes are on their own MIXES: line.

Full example, start to finish

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

Location: 1772 Greenspoint Ct, Mt Pleasant, SC 29466

Description: 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 with the mix visible; photos file to 2026 POOL BUILDER FILES › Heritage › Walker (the material is left out of the folder name).